Sitka’s Evergreen Documentation

Evergreen 3.7

Last Updated May 17, 2021

Introduction

Chapter 1. New Features in Evergreen Version 3.7

New Features in Sitka's Evergreen 3.7 Playlist

1.1. Circulation

- Test Notifications - Patrons and staff may request a test notification for a patron's default email address or SMS number via the Patron Registration screen in the staff client, or on the OPAC My Account preferences page.
    - **Sitka Snippet Video - Test Notifications (0:46)**
- Hold Groups - Library staff may create lists of patrons that can then be used to place multiple title-level holds on the same bibliographic record.
    - **Sitka Snippet Video - Hold Groups (2:45)**
- Hopeless Holds - Library staff can now quickly pull a list of holds deemed unfillable and take actions to resolve them.
    - **Sitka Snippet Video - Hopeless Holds (1:11)**
- Hold placement in the staff client is now done through the new staff catalogue.
    - **Sitka Training Video - Placing Holds (6:18)**
- In-house use now records workstations.
- Preferred Name is now displayed prominently in the patron account.

1.2. Cataloguing

- New Staff Catalogue – All cataloguing functions direct to the new staff catalogue.
- Item Status now allows pasting a list of barcodes in CSV format.
- Publisher values are now extracted for display from tags 260 OR 264.

1.3. Staff Catalogue

- The new staff catalogue is now the supported staff catalogue, and includes search templates and recent searches.
    - **Sitka Training Video - Search the Catalogue (4:35)**
- Library staff can now open record in new tab from the search results list.
- Basket To Bucket action now allows adding to Shared Buckets.

1.4. Public Catalogue

- Improved email and printing options from the public catalogue, which now includes local call number.

- Show Only Available Copies filter on a title record in the public catalogue. Patrons can choose to see only the available copies of a title they are interested in.
- Preferred Name now displays first in Personal Information in My Account.
- Patrons can now send themselves test emails and texts from within My Account.

1.5. Booking

- When creating a new reservation a Patron Search is now available.

1.6. Reports

- A new output option *Calculate grouping subtotals* is available.

Chapter 2. Revisions and Attributions to Contributors

This manual was published May 17, 2021.

BC Libraries Cooperative acknowledges the Documentation Interest Group (DIG) Copyright © 2008-2017 GPLS and others, for their contribution to this manual.

```
<?dbhtml-include href="/data/asciidoc/checkouts/sitka-manual-master/matomoTracking.html"?>
```

Chapter 3. Sitka and Evergreen Resources

Sitka policy

- The Sitka Evergreen Policy Manual contains policy and best-practice documents supporting Sitka's consortial installation of the Evergreen ILS. See http://docs.libraries.coop/policy/ for html and pdf versions.

Websites

- The BC Libraries Cooperative website (https://bc.libraries.coop/support/sitka/) provides information about the implementation of Evergreen in BC and MB, including Sitka documentation, and Sitka policy and governance documents.
- See the Evergreen site (http://evergreen-ils.org/) for information about Evergreen for all audiences, not specific to Sitka. Includes links to the Evergreen blog, the software development roadmap, and general documentation.

Listservs

- Join the Sitka Group on the BC Libraries Cooperative website where current member libraries discuss Sitka's implementation of Evergreen.
    - Any library specific questions that include patron information should be directed to Co-op Support.
- Evergreen Mailing Lists http://evergreen-ils.org/communicate/mailing-lists/
    - Multiple lists for discussions of Evergreen inclding general, acquisitions, cataloguing, and circulation.
    - Messages sent to the General, Developer, and DIG Evergreen lists are searchable at http://georgialibraries.markmail.org/search/

Sitka Community Documentation

We encourage Sitka sites to share locally produced Evergreen documentation with the wider Sitka community. If you have any guides, tutorials, or tip sheets to share please contact Co-op Support.

Chapter 4. Sitka's Evergreen Support

The Co-op Support team strives to respond to new requests within 24 hours, excluding weekends. To manage requests (also referred to as tickets) the Support team uses ticket tracking software called **Request Tracker (RT)**.

4.1. How to Contact Support

There are four ways to contact Co-op Support for regular Evergreen support:

1. **Request Tracker Interface**. Submit and track requests with RT Self Service. After logging in you may use the form to create new tickets, track the progress of open tickets, or review issues that have been resolved. More information can be found in RT Self Service.
2. **Email**. Send questions to the support email address. Requests submitted by email generate RT tickets and can also be viewed online by logging in to RT Self Service.
3. **Online Contact Form**. Send questions to Co-op Support through the contact form on the BC Libraries Cooperative website. Requests submitted through the contact form generate RT tickets and can also be viewed online by logging in to RT Self Service.
4. **Phone**. Telephone support is available **9:00 AM to 4:00 PM Pacific Time, Monday to Friday**. Call our toll free number during regular hours to speak with support staff or leave a message. To protect our staff we do not accept anonymous calls so please ensure your caller ID is not blocked.

The Co-op Support toll free number can be found on the Sitka Support page. This information is also given to libraries during migration.

4.1.1. Emergency Support

Emergency support is available outside of regular support hours. If you are unable to connect to the Evergreen server, your LibPress site is down, or patron authentication via SIP or PatronAPI is down call our toll free support number and select option 9 to connect to an on-call tech.

4.2. Guidelines for Support Requests

Submitting Support Tickets (5:47)

Thorough and consistent reporting makes it easier for Co-op Support to respond to your requests.

- **Report problems as they occur**. Prompt reporting may help us catch a problem before it affects other patrons, respond quickly to issues that impact multiple libraries, or save you time if there is an easy solution. Please report issues as soon as is convenient.
- **One issue per request**. Please submit one issue at a time. Emails generate tickets in RT which are assigned to support team members. Reporting each question separately helps us assign, classify, and prioritize tickets more efficiently.
- **Contact information**. We strive to offer friendly, personalized service. Please include your name, your library, and use an email address where we can reach you directly.

- **Descriptive subject**. To make tickets easier to identify in RT please provide as descriptive a subject as possible.
  - Example of a descriptive subject line: Circ+Full Cat login unable to edit item record
  - Example of a non-descriptive subject line: Editing question
- **What, where, when, how?** Be specific about what you were doing in Evergreen, what results you obtained versus what you expected, and the steps required to reproduce the problem. If you cannot reproduce the problem exactly please describe the circumstances in which it occurred and the symptoms observed, including relevant patron and item barcodes.
- **Include error messages**. If the problem caused any OPAC or staff client error messages please copy and paste error text or attach screenshots when possible. See Submitting Files to Support for guidelines.
- **Include example barcodes and IDs**. A problem in circulation? Make sure you include the patron and/or item barcodes that were in use when the problem occurred. Cataloguing issues? Make sure you include the item barcode and/or the record ISBN/ISSN or record ID where the problem occurred.
- **Do NOT send passwords**. Co-op Support will never ask for patron or staff passwords.
- **Include report output URLs**. If you're reporting an issue or question related to a specific report you've run make sure you include the link to the report output so that Support view it.
- **Troubleshooting**. Spare yourself a boring or obvious email from the Support Team: tell us what steps you have already taken to try and resolve the problem.

4.2.1. Submitting Files to Support

When submitting files to Co-op Support please follow the guidelines below:

- Submit images as a .jpg or .png.
  - The best file formats in which to save screenshots are .png and .jpg. These files are easily accessed by Sitka Support and are unlikely to contain viruses.
- Submit plain text files (.txt) for text changes to things such as email notification wording.
- Do not submit .doc or .docx unless absolutely necessary.
  - Files saved as .doc or.docx require additional software to open them and have a higher potential for carrying viruses.

4.3. RT Self Service

Each library has one account to access RT. Under this account staff are able to see all the tickets associated with their library. Not sure what the username and password is for your library's account? Contact Co-op Support to find out.

4.3.1. Access RT Self Service

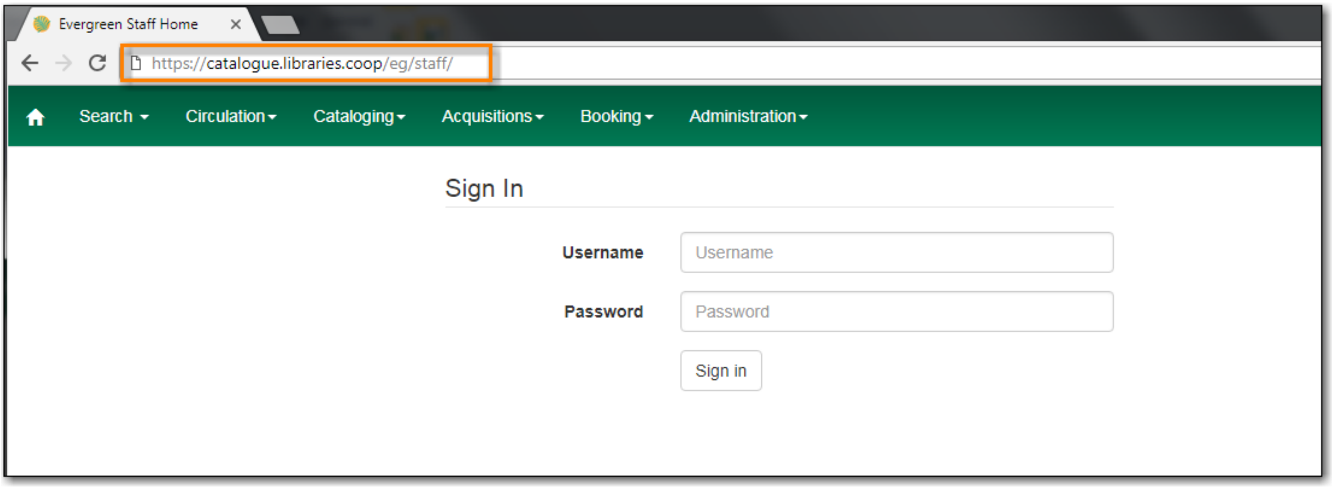
You can login on the RT website https://support.libraries.coop/rt/

The Self Service home page displays current tickets submitted by email or in RT. To re-open a closed ticket simply add a new reply. This will change the status to open and alert Co-op Support that more attention is required.

Chapter 5. Getting Started

5.1. Accessing the Evergreen Staff Client

- Sitka's Evergreen web client is only supported in Chrome. You must use Chrome to login to Evergreen.
- The web client is responsive to device and to screen size, and can look different on different devices.
- The default URL to log into the staff client is https://catalogue.libraries.coop/eg/staff/



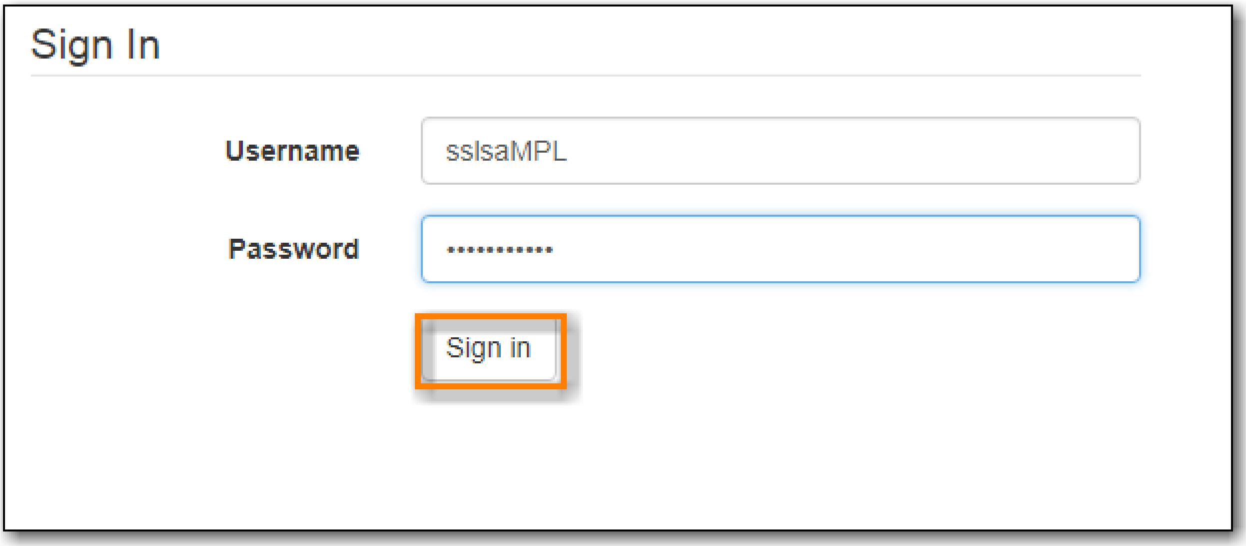
5.2. Register Staff Workstation

Sitka Snippet Video - Register Workstation (1:36)

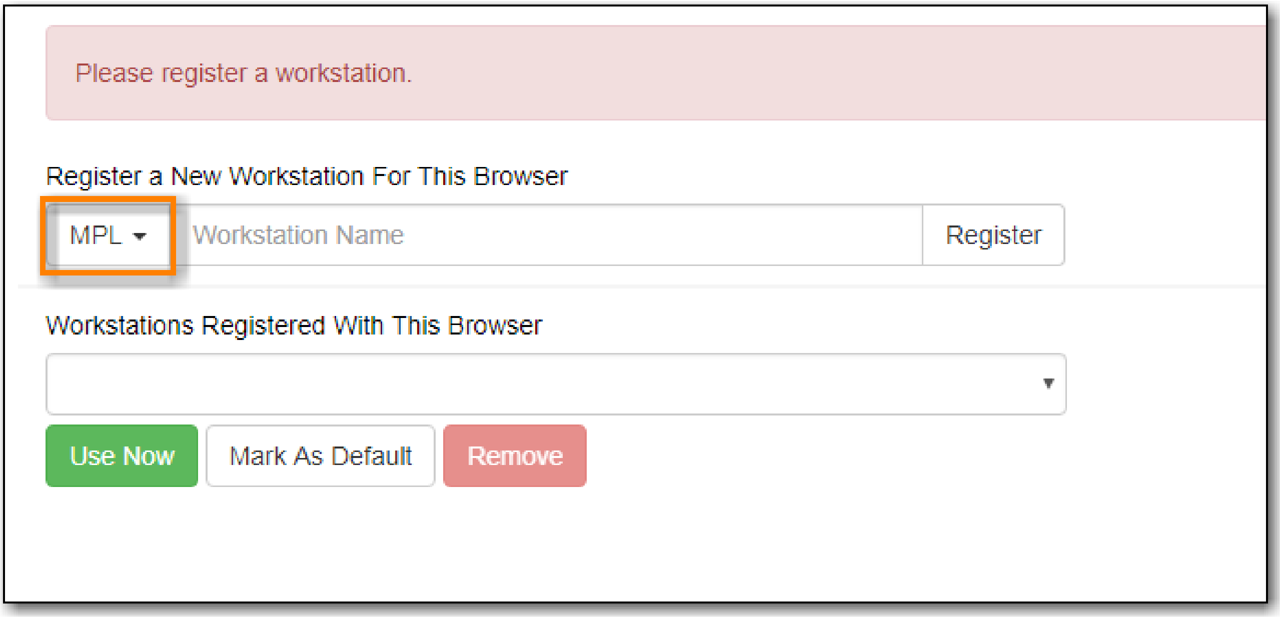
Before logging into Evergreen for the first time, you must register a workstation from your browser.

NOTE Local system administrator permissions are required to register a new workstation.

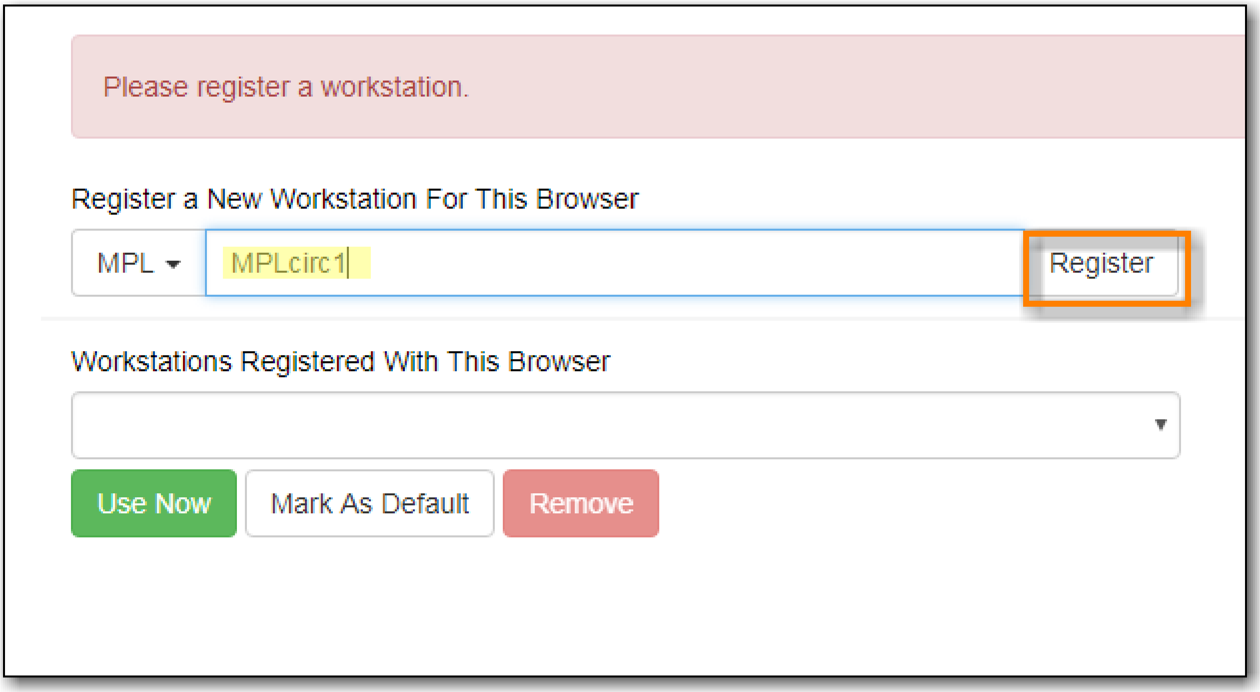
1. Navigate to the web client log in page. The default URL to log into the staff client is https://catalogue.libraries.coop/eg/staff/
2. Enter a local system administrator username and password.
3. Click **Sign In**



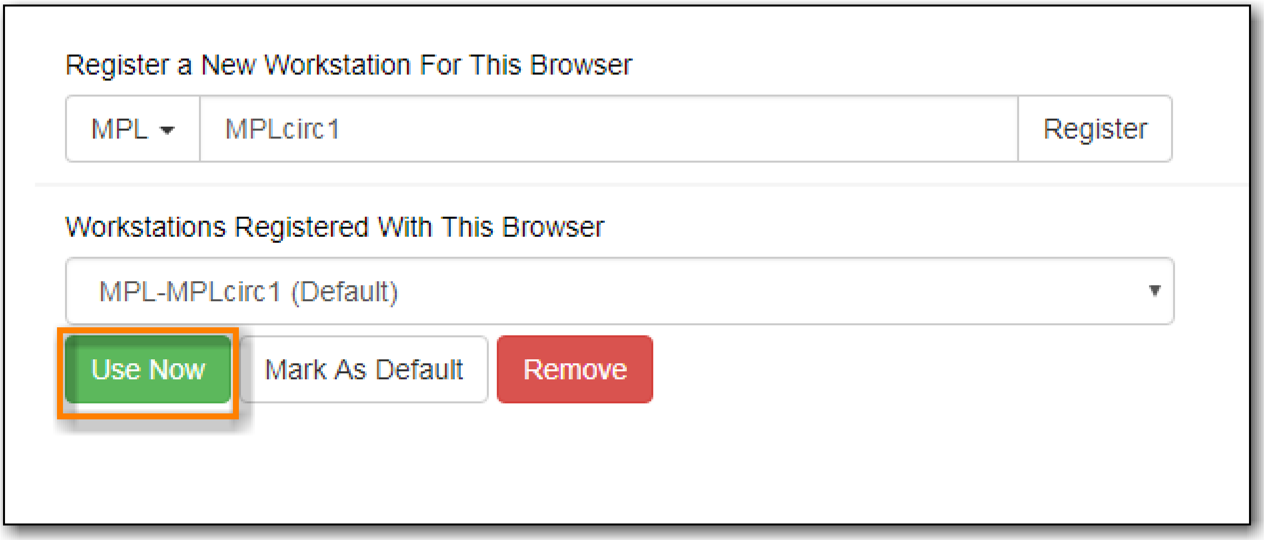
4. When you login for the first time on a new computer or a new server you will be prompted to register your workstation.
5. Choose your library short code from the drop down menu.



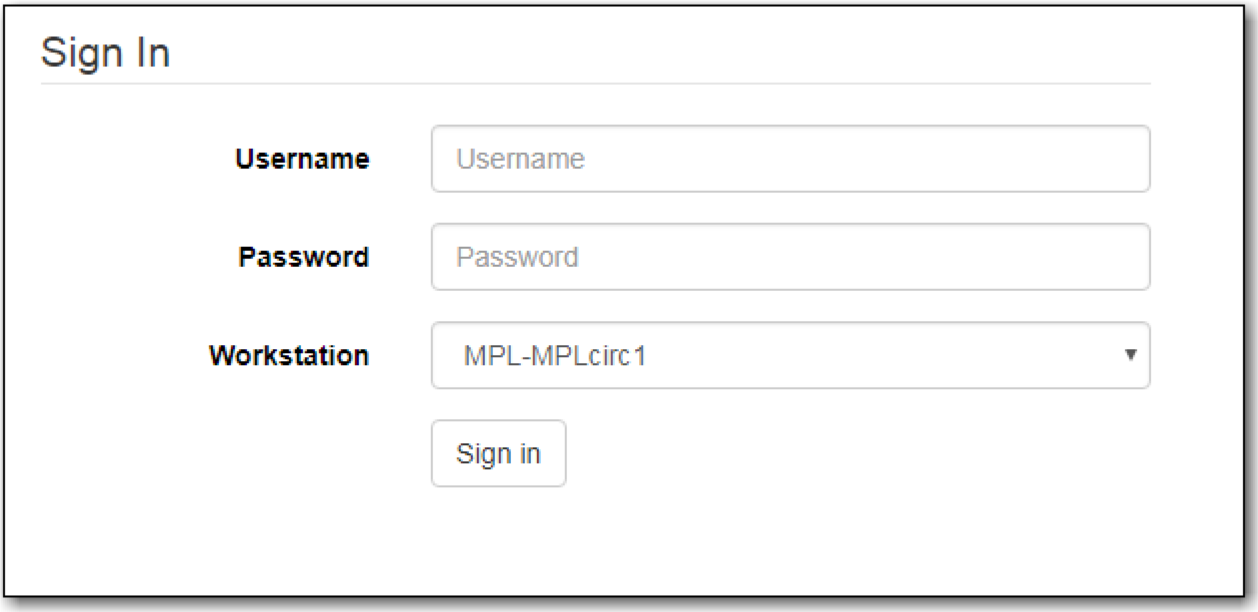
6. Enter a unique workstation name.
   a. It is important to remember your workstation name. Your workstation settings and preferences are stored on Sitka's Evergreen server with your workstation name. If you rename your workstation you will lose your stored settings and preferences.
7. Click **Register**.



8. The new workstation is listed in the **Workstations Registered With This Browser** menu.
9. Click **Use Now** to return to the login page.



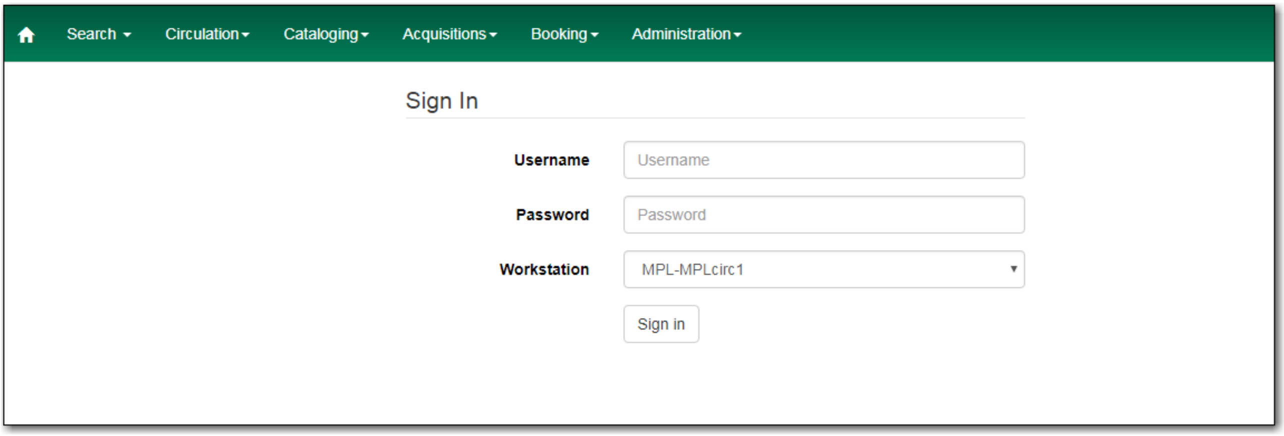
10. Your newly registered workstation should be selected by default on the login page.



11. You can now use any library staff account to log into Evergreen.

5.2.1. Logging into Evergreen

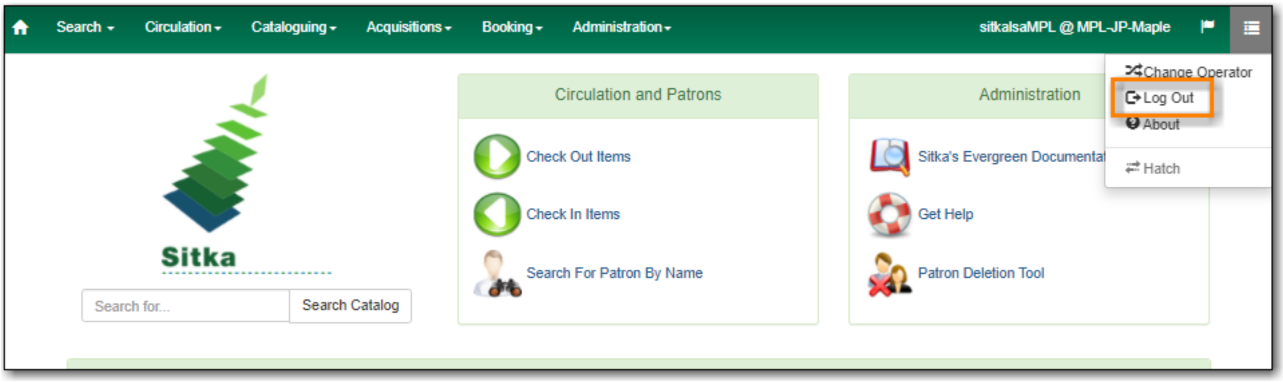
1. The default URL to log into the staff client is **https://catalogue.libraries.coop/eg/staff/**
2. Enter your username and password.
3. Verify that the correct workstation is selected and click **Sign In**.



NOTE	Ensure you are using your username and not your barcode. Your barcode cannot be used to log into the staff client unless your barcode is also use for your username.

5.2.2. Logging Out of Evergreen

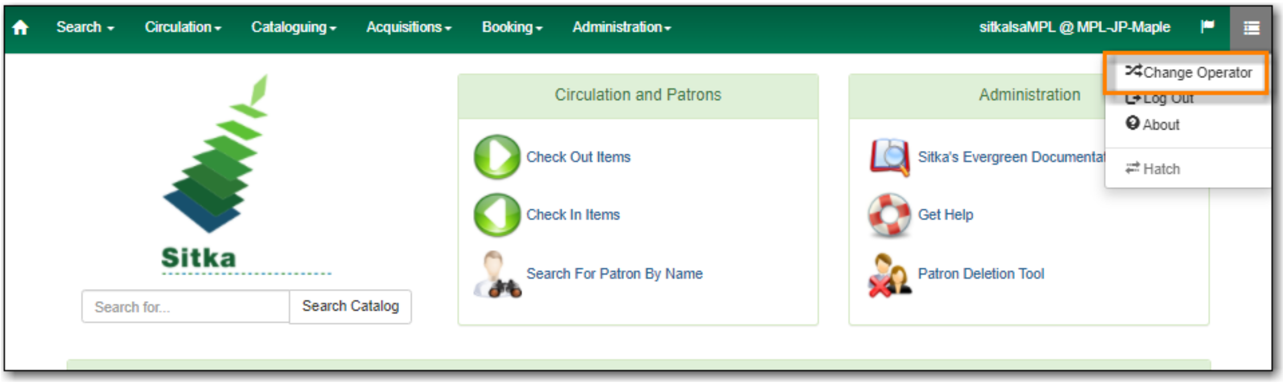
1. Click the menu button in the upper right-hand corner.
2. Select **Log Out** from the drop down menu.



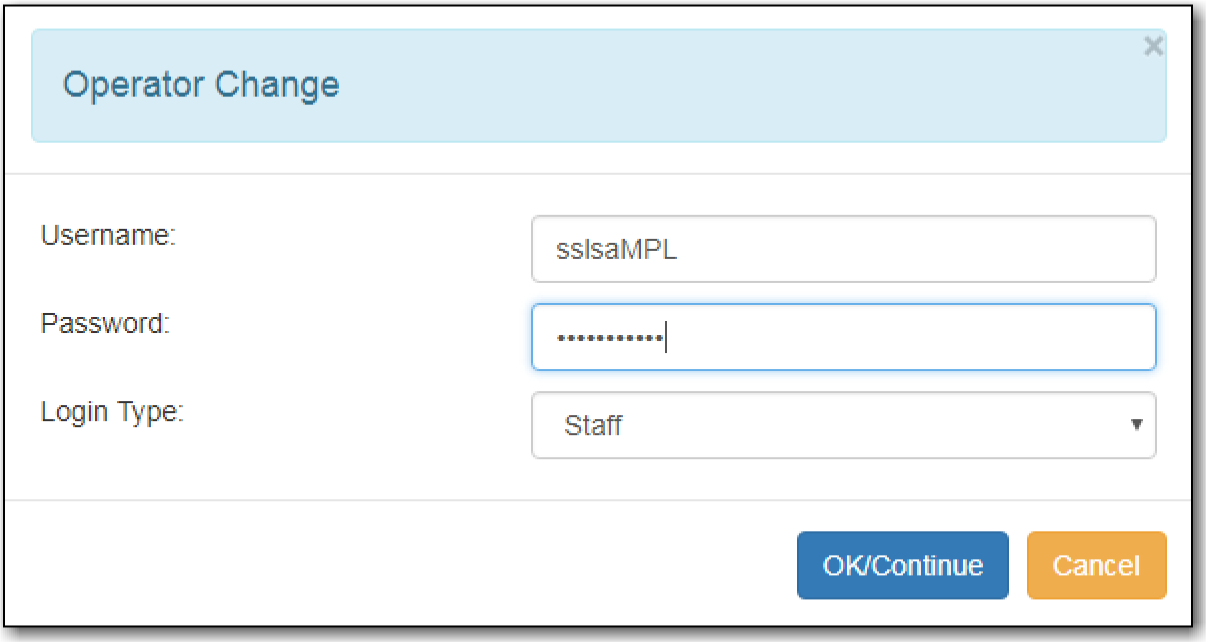
CAUTION	Closing all browser windows will automatically log you out of the web client. If you only close the tab where the web client is loaded, you will remain logged in.

5.2.3. Change Operator

1. Click the menu button in the upper right-hand corner.
2. Select **Change Operator** fom the drop down menu.



3. Enter the username and password for the staff account you would like to switch to.
4. Choose a login type from the drop down menu.
   a. *Temporary* - The new operator will be automatically logged out after a set period of time.
   b. *Staff* - The new operator will remain until the user selects **Restore Operator** from the **Menu**.
   c. *Persistent* - The new operator will replace the original operator.

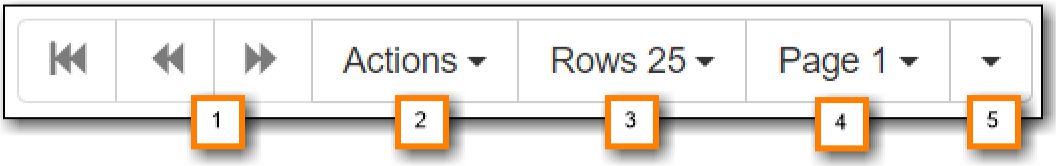


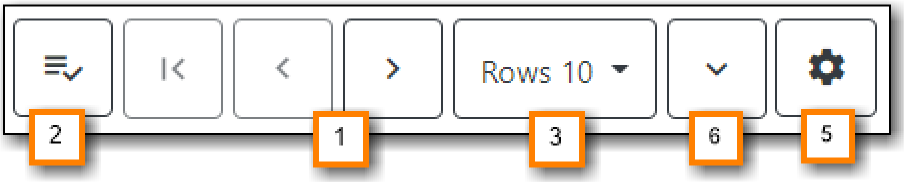
5. Click **OK/Continue**

5.3. Function Bar

The function bar can be found throughout Evergreen and enables you to page through pages, adjust the number of rows displaying, access the Actions menu, and manage your columns.

The function bar comes in two styles with similar functionality.





1. Page through pages
2. Actions Menu
3. Adjust number of rows
4. Jump to page
5. Column Configuration
6. Text wrap

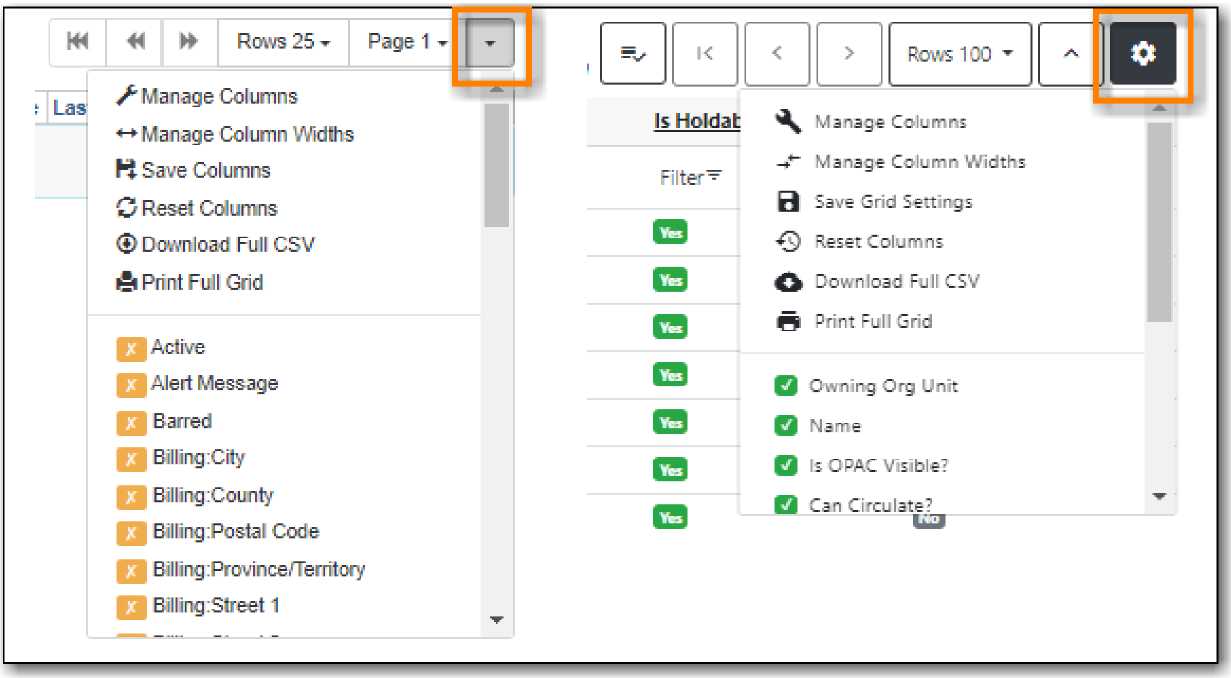
5.4. Column Configuration

From many screens and lists, you can click on the column picker drop-down menu to change which columns are displayed. Various search results tables may not default to the most useful columns.

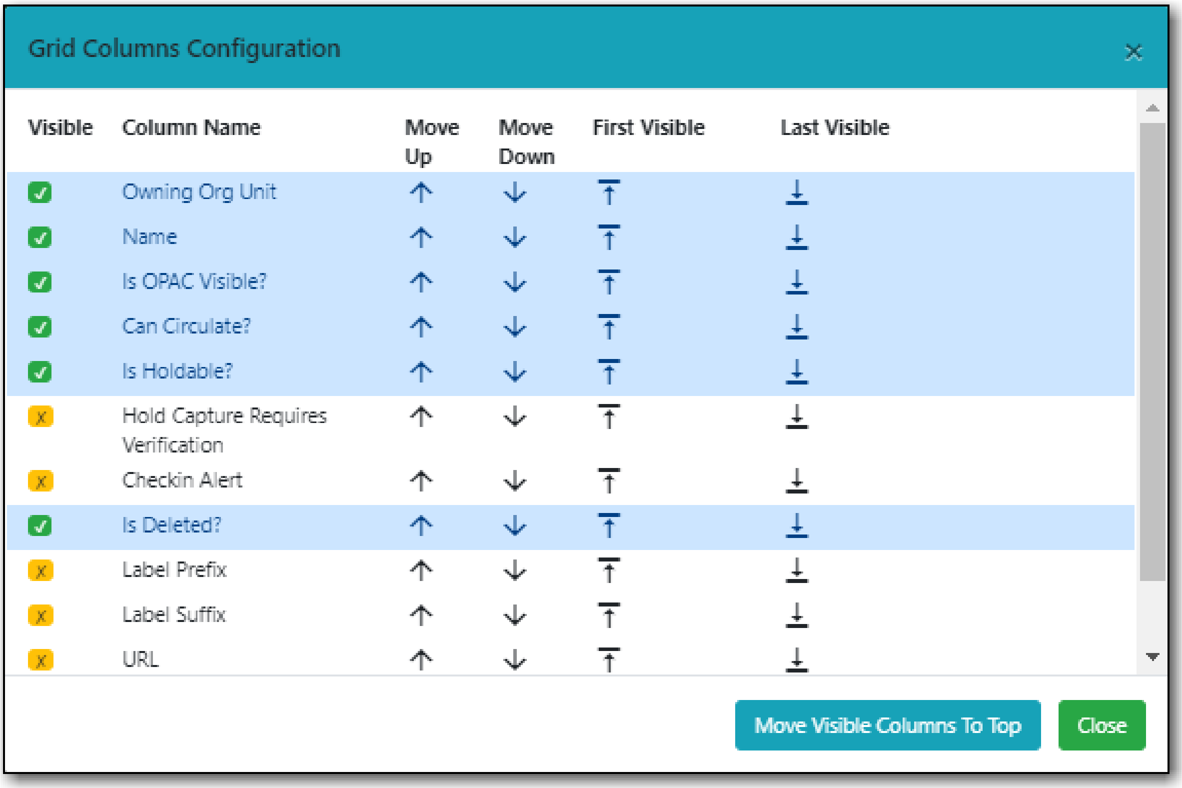
For instance, the patron search results page may be easier to use if you change the columns to Card, Last Name, First Name, Middle Name, and Primary Identification, and you may wish to have the results sort by Last Name, then by First Name.

To customize your columns:

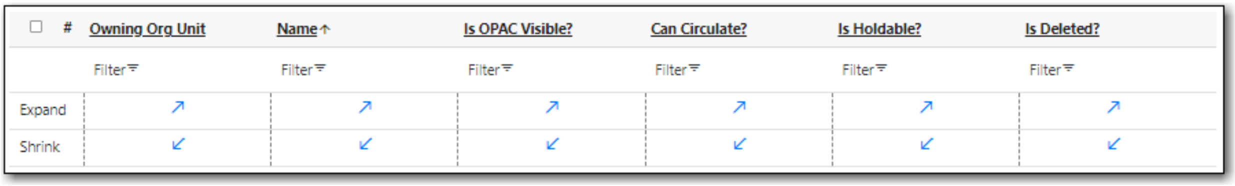
1. Click on the dropdown arrow or the settings symbol on the function bar to open the column picker.
   a. Some options in the menu and the resulting screens will differ depending on the version of the function bar.



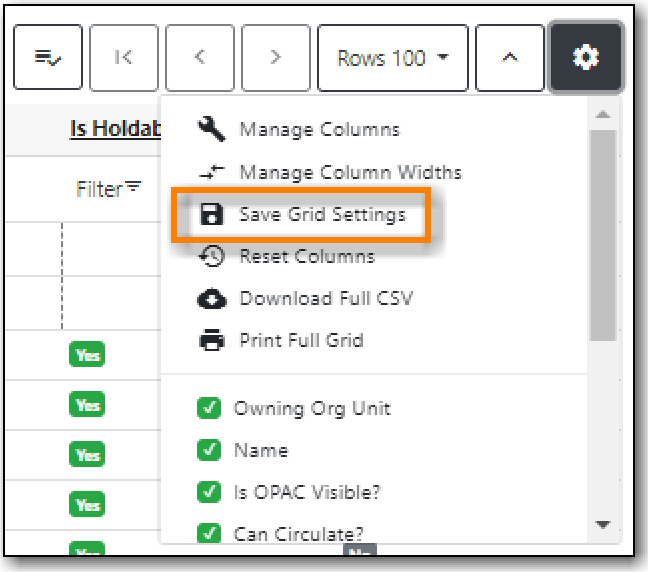
2. You can select the desired display columns from the dropdown list or,
3. Click **Manage columns** for more options.
   a. Click **Visible** to make a column visible or hidden [T/F].
   b. Click **Sort Visible Columns to Top**.
   c. Click **Move Up** or **Move Down** to change column position.
   d. Click **First Visible** or **Last Visible** to move the selected column to the top or bottom of the list.
   e. Use **Sort Priority** to prioritize how sorting should work. (A negative number will sort the column in reverse order.)
      i. This option only appears in certain cases.



4. Click **Manage Column Widths**.
   a. Click **Expand** or **Shrink** to adjust column sizes.

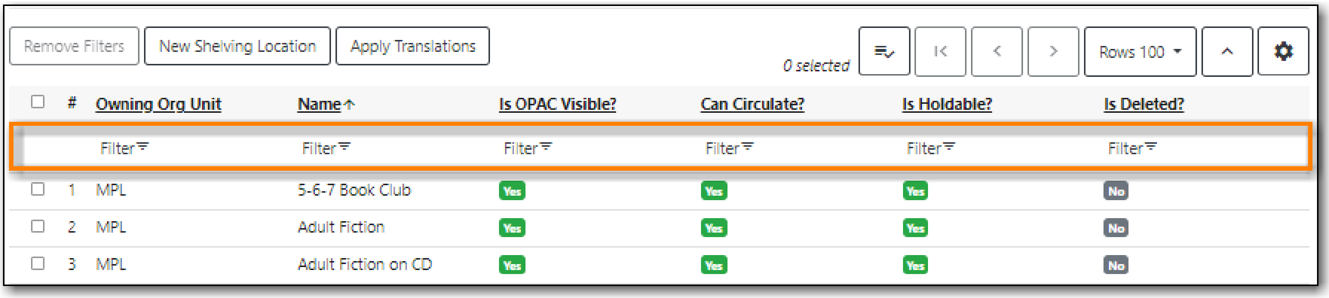


5. Click **Save Grid Settings**.

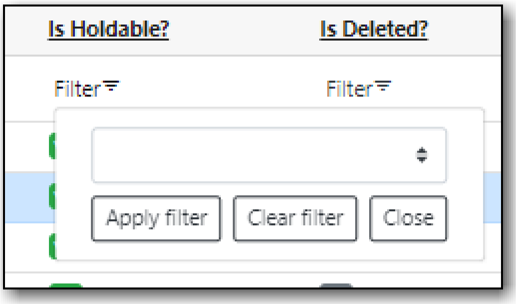


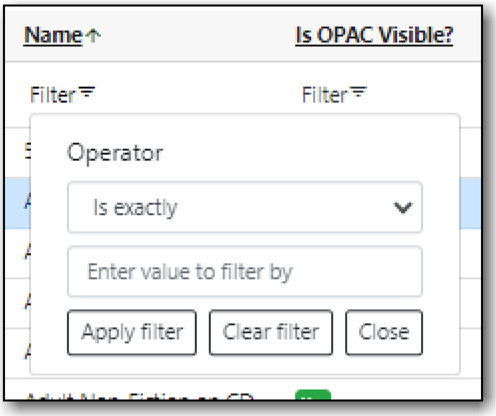
5.5. Filters

Some interfaces now include filters that enable staff to filter the available rows.

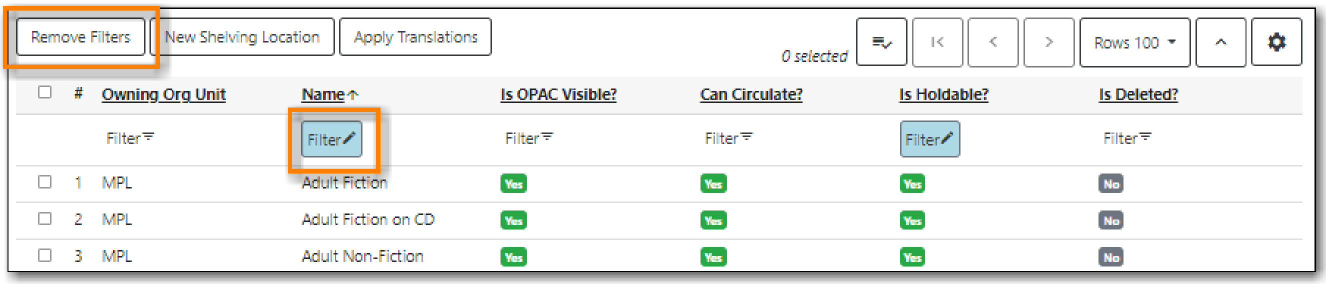


Depending on the data in the field the filters will either allow you to filter on true/false or the text values.





When a column is filtered it will display with a blue Filter that can be edited to change the value of the filter. Filters can be removed individually per column by clearing the filter or all filters can be removed at once using the **Remove Filters** button.



5.6. Keyboard Shortcuts

Staff can use the following keyboard shortcuts to navigate Evergreen:

Table 1. Keyboard Shortcuts

Key	Function
CTRL+h	Display Keyboard Shortcut List
F1	Check Out
F2	Check In
F3	Search the Catalogue
F4	Search for Patrons
F5	Item Status
F6	Record In-House Use
F8	Retrieve Last Patron
F9	Reprint Last Receipt
Shift+F1	Register Patron
Shift+F2	Capture Holds
Shift+F3	Retrieve Bib Record by TCN
Shift+F8	Retrieve Last Bib Record
CTRL+F2	Renew Items

CAUTION	These shortcut keys will not work properly on pages that use embedded content such as the traditional catalogue. On these pages you must first click the white space at the edge of the page before using the keyboard shortcut.

5.7. Downloading and Installing Hatch

Hatch is an **optional** installable program that works with your browser to manage complex printing needs, such as printing to different printers under different circumstances.

1. Install Java Runtime Environment (JRE). Windows only requires a JRE to run Hatch, not a full JDK. Download and install JRE version 1.8 or higher from java.
2. Install Hatch from Hatch
3. Install Chrome extension. If the extension was not installed automatically when installing Hatch you can get it directly in the browser from the Chrome App Store Chrome App Store

5.7.1. Enable Hatch in Evergreen

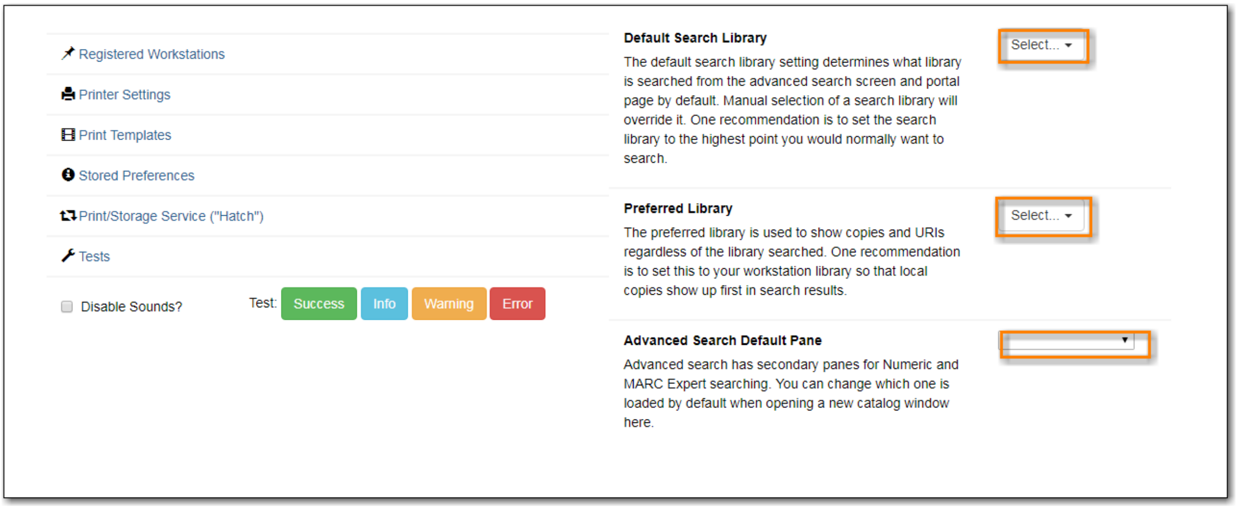
1. Log into Evergreen as LSA.
2. Click **Administration** → **Workstation**.
3. Click **Print Service (*Hatch*)**
4. Make sure that you see that Hatch is available. Select **Use Hatch For Printing** .
5. Log out. Print preferences will now be stored in Hatch.

Refer to Printing with Hatch to configure printer settings.

Refer to Troubleshooting Hatch if you are having issues with Hatch.

5.8. Set Search Preferences

1. Go to **Administration** → **Workstation**.
2. Use the dropdown menu to select an appropriate **Default Search Library**.
   a. The default search library setting determines what library is searched from the advanced search screen and portal page by default. You can override this setting when you are actually searching by selecting a different library. One recommendation is to set the search library to the highest point you would normally want to search.
3. Use the dropdown menu to select an appropriate **Preferred Library**.
   a. The preferred library is used to show copies and electronic resource URIs regardless of the library searched. One recommendation is to set this to your home library so that local copies show up first in search results.
4. Use the dropdown menu to select an appropriate **Advanced Search Default Pane**.
   a. Advanced search has secondary panes for Numeric and MARC Expert searching. You can change which one is loaded by default when opening a new catalog window here.



Additional settings are available through Catalogue Preferences in the staff catalogue. For more details see Catalogue Preferences.

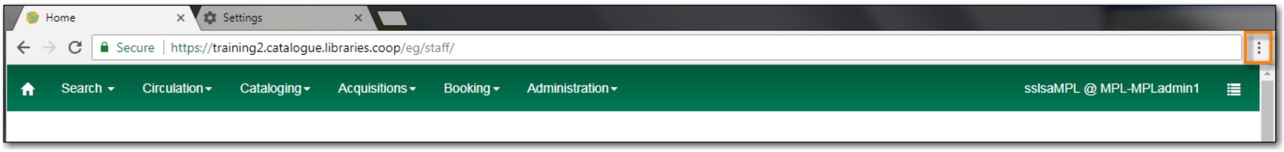
Chapter 6. Best Practices for Using the Browser

6.1. Setting Browser Defaults for Web Client

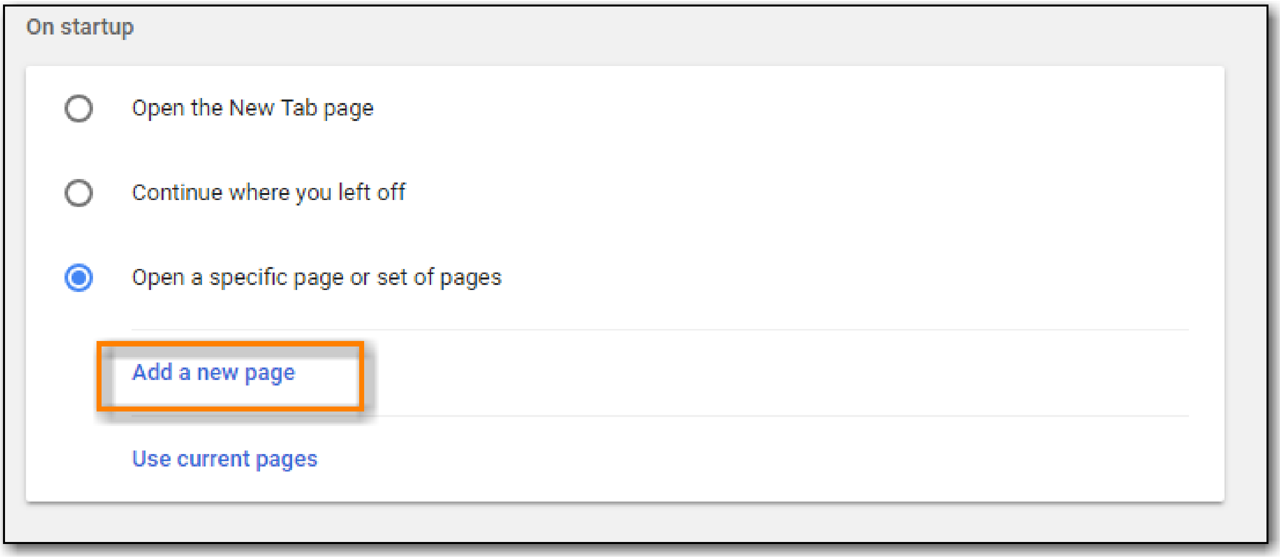
To ensure that staff can easily get to the web client portal page on login without additional steps, you can set the browser's home page to default to the web client.

Setting the Web Client as the Home Page in Chrome

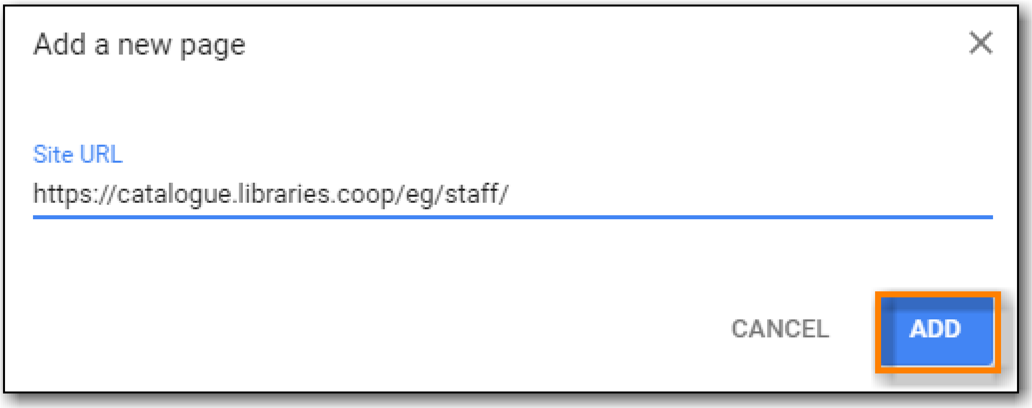
1. Click **Menu**. (three vertical dots in the upper-right corner).



2. Click **Settings**.
3. In the *On startup* section, select Open a specific page or set of pages.



4. Click **Add a new page**.
5. Site URL: **https://catalogue.libraries.coop/eg/staff/**.
6. Click **Add**.



6.2. Bookmarks and Shortcuts

6.2.1. Bookmark Toolbar

Sitka Snippet Video - Bookmark Toolbar (3:44)

The web client allows you to bookmark the pages that you use the most, and to use your browser's existing functionality to build your own custom toolbars and even to use browser profiles for different activities.

Google Chrome Help - Create, view & edit bookmarks

6.2.2. Tab Buttons and Keyboard Shortcuts

As the staff client is loaded in a web browser, library staff can use browser-based tab controls and keyboard shortcuts to help with navigation. Below are some tips for browser navigation that can be used in Chrome on Windows PCs.

Keyboard Shortcuts for Tabs

- Use **CTRL+T** or click the browser's new tab button to open a new tab.
- Use **CTRL+W** or click the x in the tab to close the tab.
- Undo closing a tab by hitting **CTRL+Shift+Tab**.
- Use **CTRL+F5** or click the Refresh button to refresh the tab.
- To open a link from the web client in a new tab, **CTRL+click** the link or **right-click the link and select Open Link in New Tab**. Using this method, you can also open options from the web client's dropdown menus in a new tab
- Navigate from one tab to another using **CTRL+Tab** on the keyboard.

Setting New Tab Behavior

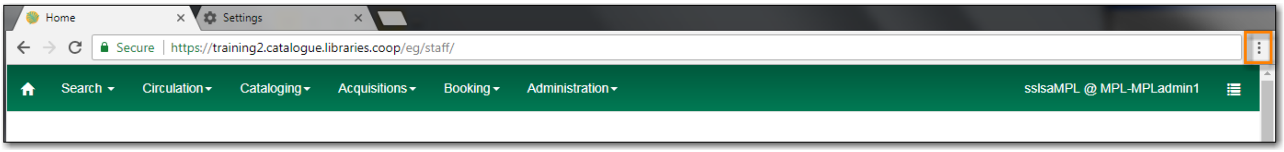
Some users may want to automatically open the web client's portal page in a new tab. Chrome will not open your home page by default when you open a new tab. However, optional add-ons will allow you to set the browsers to automatically open the home page whenever open opening a new tab. These add-ons may be useful for those libraries that want the new tab to open to the web client portal page.

6.3. Browser Configuration

6.3.1. Update browser

Make sure your browser is up to date

1. Click **Menu**.



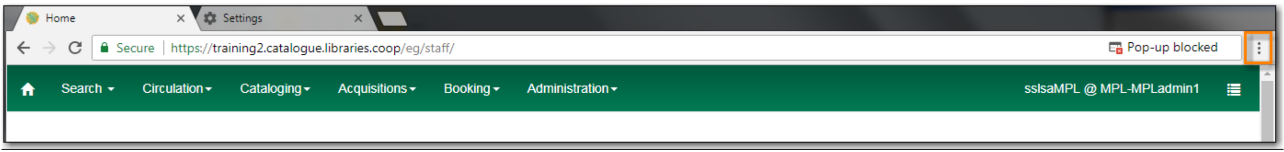
2. Click **Help**.
3. Click **About Google Chrome**.
4. You should see a message saying *Google Chrome is up to date.*

6.3.2. Allow Pop-ups

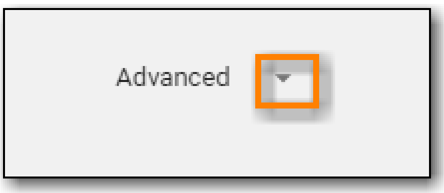
Your browser must allow pop-ups from **https://catalogue.libraries.coop** or you will see a small icon or message when a pop-up is triggered.

Allow Pop-ups

1. Click **Menu**.



2. Click **Settings**.
3. Scroll to the bottom and click **Advanced**.

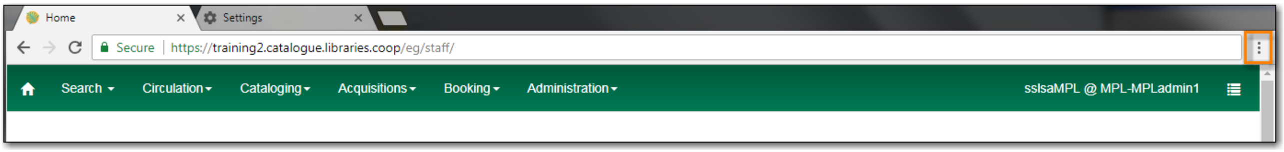


4. Under *Privacy and security* click **Site settings**.
5. Click **Pop-ups and re-directs**.
6. Click **Add**.
7. Site: **https://catalogue.libraries.coop**.
8. Click **Add**.

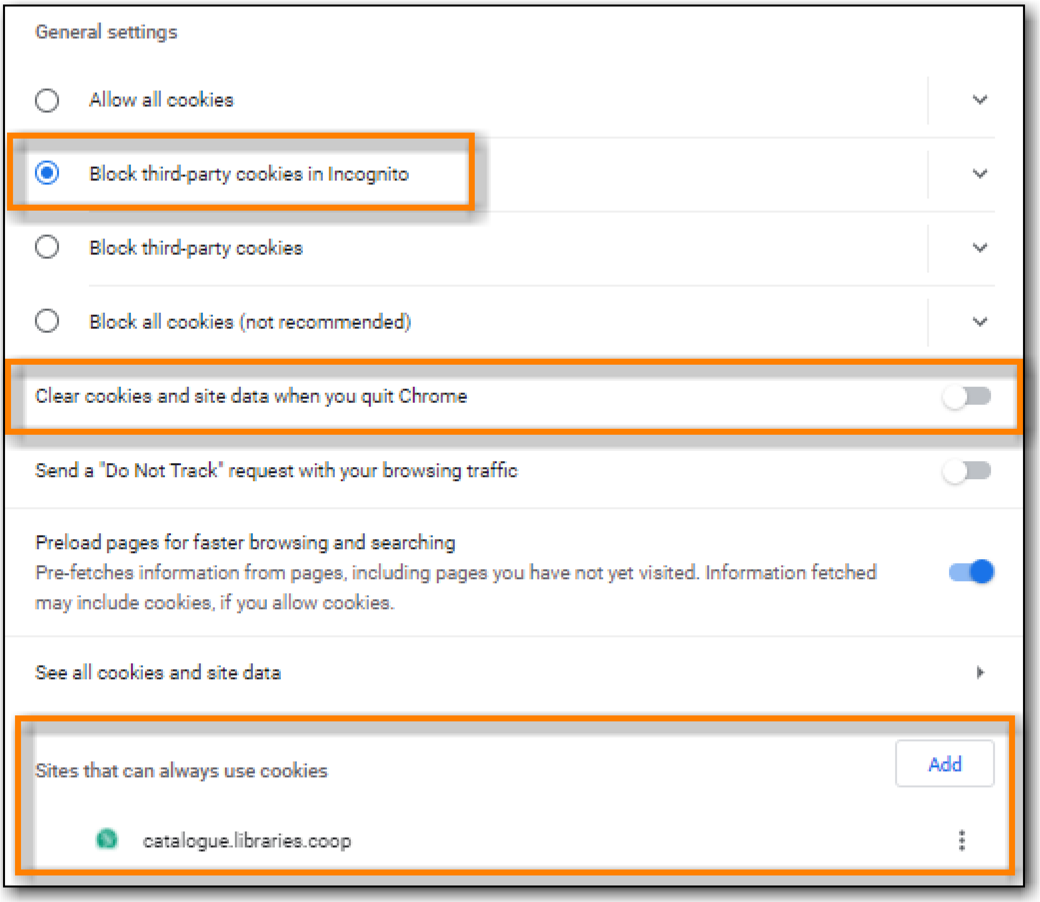
6.3.3. Allow Cookies

Allow Cookies

1. Click **Menu**.



2. Click **Settings**.
3. Select **Privacy and security** from the left hand side.
4. Click **Cookies and other site data**.
5. Under *General Settings* make sure *Block third-party cookies in Incognito* is selected.
6. *Clear cookies and site data when you quit Chrome* should be off.
7. Under *See all cookies and site data* click **Add** beside *Sites that can always use cookies*.
8. Site: https://catalogue.libraries.coop
9. Click **Add**.

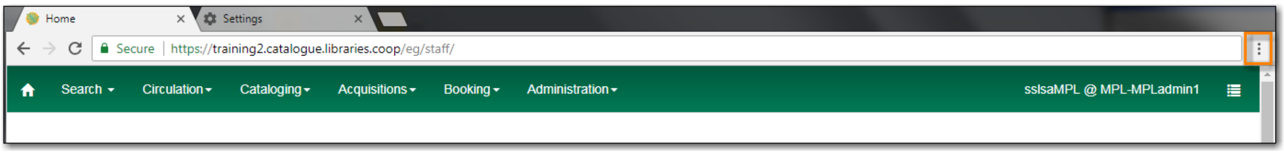


Security Software and Cookies

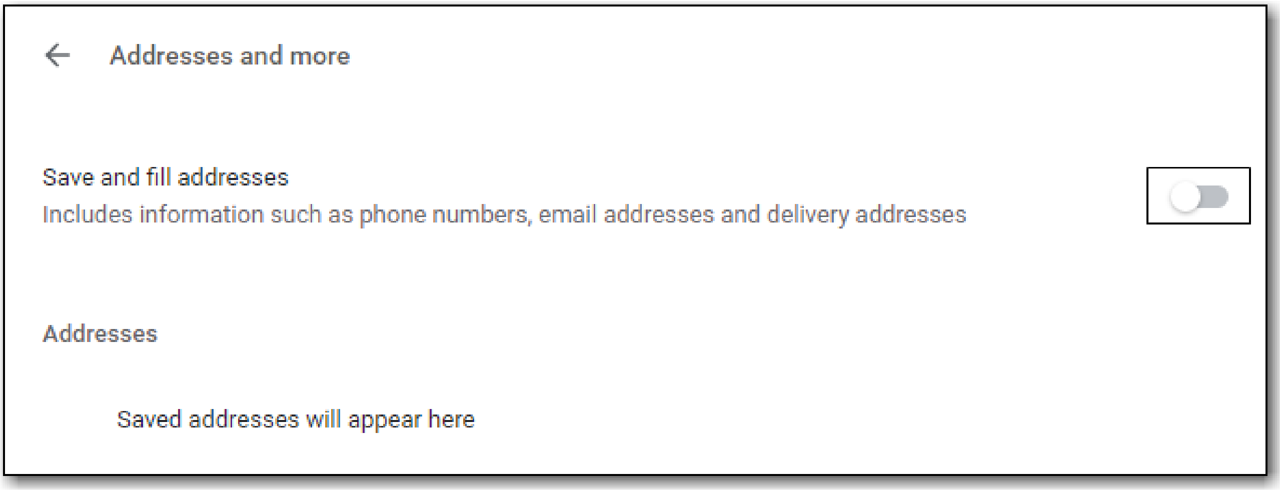
If you have cookies enabled in your browser, but they are disappearing, check your computer's security or antivirus software to see if it may be deleting your cookies on a regular basis.

6.3.4. Turn Off Autofill

1. Click **Menu**.



2. Click **Settings**.
3. Under Autofill click **Addresses and more**.
4. Turn off **Save and fill addresses**.

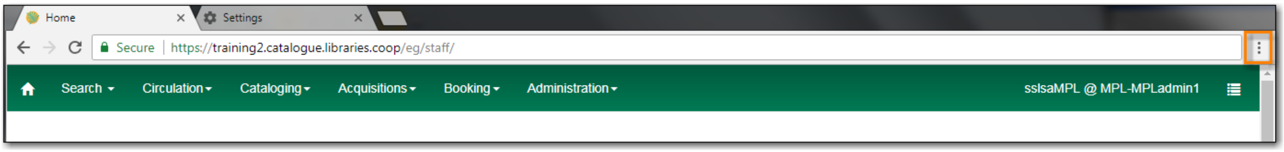


6.4. Troubleshooting

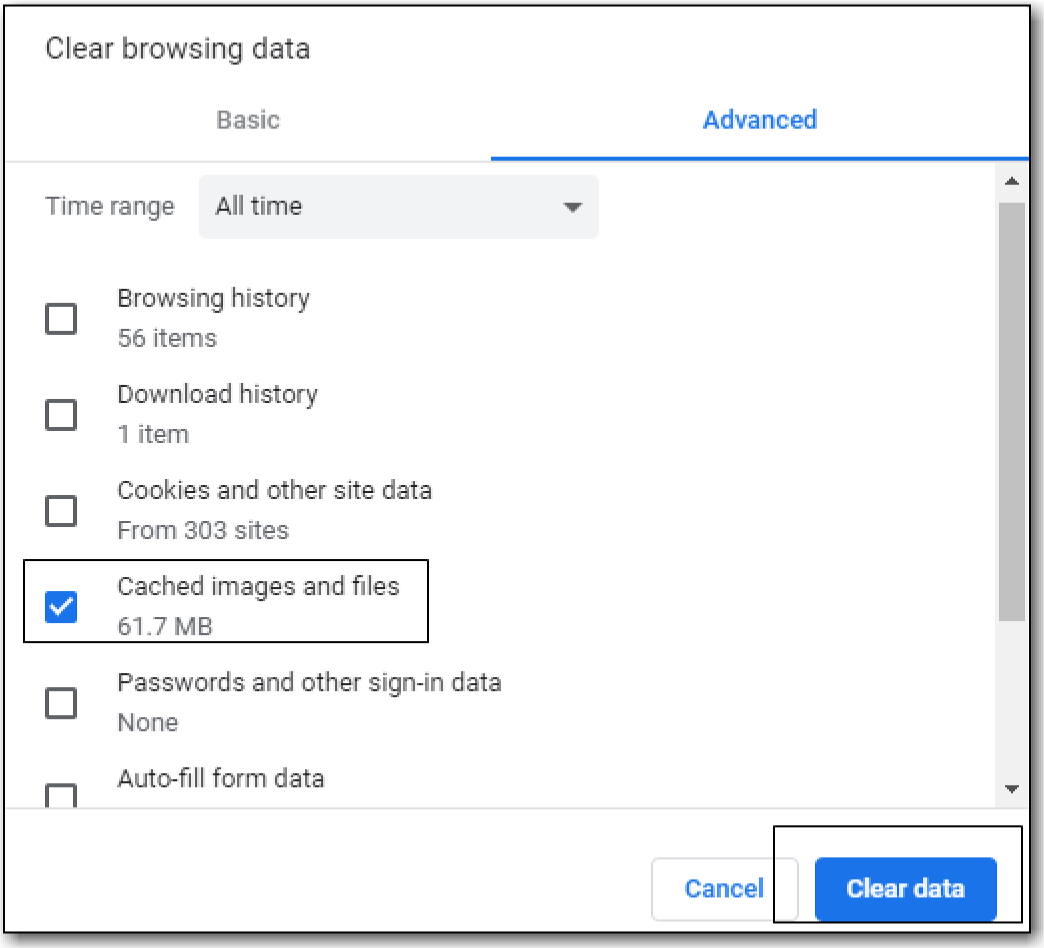
6.4.1. Clear Cache

Clear Cache

1. Click **Menu**.



2. Click **More tools**.
3. Click **Clear browsing data**.
4. Set Time Range
   a. **All time**
5. Check the box next to *Cached images and files* (other boxes can be left unchecked).
6. Click **Clear Data**.

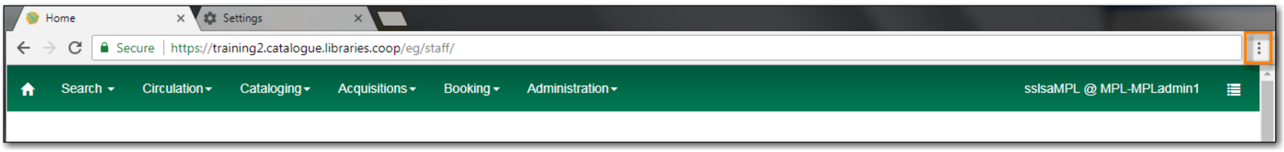


6.4.2. Clear Cookies

If you log in and see a blank page with the green bar across the top, but nothing else will load, you may need to clear your browser's cache and cookies.

Clear Cookies

1. Click **Menu**.



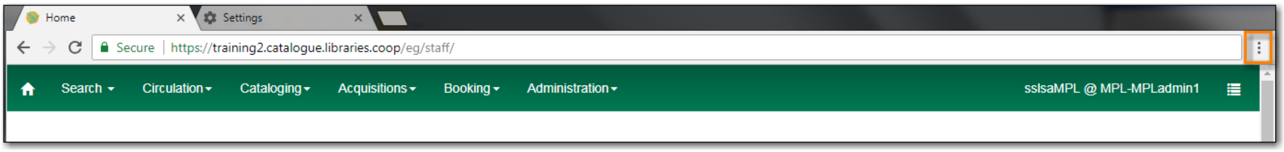
2. Click **More tools**.
3. Click **Clear browsing data**.
4. Check the box next to *Cookies and other site data*.
5. Check the box next to *Cached images and files*.
6. Set Time Range
   a. **All time** (recommended)
7. Click **Clear Data**.
8. Return to https://catalogue.libraries.coop/eg/staff

6.4.3. Reset Settings

If you still see a blank page with the green bar across after clearing your cookies the next step is to reset your settings for Chrome.

Reset Settings

1. Click **Menu**.

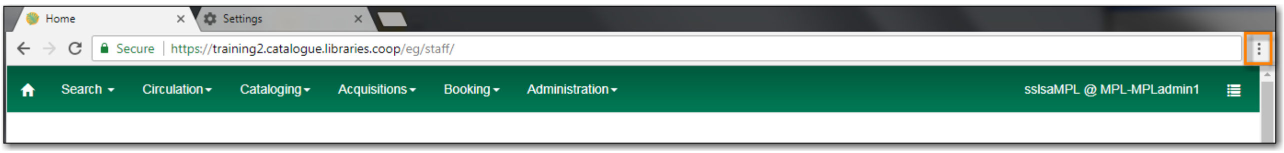


2. Click **Settings**.
3. Click **Advanced**.
4. Click **Reset and clean up**.
5. Click **Restore settings to their original defaults**.
6. Click **Reset settings**.
7. Return to https://catalogue.libraries.coop/eg/staff

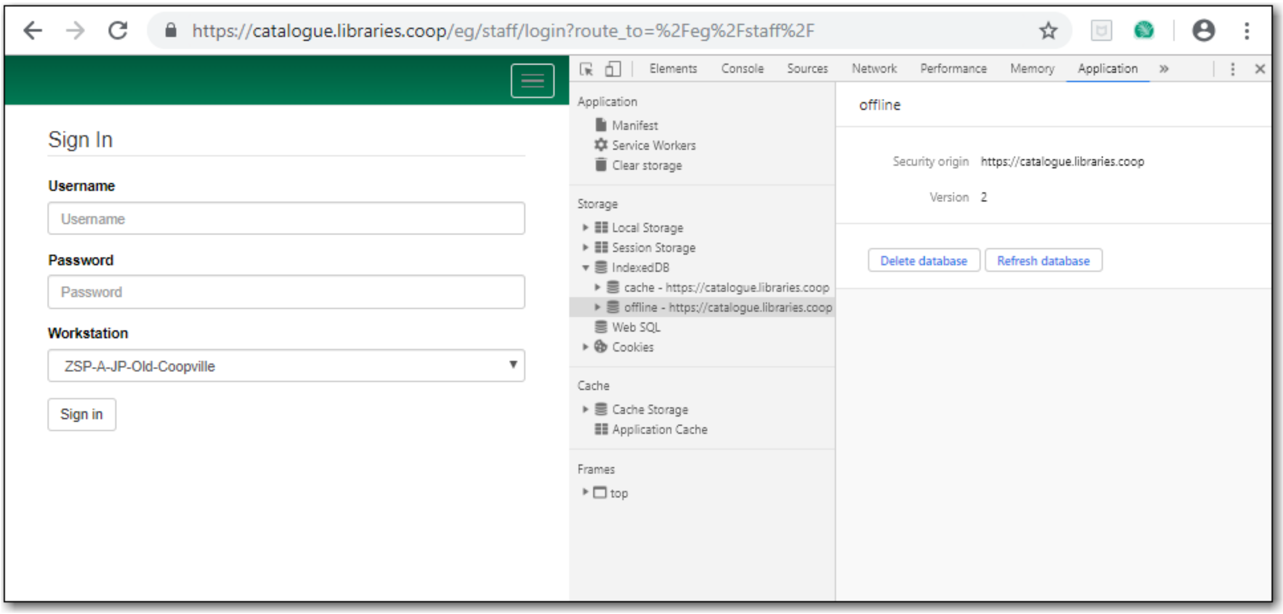
6.4.4. Delete the Offline Database

If you still see a blank page with the green bar across after clearing your cookies and resetting your settings the next step is to delete the offline database.

1. Navigate to https://catalogue.libraries.coop/eg/staff
2. Click **Menu**.



3. Click **More tools**.
4. Click **Developer tools**.
5. Switch to the *Application tab* (you may need to click on the double arrow so see all the tabs).
6. Expand the *Indexed DB section*.
7. Click on the **offline - https://catalogue.libraries.coop** section.
8. Click the **Delete database** button.
9. Click the **X** in the upper-right corner of the section to close the tool frame.



6.4.5. Reconnect Hatch

If you have Hatch installed, use these directions to reconnect your browser to Hatch after clearing your cache or deleting the offline database.

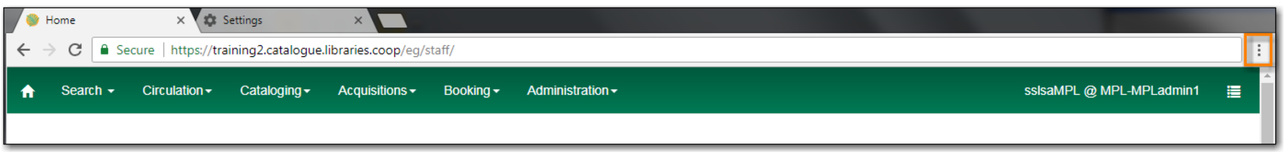
1. Reconnect your browser to Hatch
2. Log in with a Local System Administrator account.
3. Register workstation and click **Use Now** to log in again.
4. Navigate to **Administration** → **Workstation** → **Print/Storage Service ("Hatch")**.
5. Select **Use Hatch For Printing**.
6. Click on the Home icon.
7. You will be returned to the workstation registration screen again - click **Use Now** to log in again.
8. Your local settings should now be restored.

6.4.6. Retrieve Console Messages

If you are having problems, please include screenshots and error messages from the console(s).

Chrome Console Messages:

1. Click **Menu**.



2. Select More Tools.
3. Select Developer Tools. (This will open a pane on the right-side of your browser.)
4. Select the Console tab.
5. Change the "Default" dropdown to be sure that Verbose is checked.

6. Either take a screenshot or copy and paste the text that appears in the console when you see the errors occurring. Be sure to include any of the errors that display in red.

Hatch Extension Console Messages:

1. In Chrome, click **Menu**.
2. Select More tools.
3. Select Extensions.
4. Check the box at the top of the screen that says Developer Mode.
5. Scroll down to Hatch Native Messenger.
6. Click on the link that says "background" page. (This will open a new window.)
7. Select the Console tab.
8. Change the "Default" dropdown to be sure that Verbose is checked.
9. Either take a screenshot or copy and paste the text that appears in the console when you see the errors occurring. Be sure to include any of the errors that display in red.

NOTE	Please read Guidelines for Support Requests before submitting your ticket.

Circulation

Chapter 7. Patron Accounts

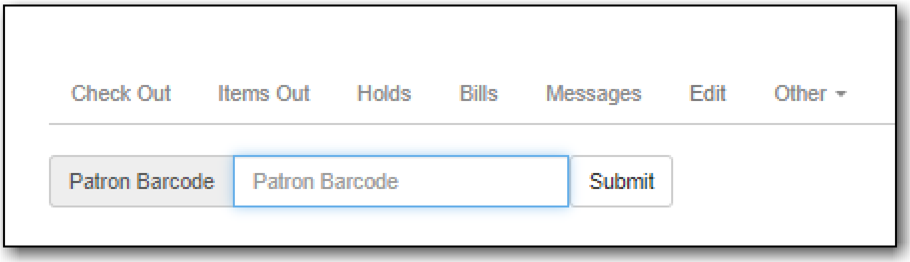
7.1. Retrieving Patron Accounts

Patron accounts can be retrieved in Evergreen using the patron's barcode or other searchable terms from the patron's account.

7.1.1. Retrieving an Account via Barcode

The check out screen allows you to enter a patron's barcode.

1. Go to **Circulation** → **Check Out**.
2. Enter the patron's barcode.
   a. If manually entering the barcode click **Submit**.

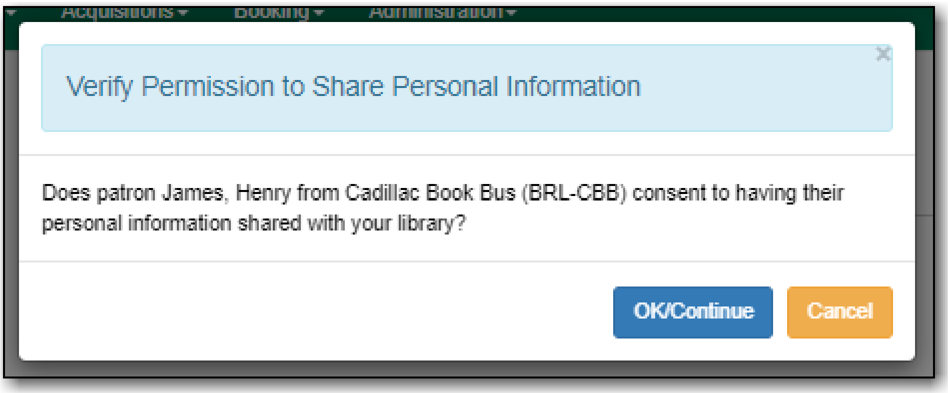


3. The patron's account will open.

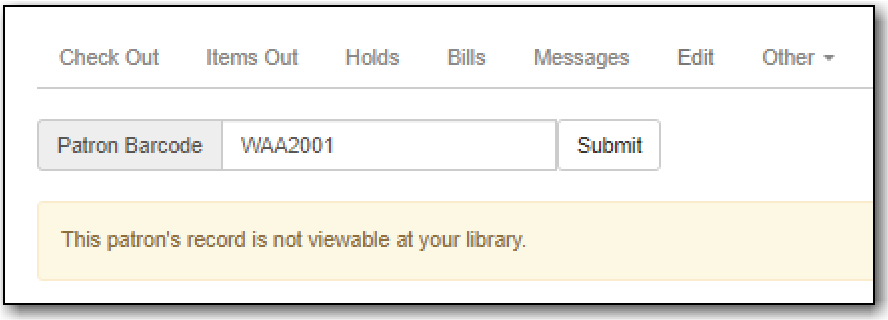
Patron Opt-In

Libraries participating in reciporcal borrowing agreements, like BC One Card, can opt-in patrons from other participating libraries.

1. When the barcode is scanned a pop-up requesting the patron's consent appears.
2. Click **OK/Continue** or **Cancel** as appropriate.



If a barcode is scanned from a non-participating library a message will indicate that the patron's record is not viewable at that library and the account cannot be opened.

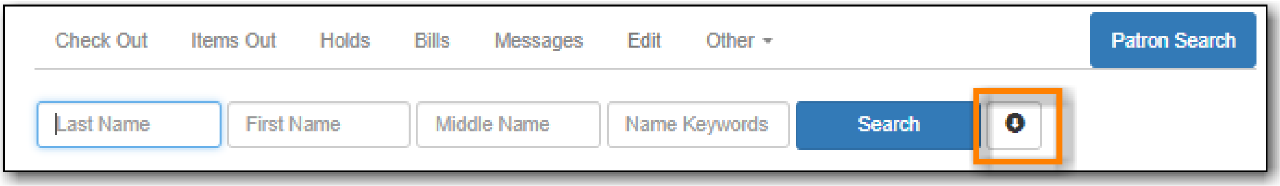


7.1.2. Retrieving an Account via Search Term

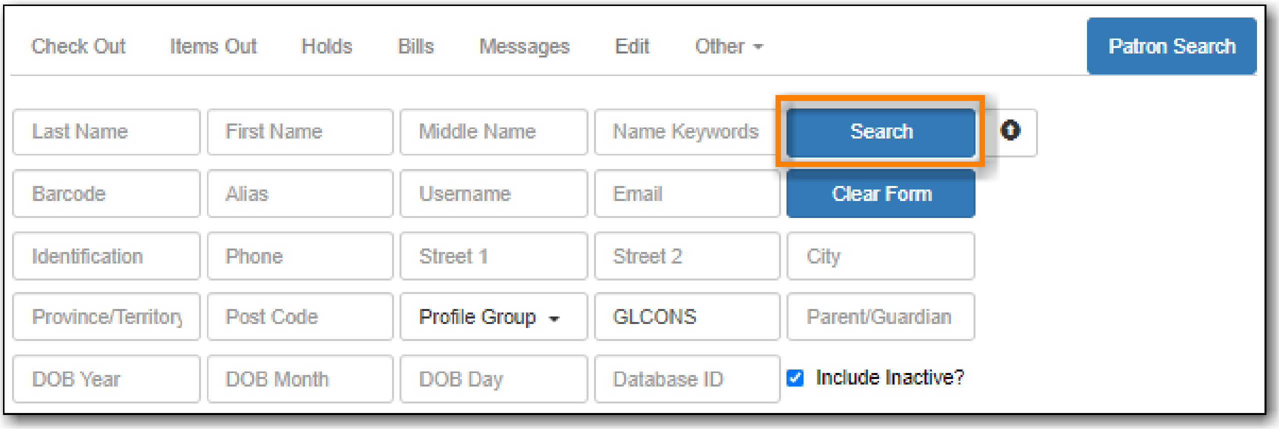
Sitka Snippet Video - Patron Search (1:04)

The patron search enables you search using information in a patron account to retrieve your patrons and those patrons opted into your library.

1. Go to **Search** → **Search for Patrons**.
2. Click on the arrow to see all possible search fields.



3. Enter your search term or terms and click **Search**.



TIP

- To ensure all relevant patrons are search Co-op Support recommends have *Include Inactive?* checked.
- Libraries participating in reciprocal borrowing agreements should always set SITKA as the search library to ensure all opted-in patrons are included in the search.
- The name fields search both the primary and preferred name fields.
- Name keywords will retrieve patrons with the specified term present in any of the name fields.
- Doing a search with *Profile Group* set to Post-Sec Library Staff, Public Library Staff, etc. is a quick way to retrieve all staff accounts for your library so you can review

them on a regular basis to ensure the appropriate people have access to the staff client.

7.2. Registering New Patrons

Before registering a new patron, best practice is to check for an existing account in Sitka's Evergreen.

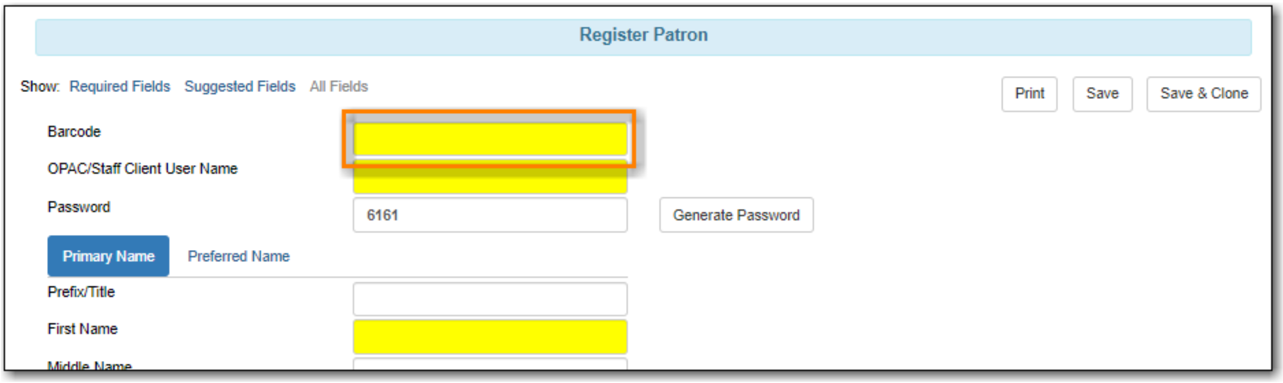
Public libraries with reciprocal borrowing agreements, such as BC One Card, should ask the patron if they have a library card at another public library and then retrieve the account via barcode.

As the registration form is completed Evergreen will alert you if the phone number, email, or address you are entering matches that of another patron belonging to or opted in at your library. The alert text is a link that will take you to a patron search of the matching patrons so you can check if they are the same patron.

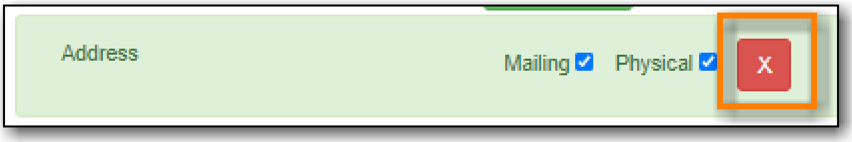
To register a new patron:

1. Select **Circulation → Register Patron.**
2. What fields display will depend on whether you're showing Required Fields, Suggested Fields, or All Fields. See Customizing the Display Fields for the settings that control which fields display.

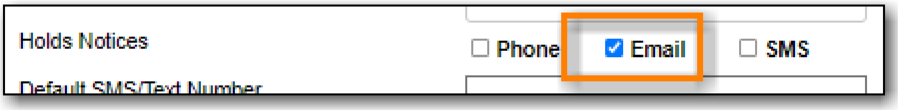
3. Enter the required information, based on your library's policies. Any fields highlighted in yellow must be filled in. See Patron Account Fields for information on specific fields.



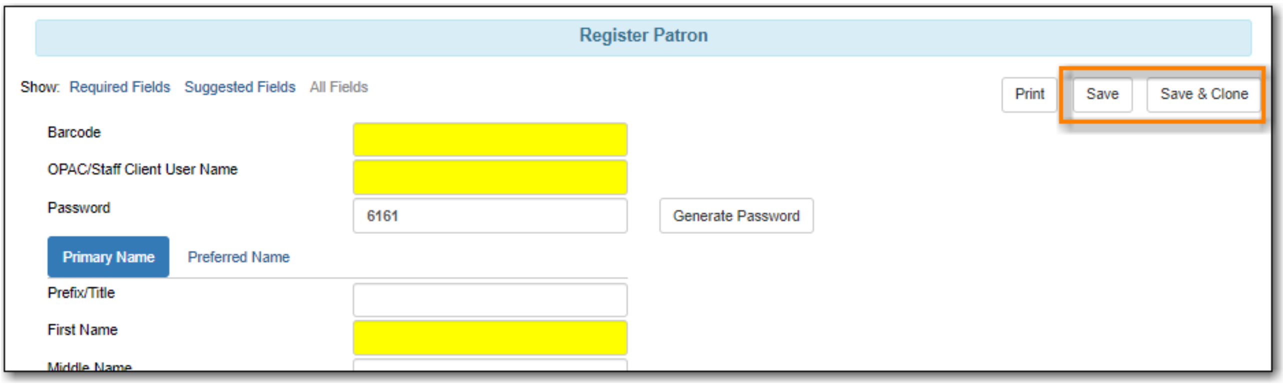
4. If you do not wish to record the address, you need to delete the fields by clicking the red X. Blank address fields will result in an error.



5. The **Holds Notices** default setting is **Email** which makes **Email Address** a required field. You can override this setting, and the required field, with patron's actual preferences as needed. You must de-select the **Email** option to save a patron record without an email address.



6. Click **Save** or **Save & Clone** at top-right of screen. **Save and Clone** will save the record and open a new record with some shared details such as phone number and optionally address.



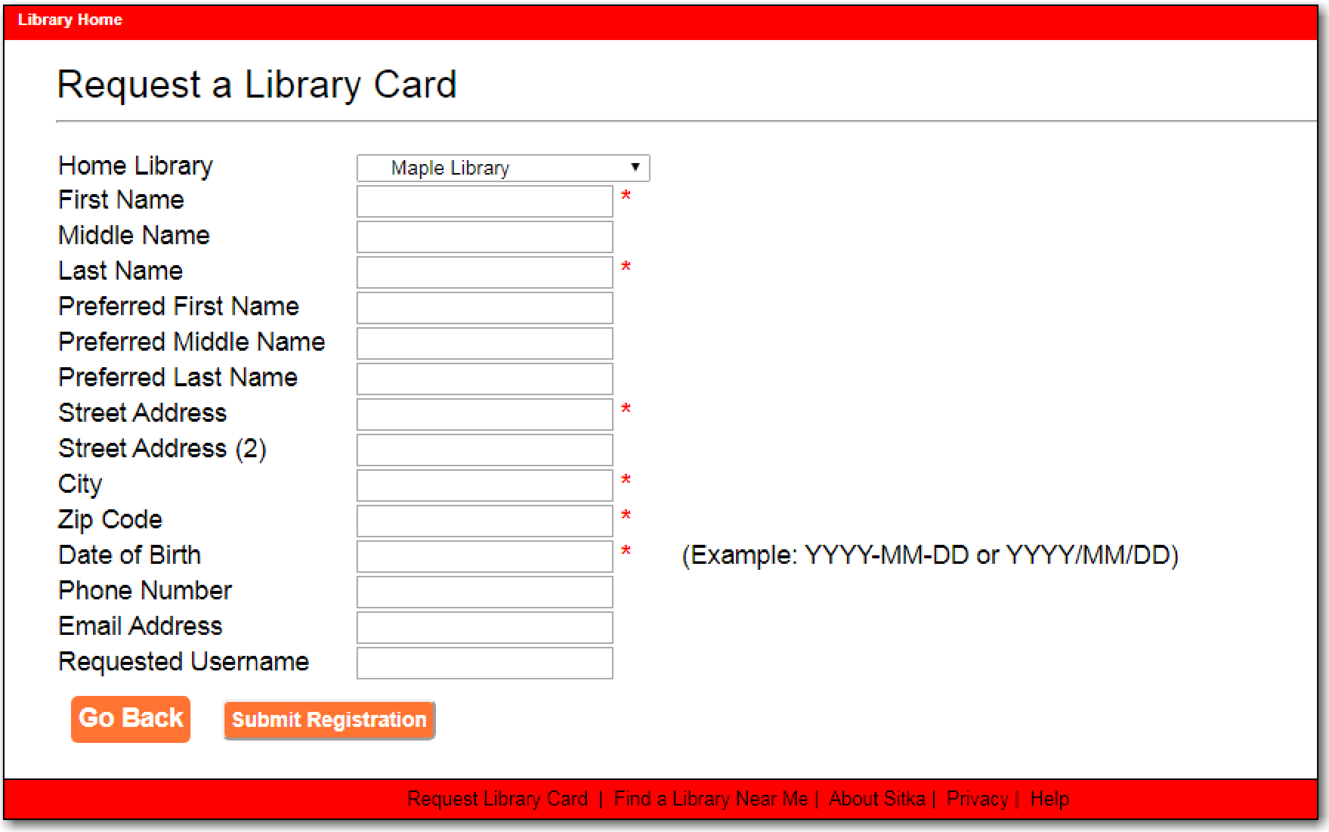
7. If any required fields have been missed an alert will appear asking you to enter valid values for all the required fields.

7.3. Patron Self-Registration

Patron Self-Registration allows patrons to initiate registration for a library account through the OPAC. Patrons can fill out a web-based form with basic information that will be stored as a "pending patron" in Evergreen. Library staff can review pending patrons in the staff-client and use the pre-loaded account information to create a full patron account. Pending patron accounts that are not approved within a configurable amount of time will be automatically deleted.

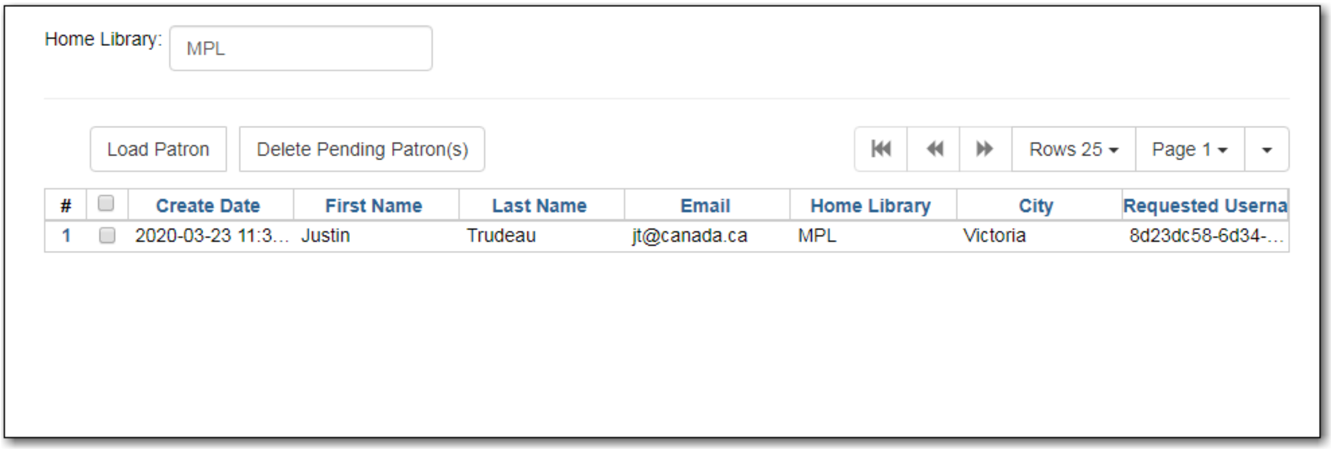
Patron Self-Registration

1. In the OPAC, click on the link to **Request Library Card**
2. Fill out the self-registration form to request a library card, and click **Submit Registration**.
3. Patrons will see a confirmation message: “Registration successful! Please see library staff to complete your registration.” This message is customizable per library.



Managing Pending Patrons

1. In the staff client select **Circulation** → **Pending Patrons**.
2. Select the patron you would like to review. In this screen you have the option to **Delete** a pending patron account or **Load** the pending patron information to create a permanent library account.
3. To create a permanent library account for the patron, click on the patron’s row, right-click and select **Load Patron** or click on the **Load Patron** button at the top of the screen. This will load the patron self-registration information into the main **Patron Registration** form.
4. Fill in the necessary patron information for your library, and click **Save** to create the permanent patron account.



Library Settings

Three new Library Settings have been created to manage patron self-registration: **only Co-op Support can edit this setting. Contact Co-op Support if you would like to enable Patron Self-Registration**

- **OPAC: Allow Patron Self-Registration** must be set to 'True' to enable use of this feature.
- **OPAC: Patron Self-Reg. Expire Interval** to set the amount of time after which pending patron accounts should be deleted.
- **OPAC: Patron Self-Reg. Display Timeout** to set the amount of time after which the patron self-registration screen will timeout in the OPAC. The default is 5 minutes.

Several existing Library Settings can be used to determine if a field should be required or hidden in the self-registration form:

- **GUI: Require day_phone field on patron registration**
- **GUI: Show day_phone on patron registration**
- **GUI: Require dob (date of birth) field on patron registration**
- **GUI: Show dob field on patron registration**
- **GUI: Require email field on patron registration**
- **GUI: Show email field on patron registration**
- **GUI: Require State field on patron registration**
- **GUI: Show State field on patron registration**
- **GUI: Require county field on patron registration**
- **GUI: Show county field on patron registration** [New Setting]

Several existing Library Settings can be used to verify values in certain fields and provide examples for data format on the registration form:

- **Global: Patron username format**
- **GUI: Regex for phone fields on patron registration** OR **GUI: Regex for day_phone field on patron registration**
- **GUI: Regex for email field on patron registration**

- **GUI: Regex for post_code field on patron registration**
- **GUI: Example for email field on patron registration**
- **GUI: Example for post_code field on patron registration**
- **GUI: Example for day_phone field on patron registration** OR **GUI: Example for phone fields on patron registration**

7.4. Patron Account Fields

The patron account is made up of required and optional fields, some of which are filled out based on local library policy and some of which are determined by global Sitka policy. Some fields can be edited by patrons via *My Account*.

Identification

Field	Required?	Description
Barcode	Yes	The barcode assigned to the patron. Generally this will be a 14 digit codabar barcode; some libraries may use a different format for older cards or if student numbers are used. If your library uses non-14 digit codabar barcodes with barcode completion make sure the correct prefix, often your library code, is included.
OPAC/Staff Client User Name	Yes	By default the username will match the barcode. Patrons can update their username via My Account.
Password	Yes	Saved passwords are not visible to library or Co-op Staff. Patrons can reset their password via the public catalogue.
Primary Name	Yes	A first and last name must be entered for all patrons. Prefix, suffix, and middle name are optional as can be used needed.

Preferred Name	No	These field can be used if the patron goes by a name different from their primary name. The preferred name is used instead of the primary for notifications and display in My Account.
Name Keywords	No	Additional keywords that can be used to group accounts for searching purposes.
OPAC/Staff Client Holds Alias	No	The alias can be used if a patron doesn't want items on the hold shelf appearing under their real name.
Date of Birth	Can be set as required by libraries	Date of birth of the patron.
Juvenile Check Box	No	Can be used to tag accounts as juvenile for policy or reporting purposes. Generally the PL Juvenile permission group is used instead.
Parent/Guardian	No	Can be used to include the parent or guardian's name for juvenile patrons.
Primary Identification Type	Yes	Co-op Support recommends using the value of *Other* unless you have a legitimate use case for collecting data for one of the other values.
Primary Identification	Can be set as required by libraries	This field is used to collect identification information about the patron. Generally this is used by academic libraries for data such as student number or homeroom.
Secondary Identification Type	No	Co-op Support recommends using the value of *Other* unless you have a legitimate use case for collecting data for one of the other values.

Secondary Identification	No	This field is used to collect identification information about the patron. Generally this is used by academic libraries for data such as student number or homeroom.

Contact Details

Field	Required?	Description
Email Address	Can be set as required by libraries	The email address the patron would like to be contacted at. Multiple adresses can be separated by a comma followed by a space. Patrons can edit their email via My Account unless the option has been disabled for your library.
Email checkout receipts by default? Check Box	Yes	Unchecked by default, this setting enables patrons to automatically be sent email check out receipts. Patrons can update this check box via My Account.
Daytime Phone	Can be set as required by libraries	Primary phone number for the patron.
Evening Phone	Can be set as required by libraries	Phone number to be used in the evenings.
Other Phone	Can be set as required by libraries	Additional phone number for the patron.

Account Settings

Field	Required?	Description
Home Library	Yes	For public libraries home library should always be set to the library whose tax base the patron falls into. For academic and special libraries the home library should be the library or applicable branch.

Main (Profile) Permission Group	Yes	The profile groups are set globally by library type. All groups have a three year expiry period with the exception of PL New User which is 3 months. Individual libraries can choose which profiles to use and how to configure your chosen profiles to suit local policy. Profiles are used by Evergreen to determine how items circulate so it's important to know which profile are used at your library and for which patrons. Contact Support to have this list customized to display only the profiles you use at your library.
Privilege Expiration Date	Yes	By default the date will be three years in the future for all profile groups, except PL New User which has an interval of 3 months. Library staff can manually adjust the date to conform to local policy.
Internet Access Level	Yes	This field can be used by staff to manually track if patrons' may access the internet at the library. The value set doesn't affect patron's access to the public catalogue or subscribed 3rd party products. A default value can be set using the library setting *Default level of patrons' internet access*.
Active Check Box	Yes	This check box is checked by default. Patron set to Inactive are not included in patron searches when the *Include Inactive?* check box is unchecked on search form.

Barred Check Box	Yes	This check box is left unchecked by default. Patrons should only be barred in extreme situations, especially if they belong to a library that participates in reciprocal borrowing.
Is Group Lead Account Check Box	Yes	This check box is left unchecked by default. This feature isn't used by Sitka.
Claims-returned Count	No	Evergreen will update the value in this field if the patron has items marked claimed returned. Staff can manually update this value.
Claims Never Checked Out Count	No	Evergreen will update the value in this field if the patron has items marked claimed never checked out. Staff can manually update this value.
Alert Message	No	This alert field will be made obsolete by new features coming with the next upgrade. Co-op Support recommends libraries use the alert field available via the Messages tab.

User Settings

Field	Required?	Description
Default Phone Number	Required if Phone checked for Hold Notices	This is the phone number used for hold notifications via phone. If blank Evergreen will use the value in Daytime Phone. Patrons can update this via My Account.
Default Hold Pickup Location	No	The location at which the patron would like to pickup their holds. Patrons can update this via My Account.

Holds Notices Check Box	No, but highly recommend at least one option selected	The selected options will be checked by default when the patron places a hold. Patrons and staff can uncheck options in the process of placing a hold. Patrons can also update their defaults via My Account.
Default SMS/Text Number	Required if SMS checked for Hold Notices	The number at which the patron would like to receive hold and courtesy text messages if enabled for your library. Patrons can update this via My Account.
Default SMS Carrier	Required if value enter in *Default SMS/Text Number*	To receive text messages must specify who their carrier is. Some carriers may not be listed as not all carriers provide the information required to allow Evergreen to send them text messages. Patrons can update this via My Account.
Receive Overdue and Courtesy Emails	Yes	Checked by default, this setting enables patrons to automatically be courtesy and overdue notices. Patrons can update this check box via My Account. If patrons opt out they will no longer receive courtey or overdue emails but will still receive hold notifications, depending the option chosen when the hold is place, and paper overdue notices for libraries that use paper overdues.

Allow others to use my account	No	This allows patrons to indicate other people who can place holds, pick up holds, check out items, and/or view their borrowing history. Patrons can update who can use their account via My Account. This feature is enabled for all libraries by default but can be disabled by setting the library setting *Allow others to use patron account (privacy waiver)* to False.

Address

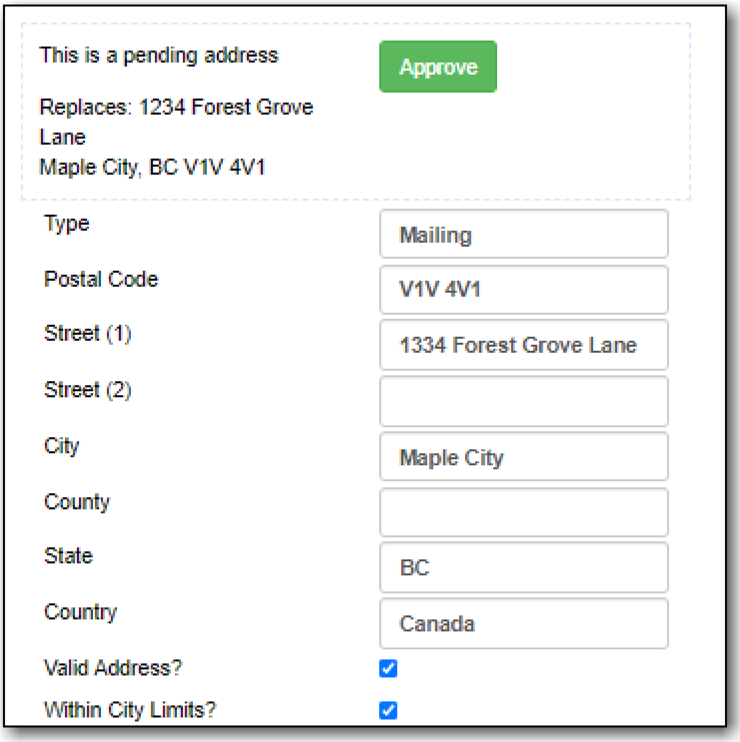
Libraries can choose to require at least one address on every account. When required a patron account cannot be saved if an address is not included.

Field	Required?	Description
Type	Yes	By default this will be set as *Mailing*.
Postal Code	Yes	Entering the patron's postal code will automatically fill in the *City* and *State* fields.
Street (1)	Yes	Street address details are entered here.
Street (2)	No	Optional field for additional street address details.
City	Yes	This will be autofilled when postal code is entered.
County	No	This field can be used if there is a applicable county for the address.
State	Yes	The provincial or territorial abbreviation must be used.
Country	Yes	Canada is entered by default. This can be manually updated if entering addresses from another country.

Valid Address?	Yes	Checked by default, this check box indicates that the address is valid. This can be used in conjuntion with the library setting *Invalid patron address penalty*.

Multiple addresses can be included if the patron has more than one address that should be entered in their account.

Libraries can allow their patrons to edit their address via My Account by setting the library setting *Allow pending addresses* to True. Editing an address creates a pending address in the patron's account that must be approved by library staff.



Statistical Categories

Patron statistical categories are used to further group patrons by categories not otherwise captured in the patron account fields. Whether statistical categories are required or not depends on how they are set up. For information on setting up patron statistical categories see Statistical Category Editor.

7.4.1. Customizing the Display Fields

The patron form can display Required Fields, Suggested Fields, or All Fields.

By default all fields will display. The local system administrator at your library can set the default to

Suggested Fields using the library setting *Default showing suggested patron registration fields*.

Customizing the fields that display and are required in the patron account can help ensure the relevant information is being recorded for your patrons and can cut down on unnessary information being saved.

Required Fields

There are a number of fields that are required for all patron accounts across Sitka, such as barcode, home library and permission group. Required fields that must be filled in to save the account are indicated in yellow.

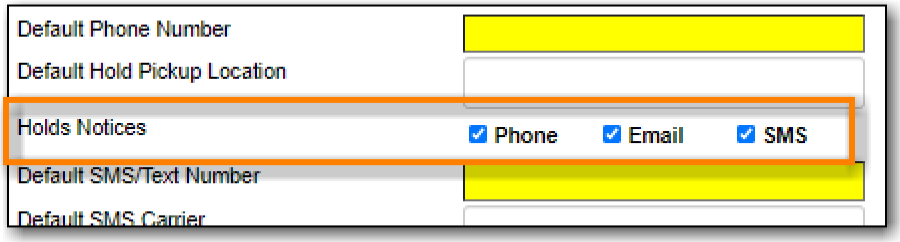
Libraries can decide to set additional fields as required to conform with local policy. The applicable library settings are:

- Require State field on patron registration
- Require at least one address for Patron Registration
- Require day_phone field on patron registration
- Require dob field on patron registration
- Require email field on patron registration
- Require evening_phone field on patron registration
- Require other_phone field on patron registration
- Require prefix field on patron registration
- require ident_value field on patron registration

When the setting is set to True the field will be indicated as required in yellow and will display when **Required Fields** is selected.

Additionally, setting any of the library settings that begin with *Show* to True will cause the applicable field to display when **Required Fields** is selected, though the field does not have to be filled in to save the account.

The *Email Address*, *Default Phone Number*, and *Default SMS/Text Number* fields are always required when the equivalent check box is checked for *Hold Notices*. Unchecking the relevant box will stop the field from being required.



Suggested Fields

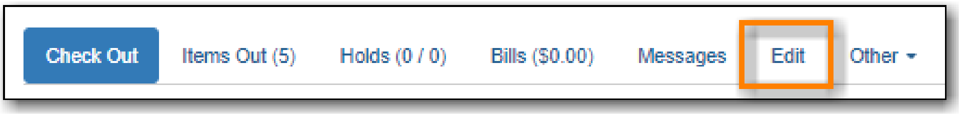
Setting any of the library settings that begin with *Suggest* to True will cause the applicable field to display when **Suggested Fields** is selected.

7.5. Updating Patron Accounts

Routine maintenance of your patron accounts includes updating patrons' contact information, contact preferences, renewing expired library cards, marking library cards lost, re-setting patrons' passwords, inserting notes or alert messages, and so on.

To access a patron's account:

1. Scan the patron's barcode or search for the patron by name.
2. When the patron account is loaded, **Check Out** is the default tab.
3. Click **Edit** to retrieve the patron information.



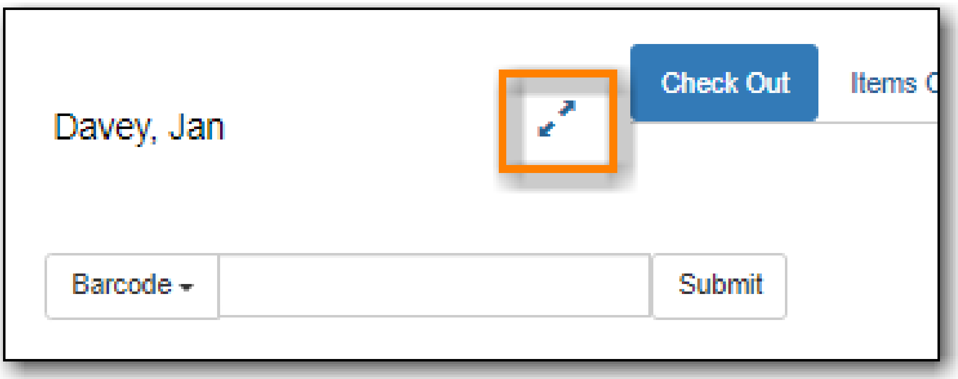
4. Make the needed edits and click **Save** at top right of screen.

NOTE If you edit phone numbers, email addresses, or hold notification preferences, you will be given the option to update any outstanding holds with the new information.

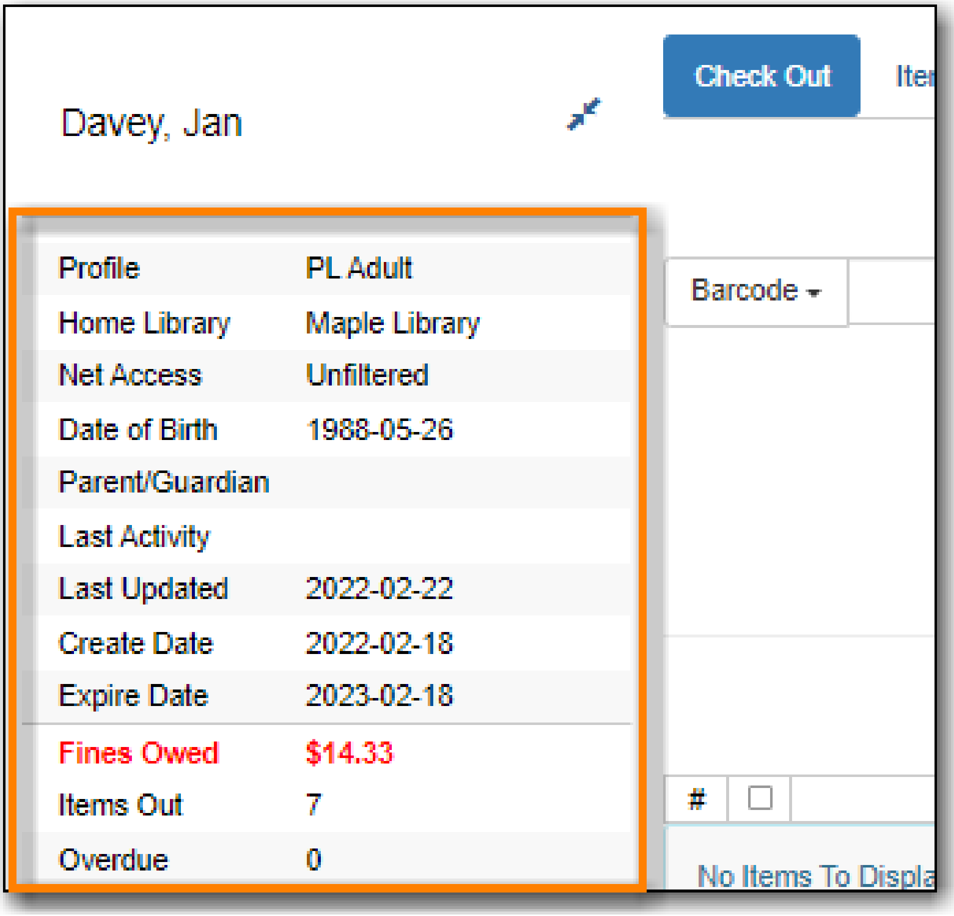
Sitka Snippet Video - Hold Notification Updates (0:41)

7.5.1. Patron Summary

1. Click the arrows beside the patron name to toggle between Patron Summary views. This choice is sticky and will stay on collapsed or expanded view until changed.

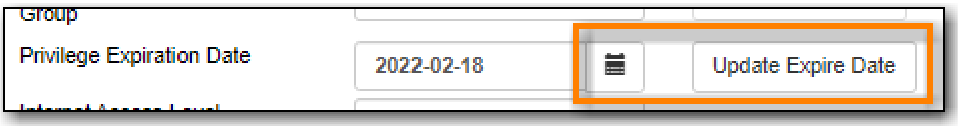


2. The expanded view displays key information about the account on left side of screen.



7.5.2. Renewing a Library Card

1. Click **Update Expire Date** or use the calendar widget to renew a card.

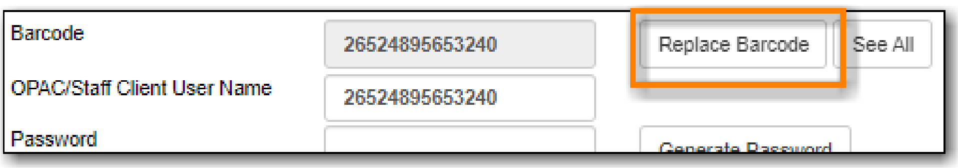


2. Click **Save** at top right of screen.

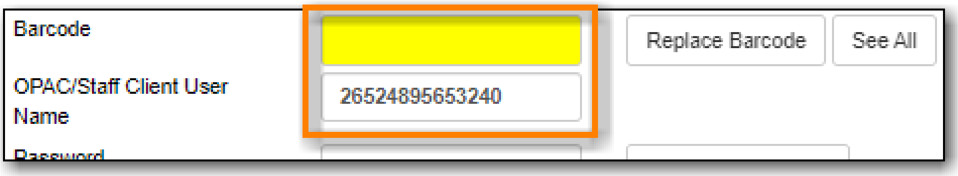
NOTE	**Update Expire Date** will give a date 3 years in the future for all Permission Groups except PL New User, which gets a date 3 months in the future. Libraries can manually edit the expiry date to match their local policy.

7.5.3. Marking a Library Card Lost

1. Click **Replace Barcode**



2. Enter the new barcode.



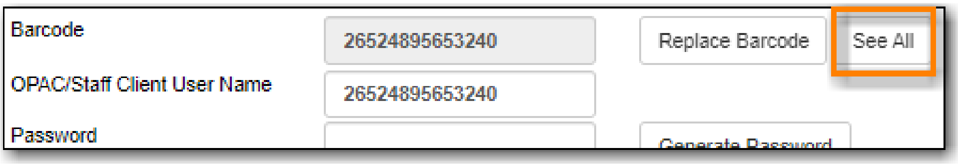
3. If the username is still the original barcode, update it to match new barcode number.
4. Click **Save** at top right of screen.

7.5.4. See All Barcodes

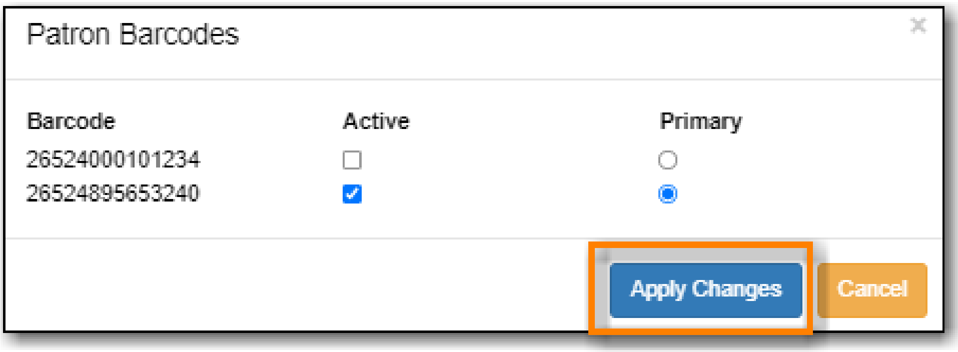
When patron accounts are merged together or a patron barcode is replaced, Evergreen marks the barcode as inactive and keeps it in the database.

If a patron presents an inactive card Evergreen will retrieve the account with a warning that the barcode is inactive and will not allow check outs. Staff can then decide which cards should be active or inactive. Best practice is to delete inactive patron cards.

1. Click **See All**.



2. All barcodes that the patron has had are displayed in a pop-up window.
3. Click **Active** to activate an inactive card.
4. Click **Primary** on the Active card, Active must be the Primary Card.
5. Click **Apply Changes**.



6. Click **Save** at top right of screen.

7.5.5. Re-setting a Patron Password

Co-op Support recommends libraries encourage their patrons to use the Forgot Your Password link in the public catalogue for password resets whenever possible. When needed it is also possible for staff to reset a patron's password in the staff client. This should be a temporary password and patrons should be encouraged to sign into *My Account* and update the password to something secure that only they know.

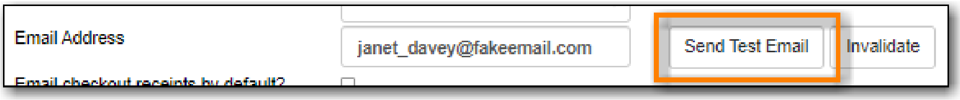
1. Click **Generate Password** to generate a random 4 digit password or type a new password into the field.

2. If your library uses the last 4 digits of phone number as default password, you may wish to set the password to match their phone number.
3. Click **Save** at top right of screen.

TIP The existing password is not displayed in patron records for security reasons.

7.5.6. Update and Test Email Address or SMS/Text Number

1. Enter new email address or SMS number, and click **Save**.
2. Click **Send Test Email** or **Send Test Text.**

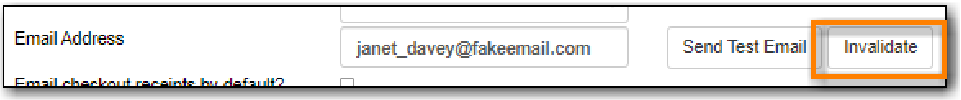


3. Confirm with the patron whether or not they received the test email or text message.

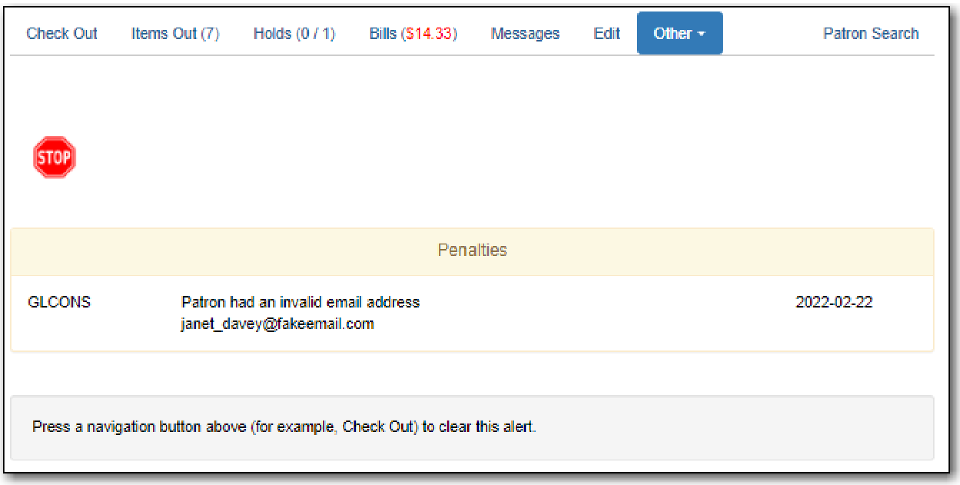
7.5.7. Invalidating an Email Address

It is good practice to keep patron email addresses current to ensure service from Evergreen's automated messaging features. If an email to a patron bounces back you can invalidate the email address.

1. Click **Invalidate**.



2. The email address will be removed and a penalty will be added to the **Messages** tab which will display when the patron's account is retrieved.



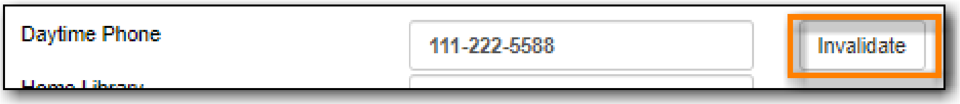
3. Evergreen will automatically archive the penalty when a new email address is entered.
4. To resolve the penalty manually see Staff-Generated Alerts, Blocks, and Notes.

NOTE Accumulated bounced back emails may result in notification emails from Evergreen being blocked by some email service providers such as Gmail and Outlook/Hotmail. This denial of service affects all Sitka's Evergreen users and we request your cooperation in maintaining current email addresses.

7.5.8. Invalidating a Phone Number

It is good practice to invalidate phone numbers that are no longer valid for your patron to prevent staff from continuing to call an out of service number or a phone number that has been re-assigned to a different person.

1. Click **Invalidate**.

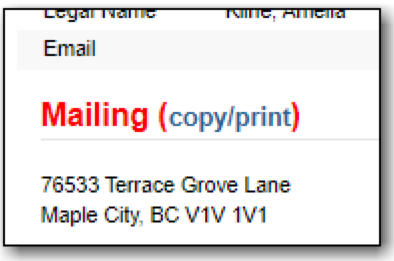


2. The phone number will be removed and a penalty will be added to the **Messages** tab which will display when the patron's account is retrieved.
3. To resolve the penalty manually see Staff-Generated Alerts, Blocks, and Notes.

7.5.9. Invalidating an Address

It is good practice to invalidate addresses that are no longer valid. Paper overdues do not check whether an address is valid so staff handling paper overdues should have a method for tracking notices returned to sender.

1. Uncheck the check box **Valid Address?**.
2. Click **Save**.
3. If the library setting *Invalid patron address penalty* is set to False for your library the box will simply be unchecked.
4. If the library setting *Invalid patron address penalty* is set to True for your library a penalty will be applied that can be seen in the Messages tab. Additionally, in the summary the address label will appear in red.



7.5.10. Update Patron Address

1. Retrieve the patron account and click **Edit**.
2. Scroll down to **Address** to edit it, and click **Save**.
3. To delete an address, click the red coloured cross, and click **Save**.
4. To add a new address, click **New Address** at the bottom of Address section, and enter required information.
5. Select **Mailing** or **Physical** and click **Save**.

7.5.11. Unlinking Shared Patron Addresses

If your library links addresses in cloned accounts, the address in the new, cloned record is greyed out, and can only be edited in the original record. The address' owning account can not be deleted or merged when other accounts are still using the address, so there are times when you need to unlink shared addresses. You do this by adding a new address to the cloned patron account record.

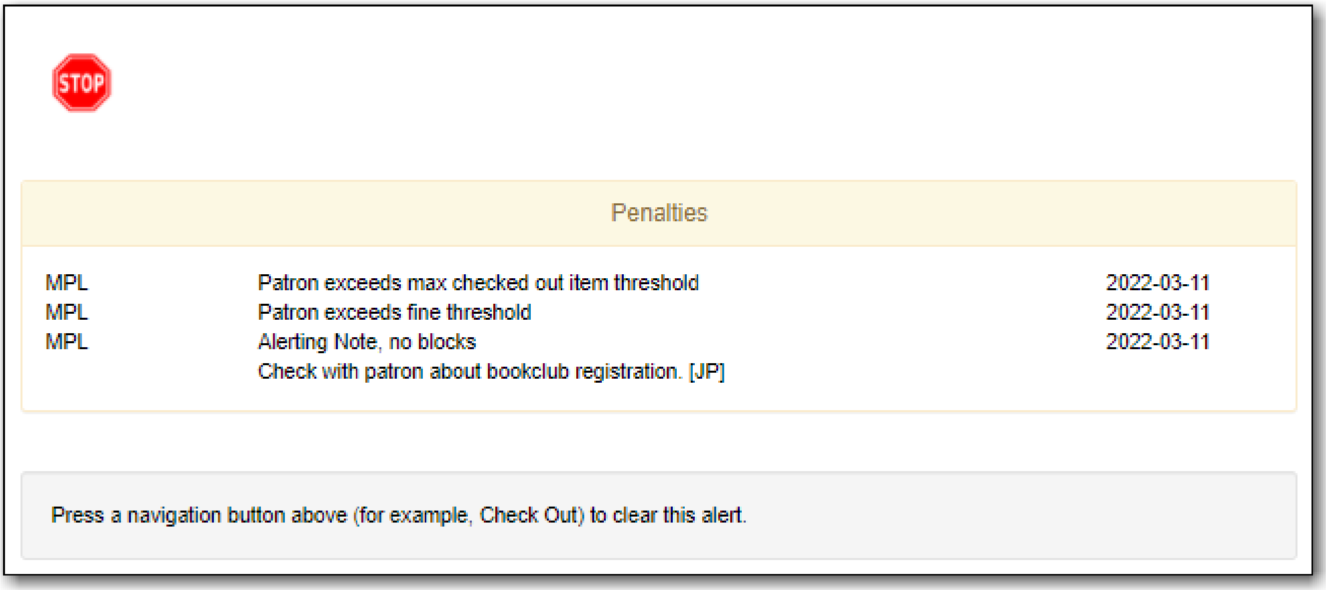
1. Uncheck the checkboxes for **Mailing** and **Physical** on the shared address.
2. Click **New Address** button.
3. Check the checkboxes for **Mailing** and **Physical** on the new address.
4. Enter the address and click **Save**.
5. The linked address is replaced.

7.6. Patron Alerts, Notes, and Messages

Alerts, notes, and blocks are applied to a patron’s account either automatically by the system or manually by staff.

7.6.1. System Generated Alerts and Blocks

When a patron has an alert or a block on their account a red **Stop** sign is displayed when the account is retrieved.



Evergreen will automatically apply alerts in the following situations:

- patron's account has expired.
- patron has a hold ready for pick up.
- patron has an invalid email address.
- patron has an invalid phone number.
- patron has an invalid address.

Evergreen will automatically apply blocks in the following situations:

- patron exceeds fine threshold.
- patron exceeds max overdue threshold.
- patron exceeds max checked out item threshold.
- patron exceeds max lost item threshold.

When these blocks are applied to an account the patron is blocked from checking out, renewing, and placing items on hold. Evergreen will also not capture or fulfill holds for the patron. The max checked out item threshold is an exception; patrons with this block can still renew items, place holds on items, and have holds captured for them.

The thresholds for these blocks are set per library and can be edited by a local system administrator in Group Penalty Thresholds.

Evergreen will remove these blocks and alerts when the cause is resolved.

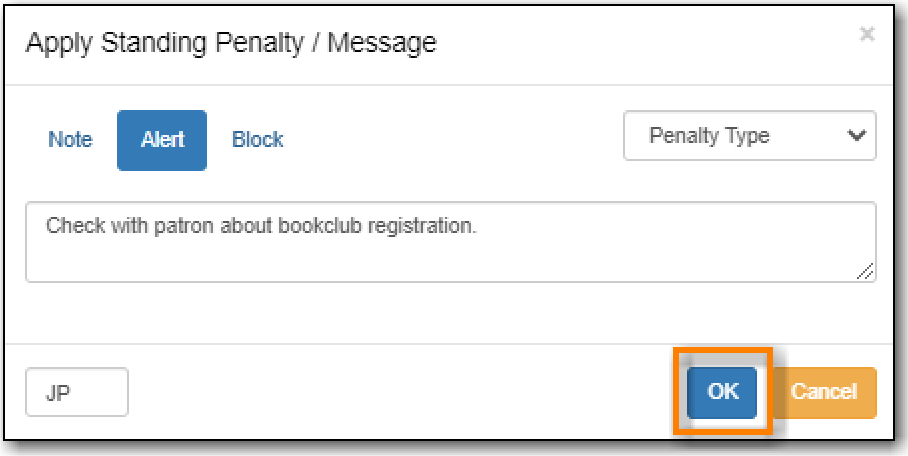
These blocks can also be overridden on an item by item basis. Alternatively, you can remove the block temporarily to carry out the circulation actions that need to be overridden. If the conditions persist, once you refresh or re-access the patron account the block will be re-applied immediately.

7.6.2. Staff-Generated Alerts, Blocks, and Notes

To add an alert, block, or note:

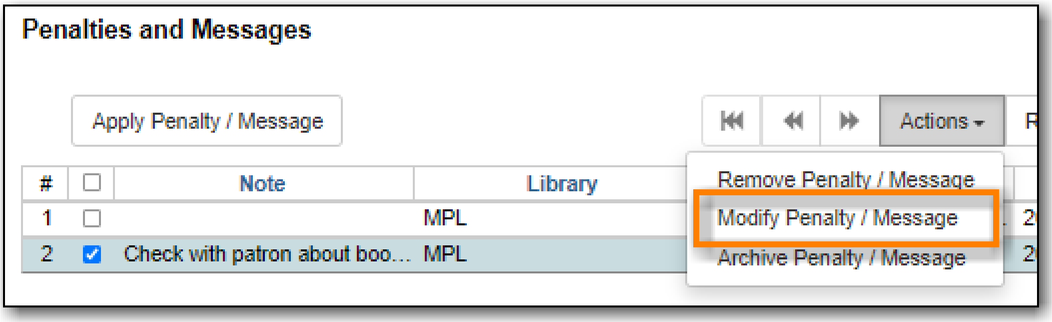
1. In the patron's acount click on the **Messages** tab.
2. Click **Apply Penalty/Message**.
3. Select **Note**, **Alert**, or **Block**.

4. Enter your text and initials and click **OK**.



To edit an alert, block, or note:

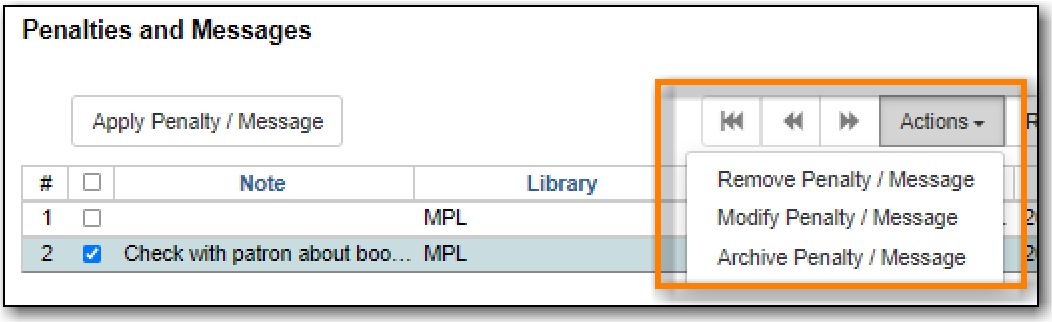
1. In the patron's acount click on the **Messages** tab.
2. Select the penalty you would like to edit.
3. From the **Actions** menu select **Modify Penalty/Message**.



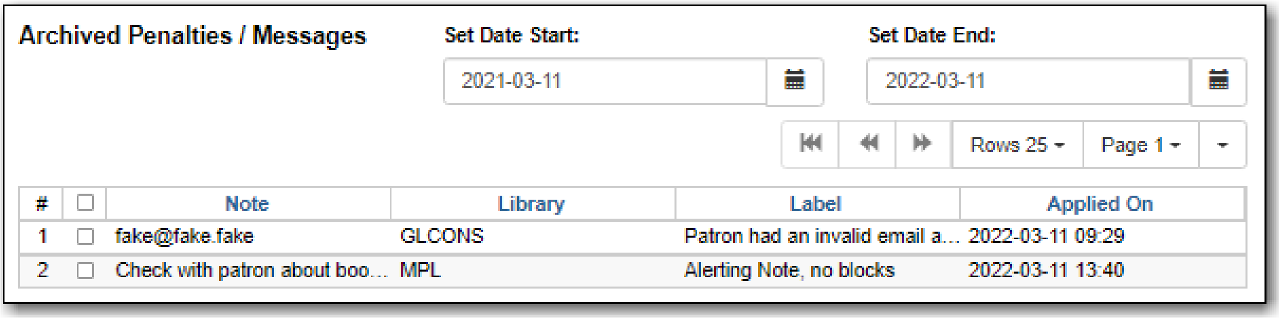
4. Make the needed changes and click **OK**.

To delete or archive an alert, block, or note:

1. In the patron's acount click on the **Messages** tab.
2. Select the penalty you would like to delete or archive.
3. From the **Actions** menu select the appropriate action.



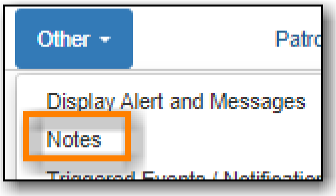
4. If archived, the penalty will now display in the archived section.



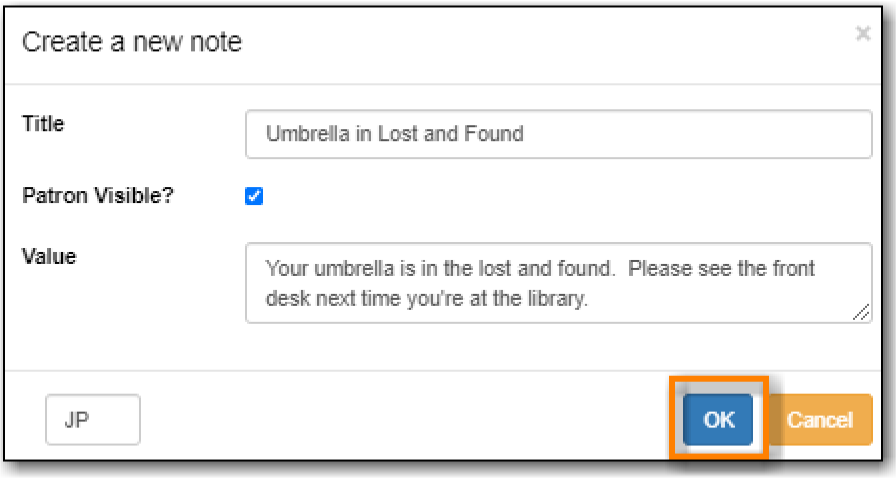
7.6.3. Staff-Generated Patron Visible Notes

Staff can add notes that display to the patron when they log into My Account.

1. In the patron's account go to **Other** → **Notes**.

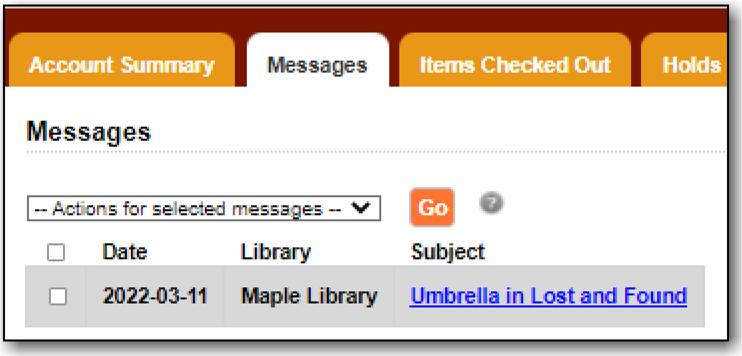


2. Click **Add New Note**.
3. Enter the title, note, your initials, and make sure the box for *Patron Visible* is checked.
4. Click **OK**.



5. The patron account will display a *Notes* icon in the staff client as well as being visible to the

patron in My Account.



7.7. User Buckets

User Buckets allow staff to batch delete and make batch modifications to user accounts in Evergreen. Batch modifications can be made to selected fields in the patron account:

- Home Library
- Profile Group
- Network Access Level
- Barred flag
- Active flag
- Juvenile flag
- Privilege Expiration Date
- Statistical Categories

Batch modifications and deletions can be rolled back or reversed, with the exception of batch changes to statistical categories.

Patron accounts can be added to User Buckets by scanning individual patron barcodes or by uploading a file of patron barcodes directly in the Patron Bucket interface. They can also be added to a User Bucket from the Patron Search screen. Batch changes and batch edit sets are tied to the Patron Bucket itself, not to the login of the bucket owner.

7.7.1. Create a User Bucket

To add users to a bucket via the Patron Search screen:

1. Go to **Search** → **Search for Patrons**.
2. Enter your search and select the users you want to add to the user bucket by checking the box next to each user row. You can also hold down the CTRL or SHIFT on your keyboard and select multiple users.
3. Click **Add to Bucket** and select an existing bucket from the drop down menu or click **New Bucket** to create a new user bucket.
   a. If creating a new user bucket, a dialog box called *Create Bucket* will appear where you can

enter a bucket *Name* and *Description* and indicate if the bucket is *Staff Shareable?*. Click **Create Bucket**.

4. After adding users to a bucket, an update will appear at the bottom-right hand corner of the screen that says *"Successfully added # users to bucket [Name]"*.

To add users to a bucket by scanning user barcodes in the User Bucket interface:

1. Go to **Circulation→User Buckets** and select the **Pending Users** tab at the top of the screen.
2. Click on **Buckets** and select an existing bucket from the drop down menu or click **New Bucket** to create a new user bucket.
    a. If creating a new user bucket, a dialog box called *Create Bucket* will appear where you can enter a bucket *Name* and *Description* and indicate if the bucket is *Staff Shareable?*. Click **Create Bucket**.
    b. After selecting or creating a bucket, the Name, Description, number of items, and creation date of the bucket will appear above the *Scan Card* field.
3. Scan in the barcodes of the users that you want to add to the selected bucket into the *Scan Card* field. Each user account will be added to the Pending Users tab. Hit ENTER on your keyboard after manually typing in a barcode to add it to the list of Pending Users.
4. Select the user accounts that you want to add to the bucket by checking the box next to each user row or by using the CTRL or SHIFT key on your keyboard to select multiple users.
5. Go to **Actions→Add To Bucket** or right-click on a selected user account to view the *Actions* menu and select **Add To Bucket**. The user accounts will move to the Bucket View tab and are now in the selected User Bucket.

To add users to a bucket by uploading a file of user barcodes:

1. Go to **Circulation→User Buckets** and select the **Pending Users** tab at the top of the screen.
2. Click on **Buckets** and select an existing bucket from the drop down menu or click **New Bucket** to create a new user bucket.
    a. If creating a new user bucket, a dialog box called *Create Bucket* will appear where you can enter a bucket *Name* and *Description* and indicate if the bucket is *Staff Shareable?*. Click **Create Bucket**.
    b. After selecting or creating a bucket, the Name, Description, number of items, and creation date of the bucket will appear above the Scan Card field.
3. In the Pending Users tab, click **Choose File** and select the file of barcodes to be uploaded.
    a. The file that is uploaded must be a .txt file that contains a single barcode per row.
4. The user accounts will automatically appear in the list of Pending Users.
5. Select the user accounts that you want to add to the bucket by checking the box next to each user row or by using the CTRL or SHIFT key on your keyboard to select multiple users.
6. Go to **Actions→Add To Bucket** or right-click on a selected user account to view the *Actions* menu and select **Add To Bucket**. The user accounts will move to the **Bucket View** tab and are now in the selected User Bucket.

7.7.2. Batch Edit All Users

To batch edit all users in a user bucket:

1. Go to **Circulation→User Buckets** and select the **Bucket View** tab.
2. Click **Buckets** and select the bucket you want to modify from the list of existing buckets.
   a. After selecting a bucket, the Name, Description, number of items, and creation date of the bucket will appear at the top of the screen.
3. Verify the list of users in the bucket and click **Batch edit all users**. A dialogue box will appear where you can select the batch modifications to be made to the user accounts.
4. Assign a *Name for edit set*. This name will allow staff to identify the batch edit for future verification or rollbacks.
5. Set the values that you want to modify. The following fields can be modified in batch:
   - Home Library
   - Profile Group
   - Network Access Level
   - Barred flag
   - Active flag
   - Juvenile flag
   - Privilege Expiration Date
6. Click **Apply Changes**. The modification(s) will be applied in batch.

Permissions

All permissions must be granted at the organizational unit that the workstation is registered to or higher, and are checked against the users' Home Library when a batch modification or deletion is executed.

7.7.3. Batch Modify Statistical Categories

Batch modify statistical categories for all users in a bucket:

1. Go to **Circulation→User Buckets** and select the **Bucket View** tab.
2. Click **Buckets** and select the bucket you want to modify from the list of existing buckets.
   a. After selecting a bucket, the Name, Description, number of items, and creation date of the bucket will appear at the top of the screen.
3. Verify the list of users in the bucket and click **Batch modify statistical categories**. A dialogue box will appear where you can select the batch modifications to be made to the user accounts. The existing patron statistical categories will be listed and staff can choose:
   a. To leave the stat cat value unchanged in the patron accounts.
   b. To select a new stat cat value for the patron accounts.
   c. Check the box next to Remove to delete the current stat cat value from the patron accounts.

4. Click **Apply Changes**. The stat cat modification(s) will be applied in batch.

7.7.4. Batch Delete Users

To ensure needed statistics are preserved it is not currently possible to delete users through User Buckets.

To delete users refer to Sitka's Patron Deletion Tool

7.7.5. View Batch Changes

1. The batch changes that have been made to User Buckets can be viewed by going to **Circulation** → **User Buckets** and selecting the **Bucket View** tab.
2. Click **Buckets** to select an existing bucket.
3. Click **View batch changes**. A dialogue box will appear that lists the *Name*, date *Completed*, and date *Rolled back* of any batch changes made to the bucket. There is also an option to *Delete* a batch change. This will remove this batch change from the list of actions that can be rolled back. It will not delete or reverse the batch change.
4. Click **OK** to close the dialog box.

7.7.6. Roll Back Batch Changes

1. Batch Changes and Batch Deletions can be rolled back or reversed by going to **Circulation** → **User Buckets** and selecting the **Bucket View** tab.
2. Click **Buckets** to select an existing bucket.
3. Click **Roll back batch edit**. A dialog box will appear that contains a drop down menu that lists all batch edits that can be rolled back. Select the batch edit to roll back and click **Roll Back Changes**. The batch change will be reversed and the roll back is recorded under *View batch changes*.

NOTE	Batch statistical category changes cannot be rolled back.

7.7.7. Sharing Buckets

If a User Bucket has been made Staff Shareable, it can be retrieved via bucket ID by another staff account. The ID for each bucket can be found at the end of the URL for the bucket. For example, in the screenshot below, the bucket ID is 32.

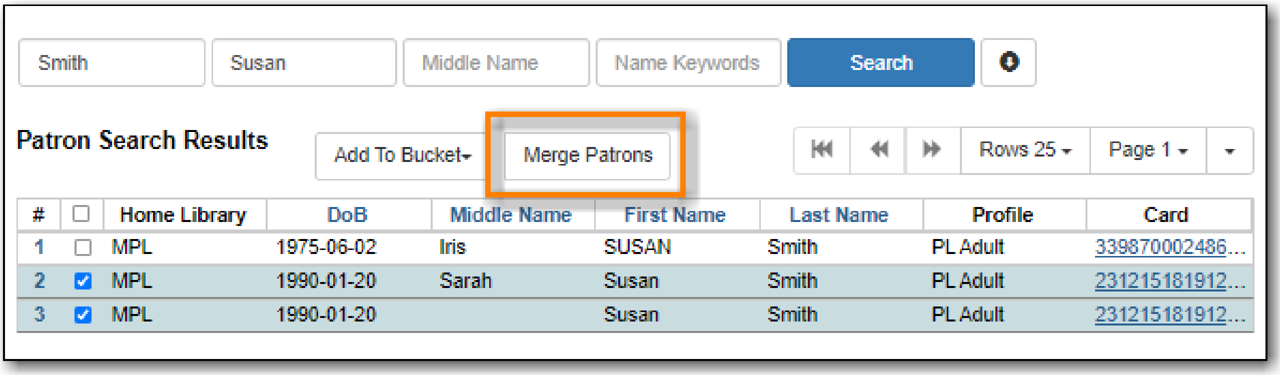
1. To retrieve a shared bucket click **Circulation** → **User Buckets** and click the **Bucket View** tab.
2. Click **Buckets** and select **Shared Bucket**.
3. A dialogue box will appear. Enter the ID of the bucket you wish to retrieve and click **Load Bucket**.
4. The shared bucket will load in the **Bucket View** tab.

7.8. Merging Patron Accounts

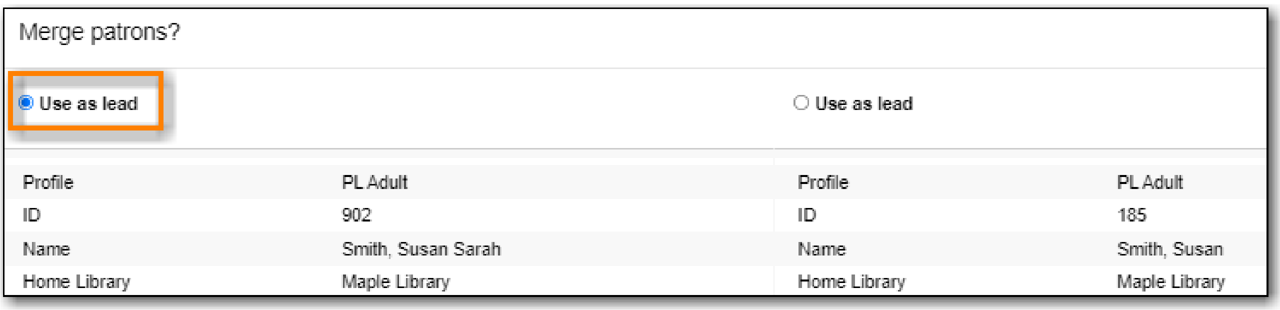
NOTE

- Local System Administration permission is required to merge patron accounts.
- Patron accounts can only be merged if both accounts have the same home library; you may need to update the home library in one of the accounts before merging.

1. Click **Search** → **Search for Patrons**.
2. Search by terms shared by the two accounts such as name or phone number.
3. Select the checkboxes for the two accounts you want to merge and click **Merge Patrons**.



4. Review the details of the two accounts to confirm that both accounts are for the same user.
5. Check the radio button **Use as lead** above the account you want to keep.



6. Click **Merge**.
7. The accounts will be merged together. The notes, bills, holds, and outstanding items from the non-lead card are transferred to the lead account and the non-lead card is marked inactive by default.

TIP

If you scan an inactive card on the Check Out screen, Evergreen will retrieve the account and show the message *Patron account retrieved with an INACTIVE card.*,

Co-op Support recommends manually deleting inactive cards using the Patron Deletion Tool or automatically deleting inactive cards by setting the library setting *Patron Merge Barcode Delete* to True.

Chapter 8. Circulation

Sitka Training Video - Circulation (5:49)

8.1. Check Out

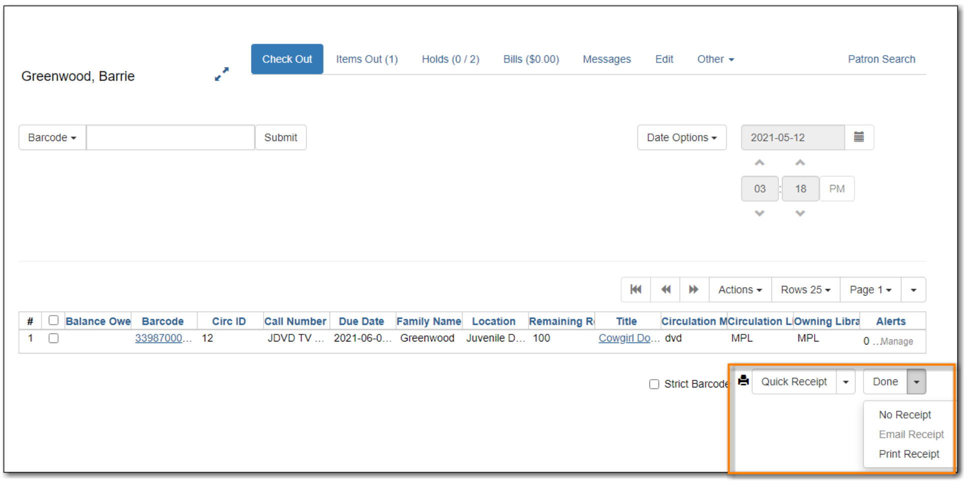
Sitka Training Video - Check Out (3:12)

Sitka's Evergreen circulates catalogued, pre-catalogued, and non-catalogued items.

- Regular circulation of items in your catalogue with a barcode.
- Pre-catalogued , or pre-cat, circulation of items that have a barcode but have not been catalogued yet. Pre-cat records are created on the fly in **Check Out** screen, and can not be searched in the catalogue; pre-cats can only be found in patron account or by item barcode search. Many Sitka sites use pre-cat functionality to circulate interlibrary loan items from other libraries. There is no need to route item to cataloguing when using pre-cat for interlibrary loan, you can simply ignore the alert.
- Non-catalogued, or non-cat, circulation of items that are not catalogued.

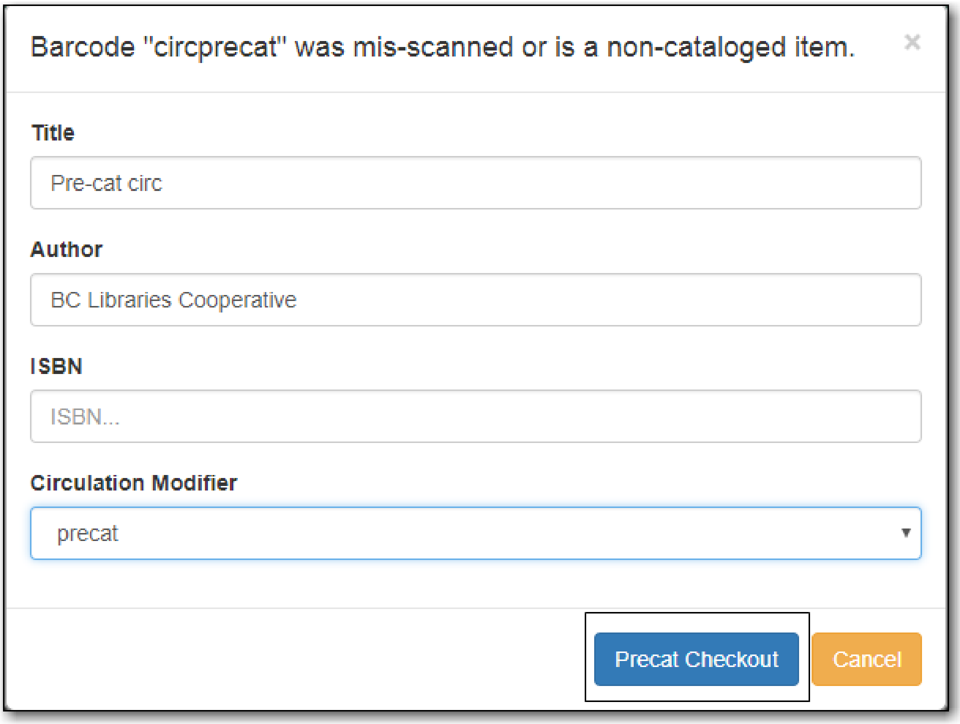
8.1.1. Regular Items

1. Click **Check Out Items**, or **Circulation → Check Out**.
2. Scan or enter patron barcode.
3. Scan or enter item barcode.
4. Click **Done** or **Quick Receipt**, to make choice to print, email, or no receipt, and to exit the **Check Out** screen.



8.1.2. Pre-catalogued Items

1. Scan or enter item barcode on patron's **Check Out** screen.
2. At prompt, enter required information and click **Precat Checkout**.

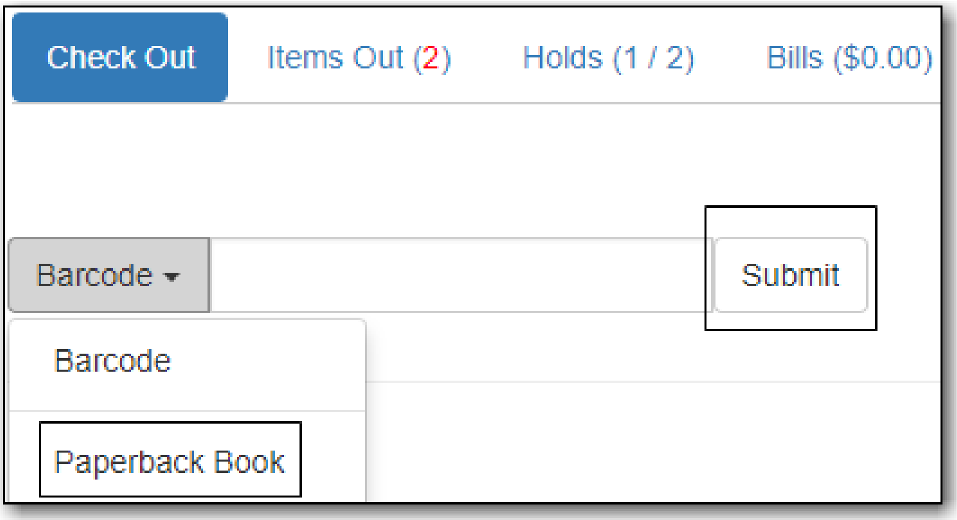


NOTE On check-in, Evergreen will prompt staff to re-route the item to cataloguing. This can be ignored if checking in an inter library loan item.

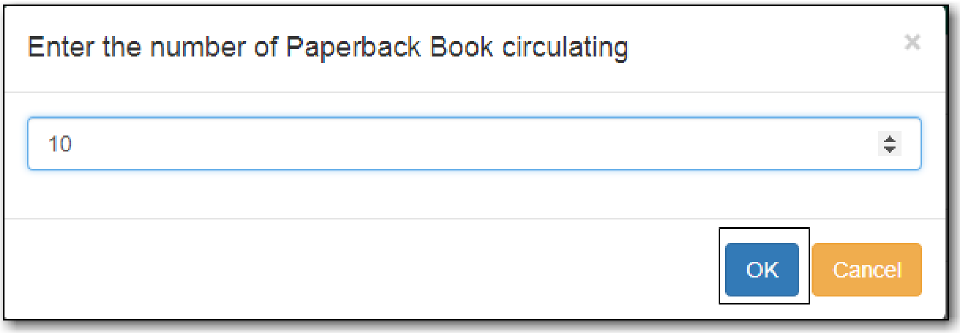
8.1.3. Non-catalogued Items

Items are manually checked out with a due date but when the due date expires, the items disappear from the patron's record and no fines accrue. Circulation statistics are collected. Non-catalogued item types are library specific and are created locally

1. Click on **Check Out Items**
2. Click on the drop down arrow in **Barcode** to choose the type of non-catalogued items, and click **Submit**.



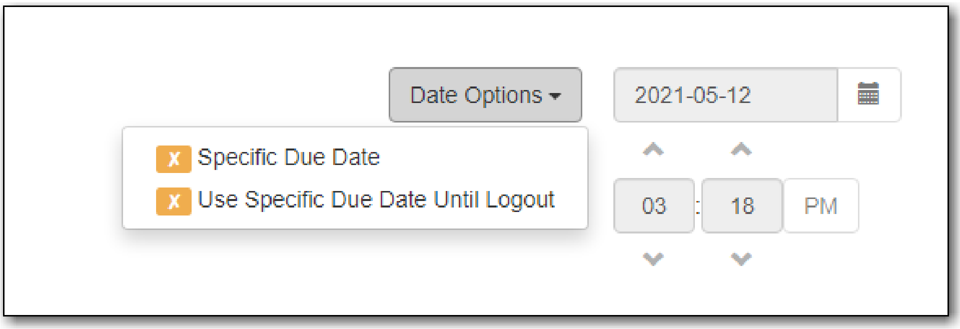
3. Enter the number of items and click **OK**.



8.1.4. Due Dates

Due dates based on your circulation policies are calculated automatically at **Check Out**. Use **Date Options** to override the default due dates. You can choose to use a specific due date per session or continuously until log-out.

1. Before you scan the item, click the drop down arrow in **Date Options**.
2. Select **Specific Due Date** or **Use Specific Due Date Until Logout**.
3. Use the calendar widget or enter a date.
    a. For hourly loans use the time picker to select the due date time. (Daily loans always have 11:59pm/23:59pm as the due date time regardless of what is selected for due date time.)
4. Scan the item barcode.

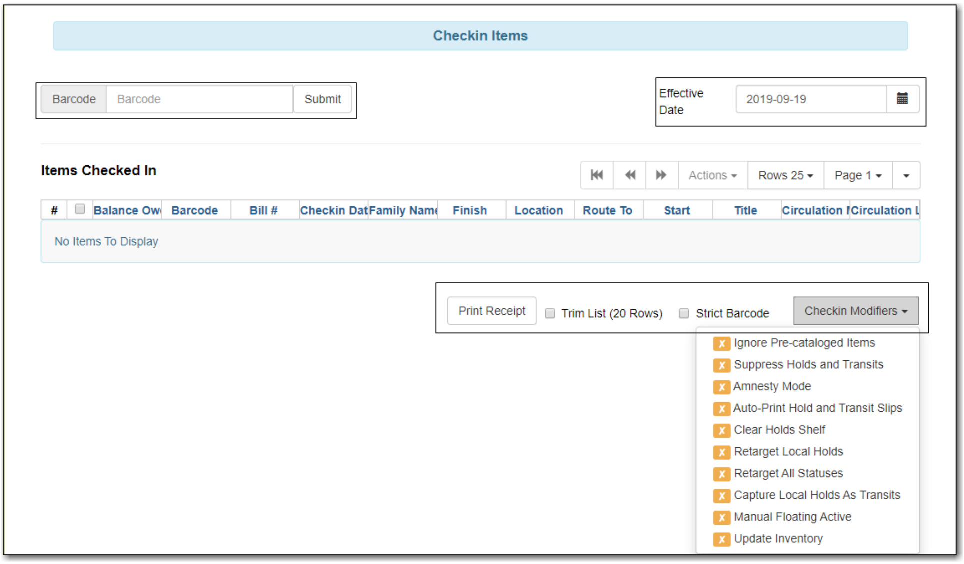


8.2. Check In

Sitka Training Video - Check In (3:44)

8.2.1. Regular Check In

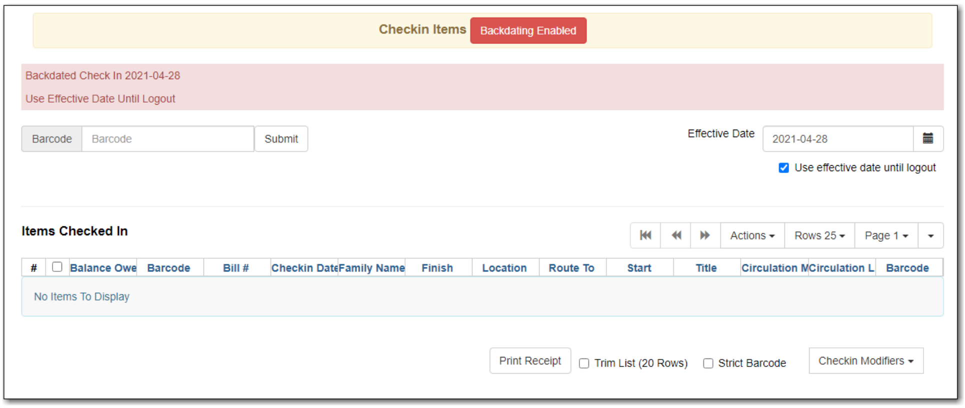
1. Click **Check In Items**.
2. Scan barcodes.



8.2.2. Backdated Check In

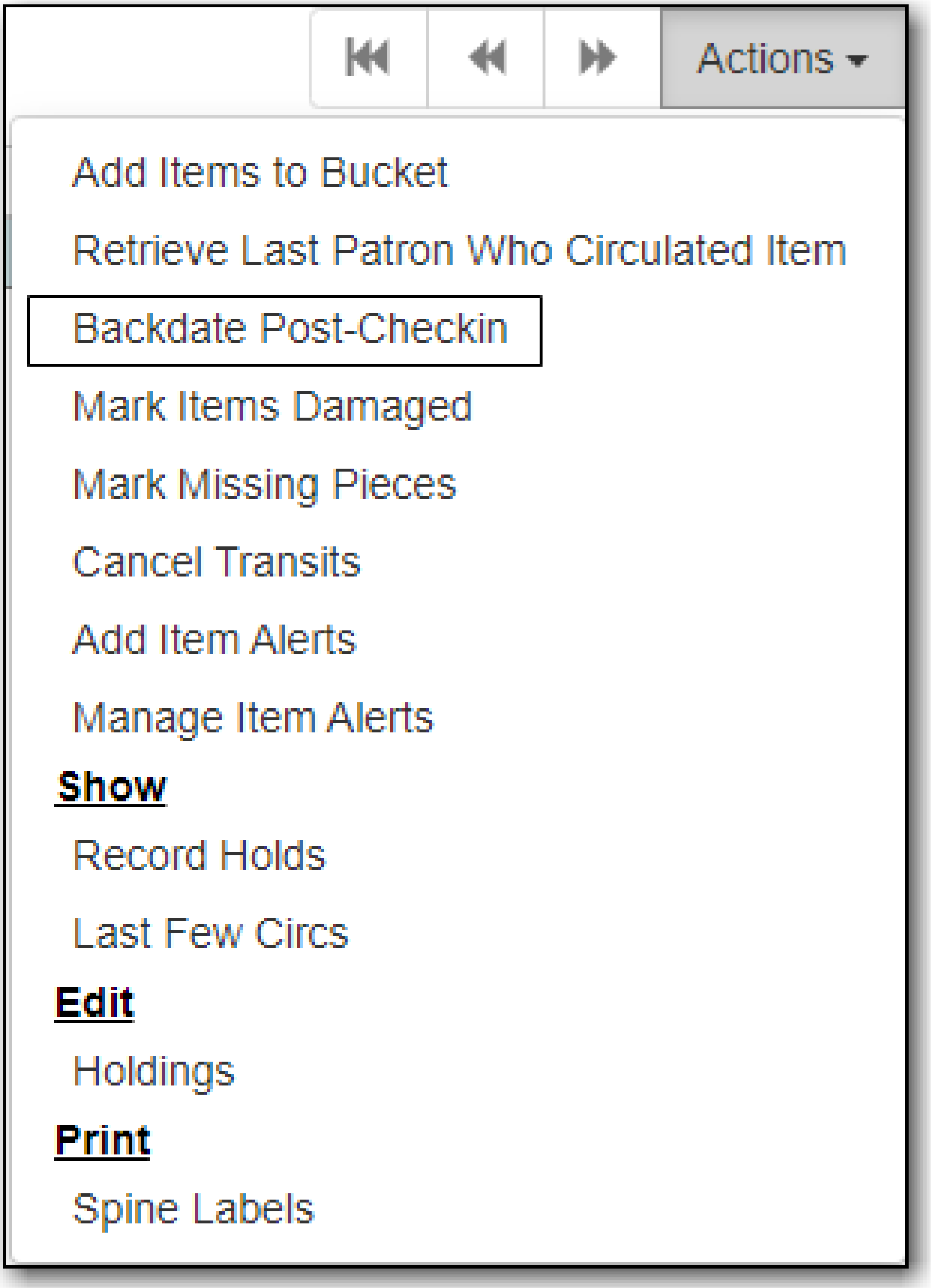
This is useful for clearing a book drop.

1. Click the calendar widget and set date, or edit date in **Effective Date** field.
    a. The new effective date is now displayed in the header.
    b. Check the box **Use effective date until logout** to make the backdate effective until logout.
2. Scan barcodes.
3. Edit **Effective Date** when backdated check in is complete.



8.2.3. Backdate Post-Check In

1. Select the item(s) on the **Check In** screen and click **Actions** → **Backdate Post-Checkin**.



2. Use the calendar widget to select an effective check in date and click **Submit**. Overdue fines will be adjusted according to the new effective check in date.

8.2.4. Check In Modifiers

Click the **Checkin Modifiers** drop down arrow. These options may be selected singly or simultaneously. The selected option is displayed in the header area.

- Ignore Pre-cat Items: no prompt when checking in a pre-cat item. Item will be routed to Cataloguing with Cataloguing status.
- Suppress Holds and Transit: item will not be used to fill holds or sent in transit. Item has Reshelving status.
- Amnesty Mode/Forgive Fines: overdue fines will be voided or not created.
- Auto-Print Hold and Transit Slips: slips will be automatically printed without prompt for

confirmation.

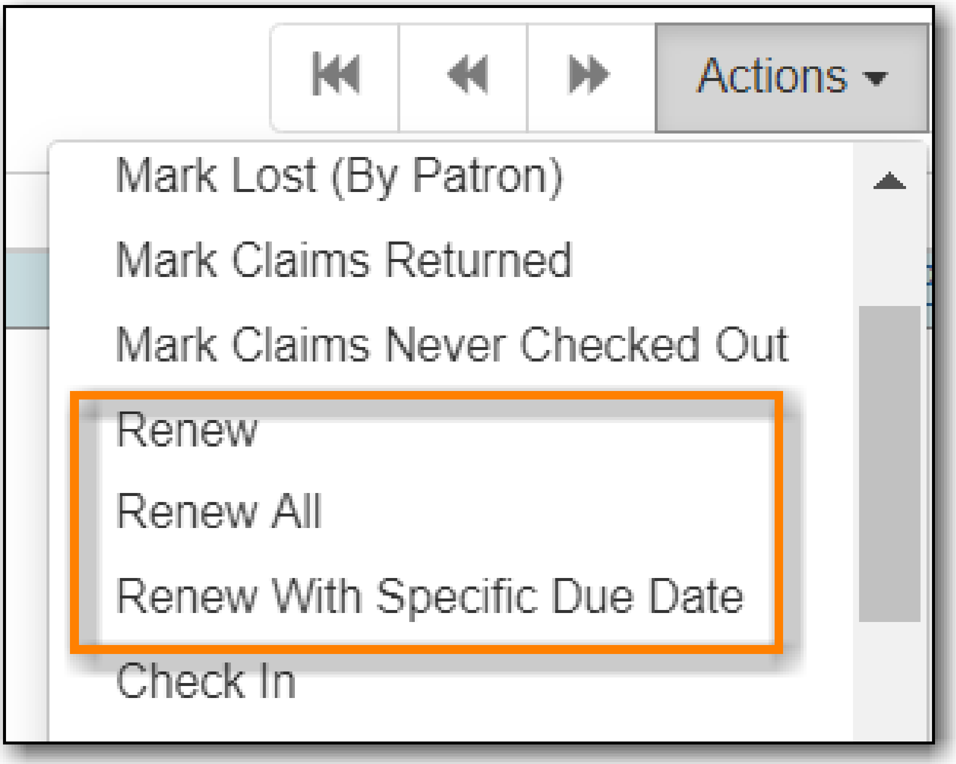
- Clear Holds Shelf. Checking in hold-shelf-expired items will clear the items from the holds shelf (holds to be cancelled).
- Retarget Local Holds. This makes Evergreen’s hold targeter find the items immediately, and is useful for checking in newly holdable items.
- Retarget All Statuses. Checks for a local hold to retarget, regardless of the status of the item being checked in. This modifier must be used in conjunction with the Retarget Local Holds modifier.
- Capture Local Holds as Transits. Local holds will be given an in transit status instead of on holds shelf. The intent is to stop the system from sending holds notifications before the item is ready to be placed on the holds shelf and item will have a status of in-transit until checked in again.
- Manual Floating Active. Works in conjunction with floating groups, if configured for your library by Co-op Support.
- Update Inventory adds a date and time stamp, and workstation name, to item records as they are checked in, facilitating inventory processes.

8.3. Renewal and Edit Due Date

Checked-out items can be renewed if your library’s policy allows it. The new due date is calculated from the renewal date. Existing loans can also be extended to a specific date by renewing with a specific due date, or editing the due date.

8.3.1. Renewal

1. Click the **Items Out** tab in the patron account.
2. Select the items and click **Actions**.
3. Select, **Renew**, **Renew All**, or **Renew With Specific Due Date**.

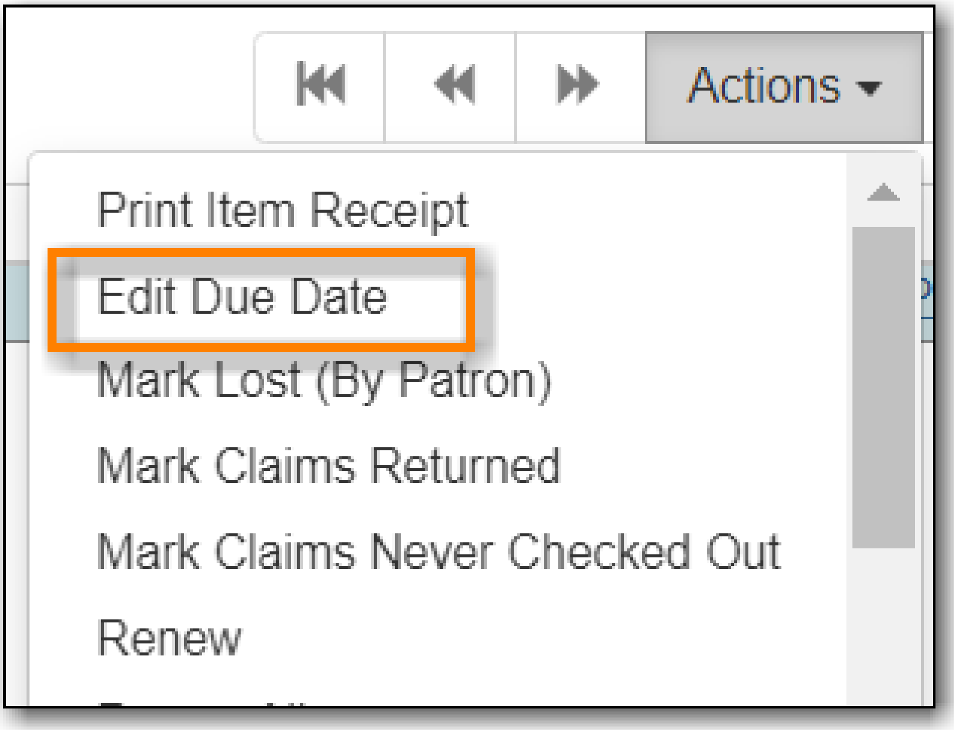


TIP You can also renew items on the **Item Status** screen.

NOTE It is not currently possible to select a specific due date time when renewing hourly loans with **Renew With Specific Due Date**. For now the **Edit Due Date** function should be used if a specific time is required.

8.3.2. Edit Due Date

1. Click the **Items Out** tab in the patron account.
2. Select the items and click **Actions**.
3. Select, **Edit Due Date**.
4. Select the new due date and due date time (if working with hourly loans).



NOTE

Edit Due Date changes the due date in the existing circulation record without reducing remaining renewals, or creating a new circulation record. It does not generate new circulation statistics, and no new notices are generated. For example, editing the due date will not generate a new pre-due notice near the new due date. Co-op Support strongly recommends you use **Renew With Specific Due Date** rather than manually edit a due date unless you are working with hourly loans.

8.4. Autorenewals

8.4.1. Autorenew

Circulation policies in Evergreen can now be configured to automatically renew items checked out on patron accounts. Circulations will be renewed automatically and an email notification sent to patrons to inform them of the renewal or if the item could not be renewed. Patrons will not need to log in to their accounts or ask library staff to renew materials.

Autorenewals are set in the **Circulation Duration Rules**, which allows this feature to be applied to selected circulation policies. Effectively, this makes autorenewals configurable by patron group, organizational unit or library, and circulation modifier.

8.4.2. Configure Autorenewals

Autorenewals are configured by Co-op Support. Please contact Co-op Support if you would like to enable Autorenewals.

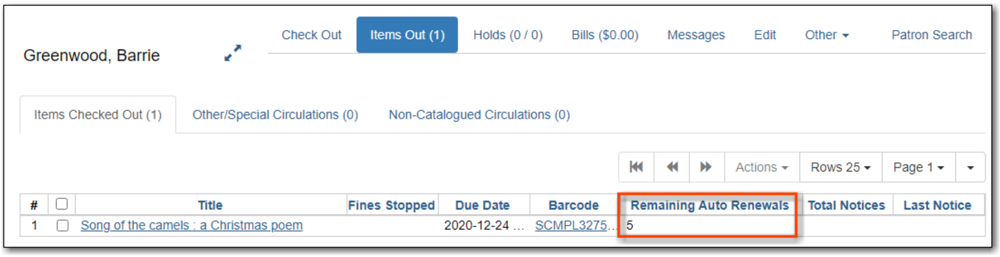
- max_auto_renewals is the allowed number of automatic renewals.
- max_renewals is the allowed number of manual renewals, whether staff or patron initiated.

The Circulation Duration Rule is then applied to specific circulation policies (Administration → Local Administration → Circulation Policies) to implement autorenewals in Evergreen.

NOTE Autorenewals will not occur if the item has holds, exceeds the maximum number of autorenewals allowed, or if the patron has been blocked from renewing items.

8.4.3. Autorenewals in Patron Accounts

A new column called AutoRenewalsRemaining indicates how many autorenewals are available for a transaction.

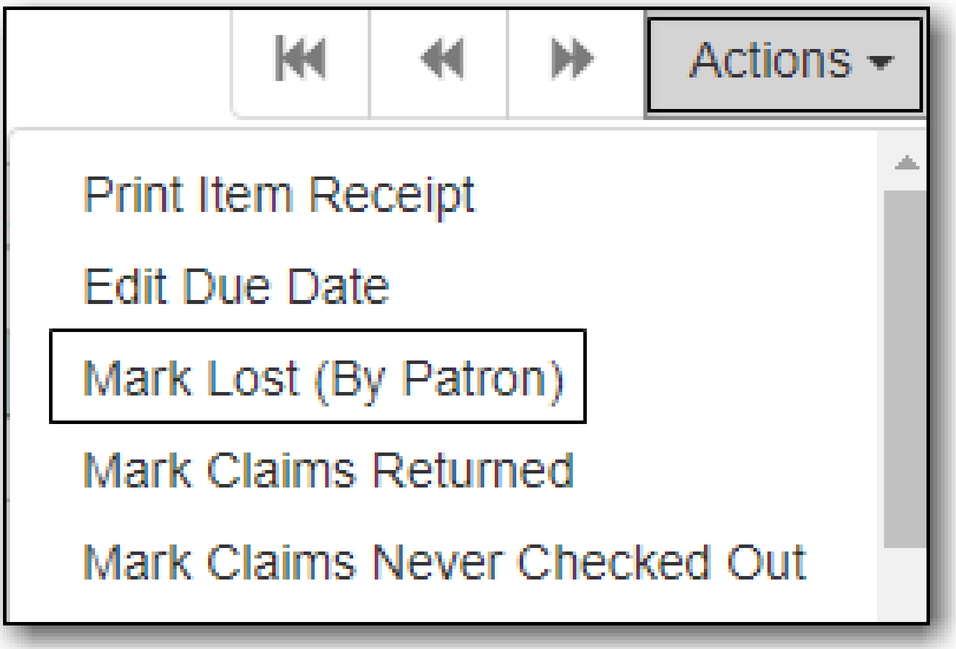


8.5. Mark Items Lost, Claims Returned, and Claims Never Checked Out

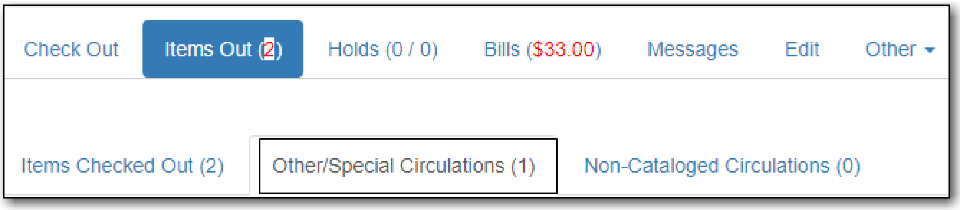
8.5.1. Lost

Marking an item **Lost** automatically bills the patron the replacement cost of the item and a processing fee if you charge one. Overdue fines can be voided or retained.

1. Click **Items Out** in patron accounts.
2. Select the item and click **Actions** → **Mark Lost (By Patron)**.



3. The item is now displayed on the patron’s **Other/Special Circulations** tab.



NOTE A **Lost** item will display on the patron account until linked bills are resolved. Bills include replacement charges, overdue charges, and manual charges added to the existing bills. See Billing for more information on managing **Lost** bills.

When a lost item is found and returned, your library may choose to:

- Always void lost charges.
- Void lost charges if the item is returned within a specified time period, e.g. within 6 months since the due date.
- Generate a refund if payment has been made.
- Generate a refund only if the item is returned within a specified time period since the payment date.
- Restore existing overdue fines.
- Generate new overdue fines based on the check in date.

8.5.2. Claims Returned

The date entered for a **Claims Returned** item establishes the fine. If the date given is past, bills will be adjusted accordingly, and remain linked to patron account until resolved. Patron’s **Claims-returned Count** is automatically increased, and the item’s status is changed to **Claimed Returned**.

1. Click **Items Out** in patron account.
2. Select the item and click **Actions** → **Mark Claims Returned**, enter date, and click **Submit**.
3. The item is now displayed on the patron’s **Other/Special Circulations** tab.

8.5.3. Claims Never Checked Out

1. Click **Items Out** in patron account.
2. Select the item and click **Actions** → **Claims Never Checked Out**, and click **OK/Continue**.
3. The item is checked in effective from the check out date, disappears from the patron account, and has its status changed to **Missing**.

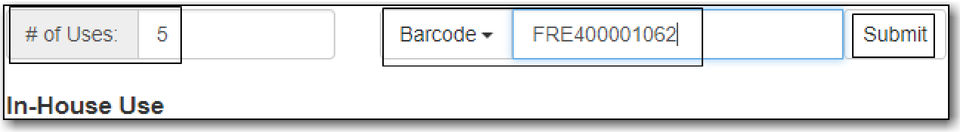
8.6. In-House Use

In-house use can be recorded for catalogued and non-catalogued items. The statistics for in-house

use are separate from regular circulation statistics. The in-house use count of catalogued items is not included in the items' total use count.

8.6.1. Catalogued Items

1. Click **Circulation** → **Record In-House Use**.
2. Enter number of uses and scan or enter barcode.



8.6.2. Non-catalogued Items

1. Click on **Circulation** → **Record In-House Use**.
2. Enter the number of uses.
3. Click on the drop down arrow in **Barcode** to choose the type of non-catalogued items, and click **Submit**.

8.7. Item Status

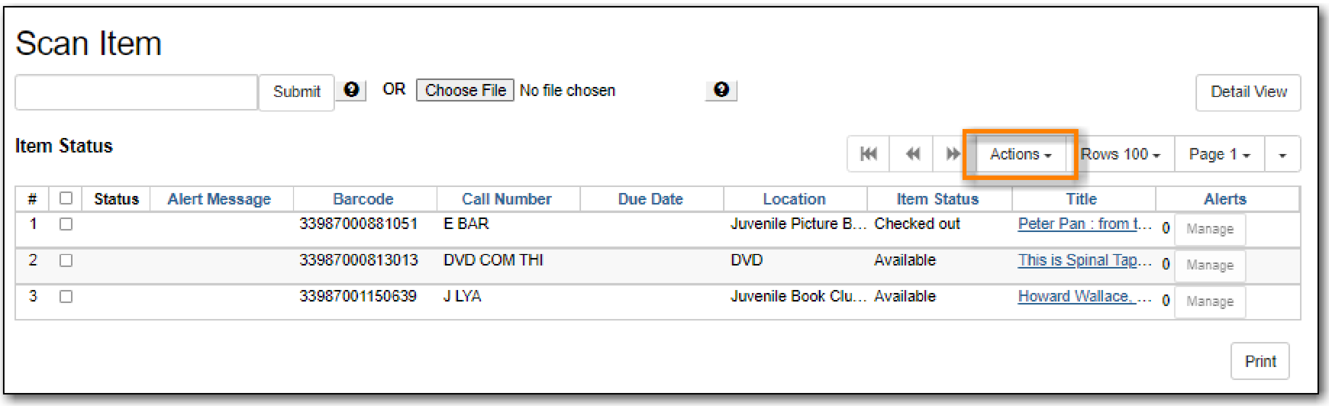
Sitka Snippet Video - Item Status (2:26)

Sitka Snippet Video - Batch Update (4:30)

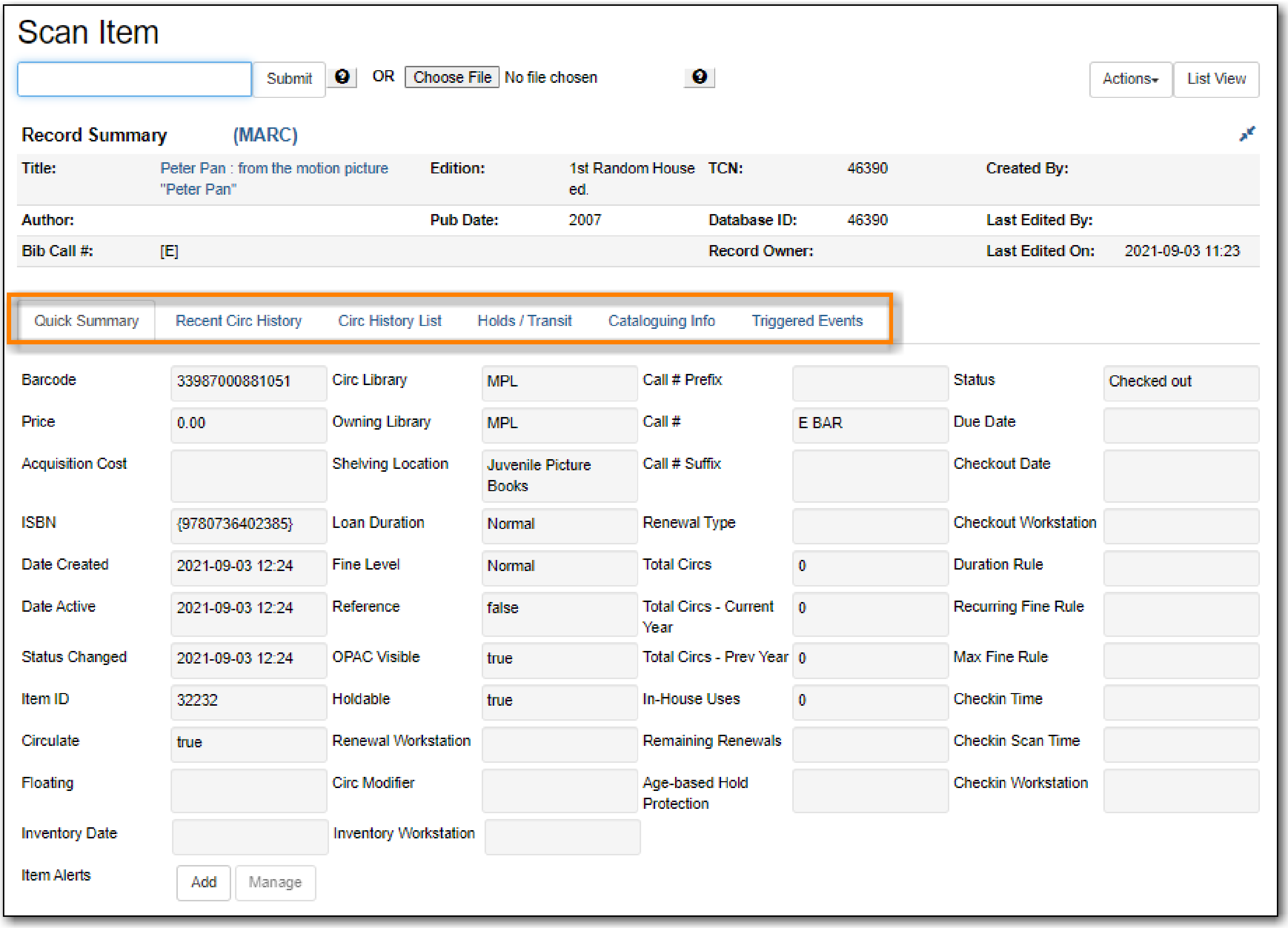
The *Item Status* screen is very useful to circulators and cataloguers at your library. Scanning a barcode into *Item Status* does not affect the item’s current status.

To access *Item Status* select **Cataloguing** → **Item Status** or **Circulation** → **Item Status**. By default the *List View* will open.

The *List View* allows staff to view information for multiple items at a glance as well as performing many actions on selected items via the **Actions** menu.



The *Detail View* allows staff to use the different tabs to see a variety of information about a specific item.

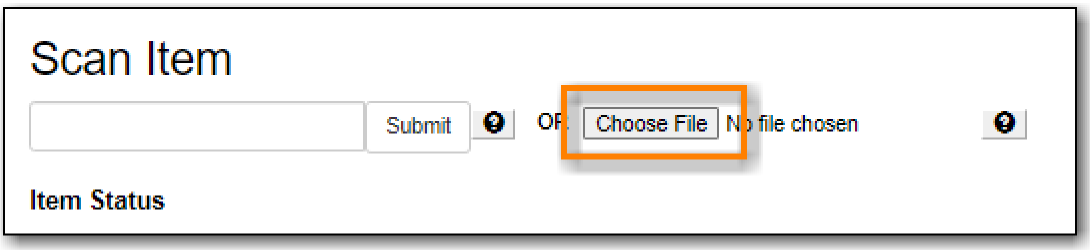


Clicking on the item's title in either the *List View* or *Detail View* will open the record in the staff catalogue.

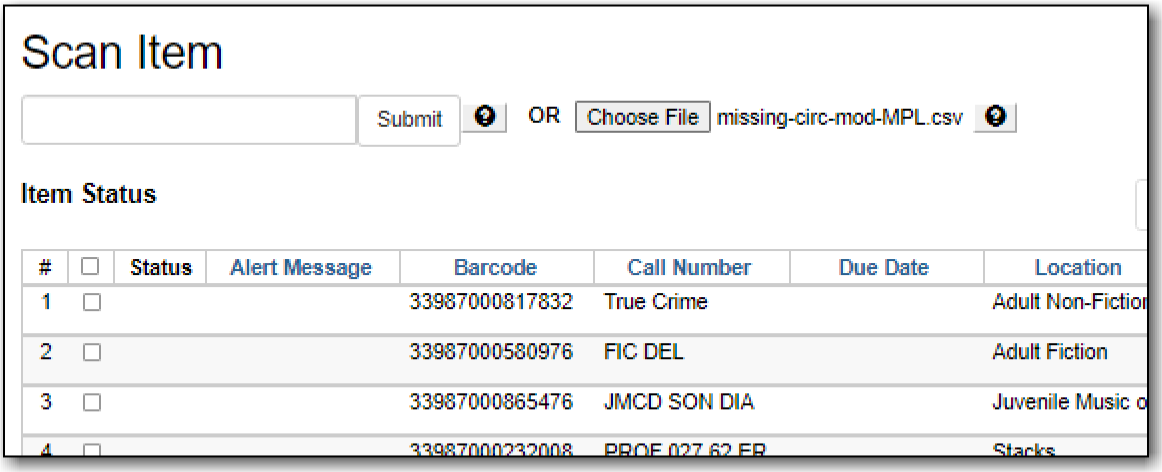
8.7.1. Upload from File (Choose file)

You can upload a .csv file of multiple barcodes using the **Choose File** option. To ensure smooth uploading and further processing of the items, it is recommended that the list contain no more than 100 items.

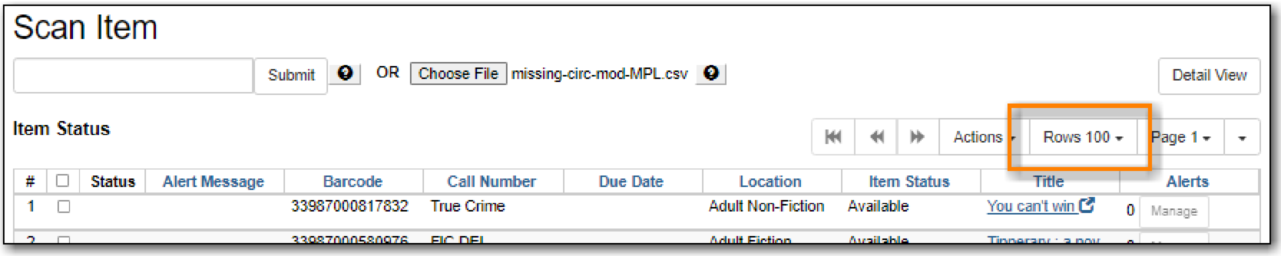
1. Run a report in Evergreen to list the items you'd like to load into *Item Status*.
2. Open the report in a program like Excel and remove all columns other than the barcode column, remove the header row, and save the file as a .csv file.
3. In Evergreen, open *Item Status*.
4. Click **Choose File**.



5. Follow the on screen prompts to select your file.
6. A progress bar will display as the file loads.
7. The items will be listed and the file name displays at the top.



8. Ensure you've set the row count high enough so that all your items display in the list.



8.8. Barcode Completion

Barcode completion can be enabled for items or patrons or both depending on a library's needs.

It is Sitka policy for libraries to use 14 digit codabar barcodes with their assigned prefix for items and patrons.

Barcode completion can be used temporarily to handle duplication within Sitka's Evergreen while libraries re-barcode any items or patrons with non-14 digit codabar barcodes.

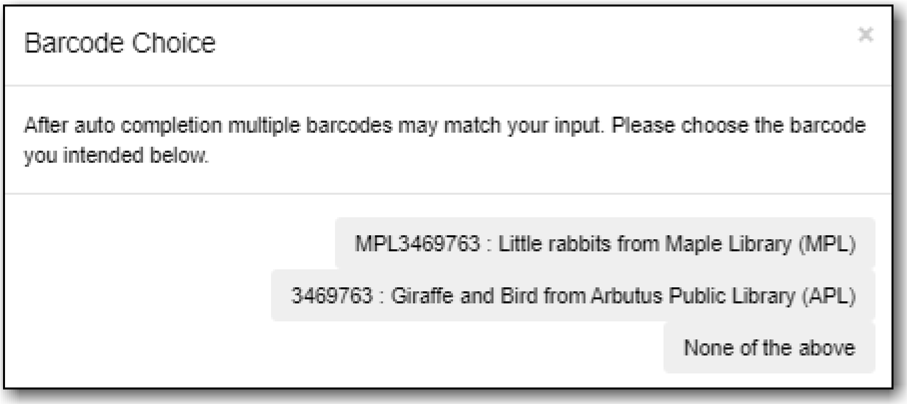
8.8.1. Registering Patrons with Barcode Completion

In some cases 14 digit codabar barcodes can't be used, such as student numbers issued by a registar's office. In those cases a barcode prefix is used to create unique barcodes within Sitka's Evergreen.

When creating new patrons, either from patron registration or by loading patron records, the assigned barcode prefix must be included in the barcode for all non-14 digit codabar barcodes. For example, 123456 would be entered as MPL123456.

8.8.2. Circulation with Barcode Completion

1. Scan a barcode into *Check Out*, *Check In*, or *Item Status*.
2. If there is only one match Evergreen automatically adds the prefix and retrieves the appropriate item or patron.
3. If there are multiple matches a pop-up will appear listing the possible barcodes.



4. Select the barcode that matches the patron or item.
5. The patron will be retrieved or the item loaded on the screen.

Barcode completion is not currently available for *My Account* or the Evergreen self check-out.

NOTE	Barcode completion will only work at your library. We recommend rebarcoding items before they are sent to fill interlibrary loans via Interlibrary Connect or make a note that the item barcode must be entered as MPL123456.

8.8.3. 3rd Party Services

Libraries that use patron barcode completion for patrons need to ensure that patrons include the prefix when logging into 3rd party services that authenticate against Evergreen, such as Overdrive.

For example, Maple Public Library uses barcode completion with the prefix MPL. The patron's barcode is 123456 on their card and is MPL123456 in the Sitka database. To log into their Overdrive account the patron must enter MPL123456.

Chapter 9. Bills and Payments

9.1. Circulation vs. Grocery Bills

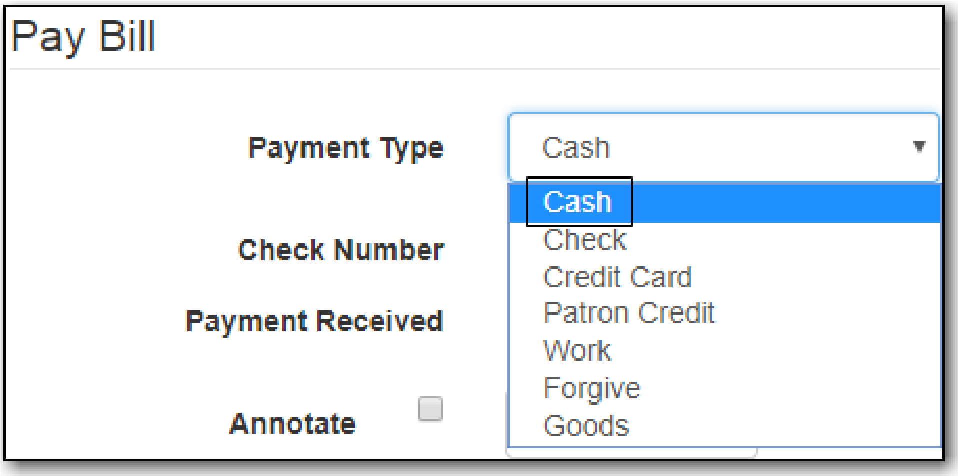
There are two types of bills in Sitka’s Evergreen: **Circulation** bills and **Grocery** bills.

- Circulation bills are system-generated charges such as overdue fines, lost item costs, and processing fees. The fine rates, replacement costs, and processing fees are determined by each library.
- Grocery bills are manually created by staff. Sitka libraries share a list of default bill types. Additional library specific bill types can be added by Co-op Support if a library requires a unique bill type; default prices can be attached to the unique bill type.

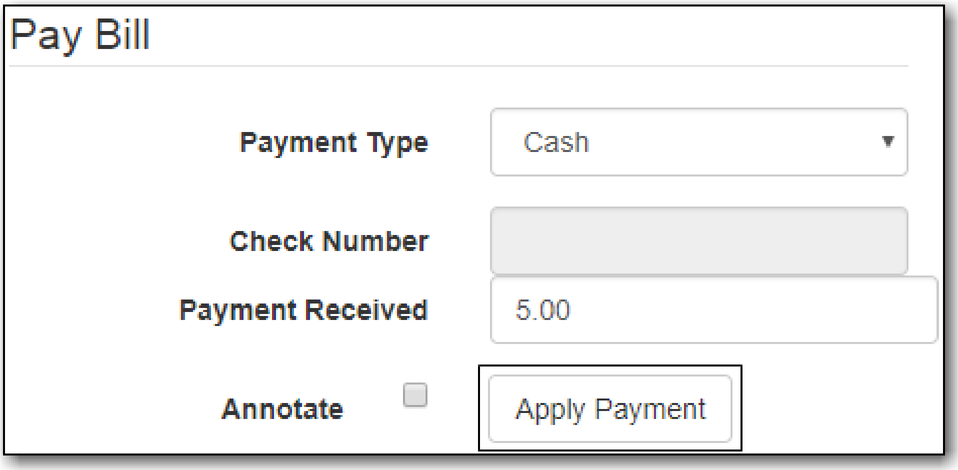
9.2. Making Payments

Bills can be paid by cash, check, or credit, or be resolved by forgiveness, work, or goods.

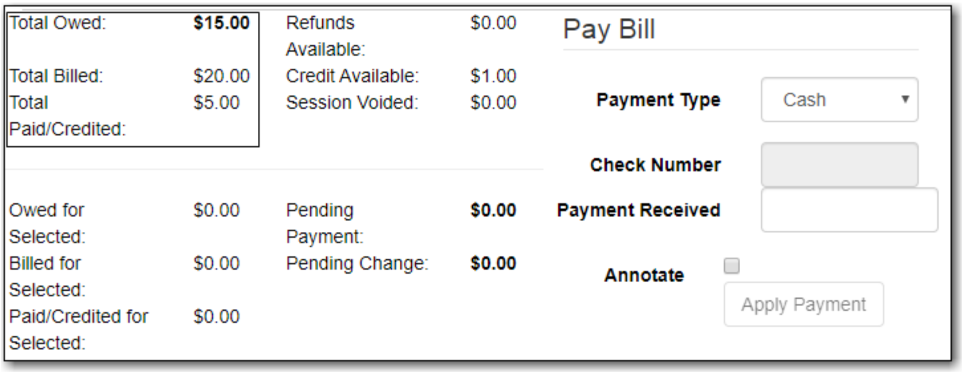
1. Click on **Bills** tab.
2. Select or de-select bills to pay. Oldest bills are paid first by default.
3. Select **Receipt On Payment** and enter **#Copies** as required.
4. Select the payment type from the drop down menu.



5. Enter the payment in the **Payment Received** field and click **Apply Payment**.



6. Details of the transaction are displayed.

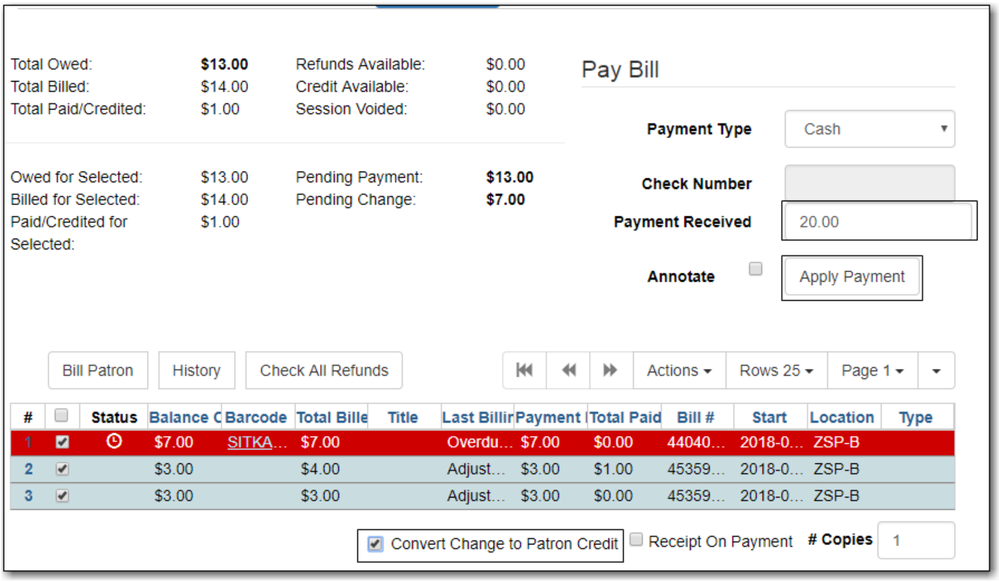


TIP Click **Annotate** to add a note to the payment.

9.3. Patron Credit

A credit can be kept in a patron account and used later to pay bills.

1. To create or add a credit, select the payment method and enter the amount in **Payment Received**
2. Select **Convert Change to Patron Credit** on bottom right.
3. Click **Apply Payment.**



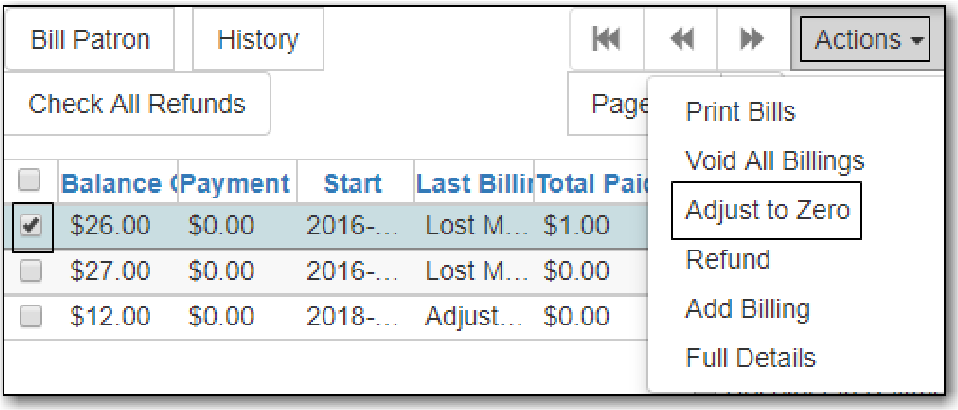
To use patron credit to pay bills, select **Patron Credit** as the payment type.

If your library does not use patron credit, you can turn it off through a library setting.

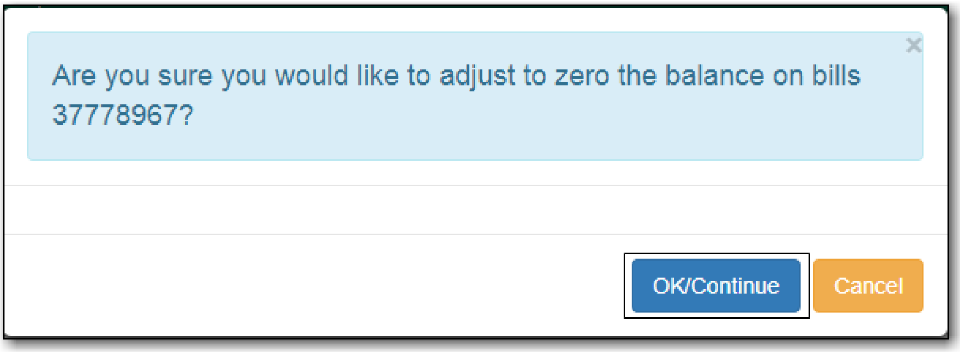
9.4. Adjust Bill Balance to Zero

This function sets any balance to zero, and is the easiest way to clear a negative balance from patron account.

1. Click **Bills** in patron account.
2. Select the bill line item and click **Actions** → **Adjust to Zero**.



3. Click **OK/Continue**.

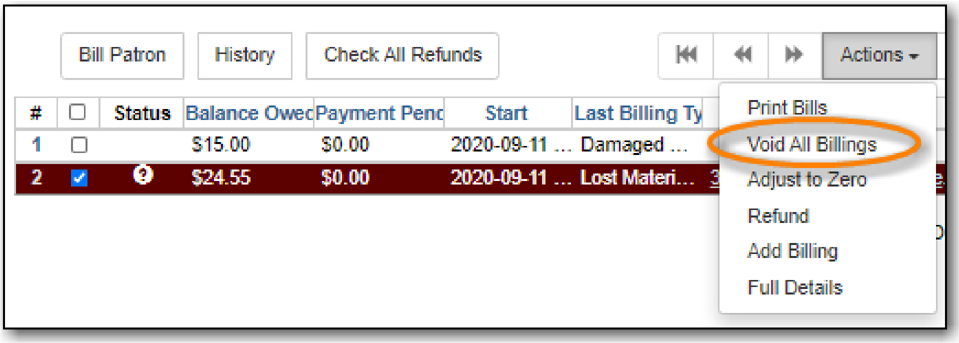


9.5. Voiding Bills

Staff with Local System Administration permissions can void bills, either entirely or in part; however, Co-op Support recommends you use the adjust to zero function in most cases.

9.5.1. Voiding a Bill

1. Click on the **Bills** tab in the patron's account.
2. Select the bill line you wish to void and click **Actions** → **Void All Billings**.

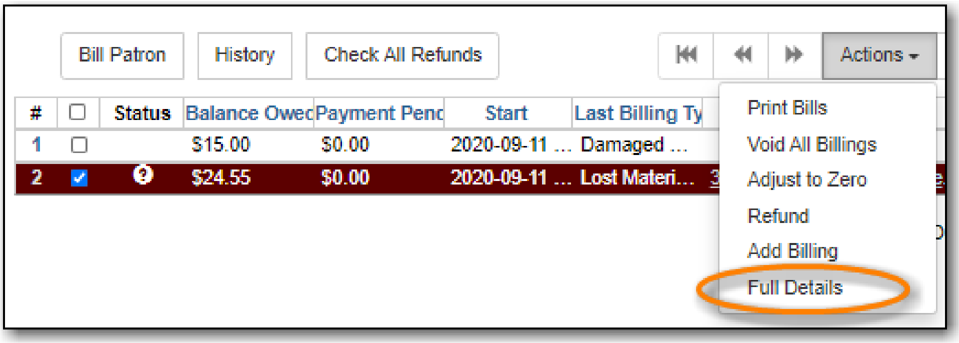


3. Click **OK/Continue**. The bill will no longer display on the patron's bill tab.

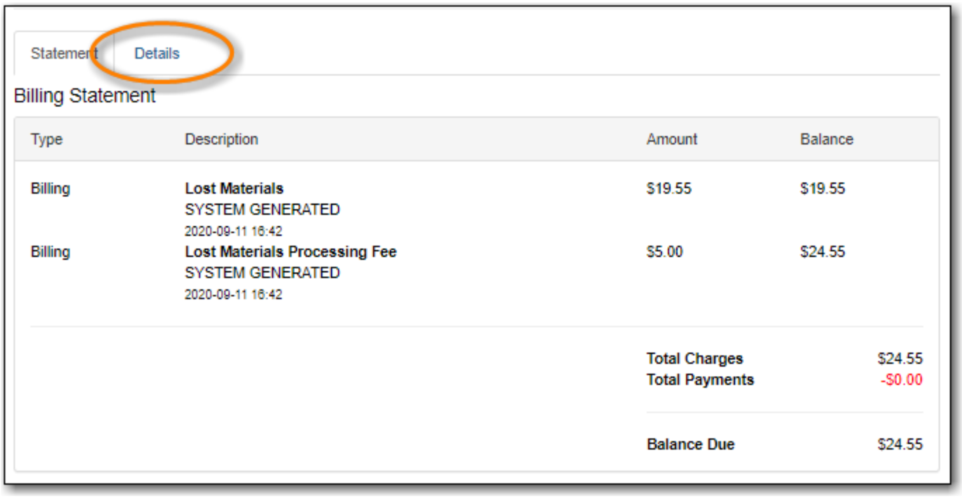
9.5.2. Voiding Part of a Bill

Sometimes you may wish to void part of a bill, such as overdue fines for a specific day or a processing charge for a lost item.

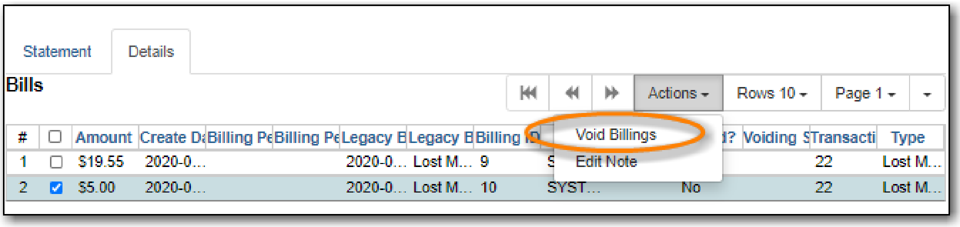
1. Click on the **Bills** tab in the patron's account.
2. Select the bill line you wish to partially void and click **Actions** → **Full Details**.



3. The bill will open on the Statement tab. Click the **Details** tab.



4. Select the specific bill line you would like to void and click **Actions** → **Void Billings**.

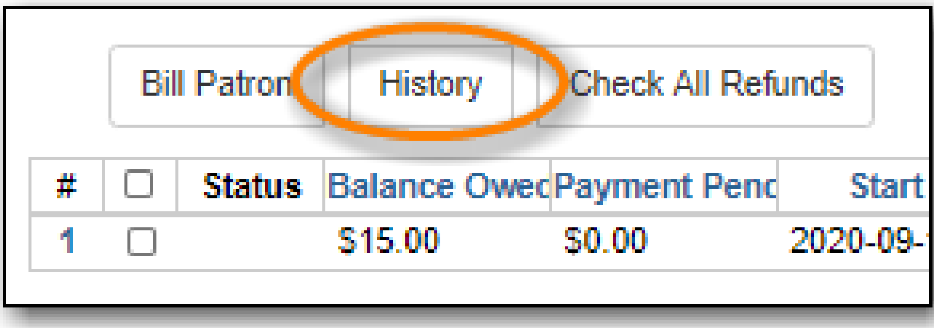


5. Click **OK/Continue**. The amount owing for the bill will be updated.

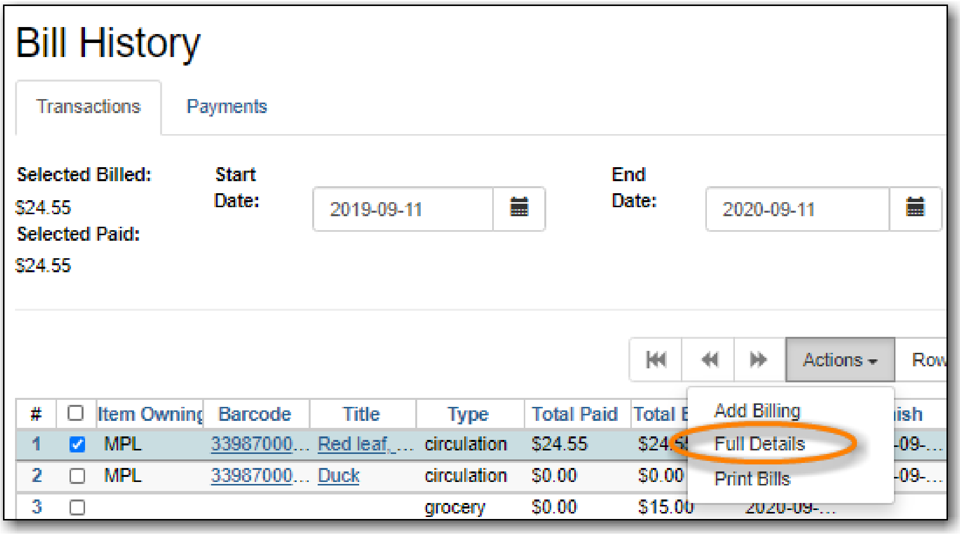
9.5.3. Voiding a Paid Bill

Sometimes you may need to void a bill a patron has already paid in order to process a refund.

1. Click on the **Bills** tab in the patron's account.
2. Click **History**

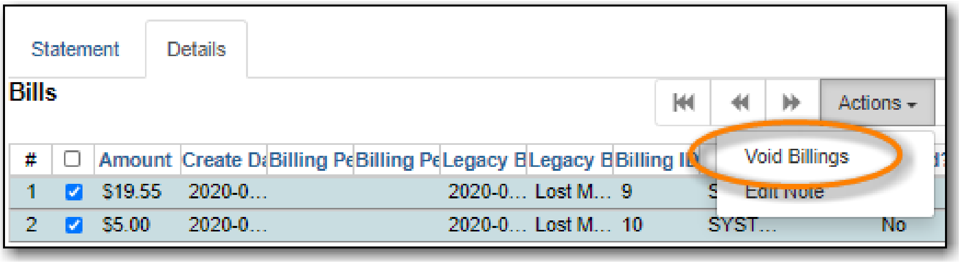


3. Select the relevant transaction and go to **Actions** → **Full Details**.



4. The bill will open on the Statement tab. Click the **Details** tab.

5. Select the bill(s) you wish to void and go to **Actions** → **Void Billings**



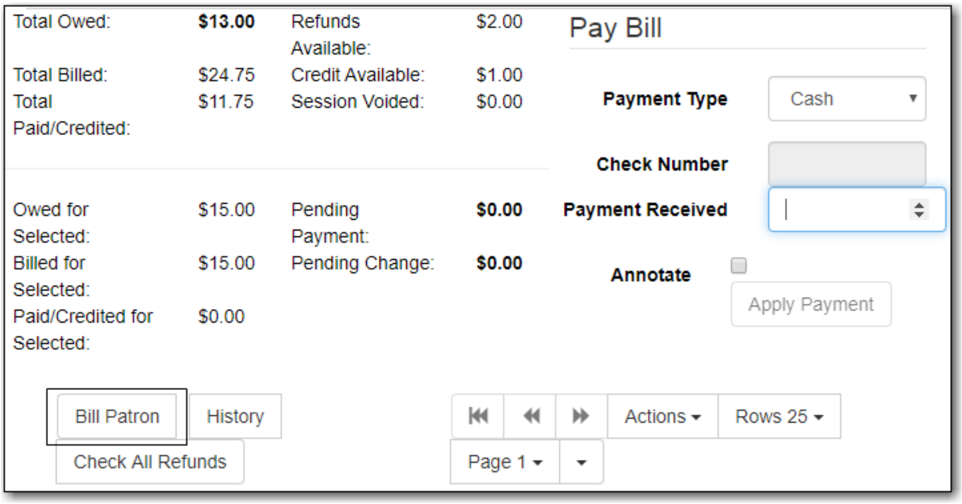
6. Click **OK/Continue**. The patron will now have a credit of the amount voided on their account.

9.6. Adding New "Grocery" Bills

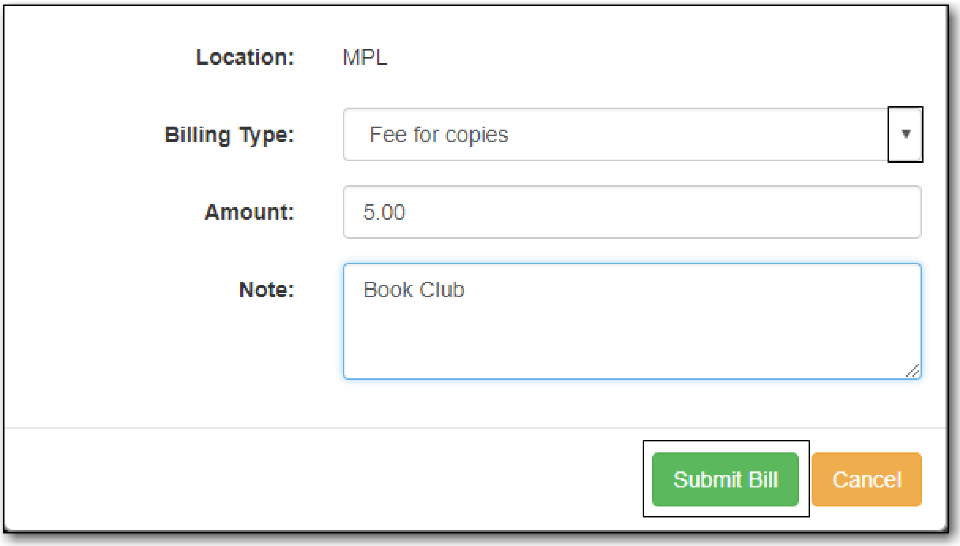
9.6.1. Create New Bill

1. Click **Bills** in patron account.

2. Click **Bill Patron**

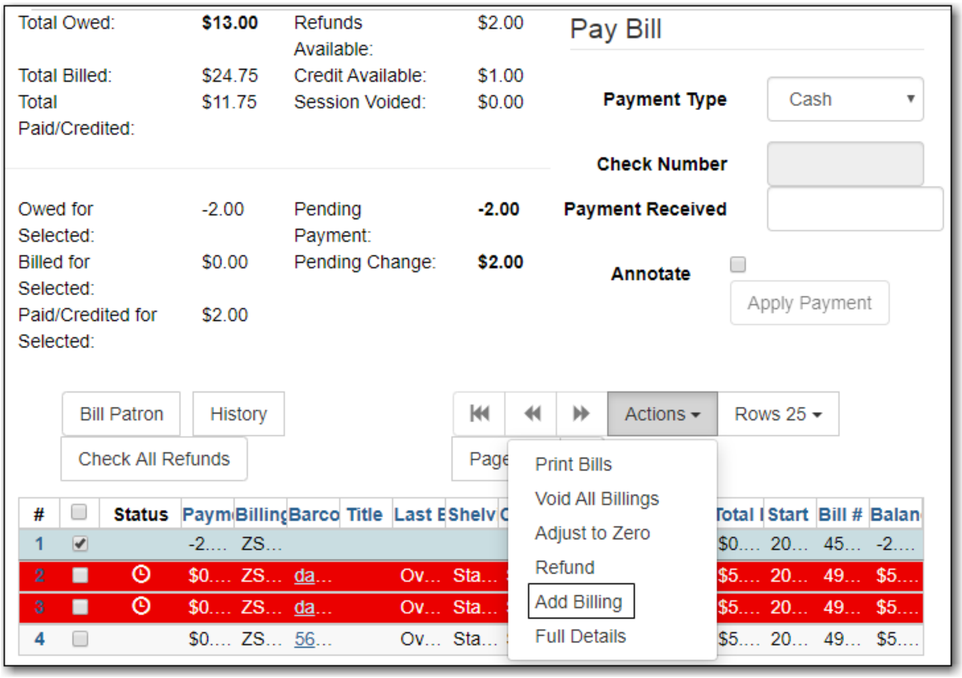


3. Click on drop down arrow and select **Billing Type**, enter bill amount, and any required note, and click **Submit Bill**.



9.6.2. Add Charge to Existing Bill

1. Select the required bill from patron's **Bills** screen and click **Actions** → **Add Billing**.

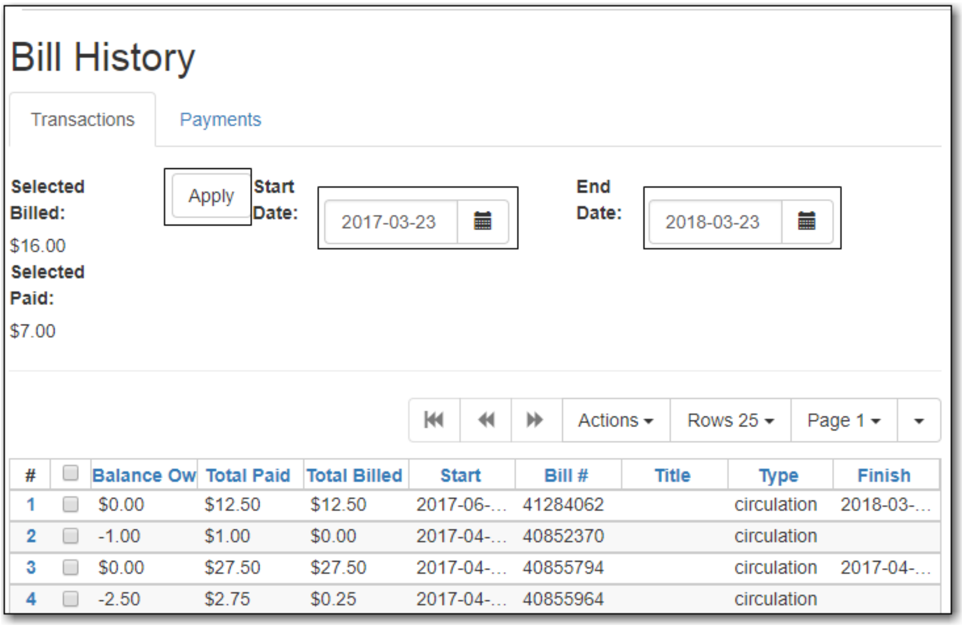


2. Click on drop down arrow and select **Billing Type**, enter bill amount, and any required note, and click **Submit Bill**. The bill's balance is updated.

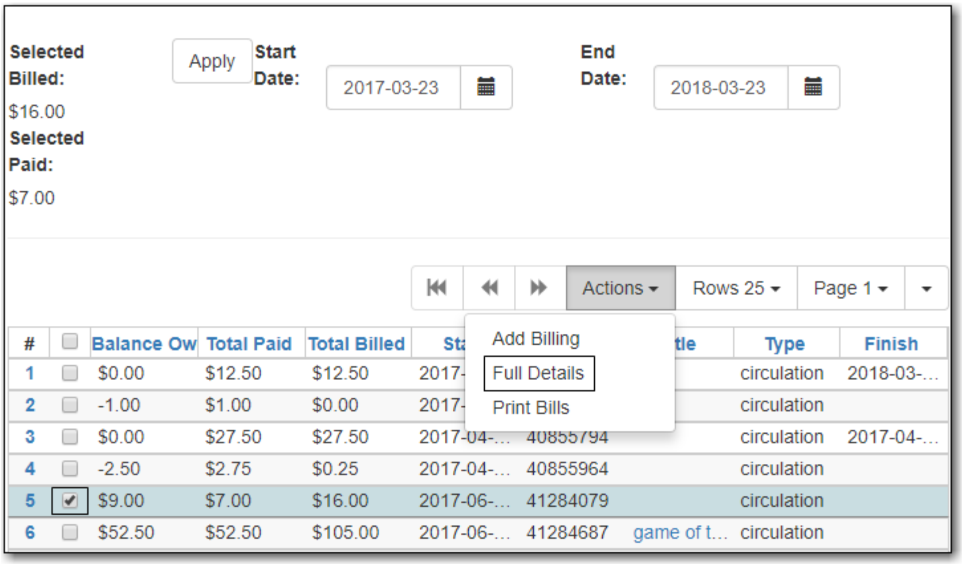
9.7. Bill History

9.7.1. Bill History

1. Click **History** in patron's bills screen.
2. View all bills, or bills from a specified time frame. Use the calendar widgets to choose the **Start Date** and **End Date**, and click **Apply**.



3. For more information about a particular bill, select the line item and click **Actions** → **Full Details**.



4. All transaction details are listed, such as time stamps, circulation dates, billing dates, amounts, staff identification, and item information

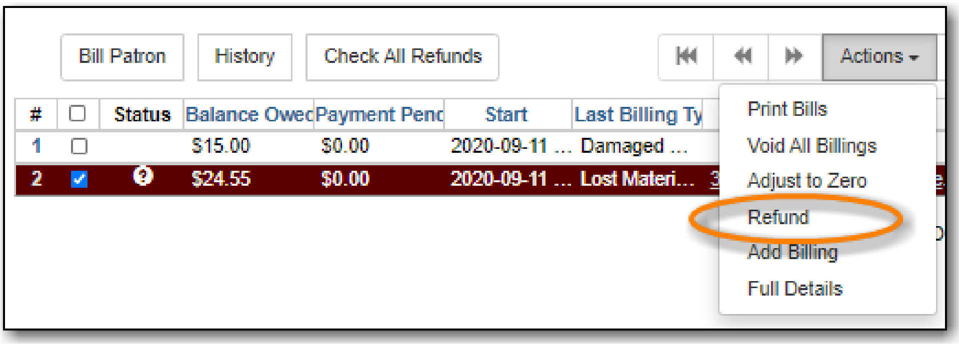
9.7.2. Payment History

1. Click **Payments** on **Bill History** screen.
2. View all payments, or payments from a specified time frame. Use the calendar widgets to choose the **Start Date** and **End Date**, and click **Apply**.
3. For more information about a particular payment, select the line item and click **Actions** → **Full Details**.

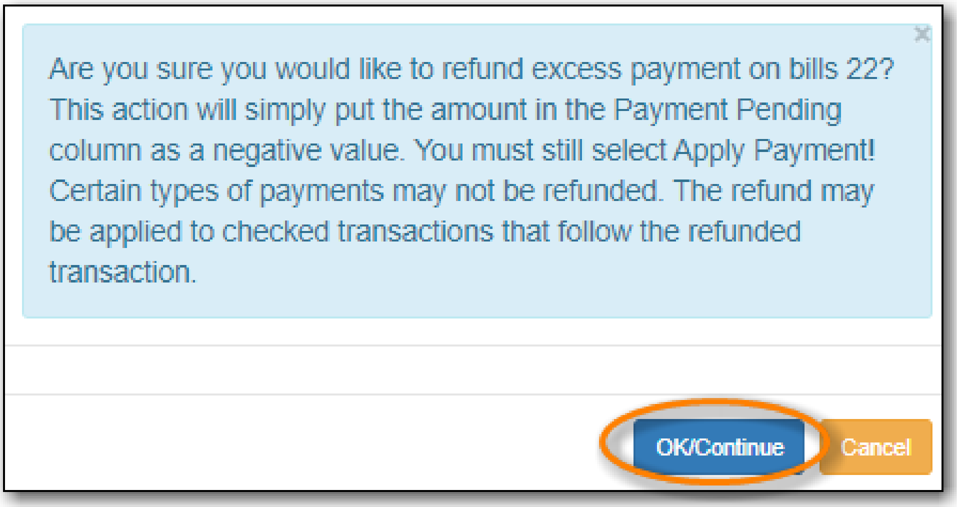
9.8. Refund

Sometimes paid bills need to be voided, such as when lost and paid items are returned. A negative balance may be created once such bills are voided. To close negative bills, you can adjust the balance to zero, add a bill entry to the negative line item, or refund the balance amount.

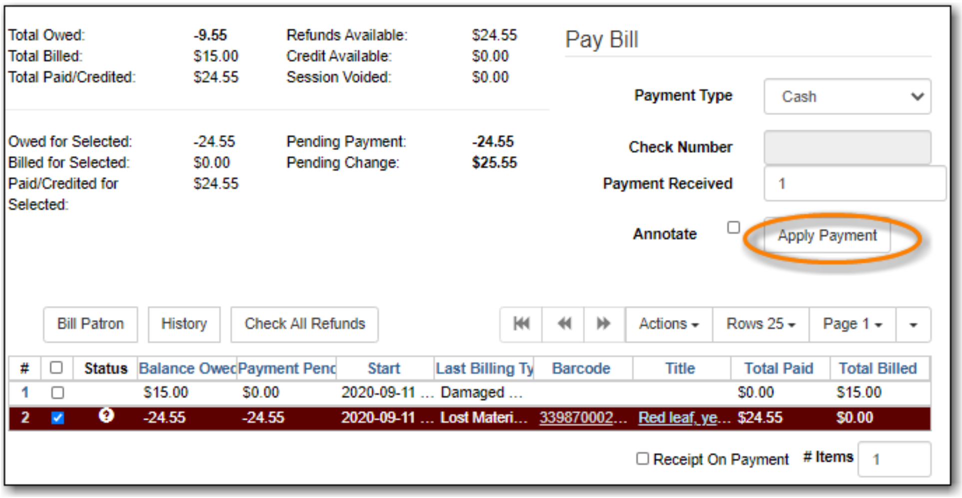
1. Click on the **Bills** tab in the patron's account.
2. Select the line for the refund and go to **Actions** → **Refund**.



3. Click **OK/Continue**.



4. Enter 1 in the **Payment Received** box. (There is currently a bug preventing the "Apply Payment" button from being used without a positive number in this box. The $1.00 payment won’t actually be applied.)
5. Click Apply Payment.



6. The payment has been refunded.
7. If you go into **History** and look at the full details for the bill you will see it shows the payment has been refunded.

Chapter 10. Holds

10.1. Placing Holds

Sitka Training Video - Placing Holds (6:18)

Sitka Snippet Video - Patron Search in Place Hold (0:51)

Sitka Snippet Video - Suspend a Hold While Placing the Hold (1:10)

Holds can be placed by staff in the web client, and by patrons on your public catalogue.

10.1.1. Hold Levels

Evergreen has four different holds levels. Library staff can place holds at all four levels, while patrons can only place meta-record, title level, and call number level holds.

The chart below summarizes the four levels of holds.

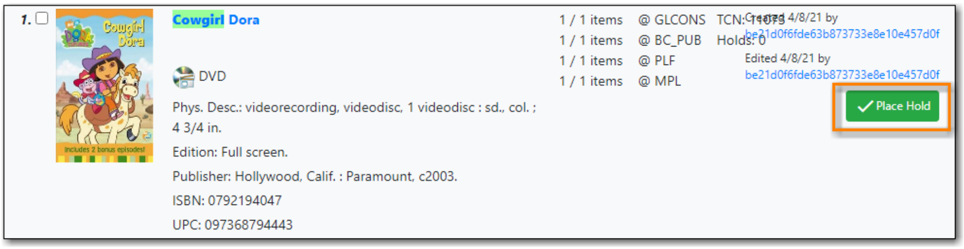
Hold level	Abbreviation	When to use How to use	Who can use	Hold tied to
Meta-record	M	Patron wants first available copy of multiple titles of the same/different format. Click on place hold to the right of the record. From holds confirmation screen, click Advanced hold options and select other applicable formats.	Patron or staff	Holdings attached to multiple MARC (title) records sharing the same title and author of selected format(s)(book, video, audiobook, etc.)

Hold level	Abbreviation	When to use How to use	Who can use	Hold tied to
Title	T	Patron wants first available copy of a title. Staff or patron click on place hold to the right of a record on search result list or record summary screen. **Libraries participating in Interlibrary Connect should use title level holds for ILC holds.**	Patron or staff	Holdings attached to a single MARC (title) record
Call Number	V	Patron wants the first available copy of a specific call number of a title. Staff click **Call Number Hold** in **Holdable?** column on the record summary screen.	Patron or staff	Call number record
Item	C	Patron or staff want a specific copy of a title. Staff click **Item hold** in **Holdable?** column on the record summary screen.	Staff	Item barcode

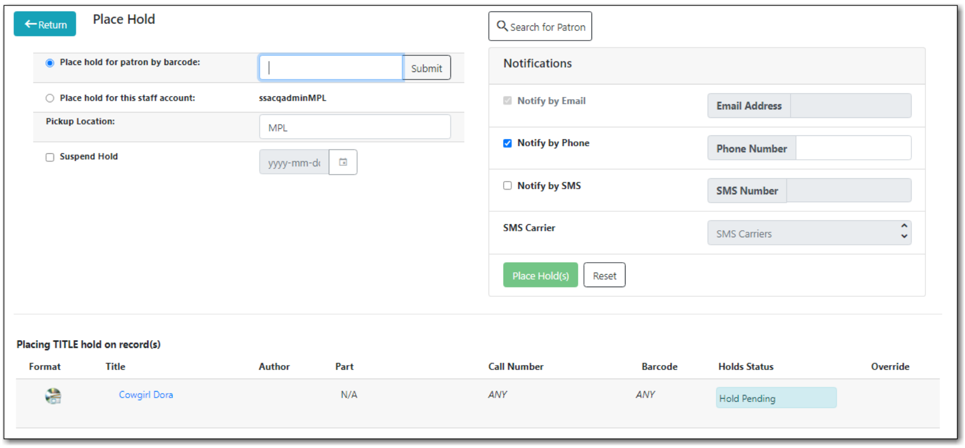
10.1.2. Title Level Hold

Sitka Snippet Video - Placing Title Level Holds (2:05)

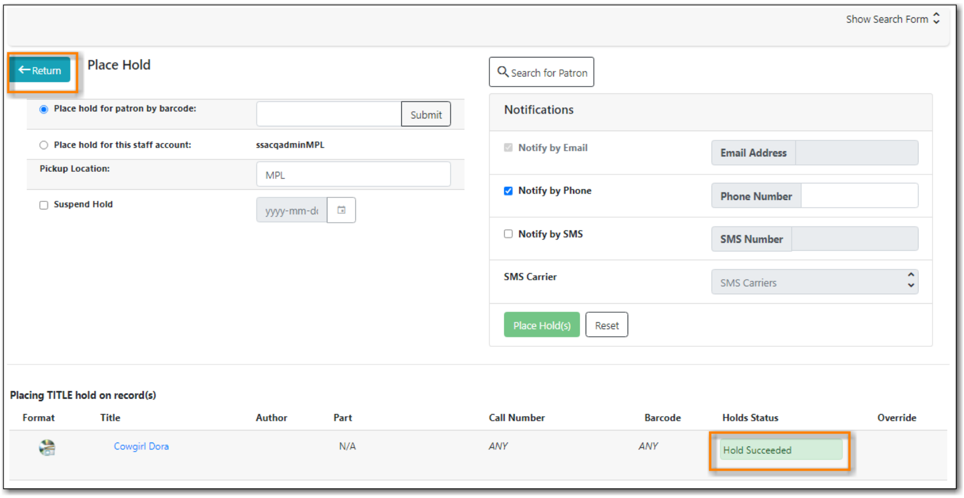
1. To place a title level hold, click the **Place Hold** button to the right of the record on the search result list, or on the record summary screen.



2. Scan or type patron's barcode, or select your own staff login, or click **Patron Search** if you do not have patron's card.
3. Edit patron hold notification methods and pickup location, if necessary, and click **Place Hold(s)**. Any method or contact number entered on this screen will override defaults in patron record, and will be used for display and print purposes for this hold.



4. Click **Return** to go back to search results, or place another hold for this title.

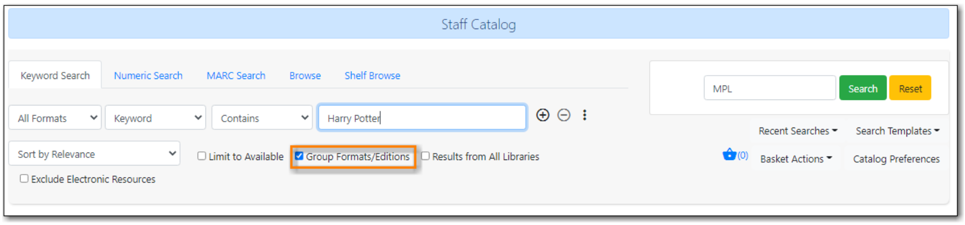


10.1.3. Meta-record Level Hold

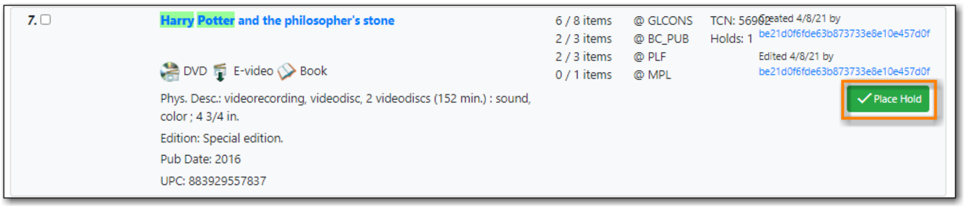
You can request acceptable formats and languages of a title at time of hold placement, or you can group formats at time of search. Records are grouped by title, author, and format. Format information is from the MARC record leader and fixed fields.

Group Formats and Editions Search

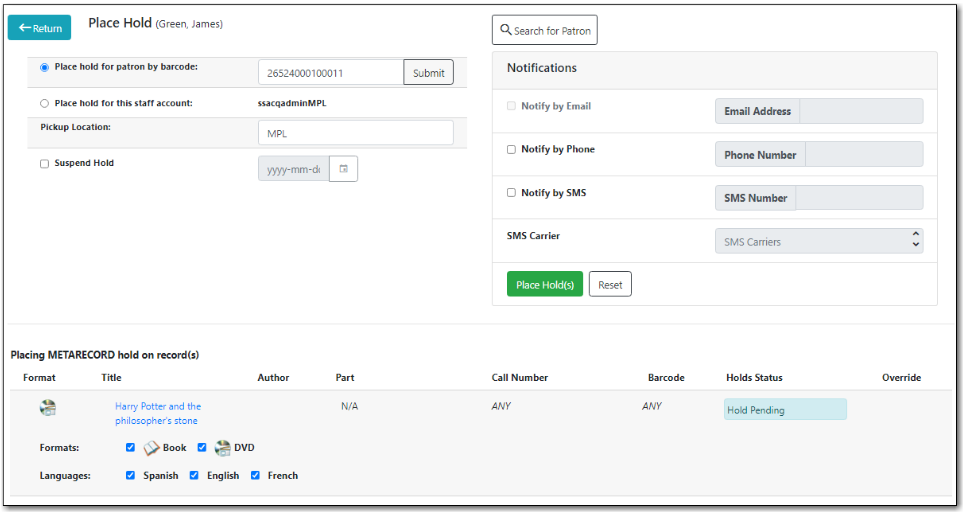
1. On the **Keyword Search** tab, check the box for **Group Formats and Editions**.



2. Enter search terms and click **Search**.
3. Click **Place Hold** beside the meta-record on the result list.



4. Select the acceptable formats and languages



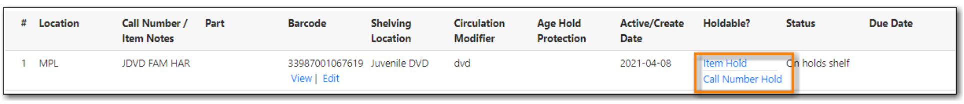
5. Click **Place Hold(s)**.

TIP	The icons indicate the available formats at the search location. The number beside the title is the number of records with physical items. Click the title to view these individual records.

TIP	After a meta-record hold is placed, if a new MARC record is added and it meets the grouping criteria, items under this new record will be targeted.

10.1.4. Call Number and Item Level Hold

1. To place a call number or item level hold, retrieve and display the record.
2. In the Item Table click **Call Number Hold** or **Item Hold** in **Holdable?** column.



3. Edit patron hold notification fields as required and click **Submit**.

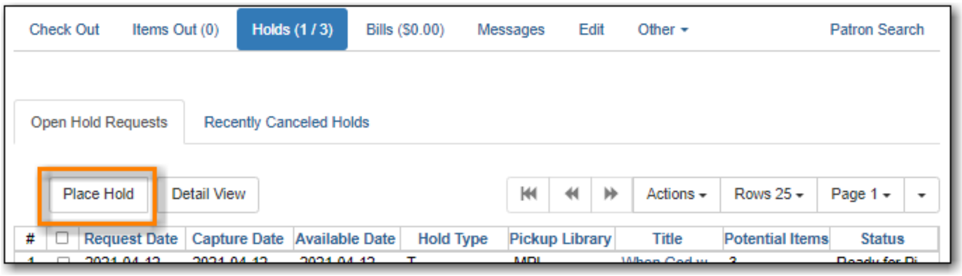
NOTE	Support recommends only using items holds if it's absolutely necessary to target a particular physical item. Item holds should never be used when placing holds on items owned by other libraries.

NOTE	Do not use Recall Hold or Force Item Hold

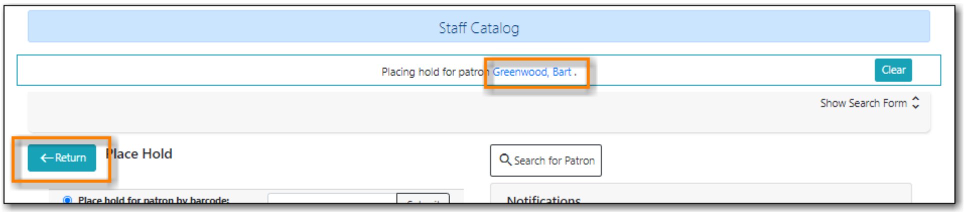
10.1.5. Placing Holds in Patron Records

Sitka Snippet Video - Placing Holds from the Patron Account (1:03)

1. Click the **Holds** tab in the patron record.
2. Click **Place Hold**.



3. The catalogue will open.
4. Search for the title and place your hold as described in Placing Holds.
5. Click **Return** to return to your search results or click on the patron's name to return to the patron's account.



10.1.6. Holds Status Messages

Hold Pending - Evergreen is waiting for the hold to be placed.

Hold Succeeded - The hold has successfully been placed for the patron.

HIGH_LEVEL_HOLD_HAS_NO_COPIES - This indicates that there are no holdable items that can fill the hold.

ITEM_AGE_PROTECTED - This indicates that the item is under age-based hold protection set through the Holdings Editor and cannot currently fill holds at your library. If you override and place the hold it will eventually be filled when the item is no longer protected.

ITEM_NOT_HOLDABLE - This indicates that the item is under age-based hold protection set through the Hold Policies and cannot currently fill holds at your library. If you override and place the hold it will eventually be filled when the item is no longer protected.

10.2. Managing Holds

Staff can edit holds in patrons' records or in title records. Patrons can edit their holds in their account on your public catalogue.

Holds can be cancelled at any time by staff or patrons. Before holds are captured, staff or patrons can suspend a hold without losing the hold queue position, can activate suspended holds, and can change notification method, phone number, pick-up location, and expiration date. Once a hold is captured, staff can change the pickup location and extend the hold shelf time if required.

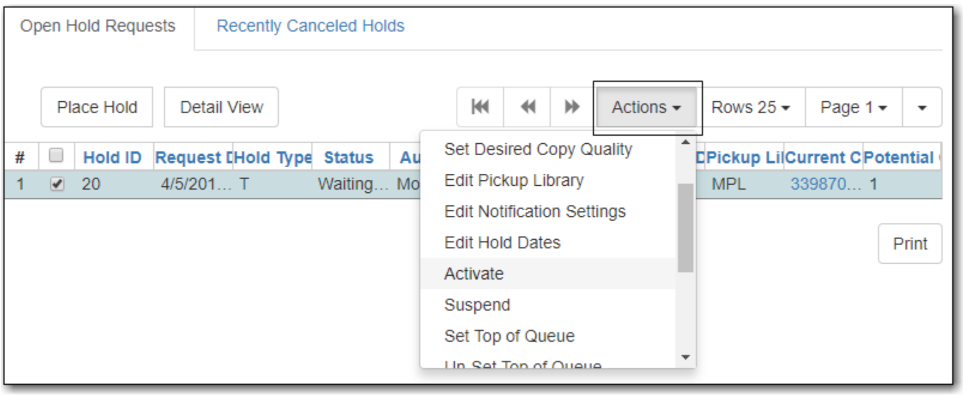
10.2.1. Hold Statuses

There are five types of status a hold may have: **Waiting for Copy**, **Waiting for Capture**, **In Transit**, **Ready for Pickup**, and the optional **Reserved/Pending**. If your library chooses to delay hold shelf status, then a hold may have the status of **Reserved/Pending**.

- Waiting-for-copy: all holdable copies are checked out or not available.
- Waiting-for-capture: an available copy is assigned to the hold. The item is on the **Holds Pull List**, waiting for staff to search the shelf and capture the hold.
- In Transit: hold is captured at a non-pickup library and on the way to the pick-up location.
- Ready for Pickup: hold is captured and on the **Holds Shelf** for patron to pick up. In the catalogue, this status displays as **On Holds Shelf**.
- Reserved/Pending: hold is captured, item is in process, and yet to be put on the **Holds Shelf**. The status will be automatically changed to **Ready for Pickup** once the delay period specified in Library Settings Editor expires.

10.2.2. Managing Holds in Patron Records

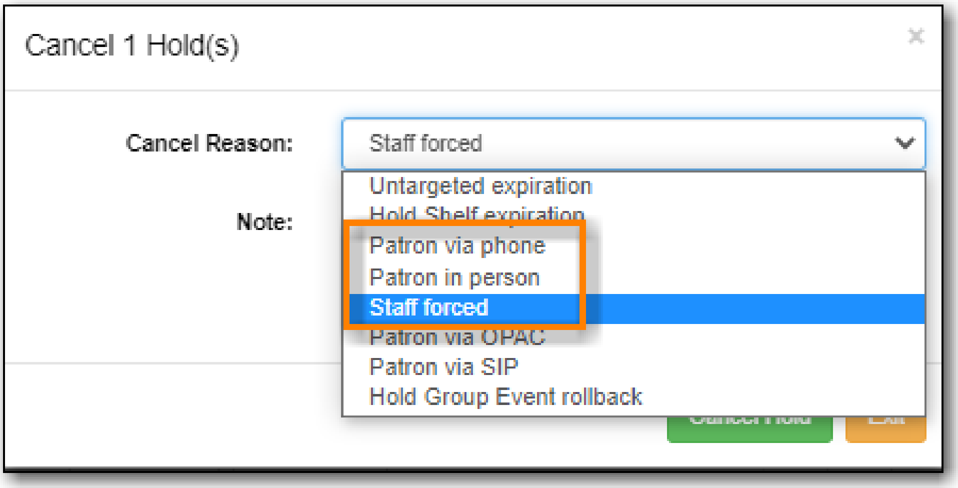
1. Click **Holds** tab in patron record.
2. Select the hold record and click **Actions**.



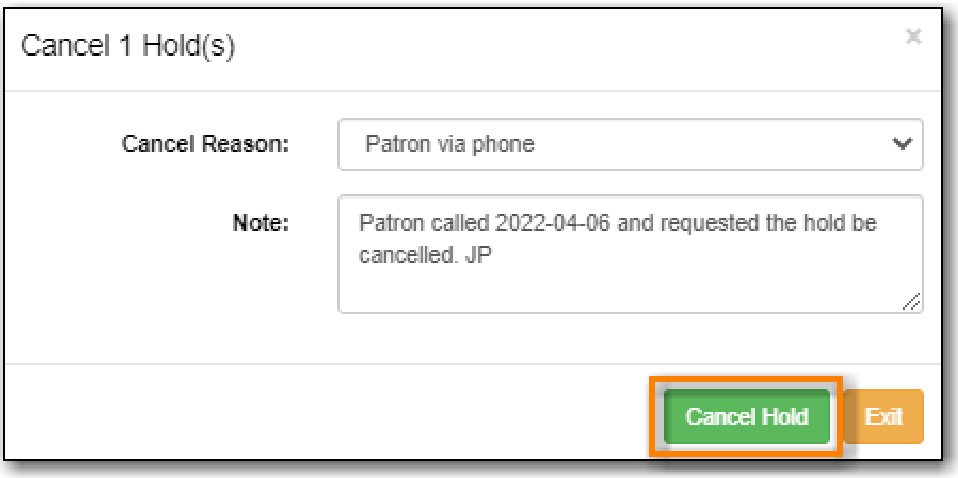
3. Manage the hold by choosing an action on the list. Use the arrow to scroll through choices.

10.2.3. Cancelling Holds

1. Select **Cancel Hold** from the **Actions** menu.
2. Choose the appropriate cancel reason from the drop down menu. Applicable cancel reasons are *Patron via phone*, *Patron in person*, and *Staff forced*. The other listed cancel reasons apply to automated cancellations.



3. Enter a note if applicable and click **Cancel Hold**.

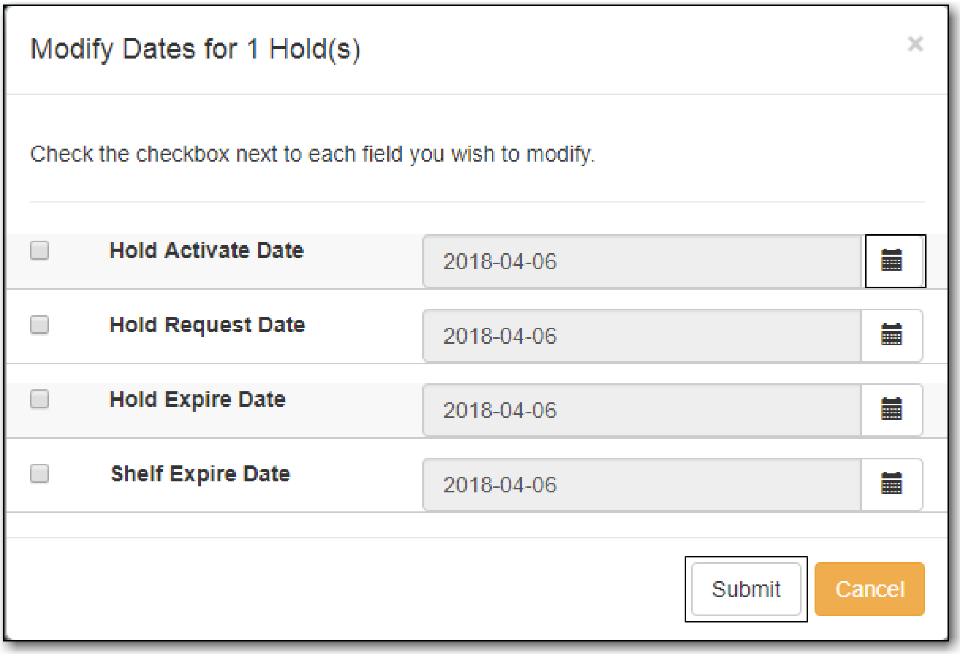


4. If the item was on holds shelf, check it in to capture the next hold or set the item to Reshelving.

CAUTION	If your library has has the Holds Cancelled by Staff notification enabled anything entered into the *Notes* field when cancelling a hold appears as the Cancel Cause in the email sent to the patron.

10.2.4. Suspend, Activate, and Edit Hold Dates

1. To suspend or activate a hold, click **Actions** and make your choice.
2. To edit dates, click **Edit Hold Dates**.



3. Use calendar widgets or enter dates for required action and click **Submit**.

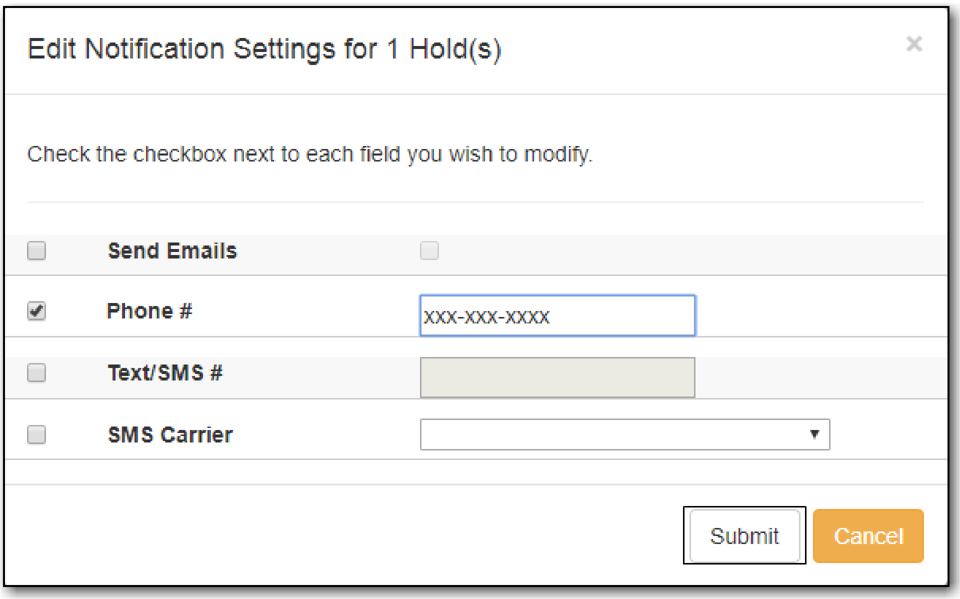
TIP

Suspended holds will not be filled but their hold position is kept. If there is no activation date, suspended holds remain inactive until staff or patrons activate them manually.

Suspended holds with activation dates will be automatically activated after hours on the activation date, regardless of the time displayed in the Activation Date field. For example, a suspended hold with an activation date of January 10th will be active for January 11th.

10.2.5. Edit Holds Notification Settings

1. Select hold in patron record and click **Actions** → **Edit Notification Settings**.
2. Edit as required and click **Submit**.



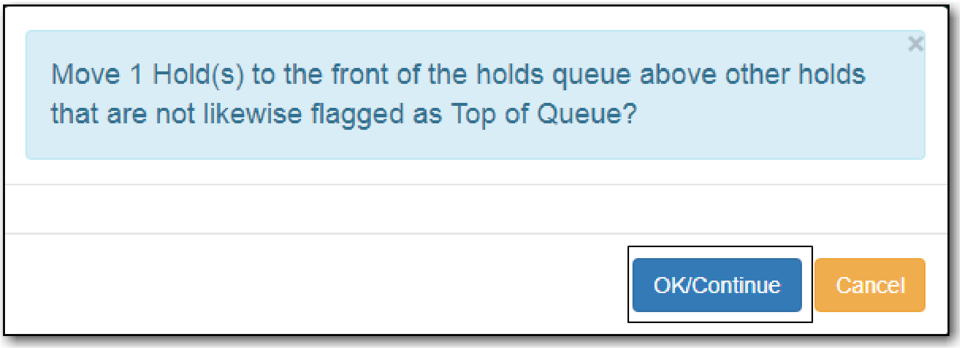
10.2.6. Edit Pickup Library

1. Select hold in patron record and click **Actions** → **Edit Pickup Library**
2. Click the dropdown list of all libraries, choose the new pickup location, and click **Submit**.

TIP	For libraries sharing resources with other libraries, Co-op Support strongly recommends you do not edit pickup location. Best practice is to cancel the hold and place another hold with new pickup location. There may be eligible copies at the new location, but the hold targeter will not find them if you just change the pickup library. Editing the pickup location in the existing hold will not force Evergreen to re-target the eligible copies.

10.2.7. Edit Hold Queue Position

1. Click **Actions** → **Set Top of Queue** to move the selected hold to the top of the hold queue.



2. Click **Un-Set Top of Queue** to remove a hold from the top of the queue.

TIP	If an item has already been assigned to the hold on top of the queue, you need to suspend the old top hold, **Find Another Target** for the new top hold, then activate the old top hold.

TIP	You can also edit hold position by clicking **Edit Hold Dates** → **Hold Request Date**. For most libraries, holds are filled based on request time sequence. Changing request time will change the holds fulfillment sequence.

10.2.8. Cancelled Holds

1. Click **Recently Canceled Holds** tab on patron's **Holds** screen.
2. Select a hold and click **Actions** → **Uncancel Hold** if needed.

10.2.9. View Hold Details

1. Select the hold and click **Detail View**. Useful information about the hold is displayed.
2. Click **New Note** or **Staff Notifications** to add information as required.

TIP	Notes can be printed on the hold slip if the **Print on Slip?** checkbox is selected.

10.2.10. Managing Holds in Title Records

1. Retrieve and display the title record in the catalogue.
2. Click **View Holds** tab.
3. Select the hold and click **Actions** and follow steps as described above.

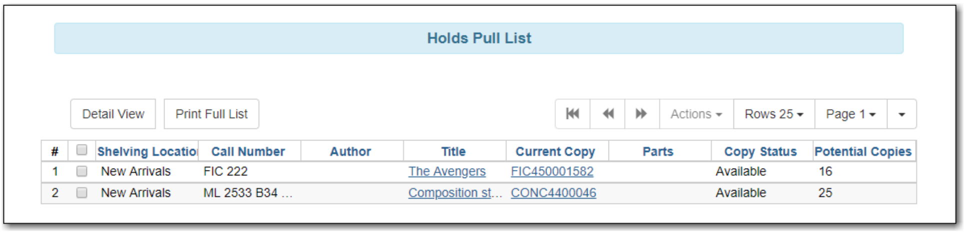
10.3. Pull List for Hold Requests

Sitka Training Video - Pull List for Hold Requests (1:31)

Evergreen matches hold requests with available items in your library at regular intervals. Once a matching copy is found, the item’s barcode number is assigned to the hold, and the item is put on the **Holds Pull List**. Staff print the **Holds Pull List** and search for the items on the shelves.

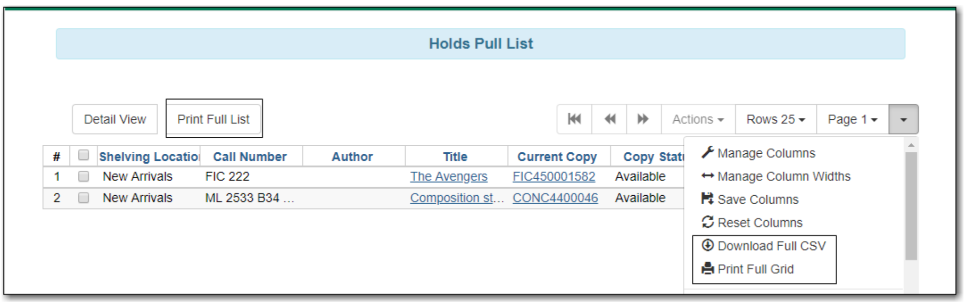
The pull list is dynamic and is updated constantly. Once an item on the list is no longer available, or a hold on the list is captured, the items will disappear from the list. The pull list should be checked or printed at least once a day.

1. To retrieve your **Holds Pull List** select **Circulation** → **Pull List for Hold Requests**.
2. The **Holds Pull List** is displayed. By default the items on the list are grouped first by **Shelving Location**, then by **Call Number**. You can re-sort by clicking the column labels.



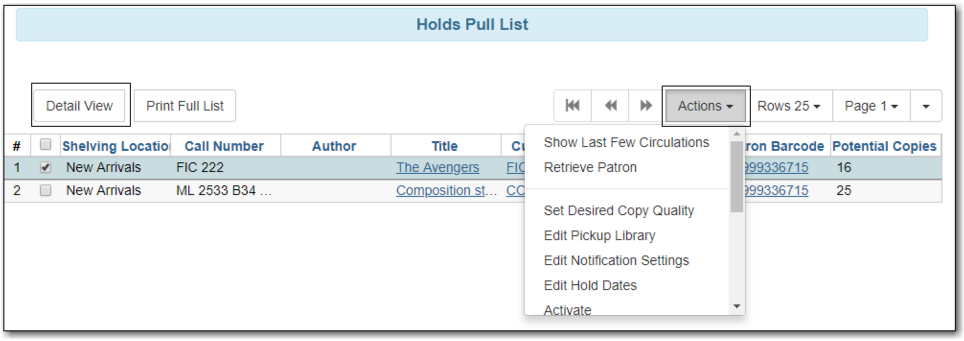
10.3.1. Print or Export Pull List for Hold Requests

1. To print the default pull list, click **Print Full List**. The full list prints Type, Title, Author, Shelving Location, Call Number, and Item Barcode.
2. To print exactly what is displayed on the screen, click the **Column Picker** → **Print Full Grid**.
3. To export the holds pull list to a CSV file, click the **Column Picker** → **Download Full CSV**.



10.3.2. Hold Management from the Holds Pull List

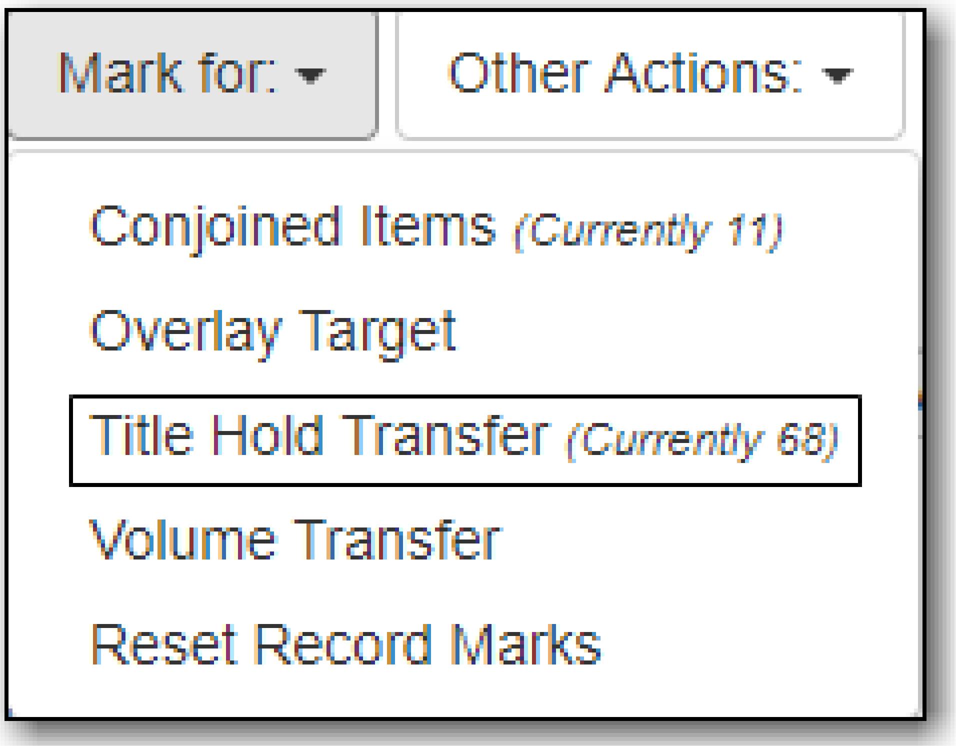
1. Select a hold and click **Detail View** to display more information about the hold.
2. Select a hold and click **Actions** and make appropriate choices. You can perform the same tasks here as in the patron or title record, such as cancel or edit hold as required.



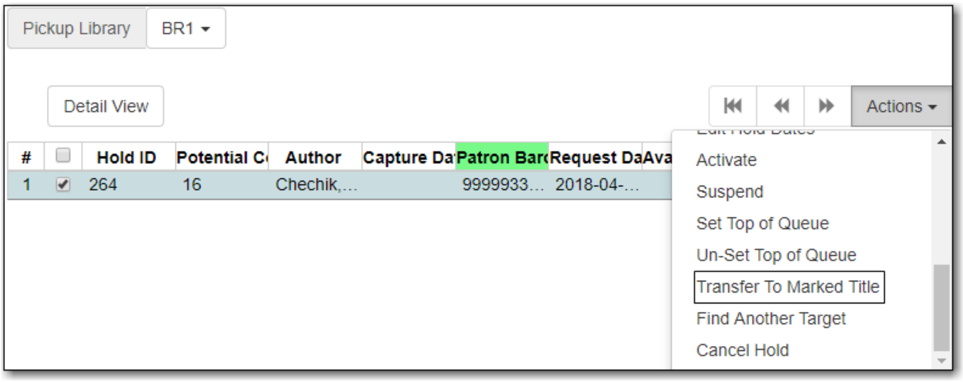
10.4. Transferring Title Holds

Holds on one title can be transferred to another title with the hold request time preserved.

1. Retrieve the bibliographic record you would like the holds to be transferred to.
2. Click **Actions** → **Mark for** → **Title Hold Transfer**.



3. Retrieve the bibliographic record that currently has the hold(s) attached to it.
4. Click the **View Holds** tab.
5. Select the hold you want to transfer and click **Actions** → **Transfer to Marked Title**.



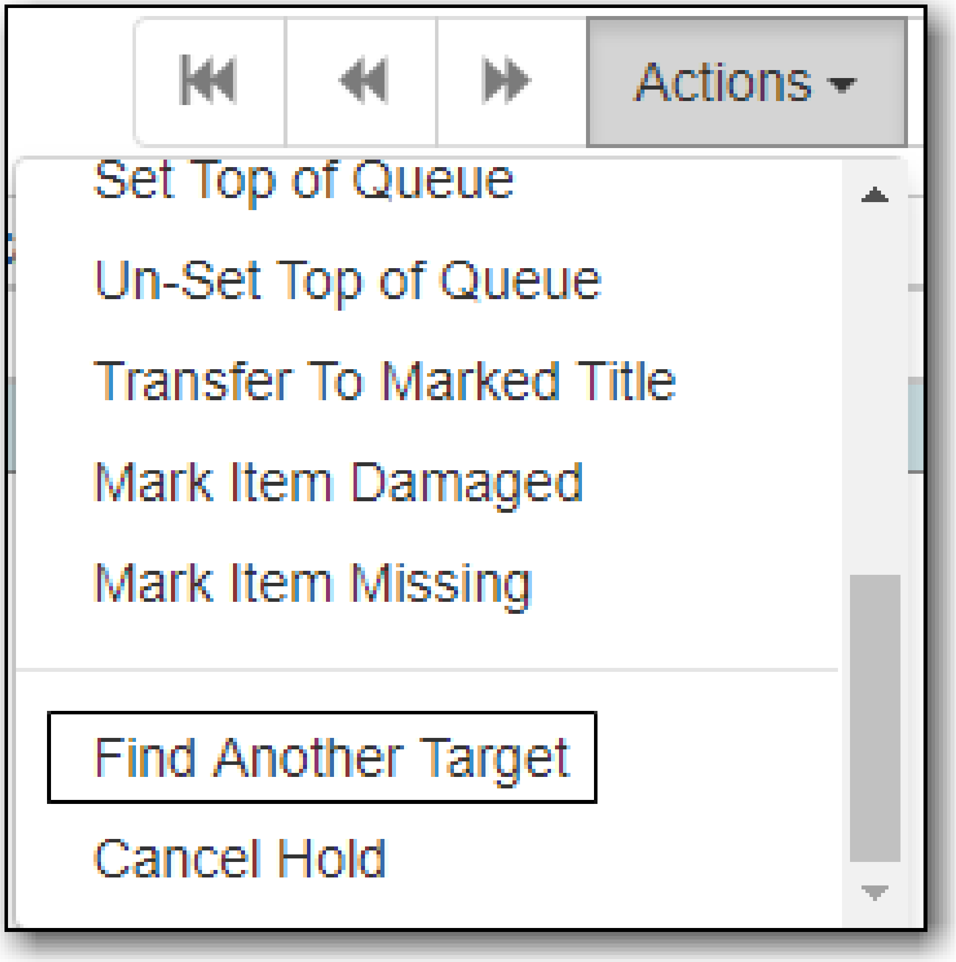
6. Click **OK/Continue**.

10.5. Re-targeting Holds

Newly created items, or items whose status was just changed from a non-holdable to a holdable status, may not trigger holds on regular check-in because these copies are not yet identified as hold targets. The holds targeter will eventually target such holds overnight, or you can re-target them immediately. Re-targeting a hold means Evergreen searches for an available copy for the hold right away, and puts it on the **Holds Pull List** if found. If there is no available copy, the hold's status will be set to **Wait for copy**.

You can re-target local holds at check-in by use of **Checkin Modifiers**, or you can manually re-target holds from title, patron, or hold record as follows.

1. Select the hold from any hold management screen and click **Actions** → **Find Another Target**.



TIP	Co-op Support recommends multi-branch libraries use **Find Another Target**, as described above, in order to re-target all holds in the system. For single branch libraries, Co-op Support recommends the check-in modifiers **Retarget Local Holds** and **Retarget All Statuses** be enabled. These check-in modifiers are sticky.

10.6. Capturing Holds

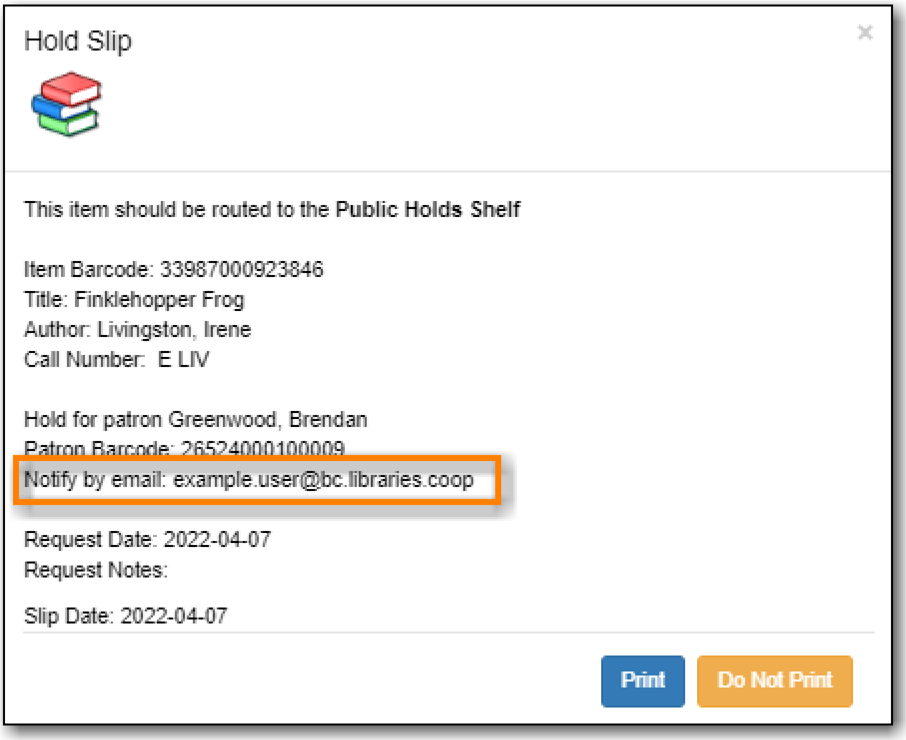
Sitka Training Video - Capturing Holds (2:29)

Holds are captured when a checked-out item is checked-in, or an item on the **Holds Pull List** is retrieved and captured. When a hold is captured, the hold slip will be printed, unless disabled, and if the patron has chosen to be notified by email or SMS text message the notification will automatically be sent out.

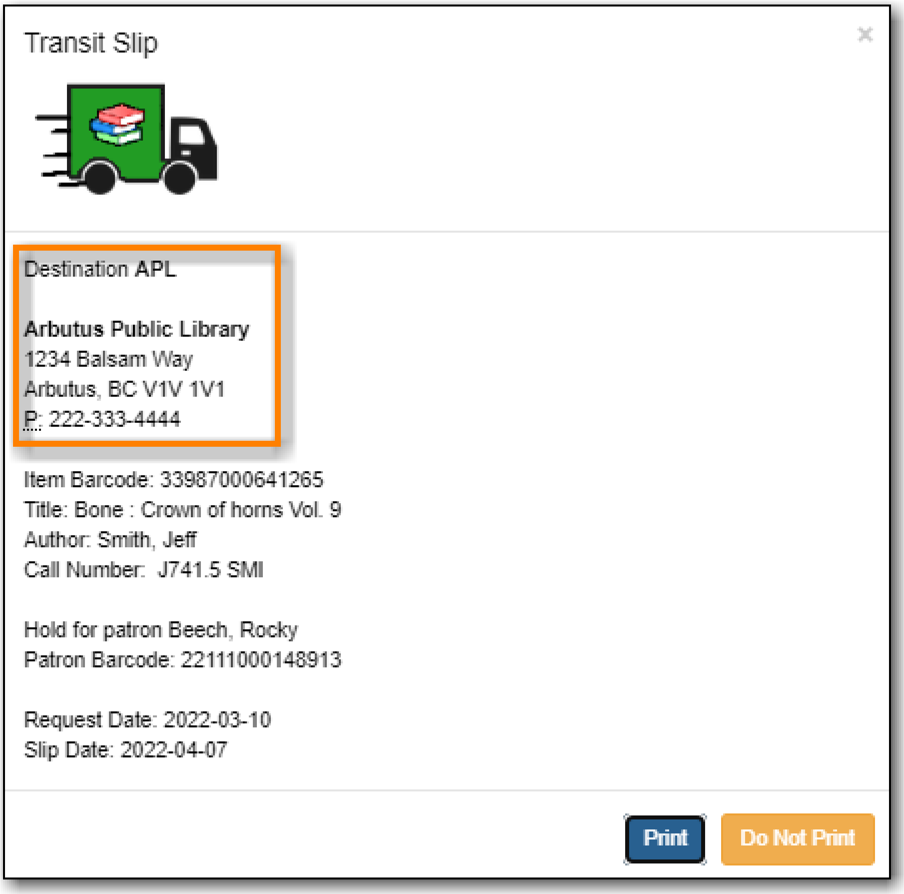
CAUTION	Hold notifications have processing delays. The email notification delay can be customized by the library. The SMS text message delay is set globally at 30 minutes and cannot be customized. If a hold is checked out to the patron during the processing delay the notification will not be sent as Evergreen no longer considers it to be relevant.

1. Select **Circulation** → **Capture Holds** or **Circulation** → **Check In**.

2. Scan or enter the barcode and click **Submit**.
3. A hold or hold transit slip pop up will appear, unless auto-printing is enabled.
    a. For hold slips the pop up will indicate what method is being used to contact the patron. This information is also available on the printed slip.



    b. For hold transit slips the pop up will indicate what library the item needs to be sent to.This information is also available on the printed slip.



4. The hold or hold transit slip is automatically printed on the **Hold Capture** screen by default. On the **Check In** screen you can select **Checkin Modifiers** → **Auto-Print Hold and Transit Slips** to print hold slips automatically.

NOTE	A patron’s contact information on a hold slip may differ from what is in their patron account. Patrons have the option to enter different notification information when placing a hold. Evergreen will use the information saved in the hold record when notifiying patrons.

10.7. Holds Shelf List and Clearing Shelf-Expired Holds

Sitka Training Video - Holds Shelf (1:12)

Items with **Ready for Pickup** status are on the **Holds Shelf** list. The function of the list is to help you manage items on the holds shelf, such as cancelling expired holds.

Hold shelf expire time is calculated according to your library’s hold shelf time expire interval in the Library Settings Editor.

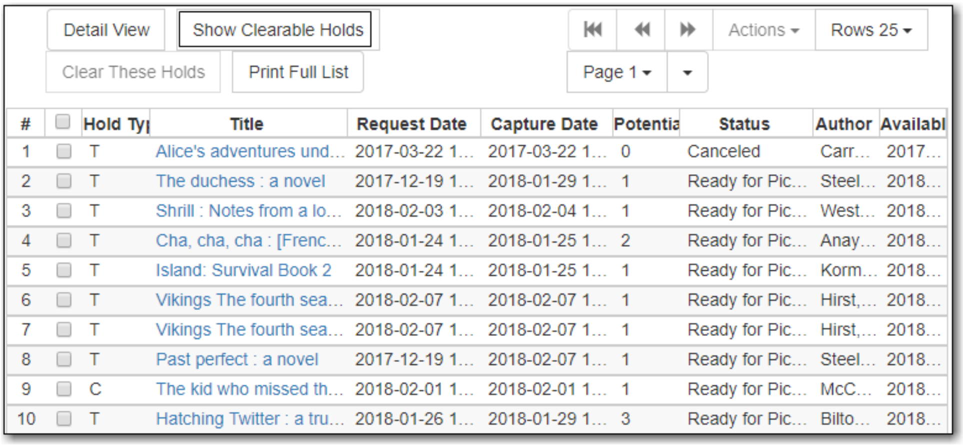
10.7.1. Holds Shelf List

1. Select **Circulation** → **Holds Shelf**.
2. The **Holds Shelf** list is displayed.

3. Select a hold, click **Actions**, and make appropriate selection.

10.7.2. Clearable Holds

1. Click **Show Clearable Holds** tab to list only expired or cancelled holds.



#		Hold Ty	Title	Request Date	Capture Date	Potentia	Status	Author	Availabl
1		T	Alice's adventures und…	2017-03-22 1…	2017-03-22 1…	0	Canceled	Carr…	2017…
2		T	The duchess : a novel	2017-12-19 1…	2018-01-29 1…	1	Ready for Pic…	Steel…	2018…
3		T	Shrill : Notes from a lo…	2018-02-03 1…	2018-02-04 1…	1	Ready for Pic…	West…	2018…
4		T	Cha, cha, cha : [Frenc…	2018-01-24 1…	2018-01-25 1…	2	Ready for Pic…	Anay…	2018…
5		T	Island: Survival Book 2	2018-01-24 1…	2018-01-25 1…	1	Ready for Pic…	Korm…	2018…
6		T	Vikings The fourth sea…	2018-02-07 1…	2018-02-07 1…	1	Ready for Pic…	Hirst,…	2018…
7		T	Vikings The fourth sea…	2018-02-07 1…	2018-02-07 1…	1	Ready for Pic…	Hirst,…	2018…
8		T	Past perfect : a novel	2017-12-19 1…	2018-02-07 1…	1	Ready for Pic…	Steel…	2018…
9		C	The kid who missed th…	2018-02-01 1…	2018-02-01 1…	1	Ready for Pic…	McC…	2018…
10		T	Hatching Twitter : a tru…	2018-01-26 1…	2018-01-29 1…	3	Ready for Pic…	Bilto…	2018…

2. Click **Clear These Holds** tab to cancel the expired holds.
3. Print the list, bring the items down from the hold shelf, and check them in.

TIP If you cancel a ready-for-pickup hold, you must check in the item to make it available for circulation or to trigger the next hold in line.

10.8. Hopeless Holds

Sitka Snippet Video - Hopeless Holds (1:11)

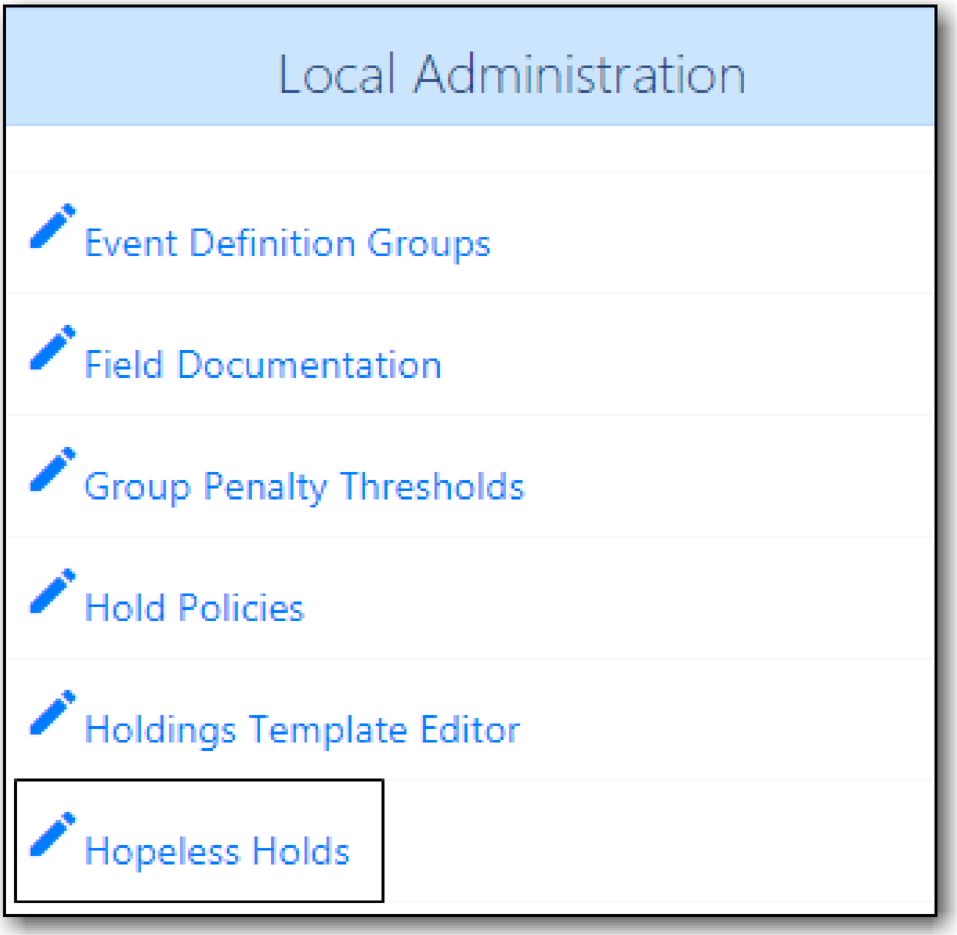
A hold is considered hopeless when there are no copies in Evergreen’s "hold_copy_map" for a title, or, when all copies in the "hold_copy_map" are in an item status with "hopeless_prone" set to True. In Sitka’s Evergreen, these statuses are globally set at Discard/Weed, Damaged, Lost, Lost and Paid, and Missing.

10.8.1. Managing Hopeless Holds

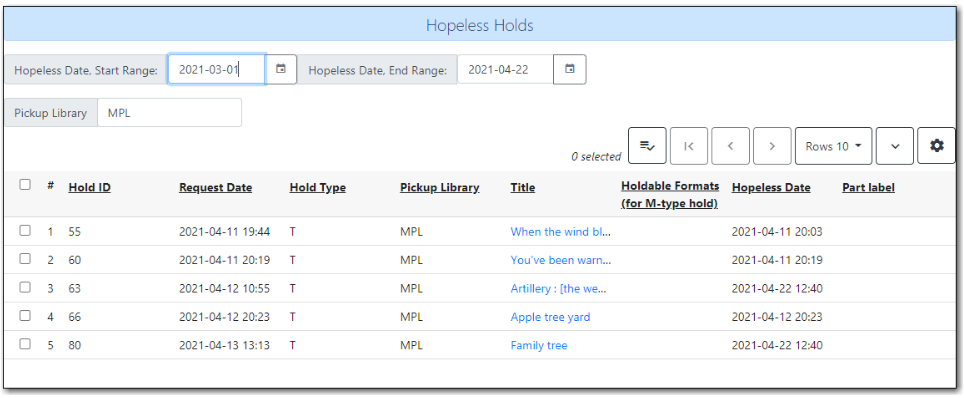
Unfulfillable holds are colloquially known as “hopeless holds.” In previous versions of Evergreen, staff relied on reports to generate lists of such holds. In Sitka’s Evergreen version 3.7, the new Hopeless Holds interface provides staff with an easy way to retrieve a list of unfulfillable holds, and perform actions on them to move them out of their hopeless condition.

10.8.2. Hopeless Holds Interface

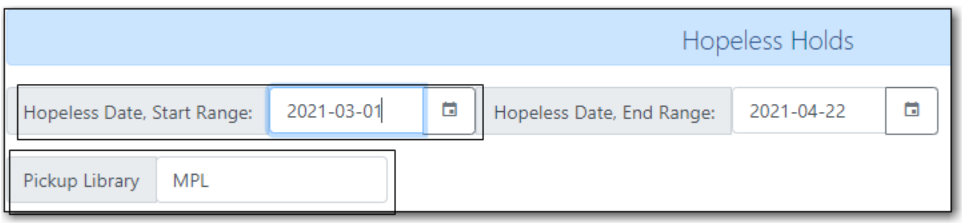
1. Click **Administration** → **Local Administration** → **Hopeless Holds.** All staff with permissions to view and modify holds can access Hopeless Holds.



2. A list of holds that are considered unfulfillable is generated. Requests are added to this list based on whether there is a value in the Hopeless Date field. Evergreen’s hold targeter assigns this date when it cannot find a potential target for a hold based on the criteria of hopeless.

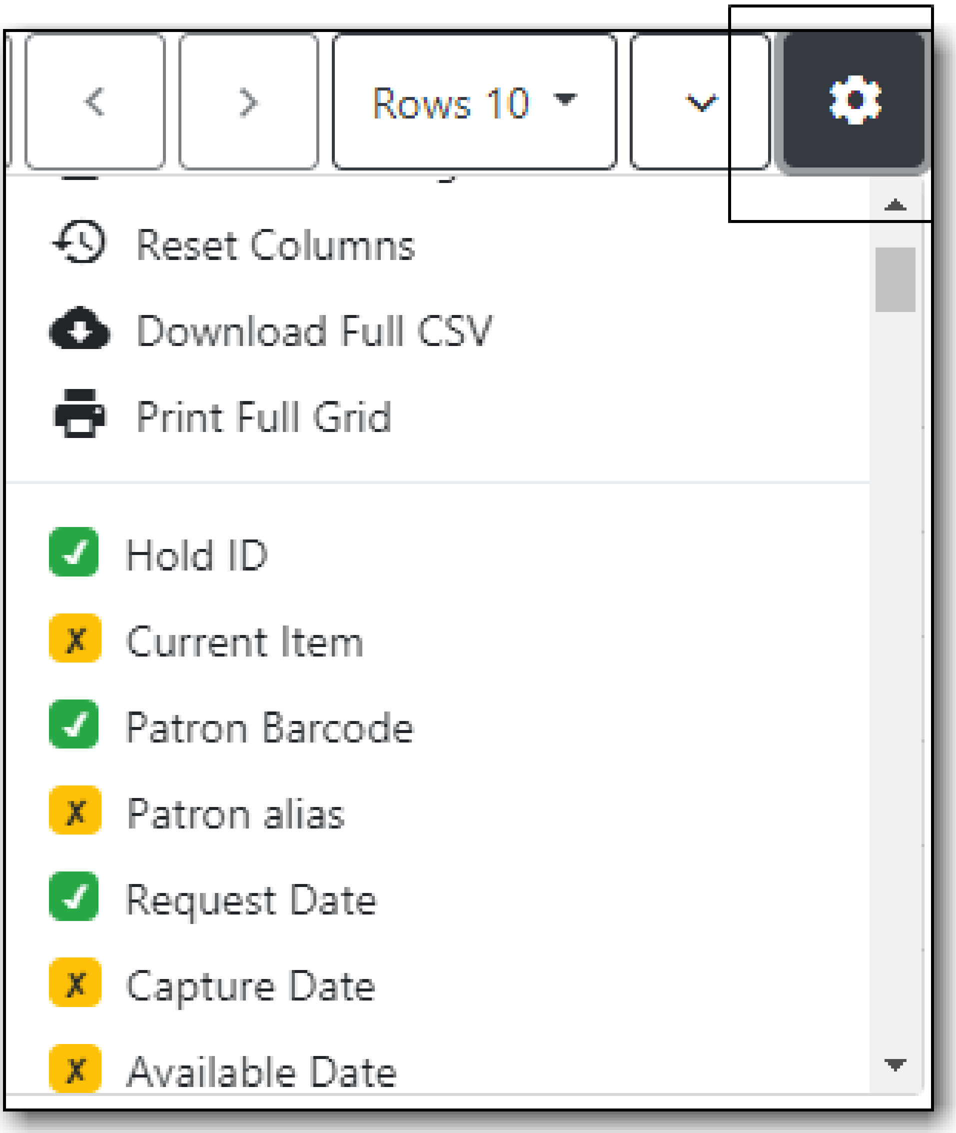


3. The list of hold requests can be filtered by hopeless date range and/or pickup library. Pickup library defaults to the workstation library and retrieves results for the selected library and its descendants.

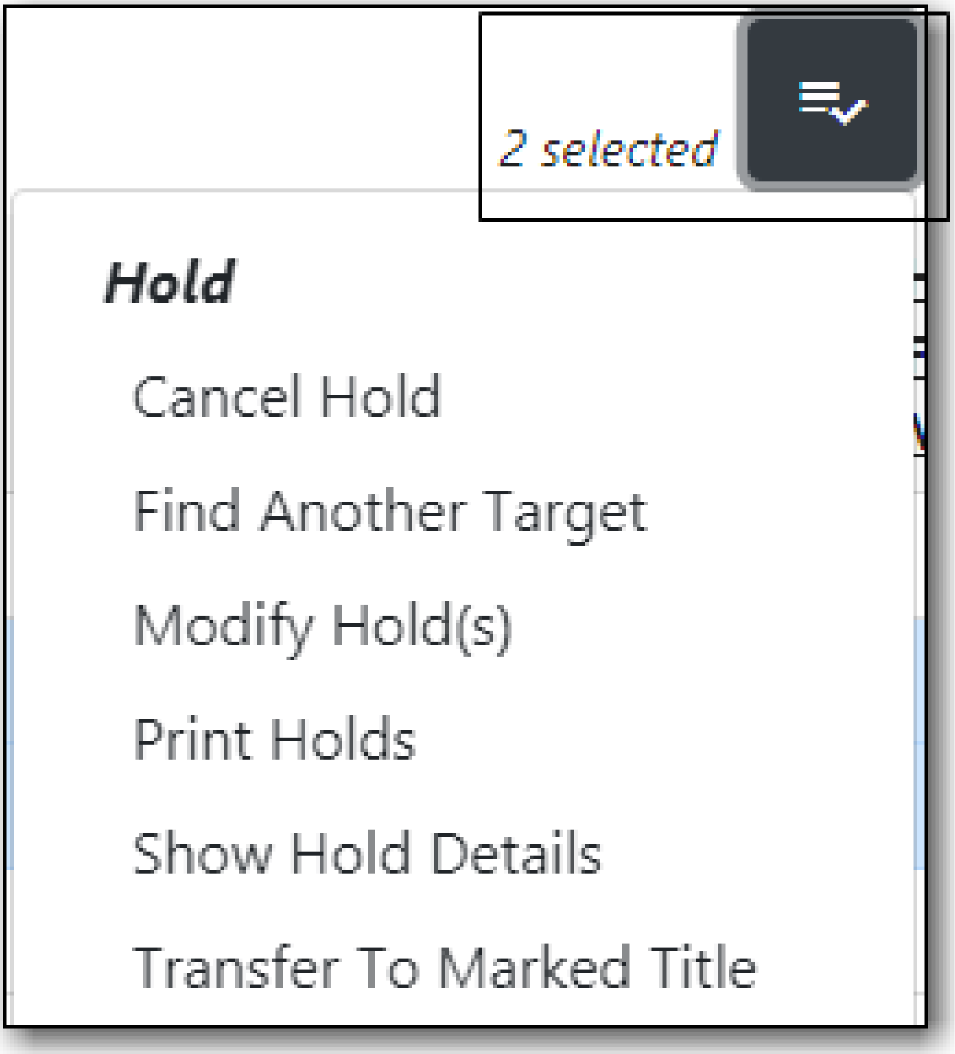


4. All columns in the grid can be sorted by clicking the column header.

5. Additional columns are available through the column picker, including the standard column options associated with Holds.



6. Click one or more hold requests from the list, and use the **Actions** menu to perform a variety of tasks. All actions activate new tabs for each selected record. Example actions are **Cancel Hold**, **Modify Hold(s)**, **Find Another Target**, **Show Hold Details**, and so on.



10.9. Hold Groups

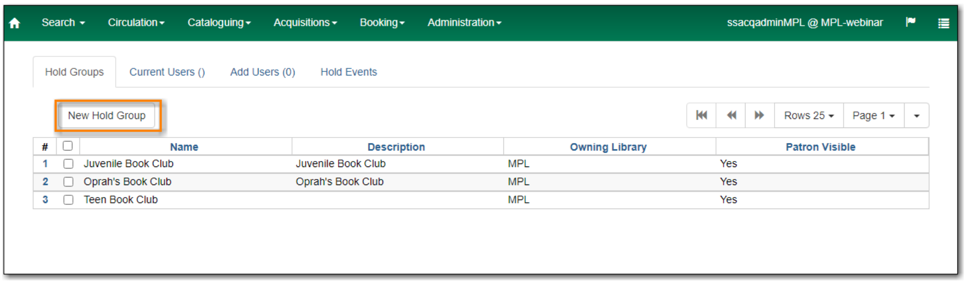
Sitka Snippet Video - Hold Groups (2:45)

The Hold Groups feature allows library staff to create lists of patrons that can then be used to place multiple title-level holds on the same bibliographic record. This is useful for book clubs, new or on-order items, and/or high demand items.

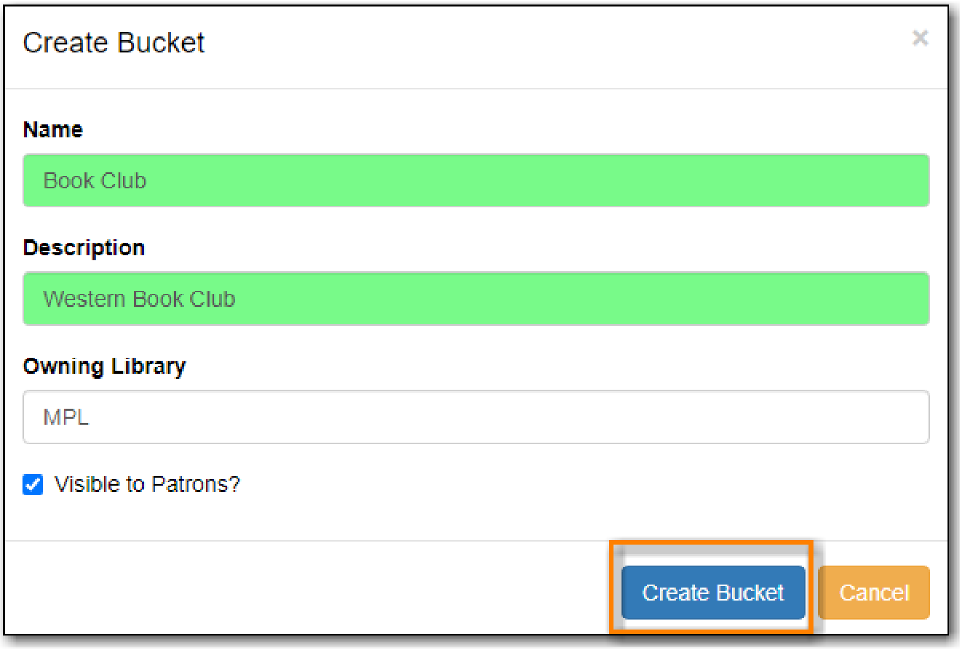
10.9.1. Create a Hold Group

Create a New Hold Group

1. **Circulation** → **Hold Groups**.
2. On the Hold Group tab, click New Hold Group.



3. Enter a name for the Hold Group.
4. Enter a description for the Hold Group (optional).
5. Choose the owning library from the drop down (defaults to the workstation library).
6. If you want the Hold Group to be visible to the patrons on the list, check the Visible to Patrons? checkbox.
7. Click **Create Bucket**.



NOTE Hold Groups are visible only to the staff member who created them but can be shared through Bucket ID.

Edit An Existing Hold Group

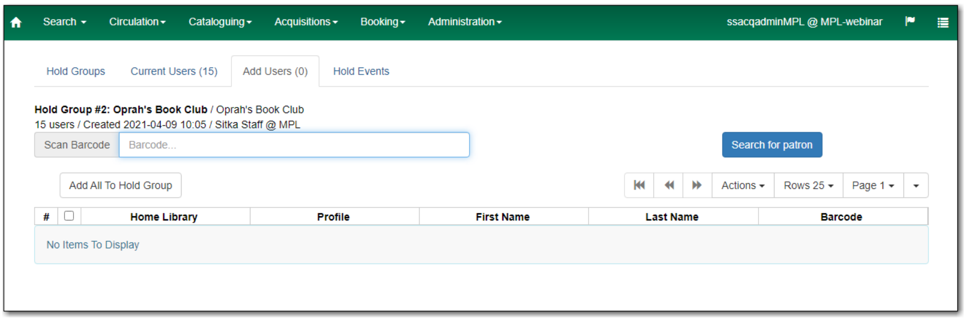
1. **Circulation** → **Hold Groups**.
2. On the Hold Groups tab, double-click the Hold Group you wish to modify. This will open the Hold Group in the Current Users tab.
3. Click the Hold Groups button and choose Edit Hold Group.
4. The Edit Bucket pop-up will open. You can edit the name, description, owning library, or visibility.

10.9.2. Add Users to a Hold Group

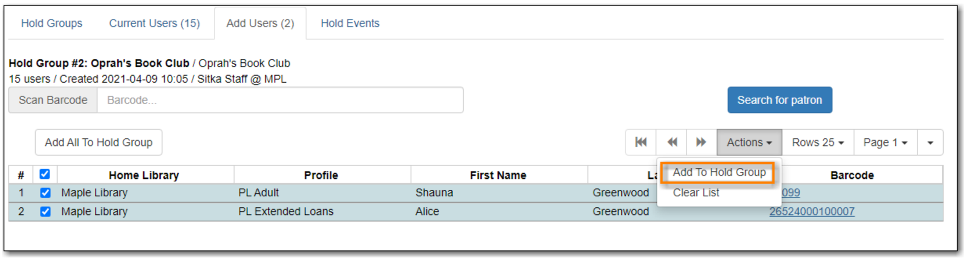
Patrons can be added to a Hold Group by barcode, by searching for a patron with an integrated patron search on the Add Users tab, or by a normal patron search. Staff must have PLACE_HOLD permissions to add patrons to a Hold Group at least at the same organizational unit depth (library) as the patron they are trying to add. For example, a staff member with branch level permissions for Branch A could only add patrons to Hold Groups owned by Branch A. If they needed to add patrons to Branch B or Branch C too, they would need system or consortial-level permissions.

Add Users By Barcode

1. **Circulation** → **Hold Groups**.
2. Double-click the name of the Hold Group you wish to add patrons to.
3. Go to the Add Users tab.



4. Scan or enter the patron barcode into the Scan Barcode field.
   a. Added patrons appear in a list under the Add All To Hold Group button. Users in this list are considered pending and have not yet been added to the Hold Group. Note that the parenthetical number for Add Users increases to display the number of pending users.
   b. Continue adding barcodes as needed.
5. From the list, select one or more users with the checkboxes at the beginning of each row or select all users with the checkbox at the list.
6. Click **Actions** → **Add to Hold Group**.



7. The users will now appear on the Current Users tab as part of the Hold Group.

Add Users With Integrated Patron Search

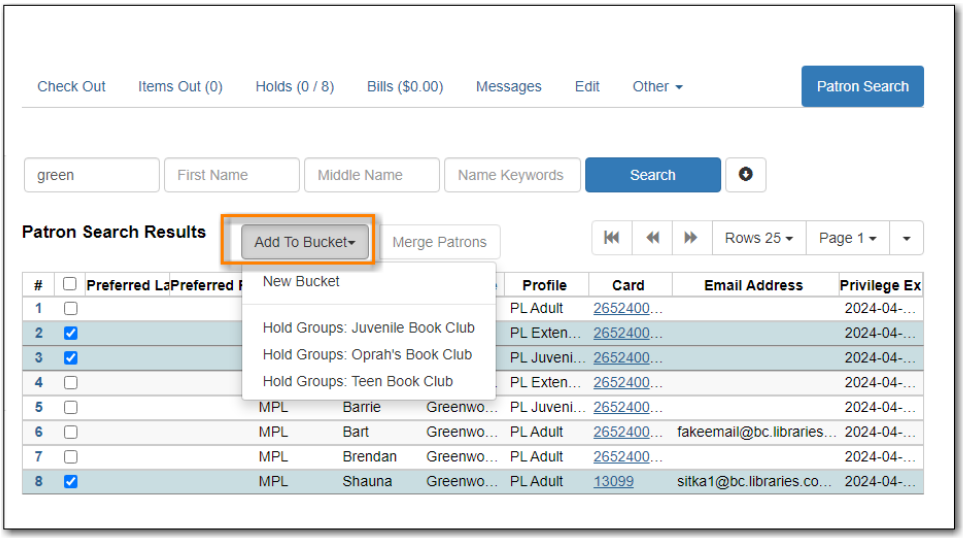
1. **Circulation** → **Hold Groups**.
2. Double-click the name of the Hold Group you wish to add patrons to.
3. Go to the Add Users tab.
4. Click **Search for Patron**. A patron search pop-up opens.
   a. The search is scoped to the workstation of the logged in staff member, but can be expanded by using the additional search fields.

5. Enter search criteria into the appropriate fields.
    a. The pop-up defaults to the basic patron search. Additional search fields are available by clicking the down-arrow button to the right of the Search button. This option is sticky.
6. Click **Search** or hit the Enter key. Results appear in the bottom portion of the pop-up window.
7. Click anywhere on a row in the results list to select that patron.
8. Click **Select**. The patron is added to the list of pending users. Users on this list have not yet been added to the Hold Group. Note that the parenthetical number for Add Users increases to display the number of pending users. Continue adding patrons as needed.
9. From the list, select one or more users with the checkboxes at the beginning of each row or select all users with the checkbox at the list.
10. Click **Actions** → **Add to Hold Group**.
11. The users will now appear on the Current Users tab as part of the Hold Group.

NOTE	You can add some or all of the users in the pending users list to different Hold Groups without entering barcodes or searching again. Simply go to the Hold Groups tab and double-click another Hold Group from the list. Return to the Add Users tab and select the users you wish to add to the new Hold Group, and use the Actions menu to add them to the Hold Group.

From Patron Search

1. **Search** → **Search for Patrons**.
2. Enter your search criteria.
3. Use the checkboxes on each patron search result to select one or more patrons.
4. Click **Add to Bucket**.



    a. A list of Hold Groups, as well as other patron buckets, are visible. (Only those Hold Groups created by the logged in user are visible.)
5. Choose the Hold Group to which you want to add the patron(s).
6. A message displays on the bottom right corner of the screen to confirm whether the patrons

were added successfully to the Hold Group.

10.9.3. Place Holds For a Hold Group

Holds can be placed from the Hold Groups interface.

From the Hold Groups Interface

1. **Circulation** → **Hold Groups**.
2. From the Hold Groups tab, double-click a Hold Group. The Hold Group will open in the Current Users tab.
3. Go to the Hold Events tab.
4. Click on **New Hold Group Event**.
5. Enter the Record ID number for the bibliographic record on which you wish to place the hold.
6. Use the checkbox to override all hold-blocking conditions possible if desired.
7. Click **Create Event**.

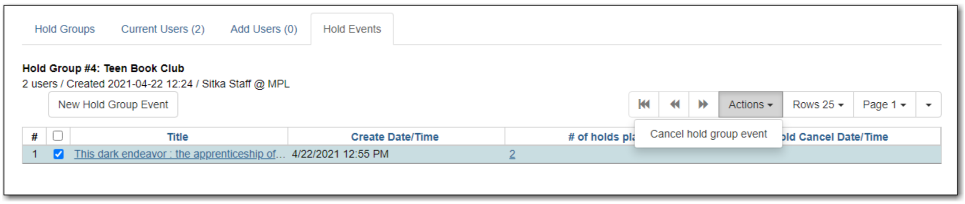
NOTE	There is pending development to allow for holds to be placed for hold groups by searching the catalogue.

10.9.4. Cancel Holds For a Hold Group

Holds can be cancelled from the Hold Events tab by selecting the hold and using the Actions menu and choosing Cancel Hold Group Event.

Cancel Holds For a Hold Group

1. **Circulation** → **Hold Groups**.
2. From the Hold Events tab, select the holds you wish to cancel.
3. Click **Actions** → **Cancel hold group event.**



4. Click **OK/Continue**

10.9.5. Deleting a Hold Group

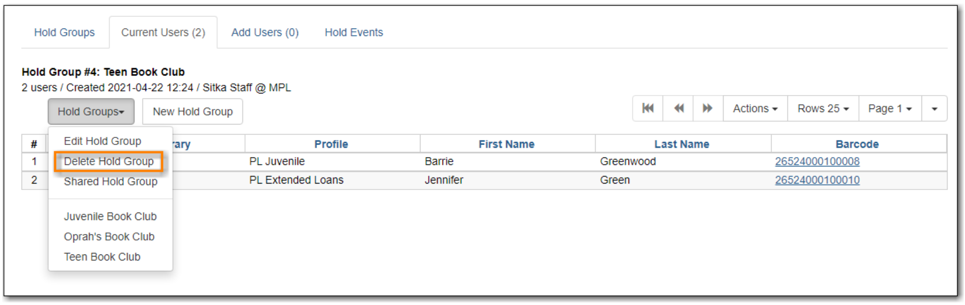
Hold Groups can be deleted on the Current Users tab. Deleting a Hold Group does not cancel any holds placed through the Hold Group.

Deleting a Hold Group

1. **Circulation** → **Hold Groups**.
2. From the Hold Group tab, double-click the Hold Group you wish to delete. This will open the

Hold Group in the Current Users tab.

3. Click the Hold Groups drop down and choose **Delete Hold Group**.



Administrative Features of Hold Groups

A new library setting allows for hold placement times to be randomized among list members for fair distribution.

New action triggers allow for Evergreen to generate email or SMS notifications to patrons when a new hold is placed through Hold Groups.

10.10. Holds Filling Explained

10.10.1. Selection Depth

When a hold is attempted on the catalogue, Evergreen checks all related library settings, hold policies, and holdings under the title, to decide whether a hold is allowed. If it is allowed, Evergreen will create a hold request record. Besides the basic information, such as pickup library, request time, and patron, it also records the range of libraries' copies that may be used to fill the hold. The range is decided based on the availability of holdable copies and libraries' policies. It is recorded in the hold request record in a field called **Selection Depth**, which is viewable when viewing holds in either the patron’s account or the title record.

Based on current Sitka settings, you will see either 2 or 3 in **Selection Depth**. 3 means only holdable copies of a library, or of a multi-branch library system, will be used to fill the hold. 2 means all holdable copies within a library federation, such as BC InterLibrary Connect (BC_ILC) or Spruce, are the hold’s potential targets. The depth setting is not editable on the staff client, nor does Evergreen re-assess or update the setting when holdings change under a title. If **Selection Depth** needs to be changed, staff have to manually cancel, then re-place the hold.

10.10.2. Holds Targeter and Potential Targets

The potential target copies of a hold are also recorded in separate records in another table, which are not viewable on the staff client. When an item is checked in, Evergreen will quickly go through this eligible copy table to check whether it is requested.

After a hold is placed, Evergreen will look for potential targets at a short interval (about 15 minutes), within the first 24 hours. After the 24 hours period, Evergreen will check the hold once a day at roughly the time of day when the hold was placed. The time is recorded in the hold request record in a field called **Previous Check Time**, which is also viewable when viewing holds.

If a potential target is found, it will be added to the eligible copy table. If an eligible copy is available, it will be put on to the library’s **Hold Pull List**. The copy will be on the pull list until the hold is captured, filled, cancelled, or re-targeted. Evergreen does not target unavailable copies, such as those checked out. But it will check the eligible copy table when items are checked in.

Though there may be multiple eligible copies available, only one copy may be put on a pull list at a time. Checking in another copy before the pull list is dealt with will capture the hold. The item will disappear from the pull list.

When there are multiple eligible copies available, Evergreen will first choose the pickup library’s copy, if available. Among other libraries' copies, it will randomly pick up a copy, unless the pickup library imposes special rules prioritizing preferred hold target source.

When Evergreen re-targets holds (at least once a day, but at different time for individual holds), it removes the current target, then looks for and picks up another one. It may or may not target the original copy. A copy that has been on a pull list for a day may disappear when the hold is re-targeted.

The eligible copy table is also updated when a hold is re-targeted. This is why Co-op Support recommends you re-target holds on newly catalogued items, or those changing from a non-holdable status to a holdable status.

10.10.3. Holds Queue and Filling Sequence

Holds are queued based on request time. Separate holds queues are formed based on the potential target copy range. For example, there is a hold queue for copy level holds and another for title level holds. Other libraries' holds are not counted in the queue of holds picked up at your library, if your holds target your own copy.

Copy level holds have a simple queue, which includes all holds targeting the copy. Title level holds queue counts all holds targeting any of the copies that the title hold may target, including the copy level holds. A title level hold takes a position in each copy level holds queue of all copies it may target. You may notice missing queue numbers in copy level holds queues. They are taken by the title level holds.

For resource-sharing libraries, you may see selection depth 2 and 3 holds. Selection depth 3 holds have a separate queue based on the pick-up library, since they target a separate set of copies. This means each library or system has its own queue if it has holdable copies.

Selection depth 2 holds are queued together with all holds (selection depth 2 and 3) targeting all copies that the selection depth 2 hold may target. The queue number may be big when a few libraries have a few selection depth 3 holds. Selection depth 2 holds take a position in each selection depth 3 holds queue under the title. You may see missing queue numbers in selection depth 3 holds queues, which are taken by selection depth 2 holds.

To view selection depth 3 holds queue, simply filter the holds by pickup library, then follow the request time. A missing queue number means there is a selection depth 2 hold placed between the surrounding two holds' request time.

Chapter 11. Items in Transit

11.1. When Will An Item Go In Transit?

Sitka Training Video - Transits (2:41)

Evergreen's **In Transit** feature is used to keep track of items transferring among branches within a library system or between separate Sitka libraries. It makes it easy for libraries to provide services such as allowing patrons to return items at any branch or Sitka library, or place holds on items belonging to another branch or library. Sitka services such as BC _ILC and SPRUCE ILL are possible because of Evergreen's **In Transit** functionality.

1. When an item is checked in at a non-owning branch or library, the status is changed to **In Transit** and a **Transit Slip** can be printed. Items in transit are sent to the destination branch or library according to your library's policy and workflow.
2. When you capture a hold with a pick-up library other than your branch or library, the item's status is changed to **In Transit**. Holds in transit are sent to the destination branch or library according to your library's policy and workflow.

TIP	If you capture holds on the **Capture Holds** screen, a **Transit/Hold** slip is printed automatically by default. If you capture holds on the **Check In** screen, you can choose to print slips automatically by selecting **Checkin Modifiers → Auto-Print Hold and Transit Slips**.

11.2. Receive In Transit Items

- All items received from other branches or Sitka libraries must be checked in. Checking in updates an in transit item's status and its location.
- If it is your item coming back, its status changes to **Reshelving**, and its location is updated.
- If the item has a local hold on it, its status changes to **On Holds Shelf**, its location is updated, and patron is notified.
- If the pickup branch for the hold is not your branch, the item is sent in transit again to the pickup branch.

11.3. Transit Details

Transit dates, and source and destination libraries, are displayed on the **Item Status** screen.

1. Select **Circulation → Item Status** and scan the item barcode, or click on item barcode hyperlink

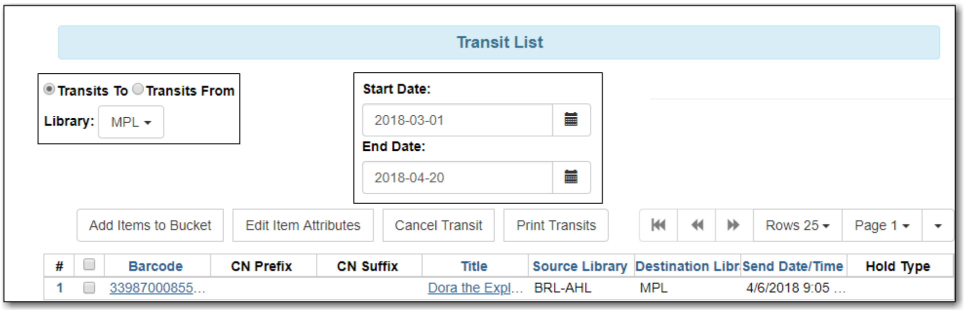
to load item in **Item Status** screen.

2. Click **Detail View**.
3. Select **Holds/Transit** tab. Transit information is displayed on the right of the screen.

11.4. Transit List

The **Transit List** report helps manage your incoming and outgoing transits. It is best practice to pull transit lists when sending or receiving items from other branches or Sitka libraries. Reconciling the list against the physical items ensures your shipments are complete.

1. Click **Administration** → **Local Administration** → **Transit List**.
2. Select **Transits To** or **Transits From** your library and specify **Start Date** and **End Date**.



3. Click **Print Transits** to print the onscreen list, or select a transit to access the **Add Items to Bucket**, **Edit Item Attributes**, or **Cancel Transit** tabs.

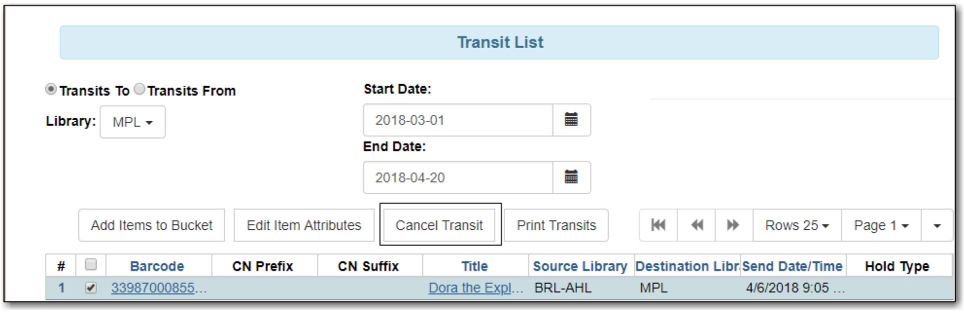
11.5. Cancel Transits

NOTE

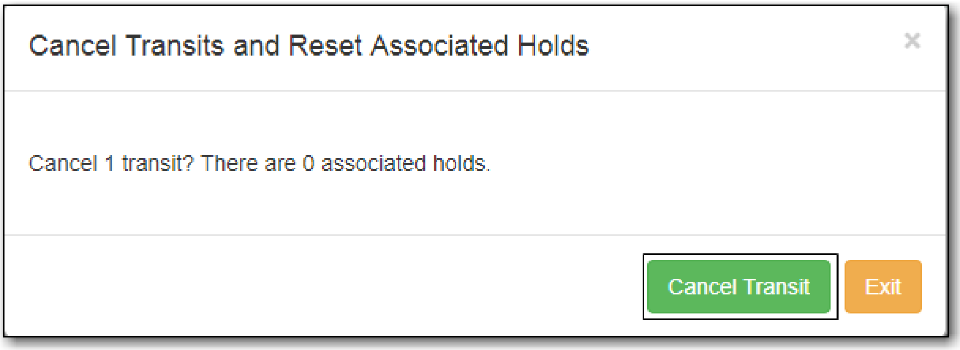
Under certain circumstances cancelling a transit may be required, but it effectively cancels the previous check in. Cancelling a transit affects data integrity and the accuracy of circulation statistics. Co-op Support strongly recommends that only sending libraries ever cancel a transit, and only before physically sending out items, while receiving libraries never cancel a transit, but check them in instead. This recommendation is a required work flow for libraries participating in BC_ILC and SPRUCE resource sharing agreements.

11.5.1. Cancel a Transit from Transit List

1. Select the transit and click **Cancel Transit** tab.



2. Click **Cancel Transit** at prompt.



3. Item status is updated to **Canceled Transit** if it had been "In Transit" “Lost” or “Checked Out” before. Items with any other prior status will return to the status they were in before they were sent into transit.
4. Items in **Canceled Transit** status must be checked in.

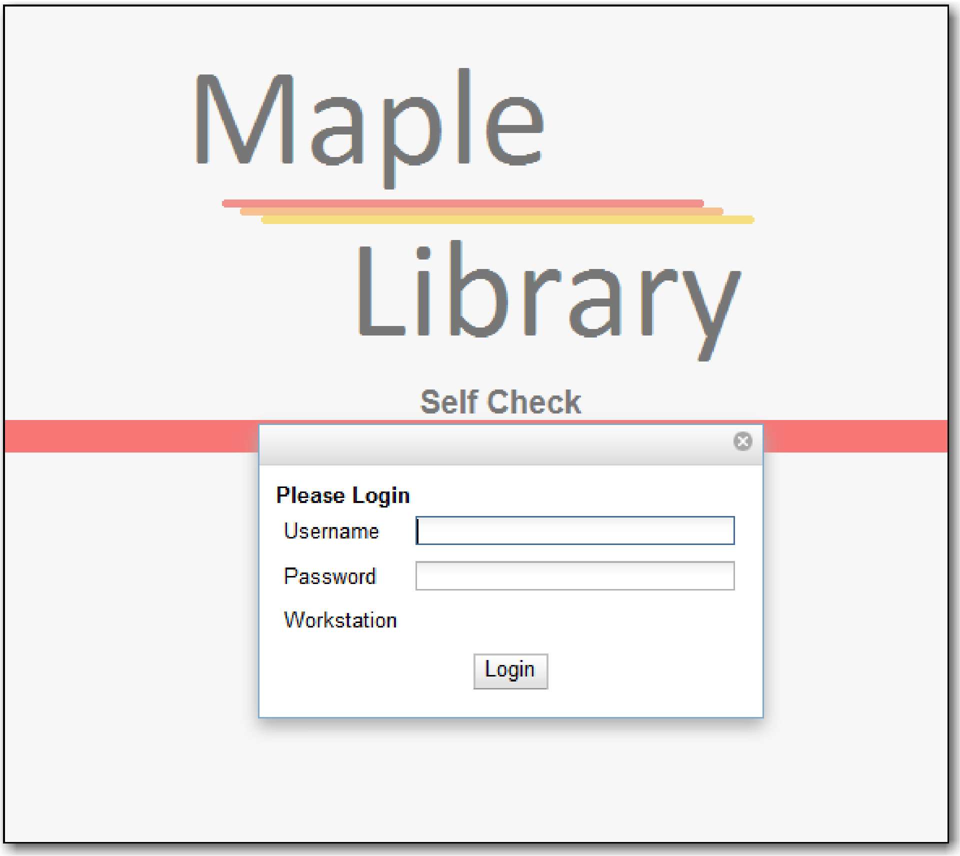
Chapter 12. Self Check

12.1. Staff Functions in the Evergreen Self Check

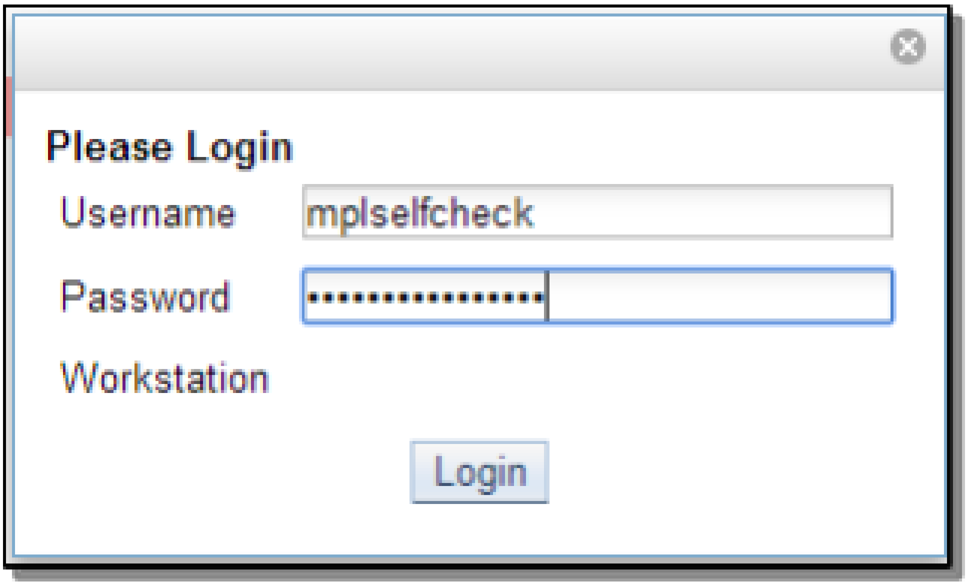
NOTE These instructions are specific to the native Evergreen Self Check. For instructions on using third party self check systems, libraries should refer to the instructions provided by the third party vendors.

12.1.1. Turn on the Self Check

1. Open the Evergreen **Self Check** interface in an internet browser.



2. Enter your self check login credentials and click **Login**.



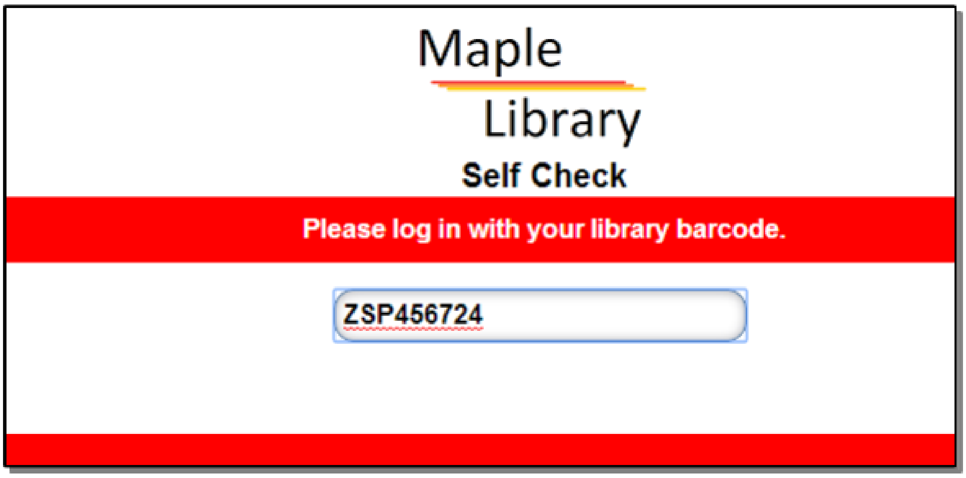
12.1.2. Turn off the Self Check

Co-op Support recommends turning off all Evergreen Self Check computers at closing to avoid any conflicts with overnight Sitka processes.

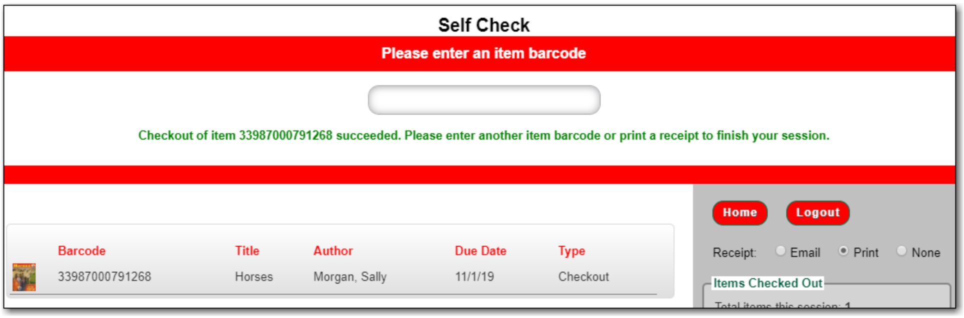
1. Close the browser
2. Turn off the computer.

12.2. Basic Check Out

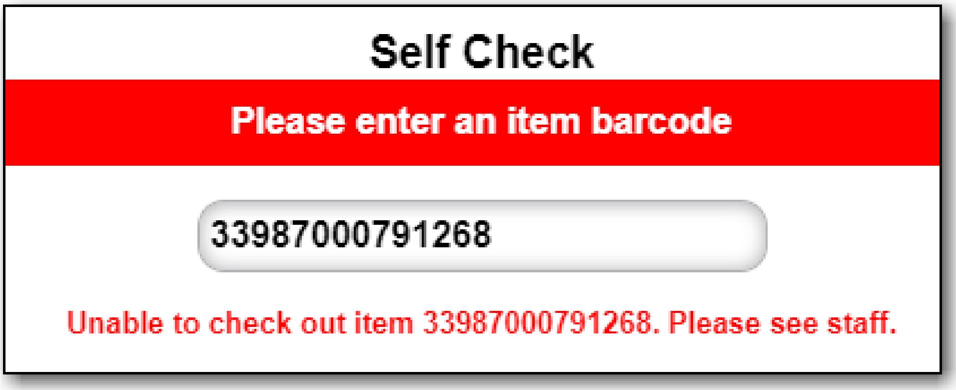
1. Scan a library card.



2. If required, enter password.
3. Scan the item barcodes. Items are listed with a check out confirmation message.



4. If a check out fails a message will advise patrons to see staff.



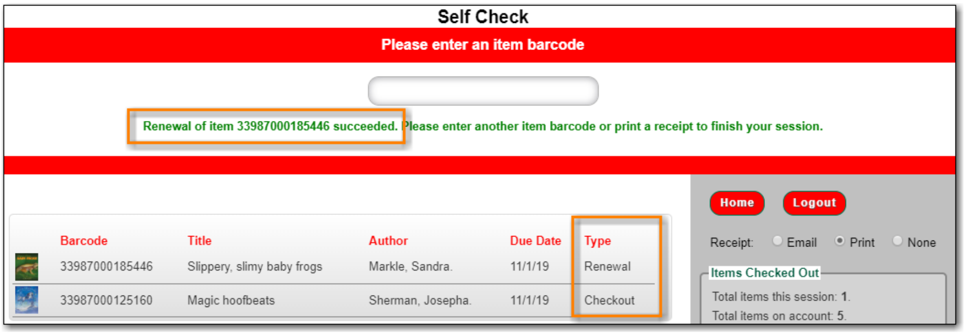
5. Select **Email**, **Print**, or **None**, for a receipt. Email only appears if patron has an email address in their account.
6. Click **Logout**

TIP If a patron forgets to logout, the system will automatically log out after the time period specified in the library setting **Patron Login Timeout (in seconds)**. An inactivity pop-up will appear to warn patrons 20 seconds before the logout.

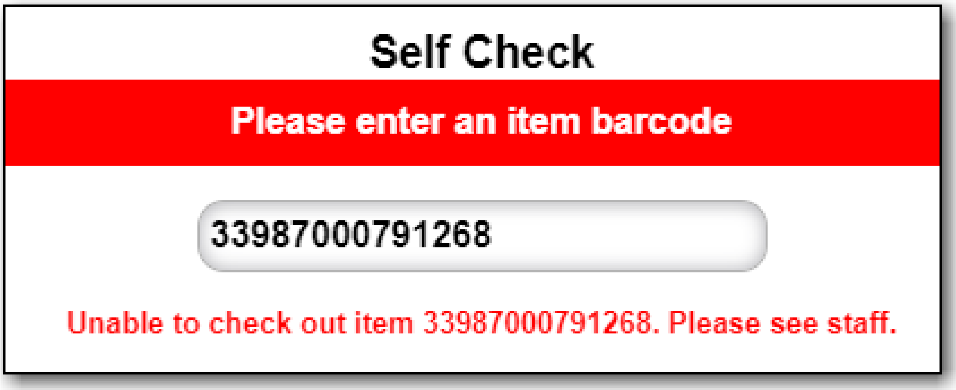
12.3. Renew Items

Patrons can renew items at the self check if they physically have the item.

1. Scan item barcodes.
2. A renewal confirmation message displays, with item details. Type displays as **Renewal**, rather than **Check out**.

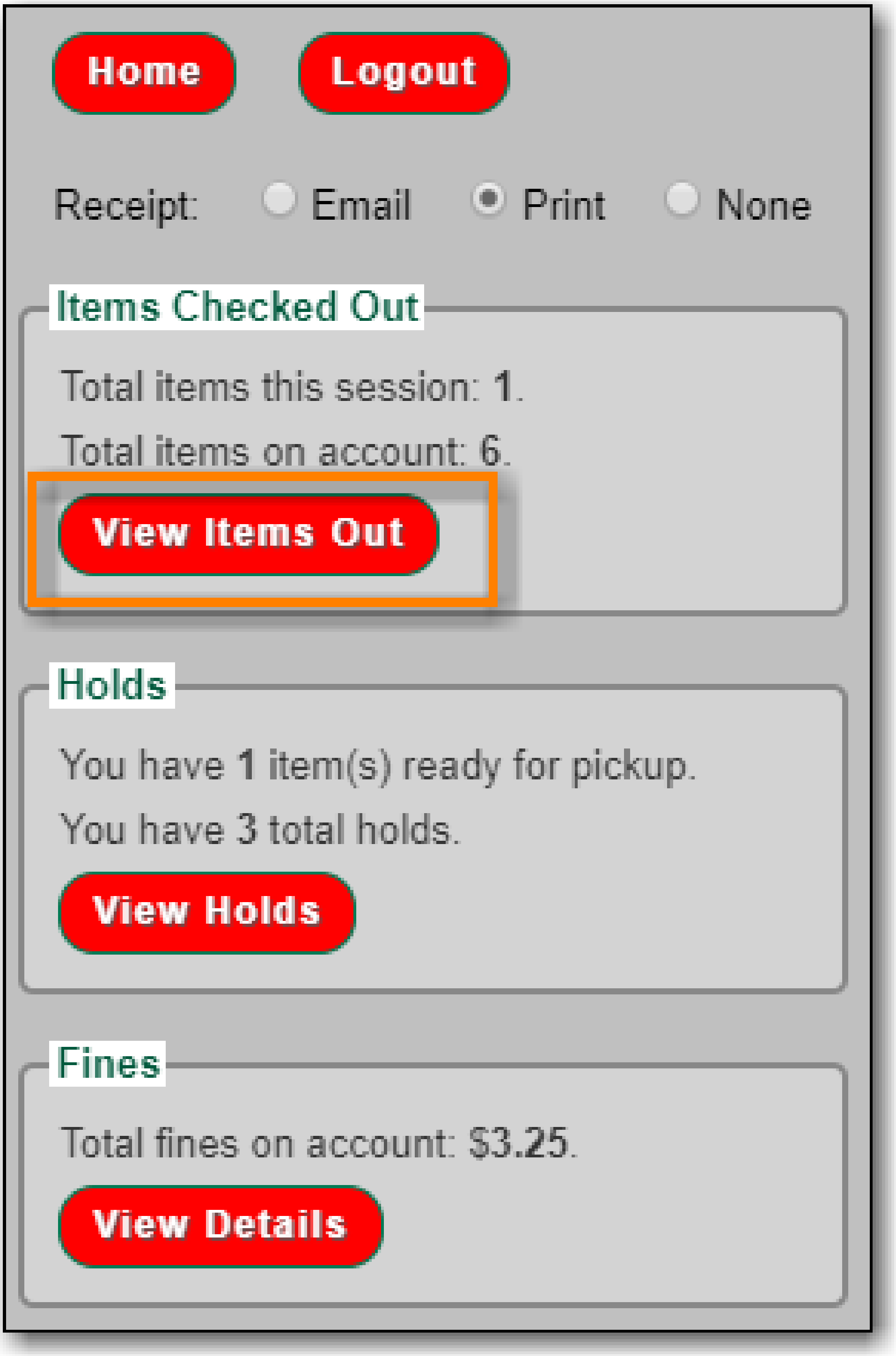


3. If the renewal fails, a message advises patron to speak to staff.



12.4. View Items Out

1. Click **View Items Out**.



2. Items out list displays.

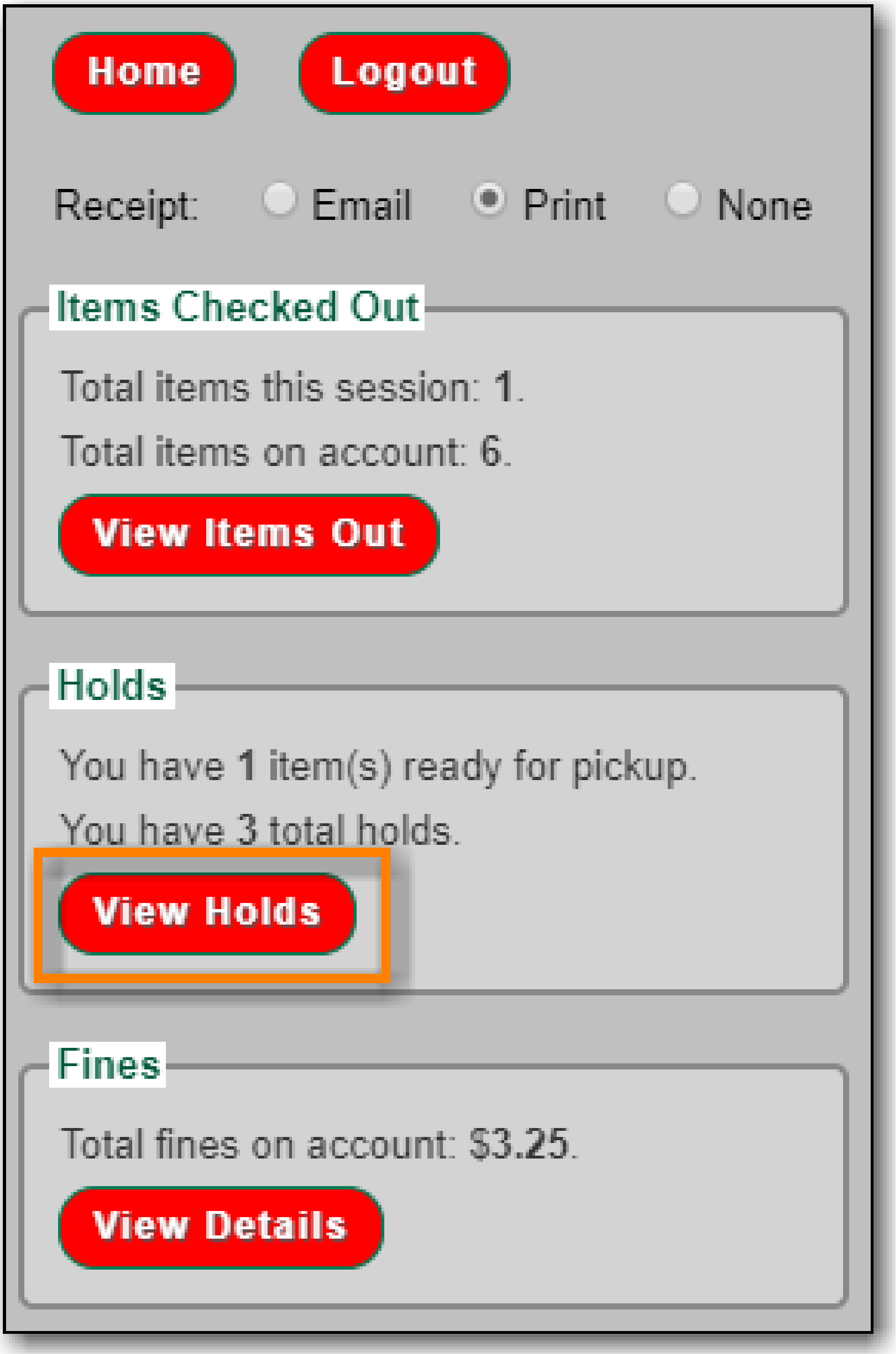
Print List

	Barcode	Title	Author	Due Date	Type
	33987000646165	The classic tales of Brer Rabbit	Harris, Joel Chandler	10/30/19	Checkout
	33987000791268	Horses	Morgan, Sally	11/1/19	Checkout
	33987000125160	Magic hoofbeats	Sherman, Josepha.	11/1/19	Checkout
	33987000185446	Slippery, slimy baby frogs	Markle, Sandra.	11/1/19	Renewal
	33987000372606	Penguins	Hoff, Mary King.	11/1/19	Checkout
	33987000368547	Lions	Kendell, Patricia.	11/1/19	Checkout

NOTE The Print List button can be enabled and disabled through the Library Settings Editor.

12.5. View Holds

1. Click **View Holds**.

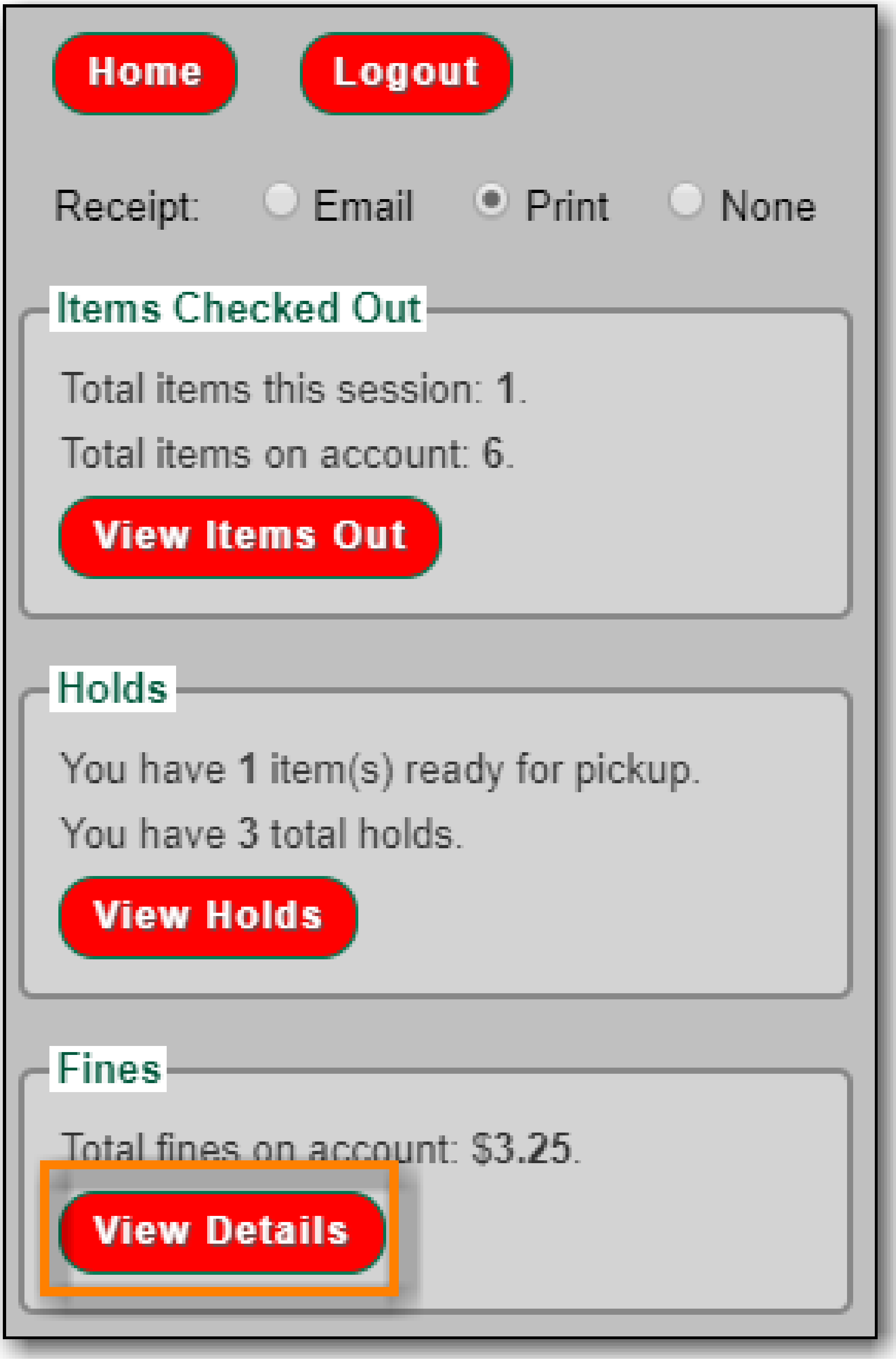


2. Items on hold list displays.

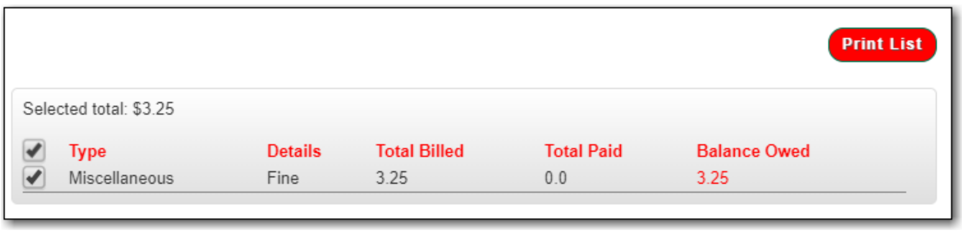
NOTE The Print List button can be enabled and disabled through the Library Settings Editor.

12.6. View Fines

1. Click **View Details**.



2. Current fines display. Fines cannot be paid through the self check.



Type	Details	Total Billed	Total Paid	Balance Owed
Miscellaneous	Fine	3.25	0.0	3.25

NOTE	The Print List button can be enabled and disabled through the Library Settings Editor.

Chapter 13. Offline Circulation

Evergreen's Offline Circulation Module is designed to log transactions during network outage, then offline transactions are uploaded and processed once network operations are restored.

In order to do offline circulation, you need to prepare your workstations when you have network access. The information that is required by the Offline Circulation program needs to be downloaded to your computers. You need to access Sitka's Evergreen server to get it.

13.1. Set up Workstations for Offline Circulation

Prior to using Offline Circulation, you need to do the following, which requires network access:

1. **Register the workstation** in the recommended browser on the computers you intend to use. Local System Administrator's account is required to do this.
2. **Load configuration information** by performing a patron search. Select any patron on the result list. Go to Edit tab. The relevant configuration information for the workstation is downloaded during this process.
3. **Set up a default printer** for Offline Circulation, if you use Hatch. Go to **Administration** → **Workstation** → **Printer Settings**.
4. **Save the Offline Circulation URL** as a Chrome Bookmark.

13.1.1. Save Offline URL

The permanent link for **Offline Circulation** is **https://catalogue.libraries.coop/eg/staff/offline-interface** . We recommend that this link is bookmarked on staff workstations. This is the location for both entering transactions while offline as well as processing them later. You will see a slightly different version of this interface depending on whether or not you are logged in.

13.1.2. Set Offline Printer

Print using Chrome

Browser print options - no additional setup required.

Print using Hatch

Hatch must be installed and enabled on your workstation

1. Click **Administration** → **Workstation** → **Printer Settings**.
2. Click **Offline** → Select Printer → Click **Apply Changes**

13.1.3. Save Patron Registration Form

1. **Search** → **Search for Patrons**.
2. Perform a search → select a user from the results → and open the **Patron Edit** interface.

a. This will allow the Offline interface to collect the information it needs, such as workstation information and the patron registration form.

13.2. Conduct Offline Transactions

To access Offline Circulation interface, go to **Circulation** → **Offline Circulation**. Alternatively you may bookmark the URL for Offline Circulation: https://catalogue.libraries.coop/eg/staff/offline-interface and access it from there.

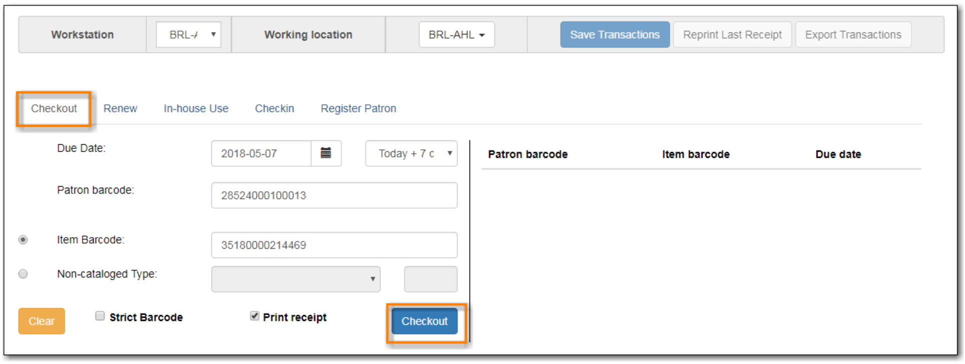
TIP	The top menu bar will load when accessing Evergreen staff client at https://catalogue.libraries.coop/eg/staff/ during offline. You may see different contents when accessing the above two URLs during online and offline time. You may see some different contents on some screens in Offline Circulation module when you access it during online and offline time, and when you are logged in and not.

CAUTION	Co-op Support strongly recommends that you only use Offline Circulation for **Check Out** & **Renew**.

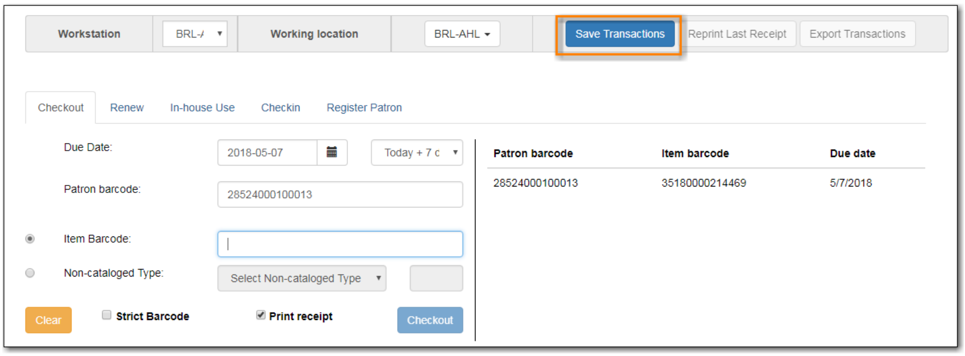
13.2.1. Check Out

To check out items in Offline Circulation:

1. Click the **Checkout** tab.
2. Enter a value in the **Due Date** field or select a date from the Calendar widget, or choose a loan period from the dropdown list. The date field entry will honor the format set in the Library Settings Editor.
3. Scan the Patron Barcode in the box labelled **Patron Barcode**.
4. Check out items:
   a. For cataloged items, scan the item barcode in the box labelled **Item Barcode**. Each item barcode will appear on the right side of the screen, along with its due date and the patron barcode. If you are manually typing barcodes, you need to click the **Checkout** button or hit the **Enter** key on your keyboard after each Item Barcode entry in order to record the transaction.
   b. For non-cataloged items, select a **Non-cataloged Type** from the dropdown and enter the number of items you wish to check out. Click **Checkout**. In the list to the right, the item barcode will appear blank since this item is unbarcoded. The due date and patron barcode will appear, however.
   c. If you make an error in entry, click **Clear** to reset the Patron Barcode and Item Barcode fields.
5. Make sure **Strict Barcode** is unchecked if you use non-codabar barcodes.
6. To print a receipt, check **Print Receipt**.



7. Click **Save Transactions** in the upper-right of the screen to complete the checkout.



   a. **Save Transactions** will save any unsaved transactions across the Offline tabs Checkout, Renew, In-House Use, and Checkin.

NOTE

- A value entered in the Due Date field will take precedence over an existing value in the Offset Dropdown; however, if you change the Offset after setting the Due Date field, the Due Date field will update to reflect the Offset value.
- Due Date and Offset values are sticky between the Checkout and Renew tabs, and also sticky between transactions. Strict Barcode and Print Receipt are sticky among the Checkout, Renew, In-House Use, and Checkin tabs and are also sticky between transactions.
- Pre-cataloged item checkout is not available in Offline Circulation. Any pre-cataloged item checked out through Offline Circulation will result in an entry in the Exception List and will not successfully check out.

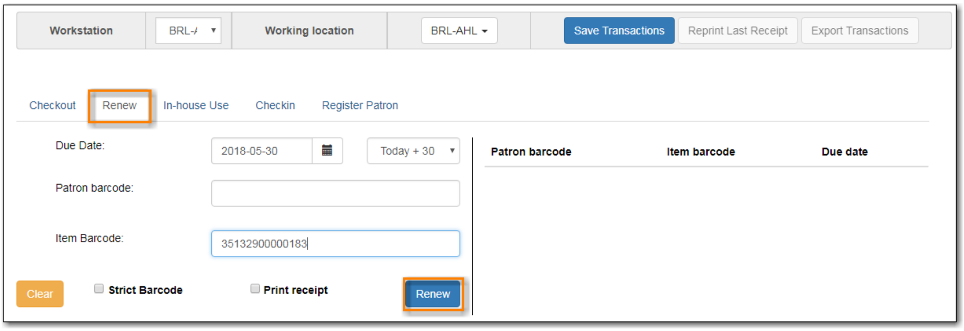
13.2.2. Renew

To renew an item, you must know the item's barcode number. The patron's barcode is optional.

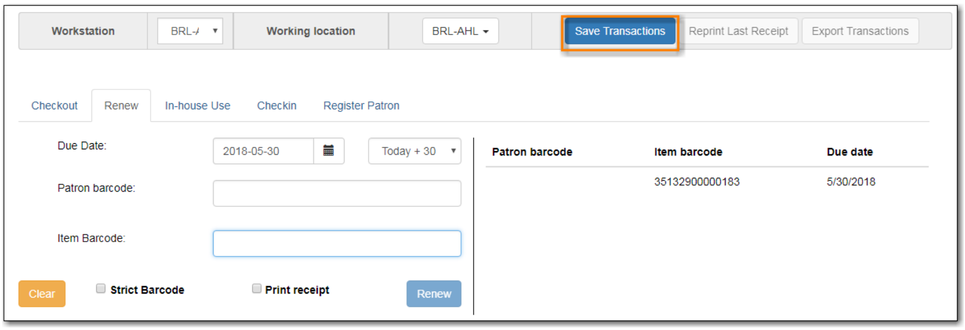
To renew items in Offline Circulation:

1. Click the **Renew** tab.
2. Ensure that the **Due Date** value is correct.
3. For each item to be renewed, scan the item's barcode in the **Item Barcode** field. If you are typing the item barcode, click the **Renew** button or hit the **Enter** key on your keyboard after each item barcode.
4. *(Optional)*: Enter the patron's library card barcode in the **Patron Barcode** field by scanning or

typing the barcode.



5. The item barcode, due date, and patron barcode (if entered) appear on the right side of the screen.
6. To print a receipt, check **Print Receipt**.
7. Click **Save Transactions** in the upper-right of the screen to complete the renewal.



13.3. Upload and Process Offline Transactions

Once you are able to connect to the server, you need to upload the offline transactions. It is good practice to do this as soon as possible, but if the local system administrator is not on site for a day or two do not panic.

There are 3 steps to to load offline transactions into Evergreen database:

1. Create a session: to be done by local system administrators at an administration workstation. This process creates a file on the server outside Evergreen database.
2. Upload transactions to a session: to be done by circulation staff at circulation workstations. Offline transactions are uploaded to the file created on the server.
3. Process the uploaded transactions: to be done by local system administrators at an administration workstation. Offline transactions are loaded into Evergreen database.

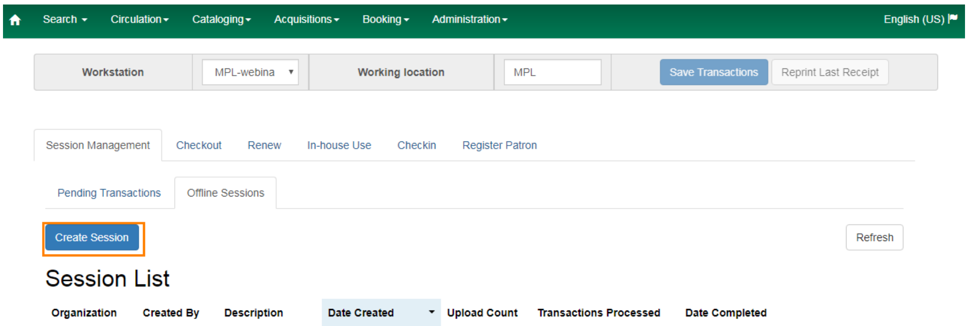
NOTE	Besides the above regular steps, you may need to handle exceptions if some of your transactions can not be processed.

Once the network has come back up, a local system administrator must first create a session before uploading transactions. Then, staff can upload transactions from each of the workstations used in offline circulation to that session. Once all of the library/branch workstations have uploaded their transactions, the local system administrator will process all the transactions in the session at once.

CAUTION	Do not use slash (/) or backslash (\) in the session name.

13.3.1. Create a session

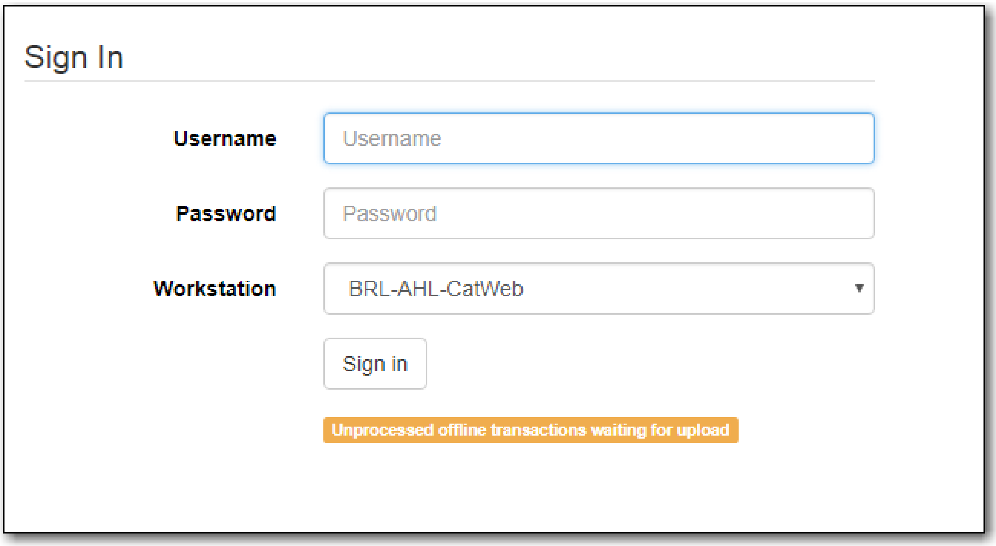
1. Log into Evergreen with a local system administrator account.
2. Go to **Circulation** → **Offline Circulation**.
3. On Session Management tab, click **Offline Sessions**.
4. Click **Create Session**.



5. On the prompt, type in a name. Click **OK/Continue**.
6. The new session shows up on top of the list.

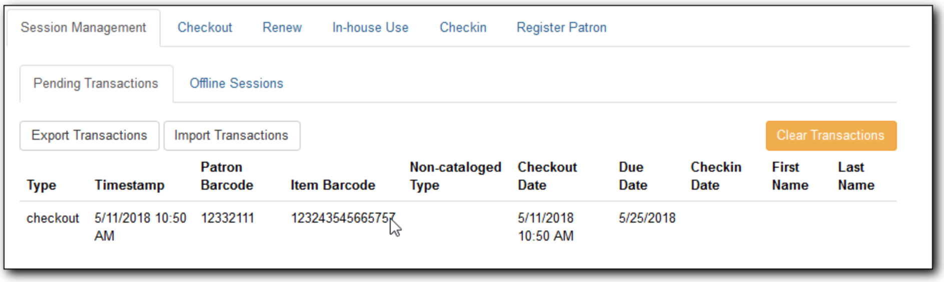
13.3.2. Upload transactions to a session

If there are pending offline transactions on a workstation, on the login page there will be an alert.

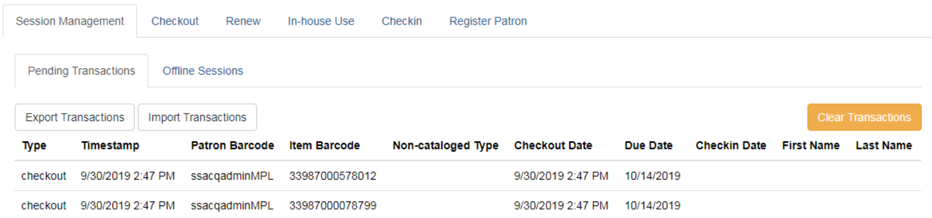


You need to upload the transactions to the session just created on each workstation used for offline circulation.

1. To upload, log in to Evergreen.
2. Go to **Circulation** → **Offline Circulation**.
3. You will see transactions listed on **Pending Transactions** tab under **Session Management**.



4. Click **Offline Sessions** tab. You will see the session your local system administrator just created. Click **Upload**.

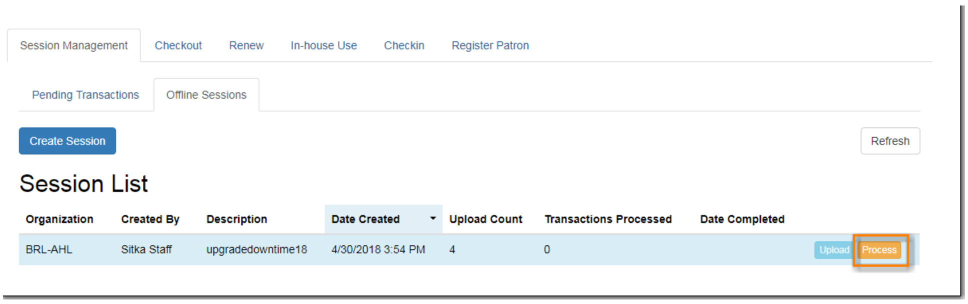


5. Repeat the above process on each workstation used for offline circulation. Once done, local system administrators may process the session.

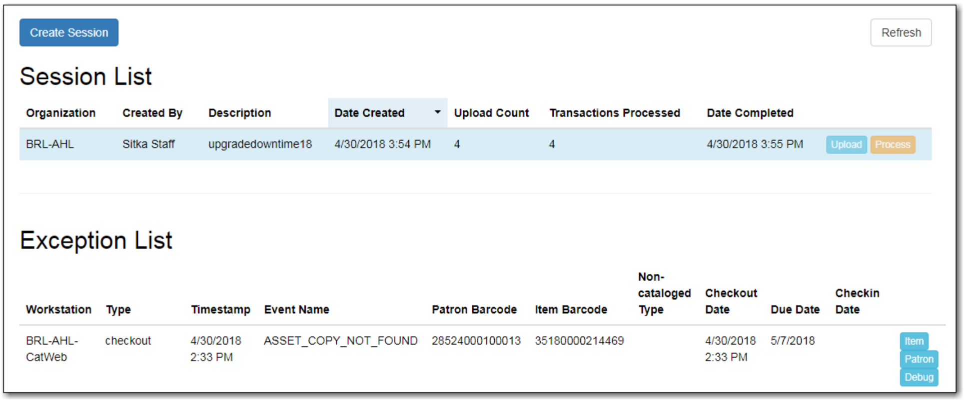
13.3.3. Process the uploaded transactions

To process uploaded transactions, you need to log in with a local system administrator's account.

1. Go to the offline session you created.
2. Check the **Upload Count**, which indicates the number of workstations that have uploaded offline transactions.
3. If the number matches the number of workstations used during offline, click **Process**.



4. It may take a while if you have many transactions. Click **Refresh** to see the processing progress. Once all transactions are processed the Date Completed and Transactions Processed columns will be updated.



5. Scroll to the bottom of the screen to see if there are any entries in the **Exception List**. Some of these may require staff follow up.

13.3.4. Handle Exceptions

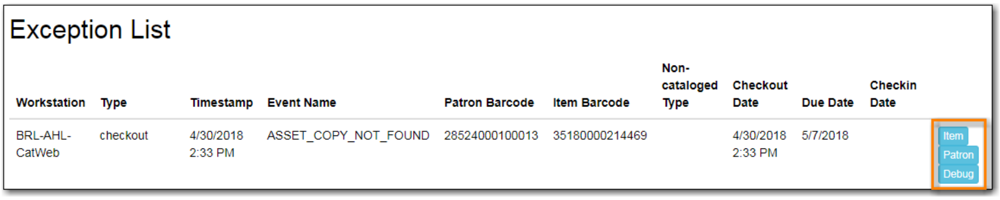
Exceptions are problems that were encountered during processing. For example, a mis-scanned patron barcode, or an item that was not checked in before it was checked out to another patron would all be listed as exceptions. Those transactions causing exceptions might not be loaded into Evergreen database. Staff should examine the exceptions and take necessary action.

These are a few notes about possible exceptions. It is not an all-inclusive list.

- Checking out a item with the wrong date (i.e. the Offline Checkout date is +2 weeks and the item's regular circulation period is +1 week) does not cause an exception.
- Overdue books are not flagged as exceptions.
- Checking out a reference book or another item set to not circulate does not cause an exception.
- Checking out an item belonging to another library does not cause an exception.
- An item that is targeted for a patron hold and captured via offline checkin will not cause an exception unless that item also goes to an In Transit status.
- An item that is on hold for Patron A but checked out to Patron B will not cause an exception. Patron A's hold will be reset and will retarget the next time the hold targeter is run. In order to avoid this it is recommended to not check out holds to other patrons.
- If you check out a book to a patron using a previous barcode for that patron, it will cause an exception and you will have to retrieve that patron while online and re-enter the item barcode in order to checkout the item.
- The Offline Interface can recognize blocked, barred, and expired patrons if you have downloaded the Offline Block List in the browser you are using. You will get an error message indicating the patron status from within the Standalone Interface at check-out time. See the section on the Offline Block List for more information.

At the right side of each exception are buttons for **Item**, **Patron**, and **Debug**.

- Clicking the **Item** button will retrieve the associated item in a new browser window.
- Clicking on the **Patron** button will retrieve the associated patron in a new browser window.
- Clicking the **Debug** button will result in a modal with detailed debugging information.



Common event names in the Exceptions List include:

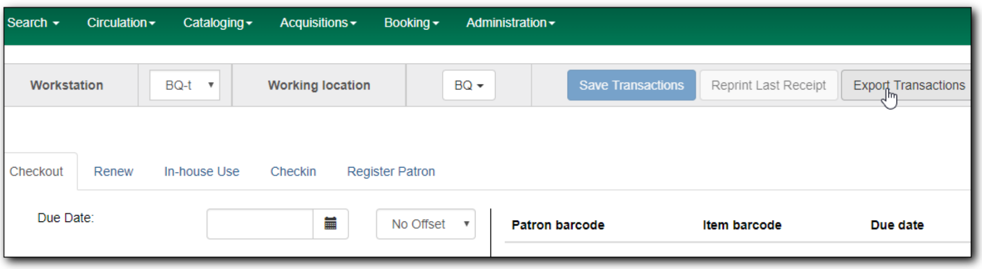
- `ROUTE-ITEM` - Indicates the book should be routed to another branch or library system. You'll need to find the book and re-check it in while online to get the Transit Slip to print.
- `COPY_STATUS_LOST` - Indicates a book previously marked as lost was found and checked in. You will need to find the book and re-check it in while online to correctly clear it from the patron's account.
- `CIRC_CLAIMS_RETURNED` - Indicates a book previously marked as claimed-returned was found and checked in. You will need to find the book and re-check it in while online to correctly clear it from the patron's account.
- `ASSET_COPY_NOT_FOUND` - Indicates the item barcode was mis-scanned/mis-typed.
- `ACTOR_CARD_NOT_FOUND` - Indicates the patron's library barcode was mis-scanned, mis-typed, or nonexistent.
- `OPEN_CIRCULATION_EXISTS` - Indicates a book was checked out that had never been checked in.
- `MAX_RENEWALS_REACHED` - Indicates the item has already been renewed the maximum times allowed. Note that if the staff member processing the offline transaction set has the `MAX_RENEWALS_REACHED.override` permission at the appropriate level, the system will automatically override the error and will allow the renewal.

13.4. Transfer Offline Transactions

Offline transactions can be exported from one workstation and imported to another. This will be helpful when a workstation containing offline transaction can not access network. You may use another workstation to upload the file.

13.4.1. Export Offline Transactions

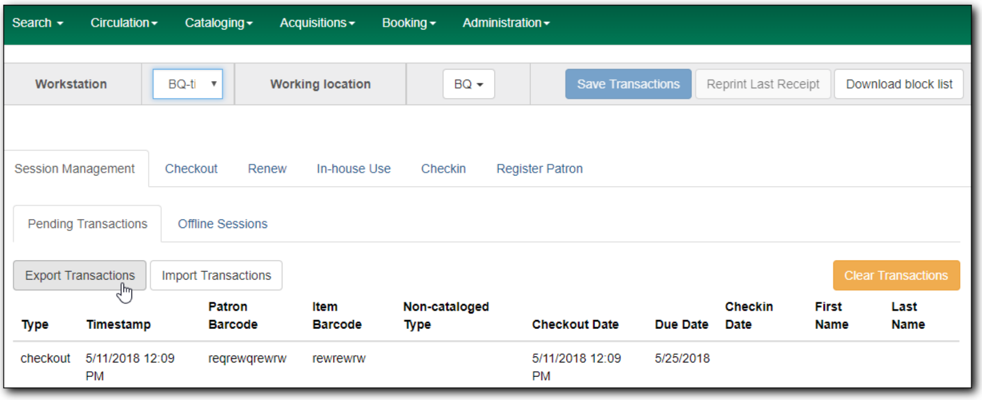
To export transactions while you are offline, navigate to **Circulation** → **Offline Circulation** and click **Export Transactions** in the top-right of the screen. This will save a file entitled pending.xacts to your browser's default download location. If you will be processing these transactions on another workstation, move this file to an external device like a thumb drive.



NOTE Depending on your browser's setting, you may be prompted to choose a location to save the file.

To export transactions while you are logged in, navigate to **Circulation** → **Offline Circulation** and click on the **Session Management** tab. Click on the **Export Transactions** button to generate the pending.xacts file as above.

Double check to make sure the file is saved safely on the workstation, click **Clear Transactions** to clear the pending transactions.



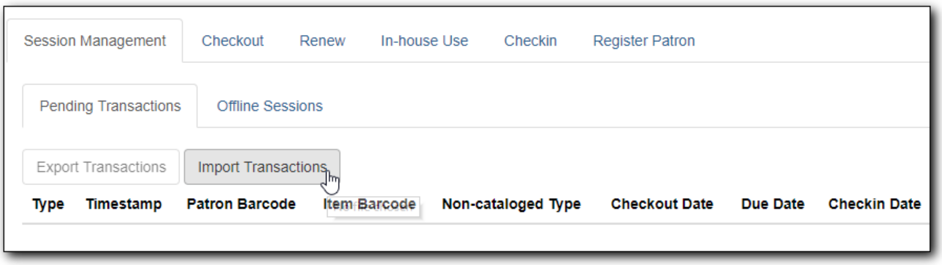
CAUTION

If you do not clear transactions after exporting, next time when you do offline circulation, your records will be appended to these transactions.

13.4.2. Import Offline Transactions

To import transactions, make sure your exported transactions file is available to the workstation you wish to load them to.

1. Log in to the staff client.
2. Navigate to **Circulation** → **Offline Circulation**
3. Click on the **Session Management** tab.
4. Click on the **Import Transactions** button.



5. Navigate to the location on your computer where the exported pending.xacts file is saved.
6. Select the file for importing.
7. The **Pending Transactions** list will populate with your imported transactions.
8. You may now proceed according to the instructions under Upload Offline Transactions.

Cataloguing

Chapter 14. Searching the Database for Cataloguing Purposes

[Sitka Training Video - Search the Catalogue (4:35)]

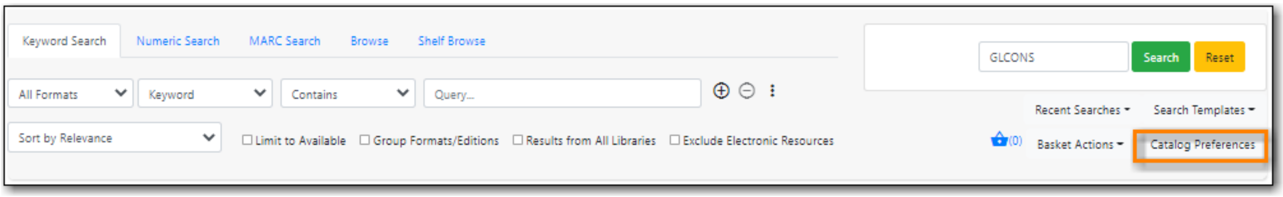
It is critical to search the database before adding titles, volumes, or copies. Good practice is to assume the item you are adding already exists, and to do an exhaustive search for the item before cataloguing it. By doing so, you will discover whether you need to add your item to an existing title record, or if you need to import or create a new title record. It is very important that you scope your cataloguing searches to the entire Sitka database. In the Catalogue Preferences you set Sitka as your Default Search Library.

14.1. Catalogue Preferences

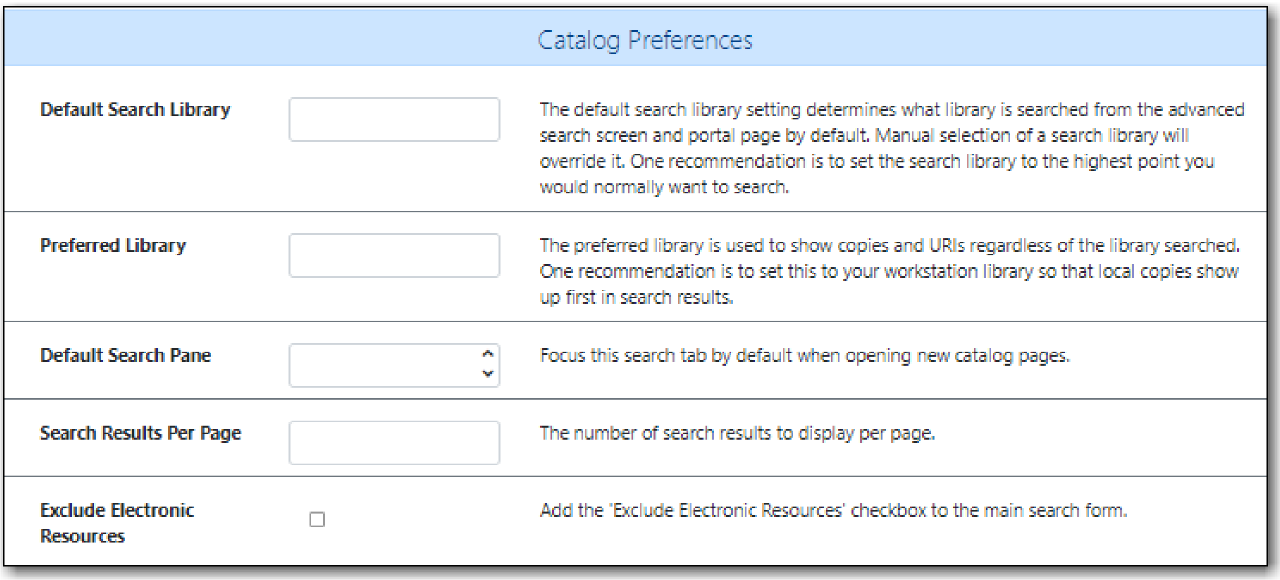
Catalogue related preferences can be set directly in the staff catalogue.

To set your catalogue preferences:

1. In the catalogue click on **Catalog Preferences**.



2. Set the values you would like for your preferences.



   a. **Default Search Library** This determines what library is searched from the advanced search screen and portal page by default. You can override this setting when you are actually searching by selecting a different library. One recommendation is to set the search library to the highest point you would normally want to search.

   b. **Preferred Library** This is used to show copies and electronic resource URIs regardless of the library searched. One recommendation is to set this to your home library so that local copies show up first in search results.

c. **Default Search Pane** You can change which search pane is loaded by default when pening a new catalogue window. Choose from Keyword Search, Numeric Search, MARC Search, Browse, and Shelf Browse.

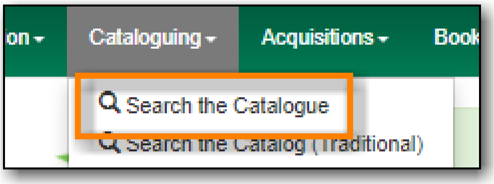
d. **Search Results Per Page** You can enter the number of search results that display per page. We recommend keeping this number under 200.

e. **Exclude Electronic Resources** Checking this adds the checkbox to the main search form.

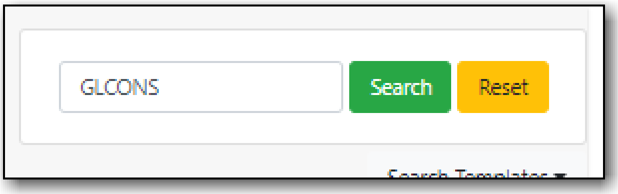
NOTE	The preference set in the staff client override any preferences for the logged in account that have been set in the public catalogue via My Account.

14.2. Numeric Search

1. To search the catalogue for holdings select **Cataloguing** → **Search the Catalogue**.

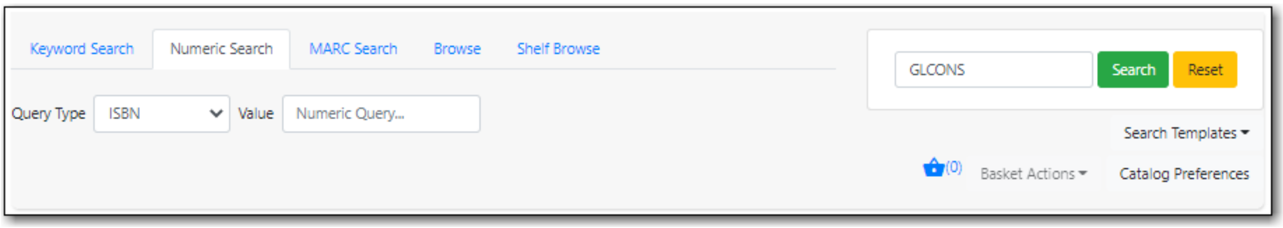


2. When searching for cataloguing purposes it is important to ensure that you search the entire consortium.

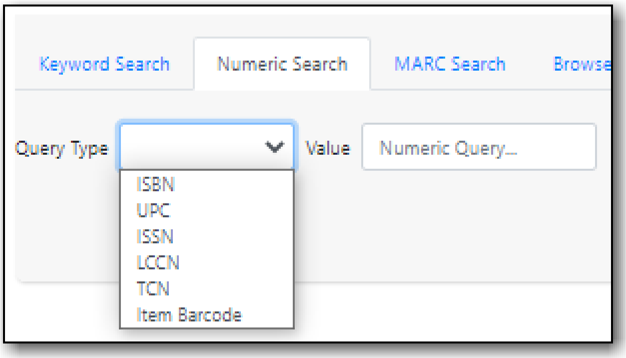


   a. (GLCONS is the Green Land Consortium on Sitka's training server.)

3. Select the **Numeric Search** tab. It will be open by default if it's set as your Default Search Pane.

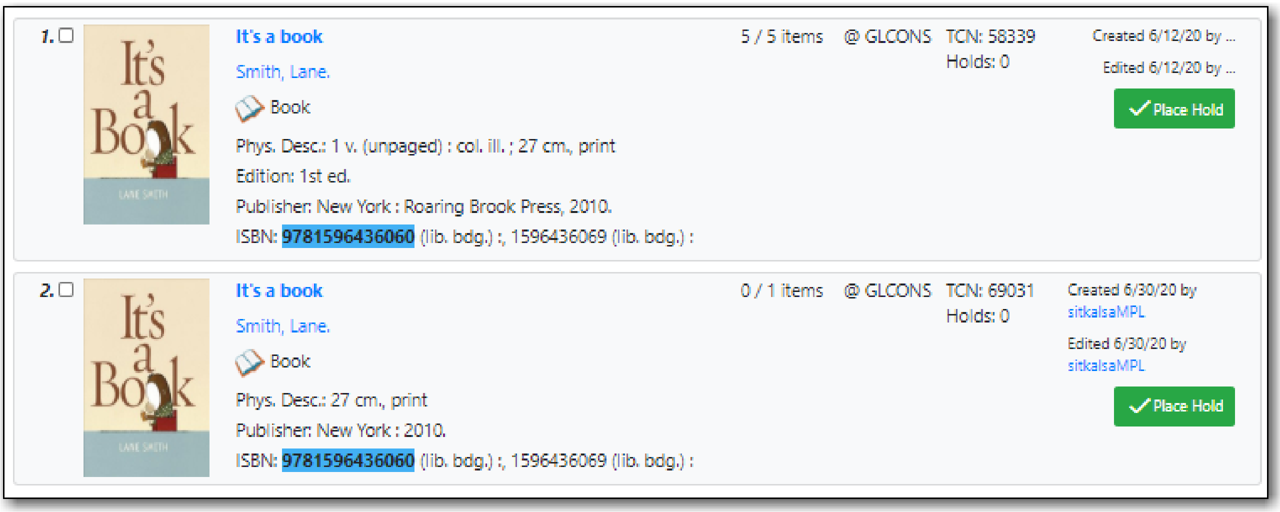


4. You can search by ISBN, UPC, ISSN, LCCN, TCN, or Item Barcode.



5. Enter your search criteria and click **Search**.

6. Your results are displayed. Refer to Viewing Search Results for Cataloguing Purposes for information on determining which result to add your holding to.



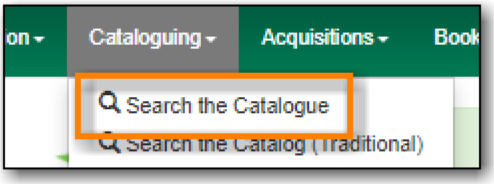
TIP

- UPC's are only recognized by the Numeric Search when the 024 indicator 1 is coded as "1" for Universal Product Code.
- If searching a LCCN do not use a hyphen, add a 0 in place of a hyphen, e.g. 2001001234.
- If an OCLC number is nine digits then Evergreen uses ocn as a prefix. For example: ocn123456789.
- If an OCLC number is less than 8 digits then Evergreen uses ocm as a prefix. In addition Evergreen will automatically prefix the number with zeros so that it is nine digits. For example: ocm01234567, or ocm00123456.

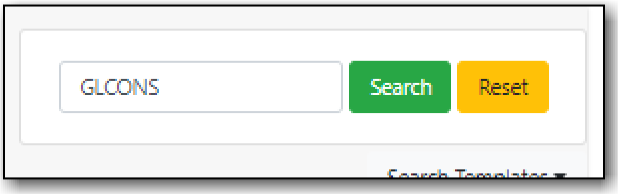
14.3. Keyword Search

When searching the catalogue for cataloguing purposes the Numeric Search should be preferred over the Keyword Search. Libraries that catalogue non-bibliographic items (laptops, museum passes, cake pans, etc.) that don't use standard identifiers, like ISBN, may need to use the Keyword Search when adding additional items to these records.

1. To search the catalogue for holdings select **Cataloguing** → **Search the Catalogue**.

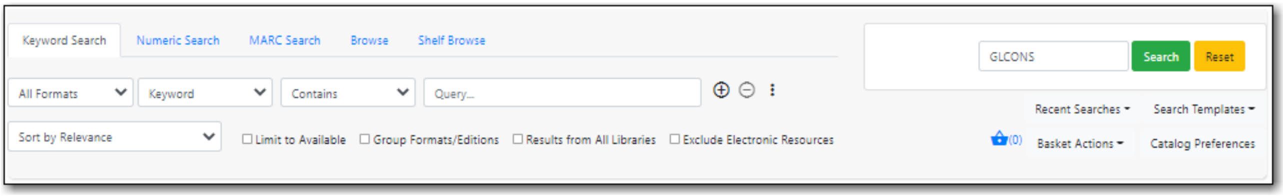


2. When searching for cataloguing purposes it is important to ensure that you search the entire consortium.

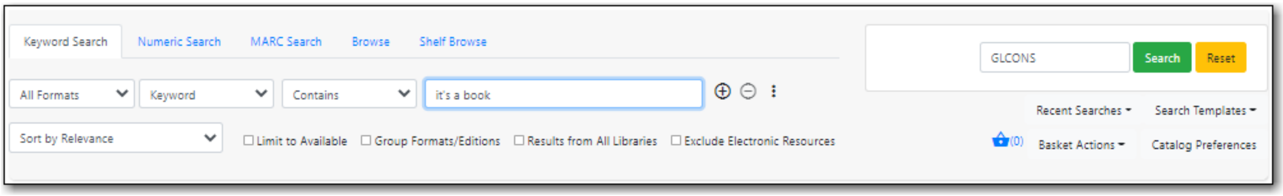


   a. (GLCONS is the Green Land Consortium on Sitka's training server.)

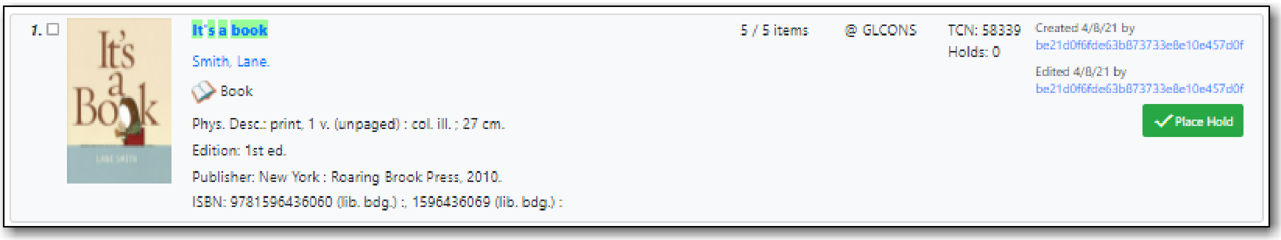
3. Select the **Keyword Search** tab. It will be open by default if it's set as your Default Search Pane.



4. Enter your search criteria and click **Search**.



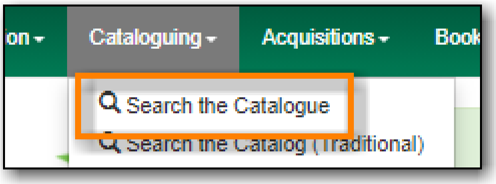
5. Your results are displayed. Refer to Viewing Search Results for Cataloguing Purposes for information on determining which result to add your holding to.



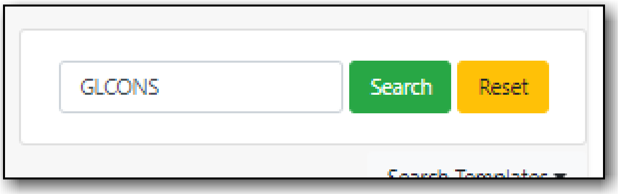
TIP It is possible to search ISBNs by Keyword, but results may not be exhaustive. We recommend using **Numeric Search** when searching for ISBN or other standard identifiers. Refer to Numeric Search.

14.4. MARC Search

1. To search the catalogue for holdings select **Cataloguing** → **Search the Catalogue**.

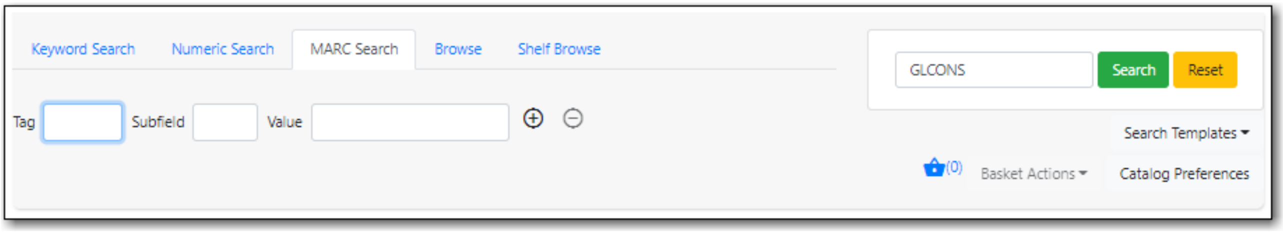


2. When searching for cataloguing purposes it is important to ensure that you search the entire consortium.

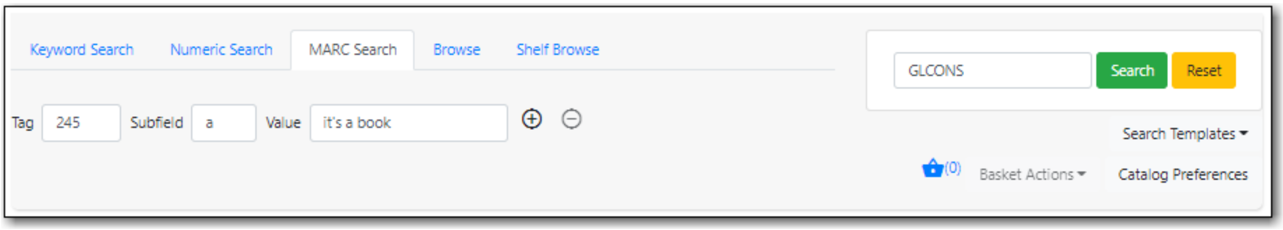


   a. (GLCONS is the Green Land Consortium on Sitka's training server.)

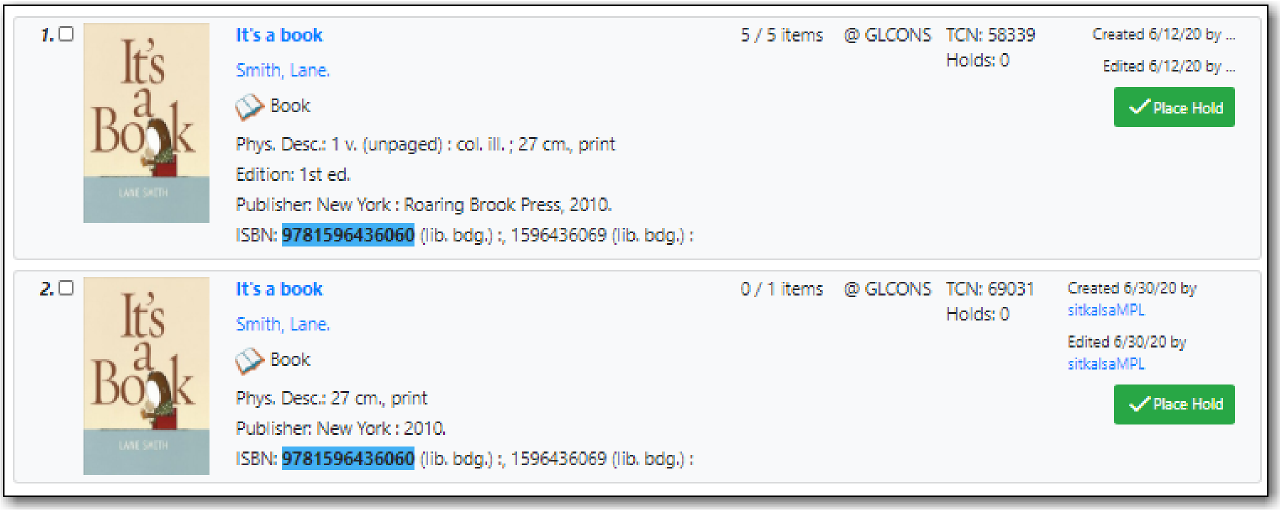
3. Select the **MARC Search** tab. It will be open by default if it's set as your Default Search Pane.



4. Enter the tag, subfield, and value and click **Search**.



5. Your results are displayed. Refer to Viewing Search Results for Cataloguing Purposes for information on determining which result to add your holding to.

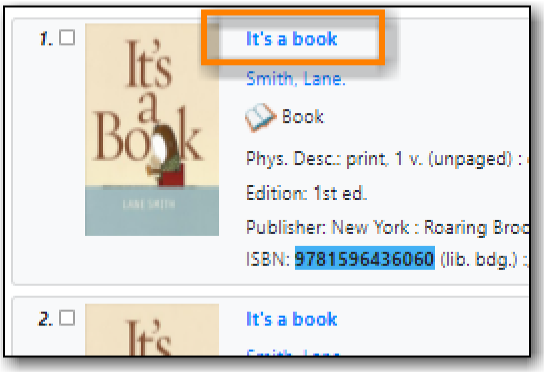


14.5. Viewing Search Results for Cataloguing Purposes

When you retrieve results it's important to look at the results to decide which is the best match for your item. Refer to Characteristics of a "Best" MARC Record in the Sitka Database.

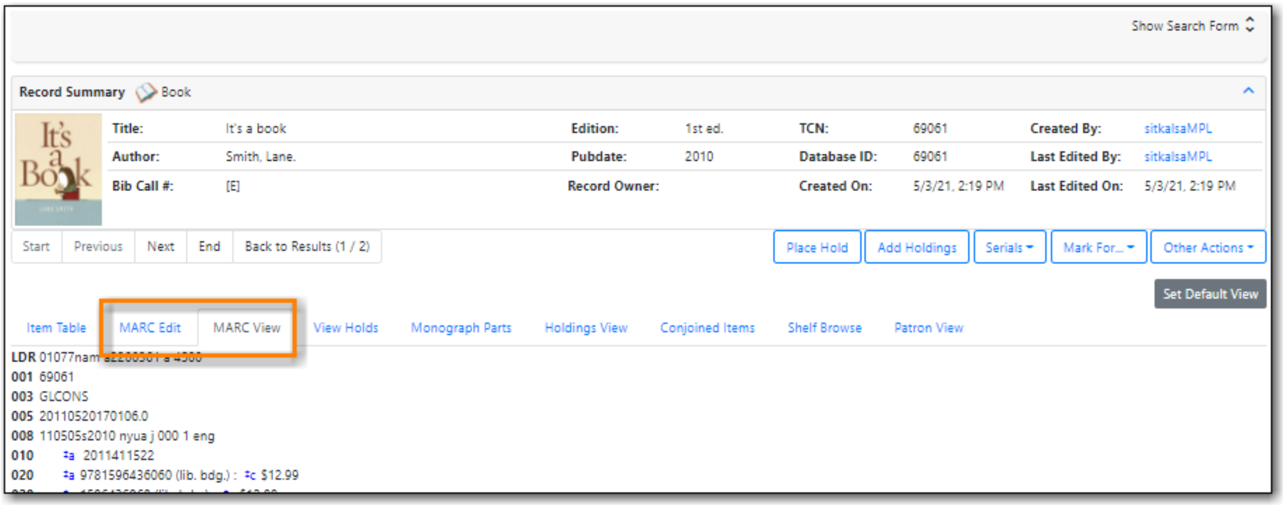
1. The results for your search will display.
   a. Brief holdings and bibliographic details display for each search result.

2. To view the record details, click on the title link.



3. Use the **MARC View** or **MARC Edit** tab to look at the MARC record to confirm that it matches with your item. Refer to the Cataloguing Procedures section of the Policy Manual for

information on how to determine a match.



4. If satisfied that the record matches the item in hand, you can proceed to add your holdings to the record.

Chapter 15. Adding Holdings to Bibliographic Records

15.1. Adding Holdings to Bibliographic Records

Sitka Training Video - Holdings Editor (7:26)

CAUTION	• Make sure your browser allows Evergreen to open pop-ups or the Holdings Editor will not appear. See Browser Configuration.

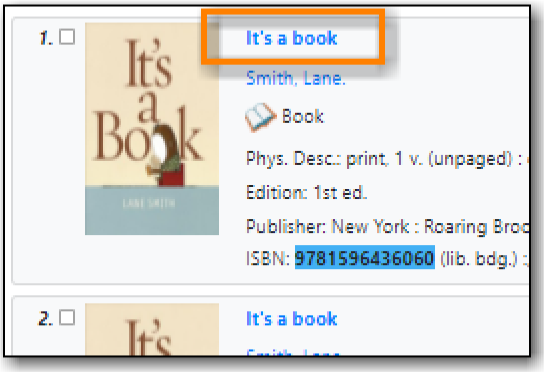
15.1.1. Adding Holdings

Sitka Training Video - Adding Holdings (1:38)

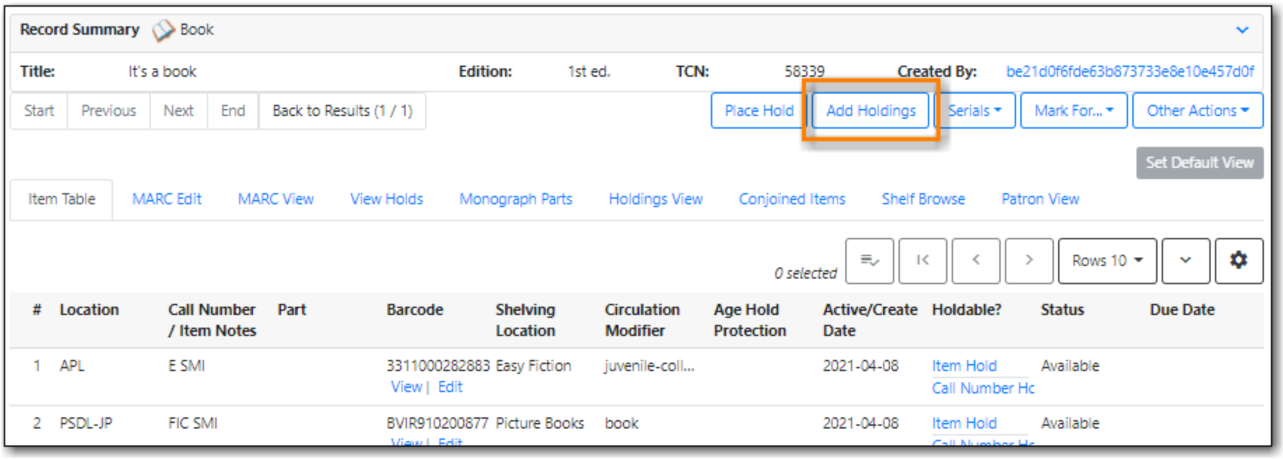
1. Search the catalogue for a record that matches the item in hand, as described in Searching the Database for Cataloguing Purposes.

   a. If you do not find a match, refer to the Sitka Cataloguing Policy for recommendations on required procedures.

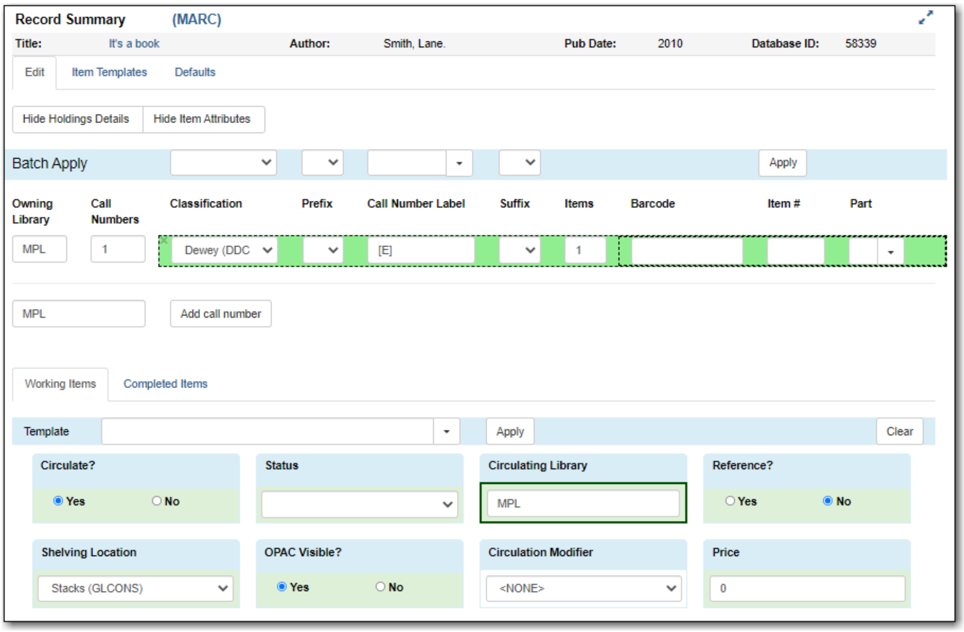
2. Click on the title link to open the record.



3. Click **Add Holdings**.



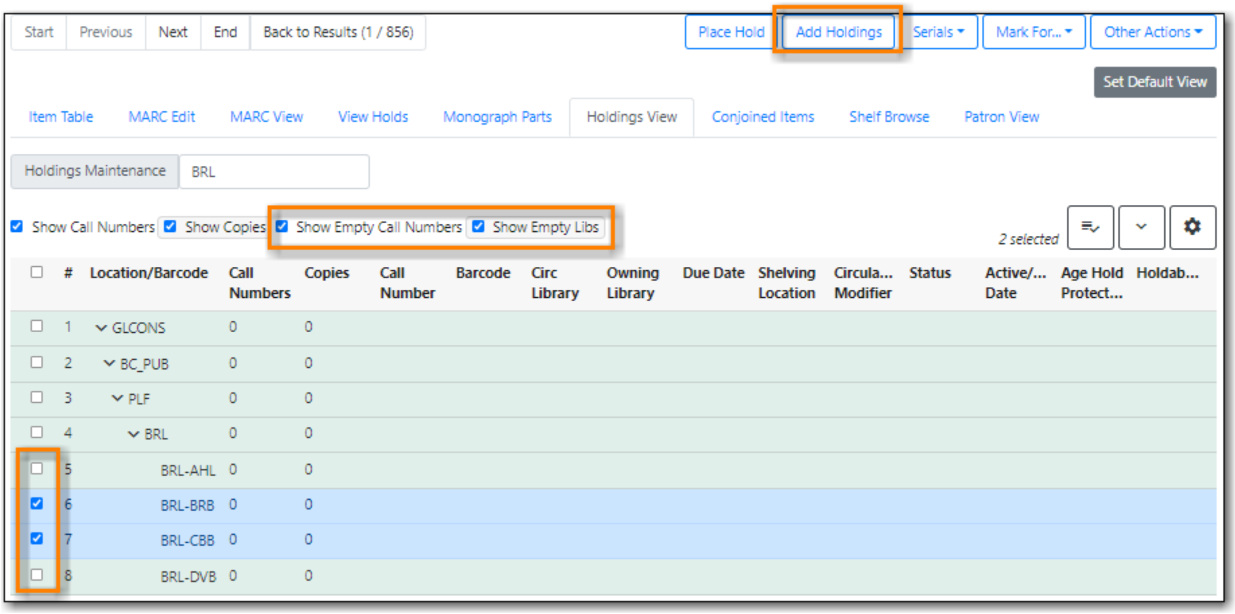
4. The Holdings Editor will open up in a new tab and will include the Call Number/Volume Editor.



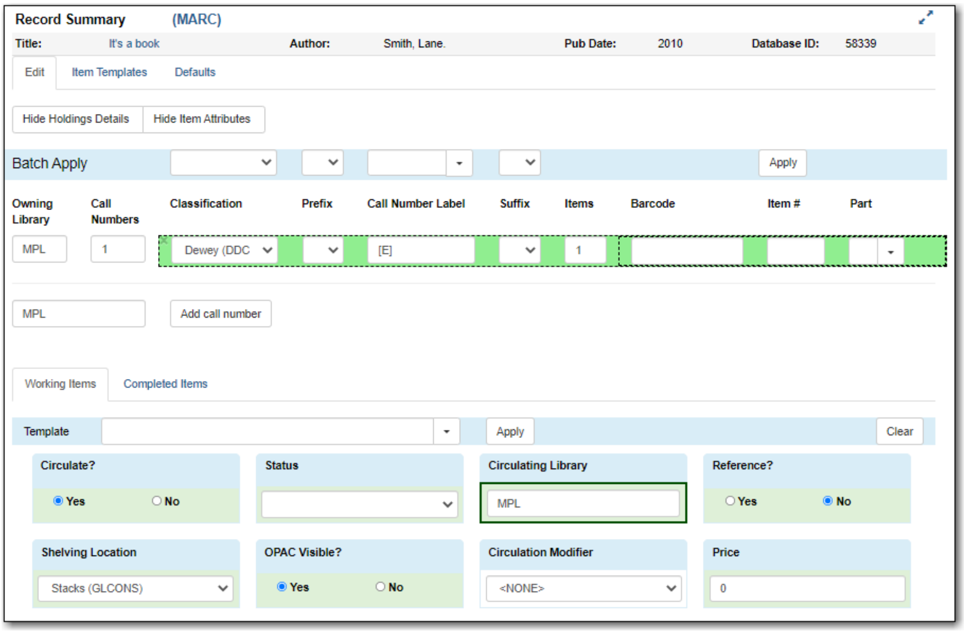
5. Complete the required fields for both the call number and item records.
   a. You can configure the default fields displayed in Holdings Editor. Click on **Defaults** on Holdings Editor. See Holdings Editor Defaults for more information.
   b. By default, a new item has **In Process** status, unless you choose a different one when creating it. Item must be checked in to become **Available** and to create item's **Active Date**.
   c. Refer to Item Attributes for information about individual fields in an item record.
   d. To ensure data consistency, we recommend using holding templates. Select one from the dropdown list, then click on **Apply**. Refer to Holdings Templates for more information on creating and using holding templates.
6. Once done, click on **Save & Exit**. The pop-up tab is closed.

15.1.2. Adding Holdings to Multiple Branches

1. Go to the **Holdings View** tab and select the branches you'd like to add items to.
   a. If you do not select a branch, the default owning and circulating library is your login working location.



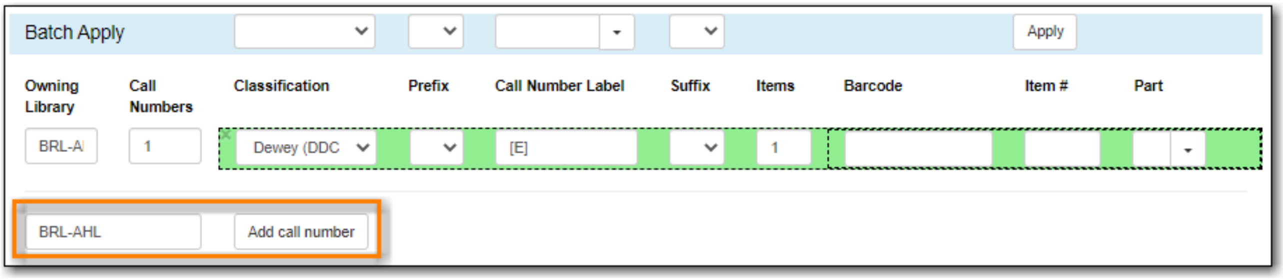
2. Click **Add Holdings**. The Holdings Editor will open up in a new tab and will include the Call Number/Volume Editor.



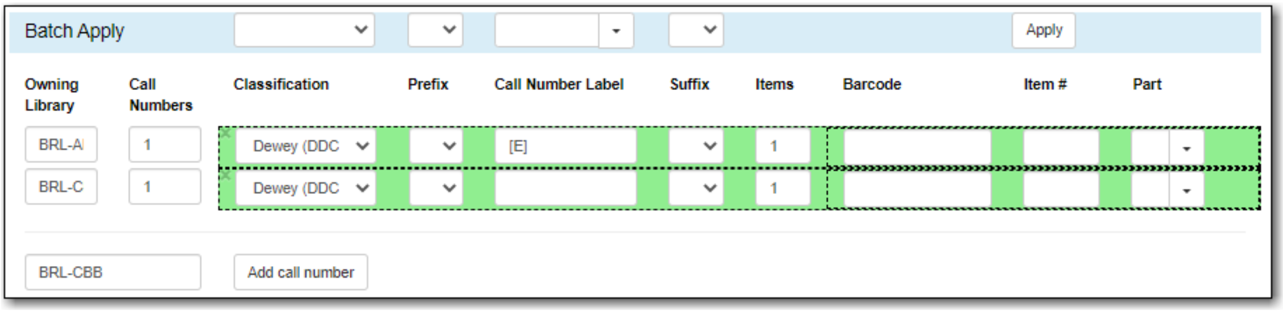
TIP Make sure both the **Show empty call numbers** and **Show empty libraries** checkboxes are selected in order to display branches without items on the library list.

You can also add call numbers for additional branches from within the Call Number/Volume Editor.

1. Click in the library field beside the **Add call number** button and select the branch from the drop down menu.
2. Click **Add call number**.

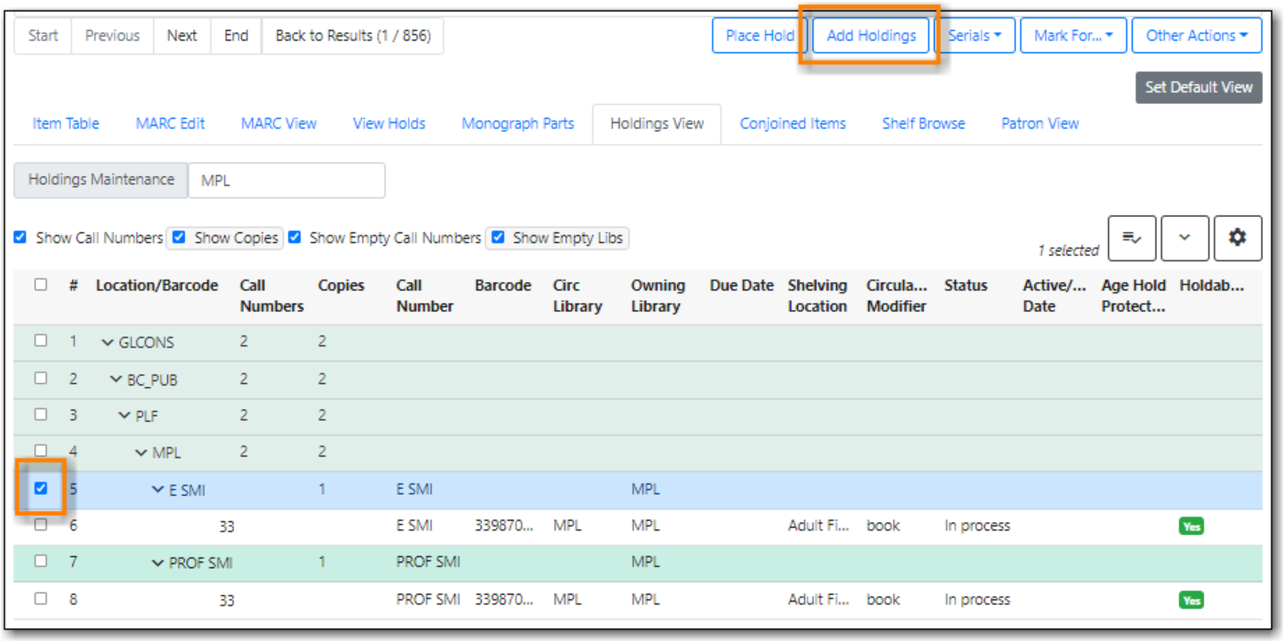


3. An additional line will display.



15.1.3. Adding Items to an Existing Call Number

1. If your library has multiple call numbers and you want to an new item to a particular one, select the call number on the **Holdings View** tab.
2. Click **Add Holdings**.



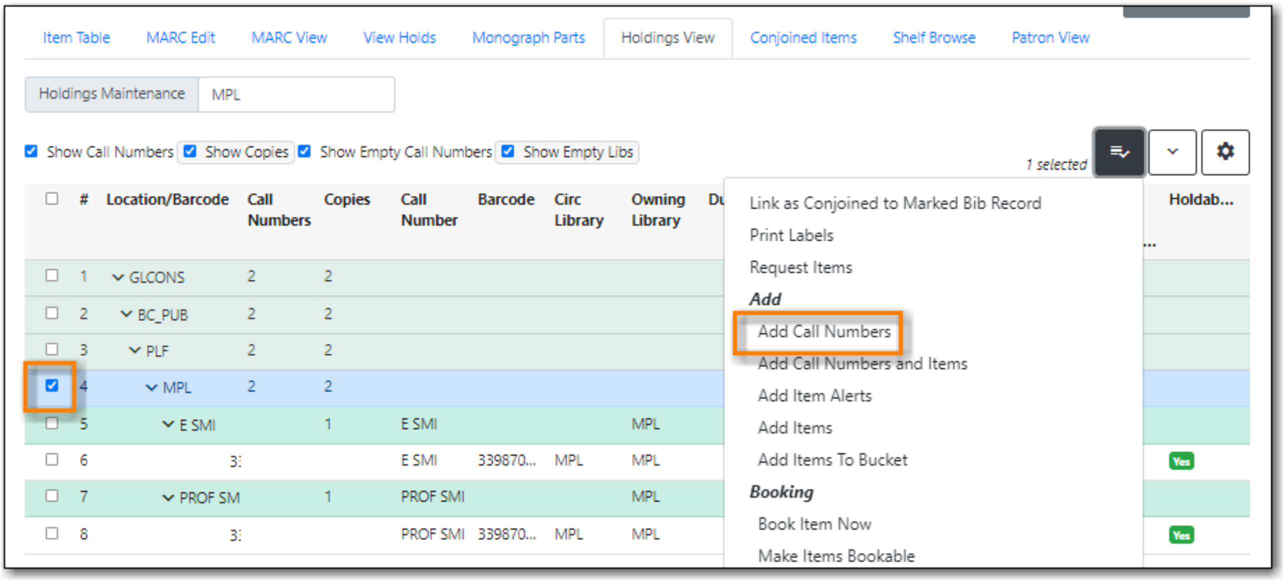
3. The Holdings Editor will open up in a new tab and will include the Call Number/Volume Editor.

15.1.4. Adding a Call Number without an Item

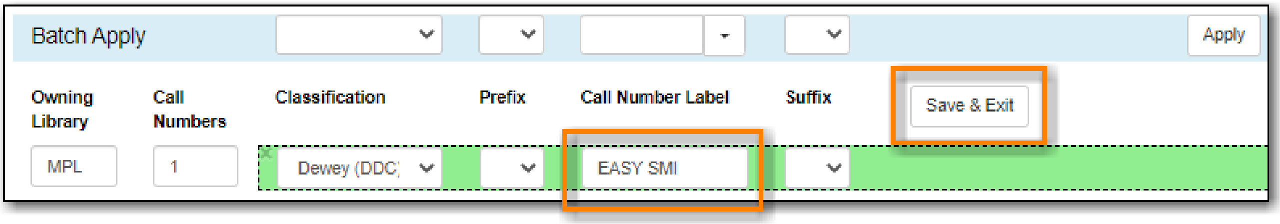
Sometimes you may need to create a call number record without any item. For example, you may want to move one of two regular collection items to reference, which will use a different call number prefix, or catalogue a pre-catalogued item.

1. Find the title record, then click on **Holdings View**, select your library, go to **Actions** list, and

scroll to **Add** to select **Add Call Numbers**.



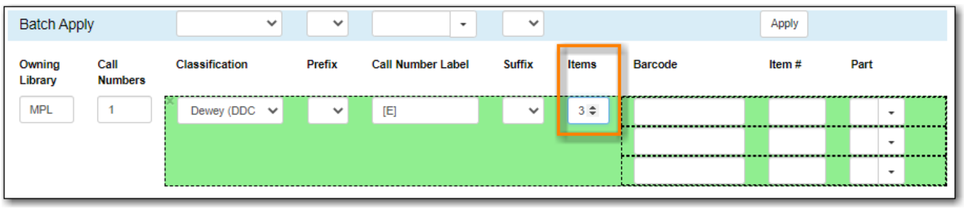
2. Complete the call number fields, then click **Save & Exit**.



TIP	Evergreen does not allow one library to have two identical individual call numbers under one title. When saving new items or editing existing items, items sharing the same call number are grouped under one call number record. This call number can be edited via any item under it, and any edit affects all items. If an item needs a different call number, you need to create a new call number record, then transfer the item to it.

15.1.5. Adding Multiple Items to One Call Number

1. To add multiple items to one library on Holdings Editor, use the arrow in the **Items** column to increase the number. Extra lines show up for more barcodes.



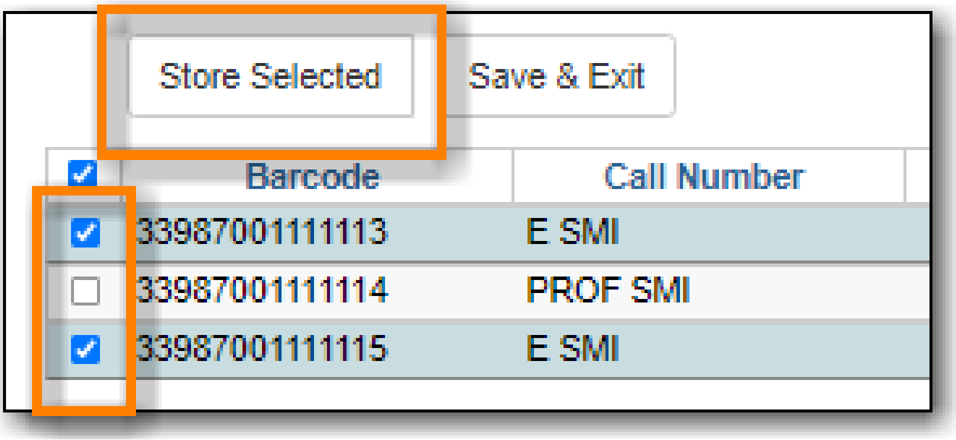
2. Type or scan in the barcodes for each item.

NOTE	**Save & Exit** is greyed out until barcodes are entered.

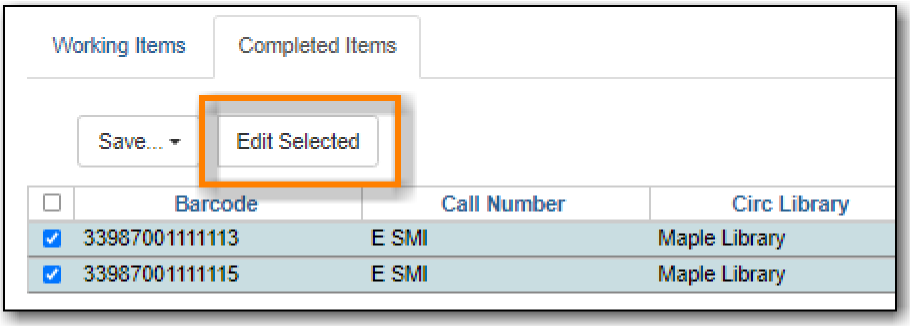
15.1.6. Working on Multiple Items

If you add multiple items, and they do not share the values in one or more item attributes, you can select and work on those that share item attributes as a group. You can also temporarily store some items to **Completed Items** tab, then work on those on **Working Items** tab, which share the same attributes. Save and exit when all items are done.

1. After you enter the barcode(s), items are displayed under **Working Items**. Select those items that share the same item attribute values. Complete the item attributes for these items. To move them to **Completed Items** tab, click on **Store Selected**.

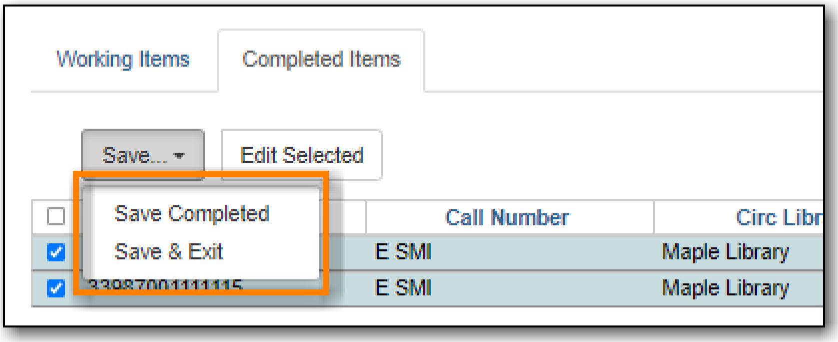


2. Completed items may be further edited, if needed. Select those you want to edit, then click on **Edit Selected**.



3. Selected items are moved back to the **Working Items** tab where you can edit them. After editing, you can store them in the **Completed Items** tab, or click **Save & Exit** when all items are done.

4. You can **Save Completed** items or **Save & Exit** from **Completed Items** tab. When you choose to **Save Completed**, item records are created in the database, but they remain on the **Completed Items** tab.



CAUTION

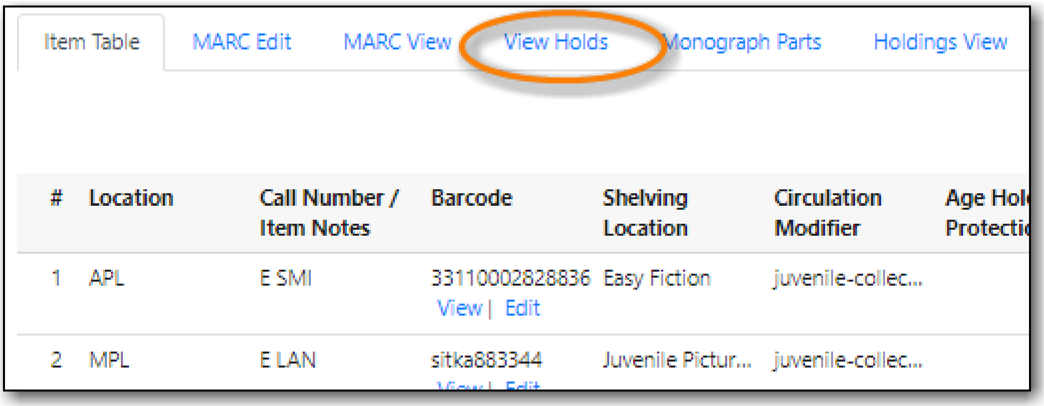
- Stored items on **Completed Items** tab are not saved in the database until you click on **Save & Exit** or **Save Completed**. They are available on the current Holdings Editor screen only. If you close the browser tab without saving them, you will lose them.
- **Save Completed** will save those items on **Completed Items** tab only. Those on **Working Items** tab will be considered discarded, though they do not disappear.

15.2. New Items and Holds

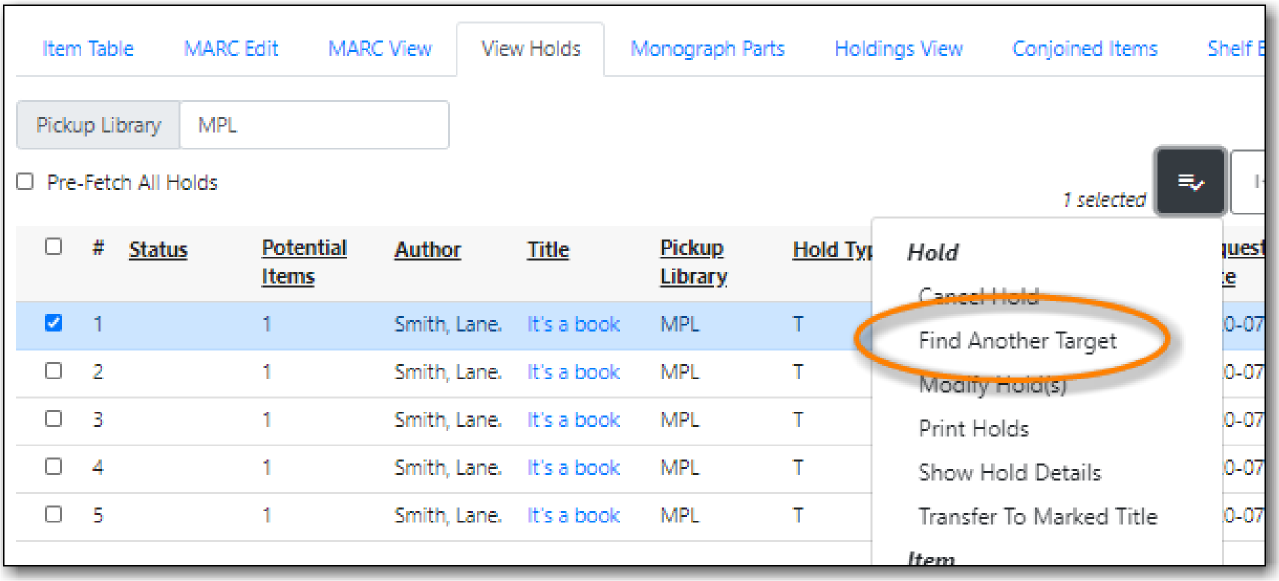
Because of the way Evergreen targets holds, new items are not guaranteed to fulfill pre-existing holds until 24 hours after cataloguing. If you are a single branch library and your cataloguing turn-around time is shorter than 24 hours you can ensure the new item is captured at check in by using the checkin modifiers **Retarget Local Holds** and **Retarget All Statuses**.

As the checkin modifiers will only re-target the top local hold, which may not be the top system hold, multi-branch libraries should instead follow the procedure below.

1. After adding the item, click on **View Holds**.



2. If there are outstanding hold requests, select the hold that is next in line then click the actions button and choose **Find Another Target**. This forces Evergreen to re-target the hold and recognize the newly catalogued item.



3. Check in the new item to capture it for the selected hold.

15.3. Adding Holdings for Non-physical Resources

There are two ways to catalogue non-physical resources in Evergreen.

Our recommended process is to use specially coded MARC records as described in Cataloguing Non-physical Resources.

Alternatively you may add placeholder holdings to a MARC record.

- Use the same steps as adding physical holdings as described in the prior section.
- It is important to use item barcodes from within your designated barcode range.
- Placeholder holdings will scope your non-physical resources to your public catalogue.

Chapter 16. Maintaining Holdings

16.1. Holdings Editor

Sitka Training Video - Holdings Editor (13:58)

The Holdings Editor is used to create or edit call number and item records.

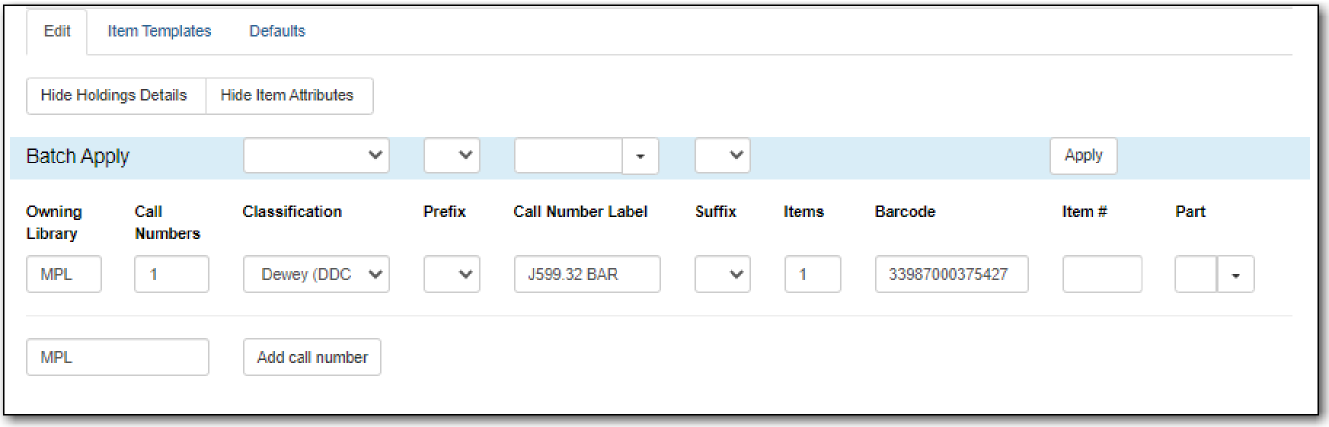
The Holdings Editor can be accessed:

- from within a bibliographic record by clicking on the **Add Holdings** button.
- from within a bibliographic record by going to **Holdings View** and selecting the appropriate option from the **Actions** menu.
- from within a bibliographic record by clicking **Edit** on the **Item Table** tab.
- from within an item bucket by selecting the appropriate option from the **Actions** menu.
- by scanning an item into **Item Status** and selecting the appropriate option from the **Actions** menu.

16.1.1. Holdings Details

Sitka Snippet Video - Holdings Details (2:38)

The Holdings Details section of the Holdings Editor contains information related to your library's call numbers.



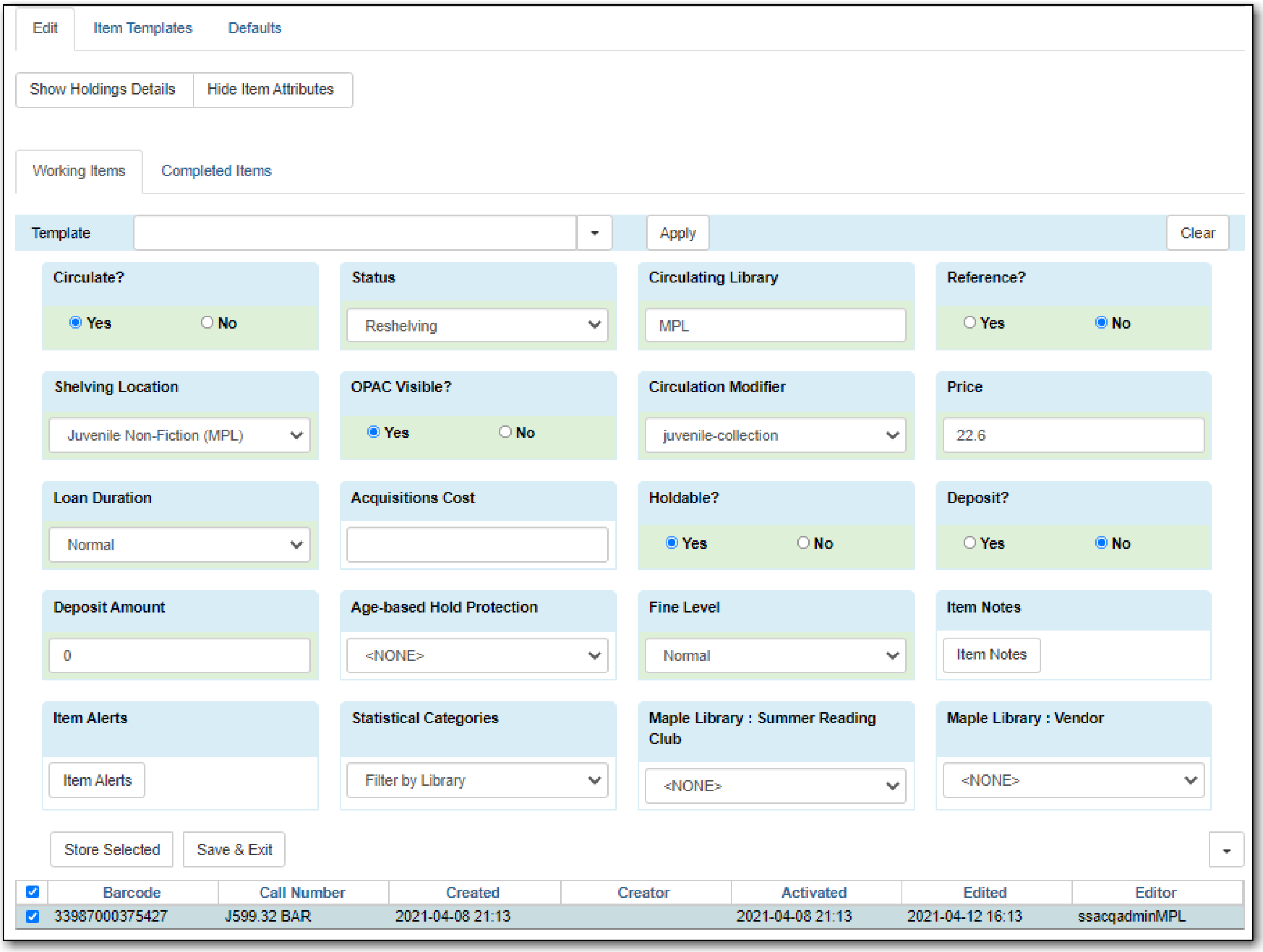
Attribute	Description	Required	Note
Owning Library	The library that owns the item.	Yes	For multi-branch libraries this will be a particular branch.
Call Numbers	The number of call numbers displaying in the editor.	Yes	When this number is increased additional fields will appear.

Attribute	Description	Required	Note
Classification	The classification scheme used by the call number	Yes	The classification scheme affects how call numbers are sorted in the Shelf Browse.
Prefix	Configured prefixes can be selected from the drop down menu.	No	See [_prefix_and_suffix] for more information.
Call Number Label	The call number you would like to assign to your item.	Yes	Evergreen will pre-populate this field with the value in the 082 $a or 050 $a, if there is a value in the field, depending on which classification scheme is the default.
Suffix	Configured suffixes can be selected from the drop down menu.	No	See [_prefix_and_suffix] for more information.
Items	The number of items using the particular call number label.	Yes	When this number is increased additional barcode, item #, and parts fields will appear.
Barcode	The barcode for the item.	Yes	
Item #	The item number assigned to the item by library staff to keep track of how many copies of an item the library has.	No	The item number does not display on the spine label or in the public catalogue.
Part	The use of parts is not currently supported in Sitka's Evergreen.	No	

16.1.2. Item Attributes

Sitka Snippet Video - Item Attributes (6:02)

The Item Attributes section contains information specific to your library's items. You can customize which attributes display in the defaults for the Working Item Tab.



The table below provides detailed descriptions of the item attribues.

Attribute	Description	Note
Acquisition Cost	The actual amount of money paid for the item	This automatically filled with the billed amount from acquisitions module. It can also be entered manually by libraries not using acquisitions.

Attribute	Description	Note
Age-based Hold Protection	Allows libraries to restrict holds to be picked up at a range of libraries	Sitka provides two sets of rules: x_month_within_single_branch and x_month_among_multi_branch. The former allows holds to be picked up at the item's circulating library only for x months, while the latter at libraries sharing the same parent with the circulating library, e.g. all branches of a library system or all single-branch libraries within a federation. In general, use the former if you are a single_branch library and want to restrict holds to your own library, or if you are a branch of a multi-branch library system and want to keep the holds at your own branch. Use the latter if you are a multi-branch library system and allow items to fill holds picked up at all your branches, but not to go out of your system.
Circulate?	Indicates whether the item can circulate or not	Leave it as "YES", unless the item is in a circulating shelving location but should not itself circulate. If the shelving location's Circulate? attribute is "NO", this field will have no effect. The "NO" value in this field overrides the shelving location's Circulate? "YES" value.
Circulation as Type	Circulation policy may be controlled by the media type in MARC records. When media type is used, this field can be used to override the MARC media type for individual items. It can also be used for statistical purposes.	Not currently used in Sitka's Evergreen.

Attribute	Description	Note
Circulation Library	Library currently circulating the item	
Circulation Modifier	An identifier used for applying circulation policies or for statistical purposes	A shared list of Sitka circulation modifiers displays in the dropdown list for all libraries. Each library selects circulation modifiers to use, and defines its own circulation policy for each modifier.
Deposit?	Indicates whether the checking out item requires a deposit or not	
Deposit Amount	Amount required as a deposit for the item	When the item is checked out a bill for this amount is automatically created in the patron account.
Fine Level	Indicates whether an item uses the Low, Normal, or High fine level attached to its circulation modifier or shelving location set up in the circulation policy.	Each circulation modifier/shelving location may have three fine levels, corresponding to these three values. Use *Normal* if only one fine level is used. Please contact Co-op Support if you need multiple fine levels for one circulation modifier/shelving location.
Floating	Indicates whether an item belongs to a floating group	This functionality must be configured by Co-op Support. If Co-op Support has not configured floating groups for you, leave the field blank.
Holdable?	Indicates whether the item is holdable or not	Leave it as "YES", unless the item is in a holdable shelving location, but holds should not be allowed on this particular item. If shelving location's Holdable? is set to "NO", this field will have no effect. The "NO" value in this field overrides the shelving location's Holdable? is "YES" field.

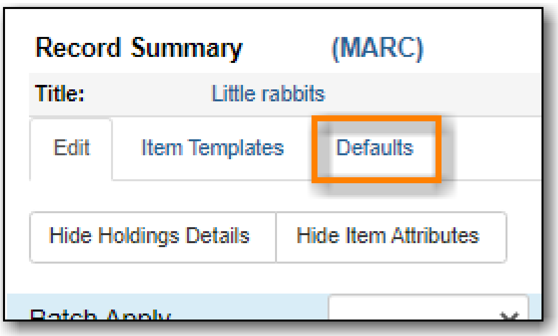
Attribute	Description	Note
Item Alert	Used for information that should been seen when an item is checked in or out (ie. Damage or number of pieces to check for).	CAUTION: some 3rd party self check machines cannot display item alerts.
Item Note	Used for information specific to the item.	Notes set as public will display in the public catalogue.
Item Tags		Not currently used in Sitka's Evergreen.
Loan Duration	Indicates whether an item uses the Short, Normal, or Long loan duration attached to its circulation modifier or shelving location set up in the circulation policy.	Each circulation modifier/shelving location may have three loan durations, corresponding to these three values. Use *Normal* if only one loan period is used. Please contact Co-op Support if you need multiple loan durations for one circulation modifier/shelving location.
OPAC Visible?	Indicates whether the item is visible in the public catalogue	Leave it as *YES*, unless the item is in an OPAC visible shelving location, but should not be displayed on OPAC. If OPAC Visible? is "NO" for the shelving location, this field will have no effect. The "NO" value in this field will hide the item, if OPAC Visible? is "YES" for the shelving location.
Price	Replacement price of the item.	Evergreen uses this price when billing patrons for lost items.
Quality	Indicates the quality of the item	Not currently used in Sitka's Evergreen.
Reference?	Indicates whether the item is reference or not.	This flag can be used for setting up circulation policies or for statistical purposes.

Attribute	Description	Note
Shelving Location	The location where the item can be found.	Shelving locations belonging to the working location and the organizations on a higher hierarchal level (library system, federation, or Sitka) are displayed in the dropdown list. Multi-branch libraries may create system level shelving locations for all branches to share.
Statistical Categories	Item statistical categories created by your library or federation.	Use the dropdown list to choose which organization's entries to display.
Status	Current status of the item	By default a new item record is assigned a status of In Process. Some status cannot be selected from the drop down menu as an action, such as checking out the item, is required to set the item to that status.

16.2. Holdings Editor Defaults

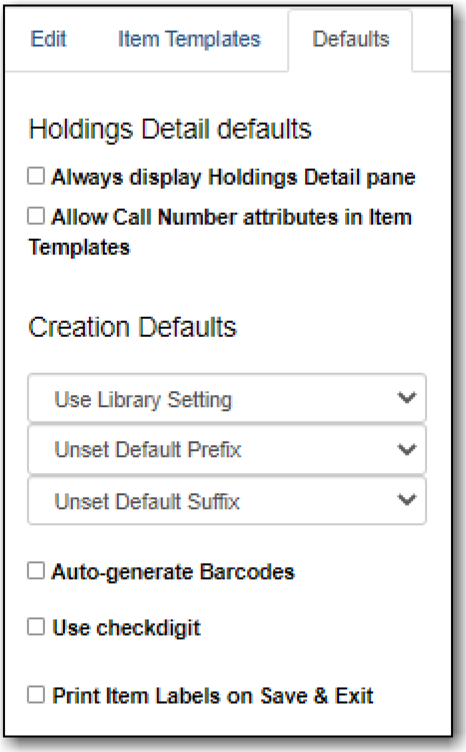
Sitka Snippet Video - Holdings Editor Defaults (2:09)

In the Holdings Editor click on the **Defaults** tab to change settings for the Holdings Editor.



16.2.1. Holdings Detail Defaults

Select the checkboxes or use the drop down menus to set the settings you'd like.

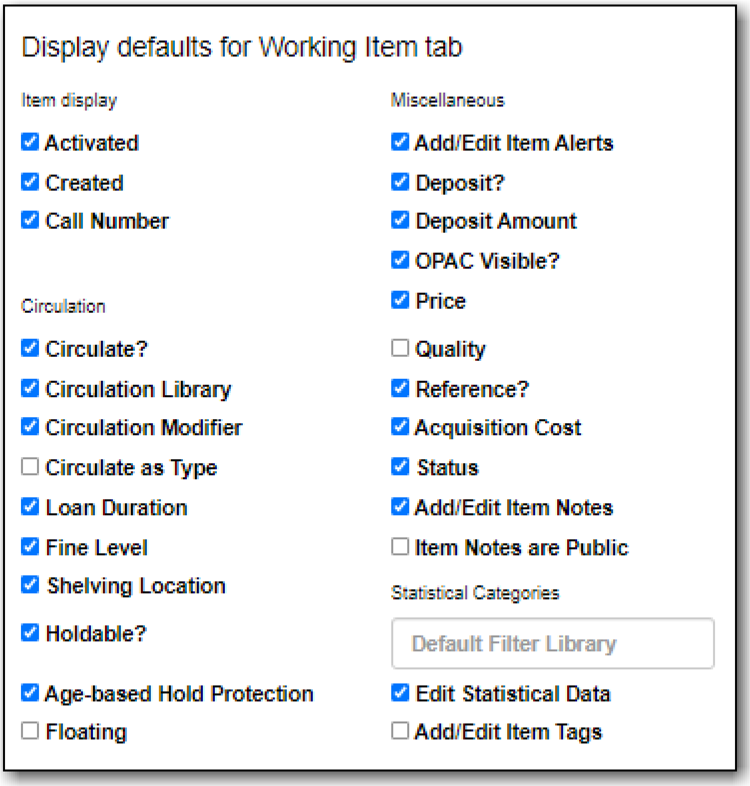


The following settings can be set for the Holdings Details:

Setting	**Description**
Always display Holdings Details pane	When selected the Holdings Detail section will show when **Add/Edit Items** is selected from the **Actions** menu.
Allow Call Number Attribues in Item Templates	When selected Classification scheme, Prefix, and Suffix are available options that can be included in Item Templates.
Classification Scheme	By default Evergreen will use the classification scheme specified by the library settings *Default Classification Scheme*. Using this setting you can specify Generic, Dewey, Library of Congress.
Default Prefix	If your library uses Prefixes select the one you'd like used as a default.
Default Suffix	If your library uses Suffixes select the one you'd like used as a default.
Auto-generate Barcodes	Not currently used in Sitka.
Use checkdigit	When checked if a non-codabar barcode is entered the outline of the Barcode field turns red.
Print Item Labels on Save & Exit	When checked the Print Items Labels interface will open when you click Save & Close. This setting is not recommend for libraries printing label sheets.

16.2.2. Display Defaults for Working Item Tab

De-select the checkboxes beside those fields that you don’t want displaying as available item attribues.



The following item attributes are not used by Sitka’s Evergreen and should always be de-selected:

- Circulate as Type
- Quality
- Add/Edit Item Tags

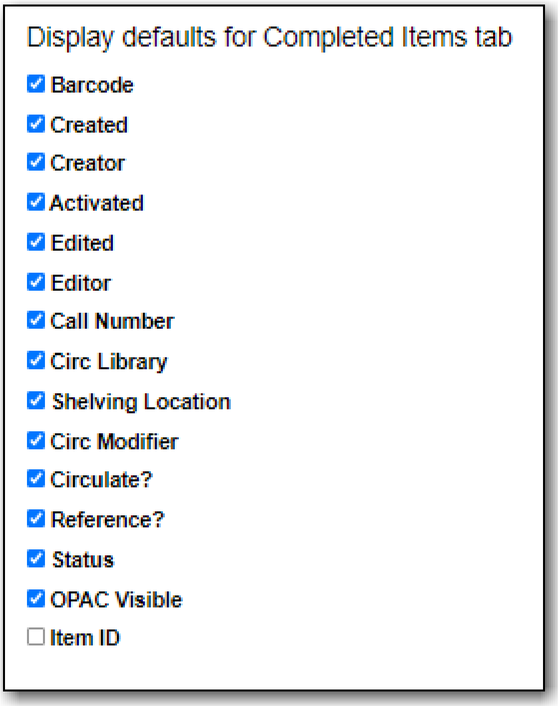
You may also want to de-select item attributes that relate to features your library doesn’t currently use. The following are item attributes that relate to features libraries may or may not use.

- Loan Duration
- Fine Level
- Age-based Hold Protection
- Floating
- Deposit
- Deposit Amount
- Acquisitions Cost

Refer to Item Attributes for information on specific item attributes.

16.2.3. Display Defaults for Completed Items Tab

De-select the checkboxes beside those fields that you don't want displaying as available item attribues.



16.3. Holdings Templates

Sitka Snippet Video - Creating and Using Holdings Templates (2:37)

Holdings templates allow you to set up templates with pre-selected values for call number and item attributes and help to ensure consistency in cataloguing of items.

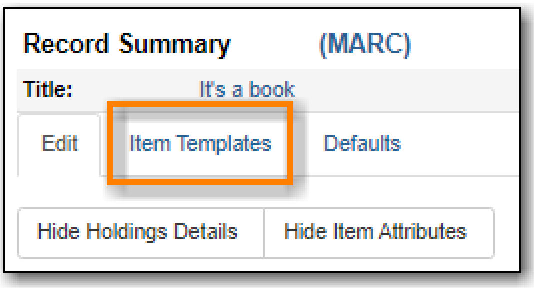
Call number attributes are not included in the template editor by default but can be added through the Holdings Details Defaults.

16.3.1. Creating Holdings Templates

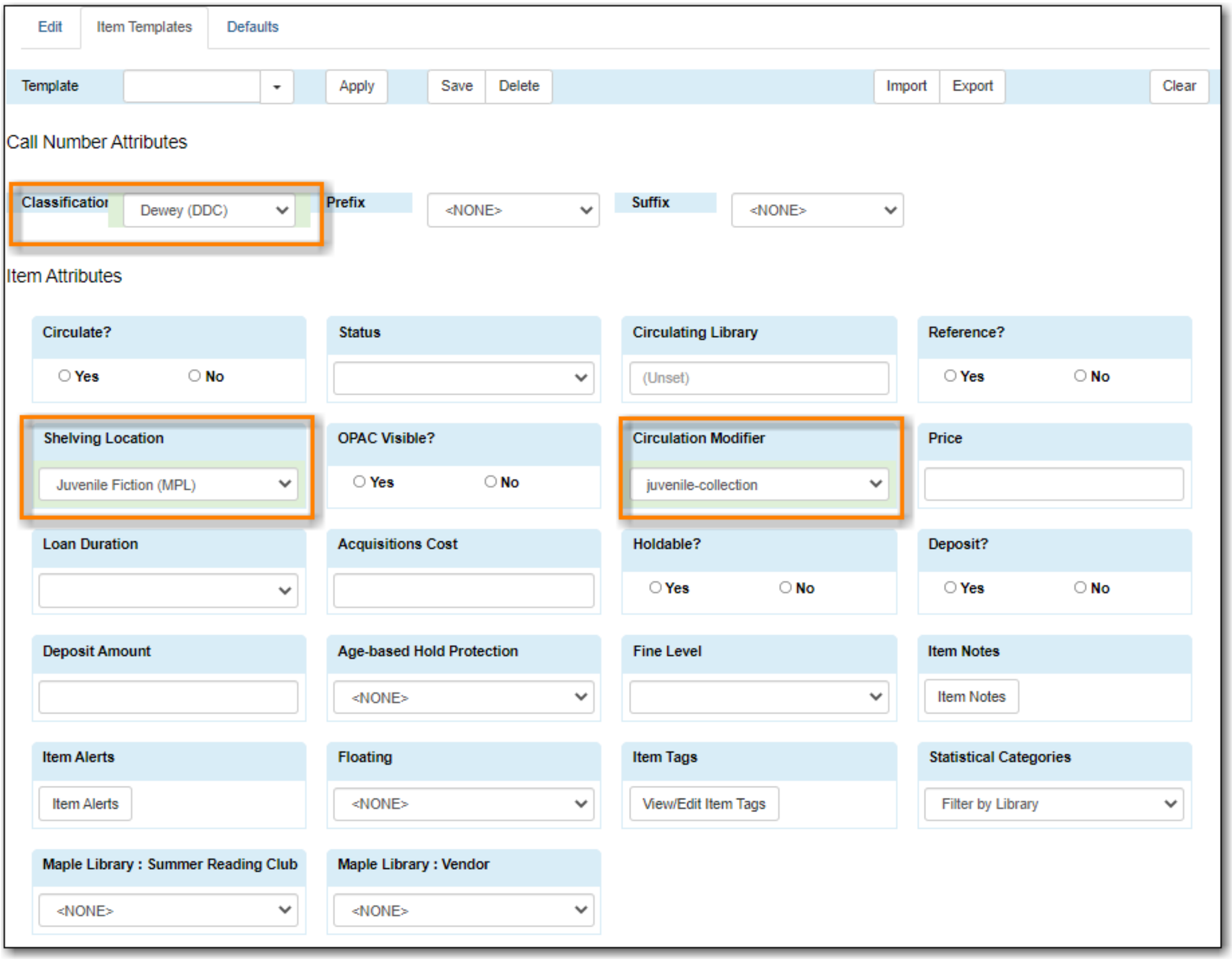
1. Go to **Administration** → **Local Administration** → **Holdings Template Editor**.

   OR

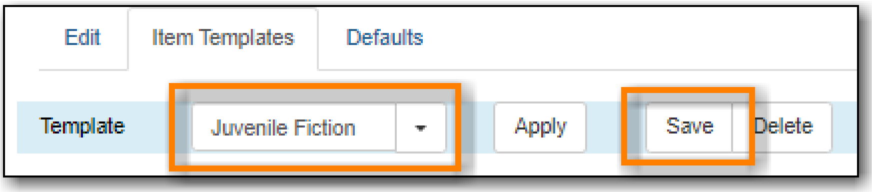
   Open the Holdings Editor through any bibliographic record and go to the **Item Templates** tab.

2. Enter the values for the call number and item attributes needed for your template.

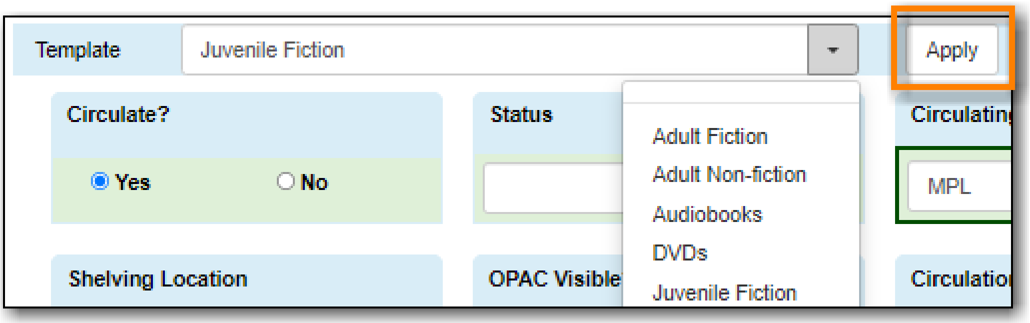


3. Type in a name for the template and click **Save**.

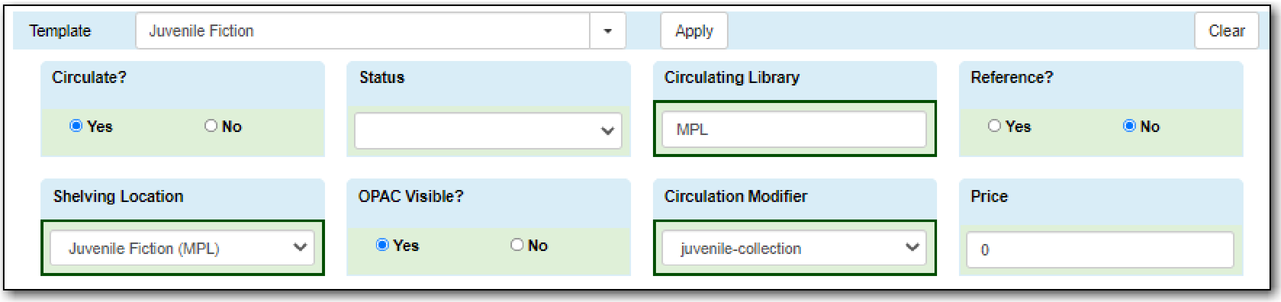


16.3.2. Using Holdings Templates

1. In the Holdings Editor click on the template drop down menu.
2. Select the template from the list and click **Apply**.



3. The applicable attributes will be updated with the values from the template and outlined in black.



16.3.3. Sharing Holdings Template

Sitka Snippet Video - Sharing Holdings Templates (1:56)

Templates are saved on the Evergreen server, but only viewable by the staff account that created them. To share templates with other staff account you need to export the templates and have staff import them into their accounts.

TIP When exporting, Evergreen will export all templates as one file. Co-op Support recommends you set up all templates needed by your cataloguers on one account before exporting the file.

1. In the Holdings Template Editor click **Export**.

2. You are prompted to specify where on your computer you would like to save the file. Click **Save** once done.
3. You can share the file with staff via email or a shared network drive or have them log into Evergreen on computer the file has been saved to.
4. In the Holdings Template Editor click **Import**.

5. Follow the prompts to locate the templates file to be loaded. Click **Open**.

TIP When importing holdings templates, existing templates will be kept and new ones added. Templates sharing the same name will be overlaid by the new templates.

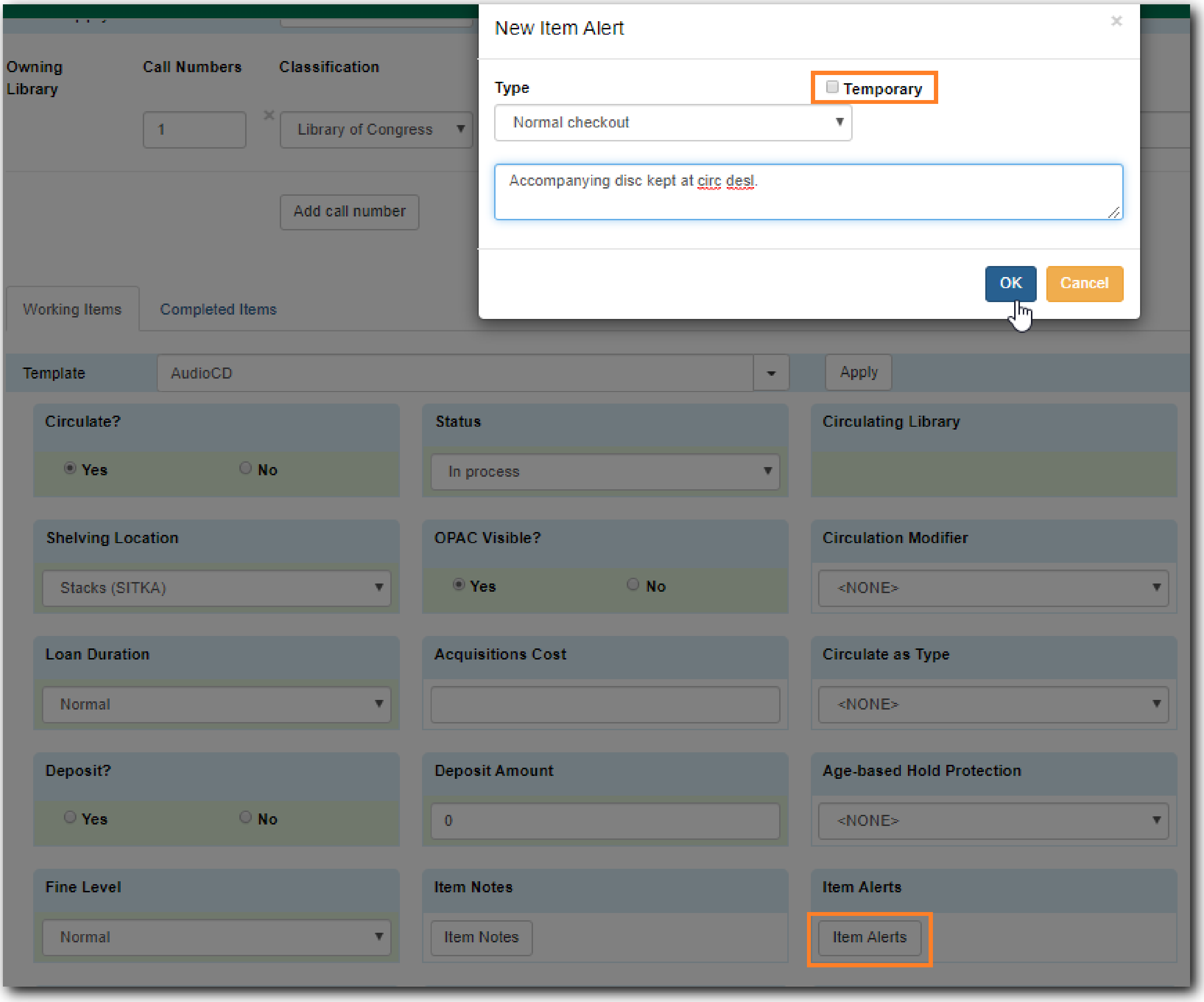
16.4. Item Alert, Note, Tag and Stat Cat

16.4.1. Item Alert

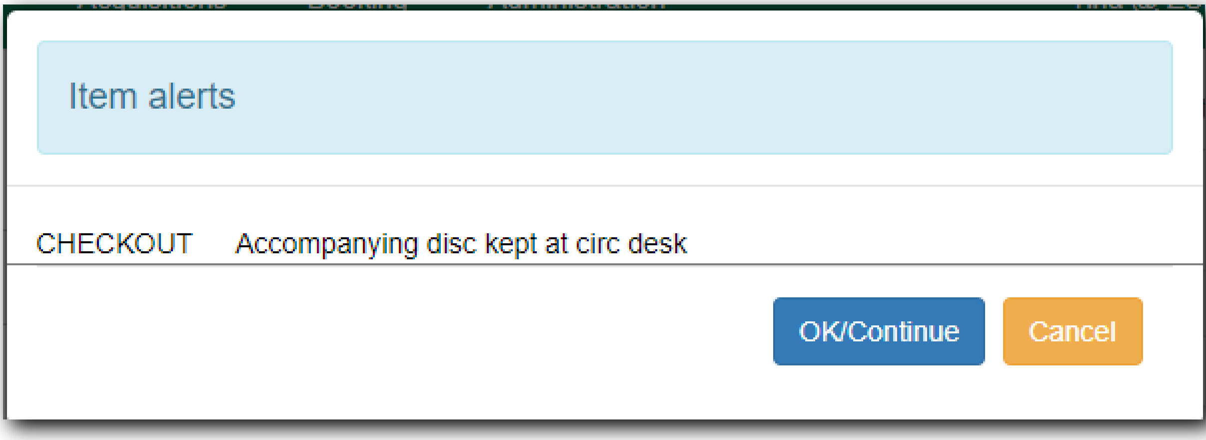
Item alerts pop up on the screen when the item is retrieved. There are a few types of item alert that show up when the corresponding type of action is applied to the item. For example, you may add a checkin item alert when you are checking out an item to a patron and notice that the spine label needs to be replaced. When the item is returned, on checking in, staff will see the message you left. You may create a checkout item alert for items that have accompanying materials kept separately. When the item is checked out, the alert will pop up on the screen.

Item alerts can be added when you create or edit a item record.

1. Click **Item Alerts**.
2. Choose a type from the dropdown list.
3. Type in the message, Click **OK**.
4. Back on the Item Editor, click **Save & Exit**.

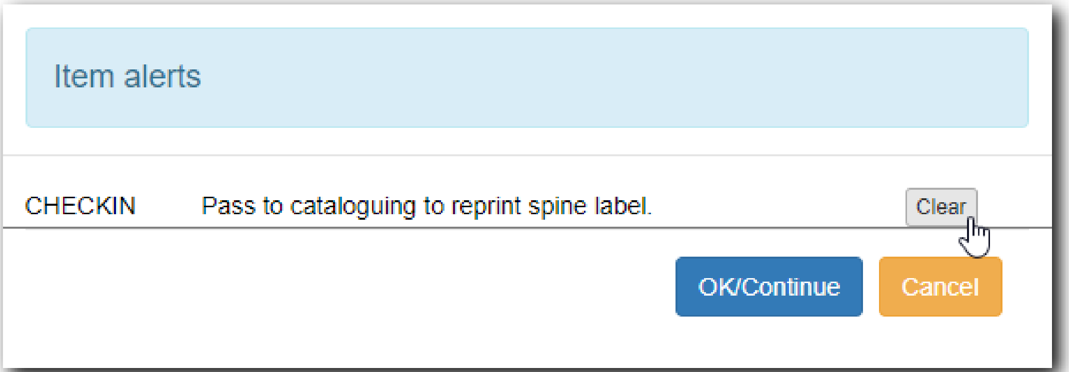


5. When the item is checked out, the alert pops up.

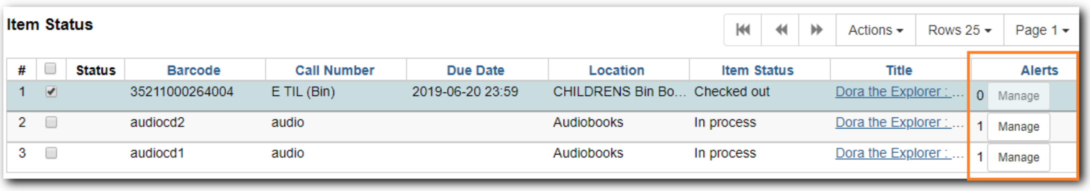


TIP

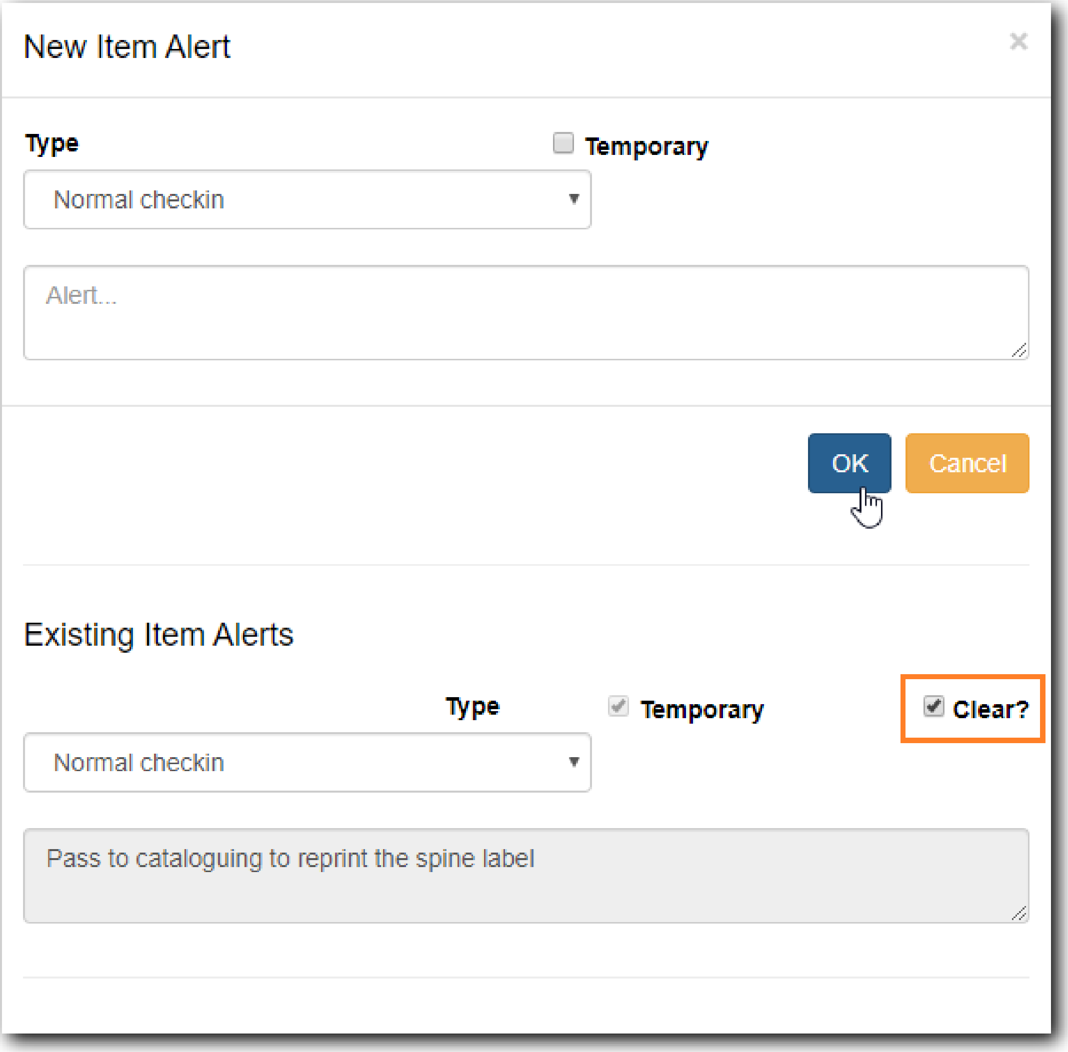
1. Alerts can be made temporary by selecting the **Temporary** check box when adding the alert. A **Clear** button shows up when the alert is displayed. Click it to delete the alert. Below is a checkin alert reminding staff to print spine label for the item. Click **Clear**, then **OK/Continue**.



2. An **Alert** column is available on some screens to provide a quick link to viewing and/or managing the alert message. Click **Manage** in the column to open the item alert pop-up. You may edit/clear the message. **Manage** is greyed out if the item does not have an alert.



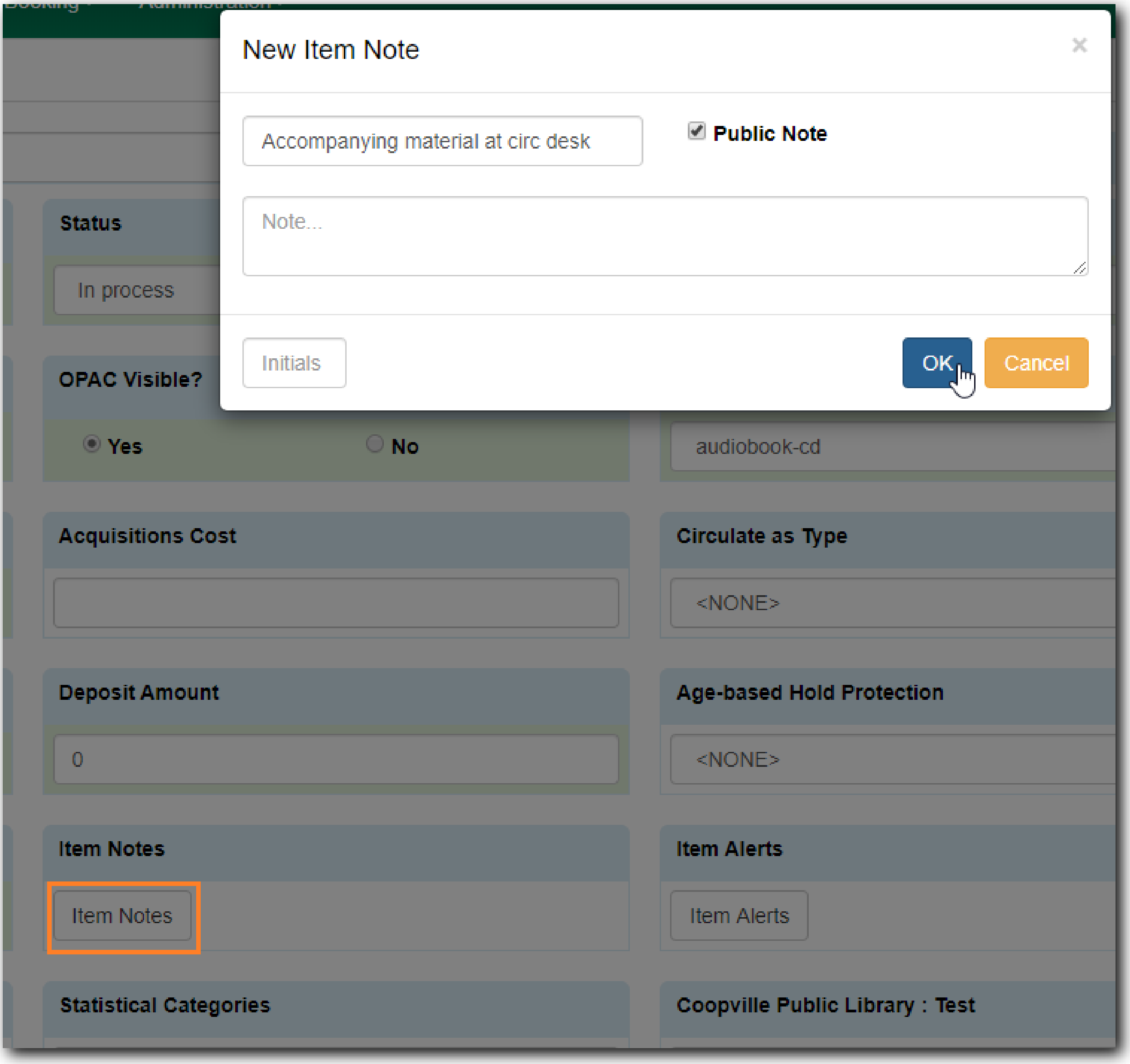
3. Alerts may be manually removed, following the same process as adding item alerts. On item alert pop-up window, select **Clear?** check box, then click **OK**. Click **Save & Exit** on Item Editor.



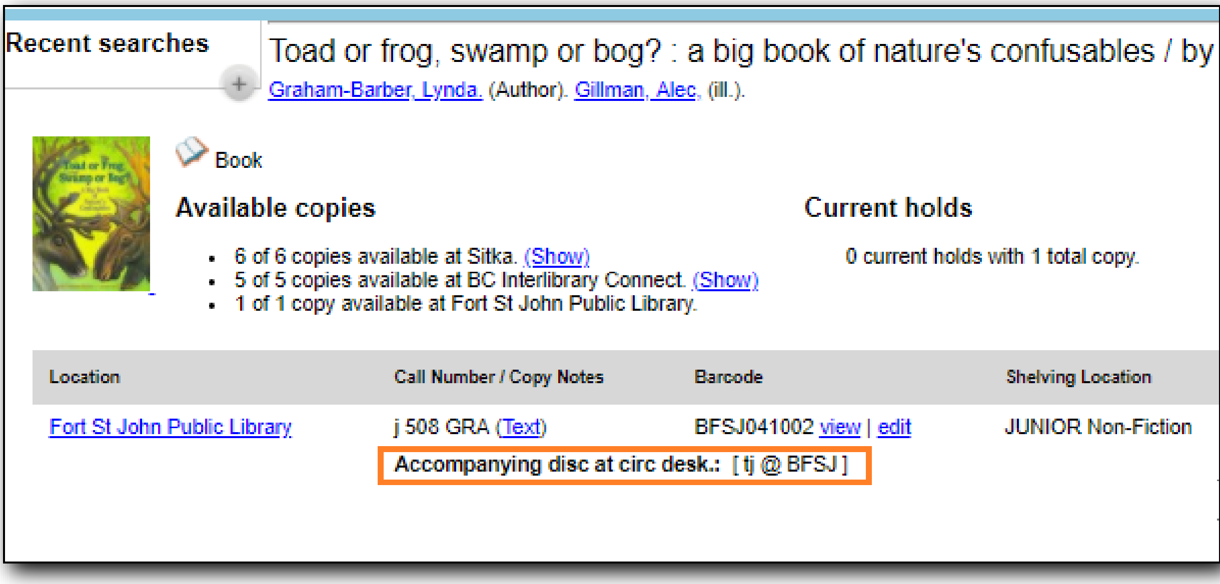
16.4.2. Item Note

Notes can be added to item records. Notes will not show up when items are retrieved, but they can be made public and displayed on the catalogue.

1. To add a note, go to the item record and click **Item Notes**.
2. Enter the note content in the pop-up window.
3. Select **Public** to make it show up on the catalogue.
4. Once done, click **OK** to go back to Item Editor.
5. Click **Save & Exit**.

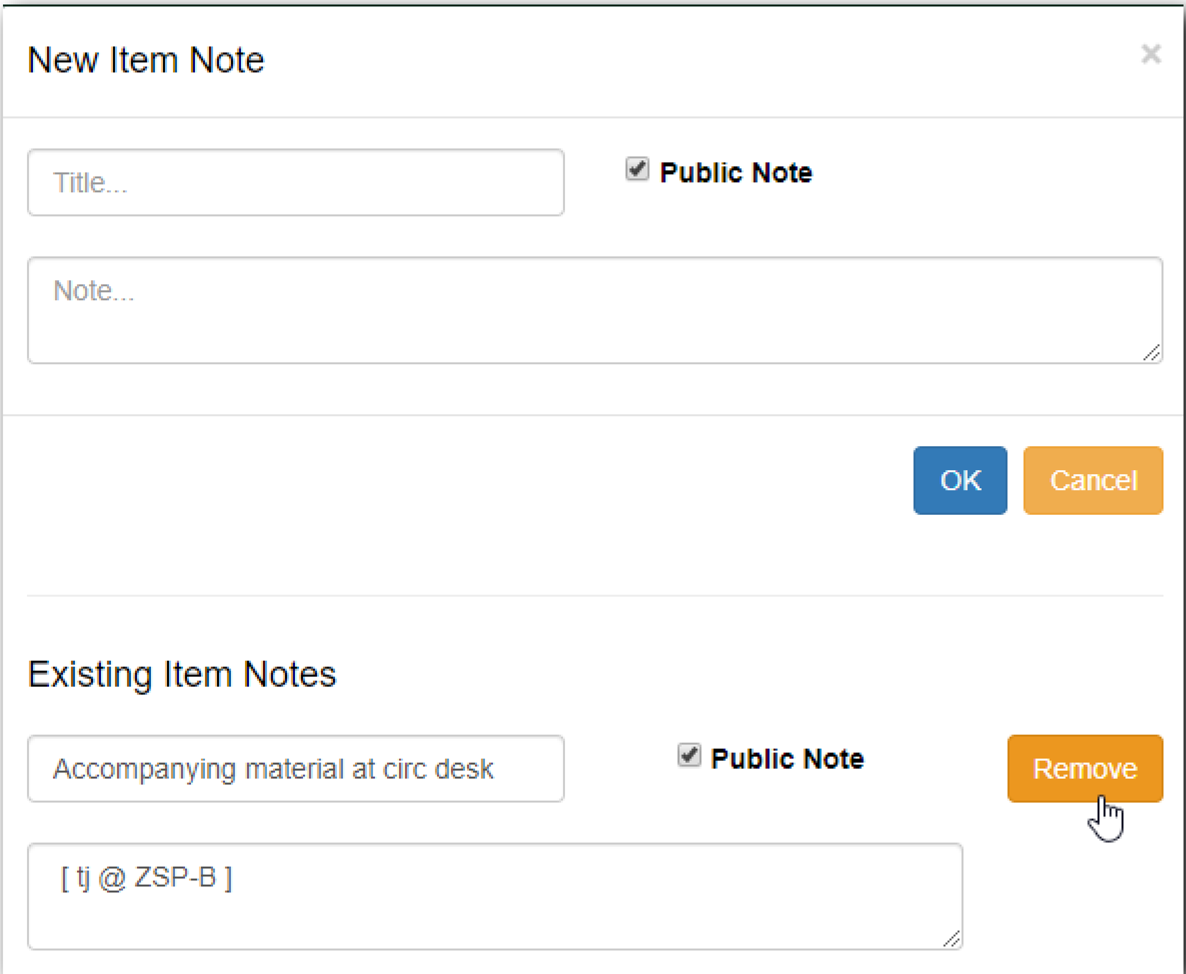


6. Public item note is displayed on the catalogue.



7. To delete a note, open the item record to access item note. Click **Remove**, then **OK** in the popup

window. **Save & Exit** the item record.



NOTE Notes can not be edited. There can be multiple notes for one item record.

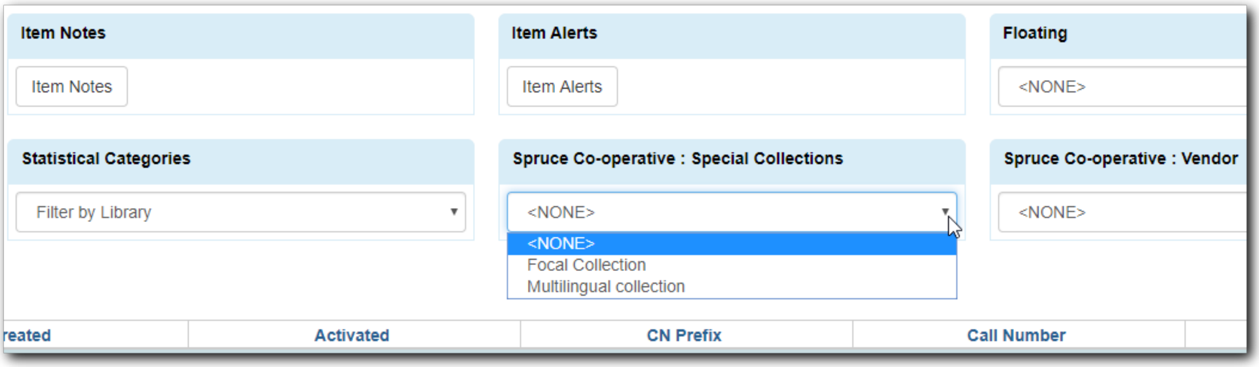
16.4.3. Item Tag

Not in use yet.

16.4.4. Item Statistical Category (Stat Cat)

Item Statistical Category, aka Item Stat Cat, is another piece of item level information that may be added to item records. As the name suggests, it may be used to facilitate reporting categories, if the data is not available in item records. Libraries create their own stat cats. Refer to Statistical Category Editor.

1. To add an item stat cat, go to Item Editor.
2. In the **Statistical Categories** column, choose an entry from the appropriate stat cat dropdown list. The value is added when the item record is saved.

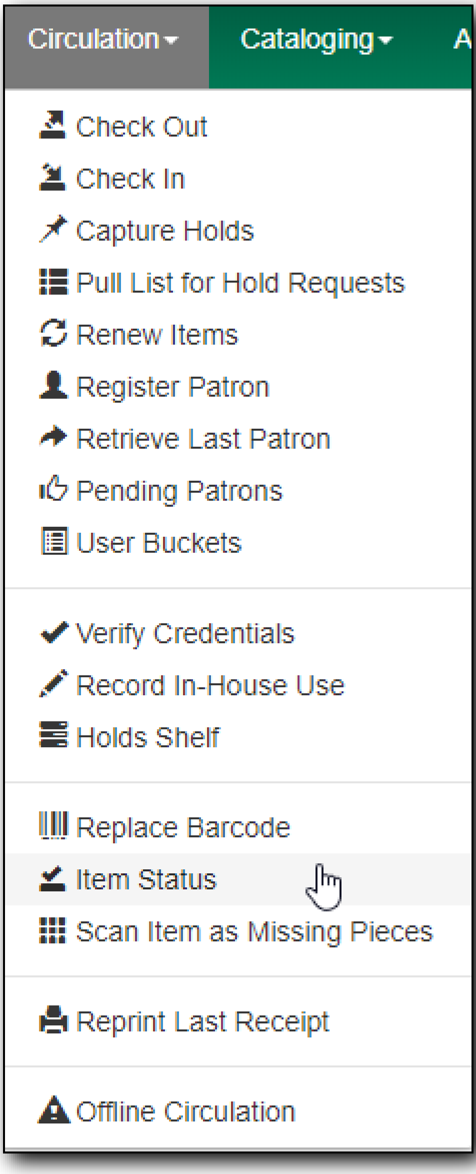


16.5. Editing Holdings

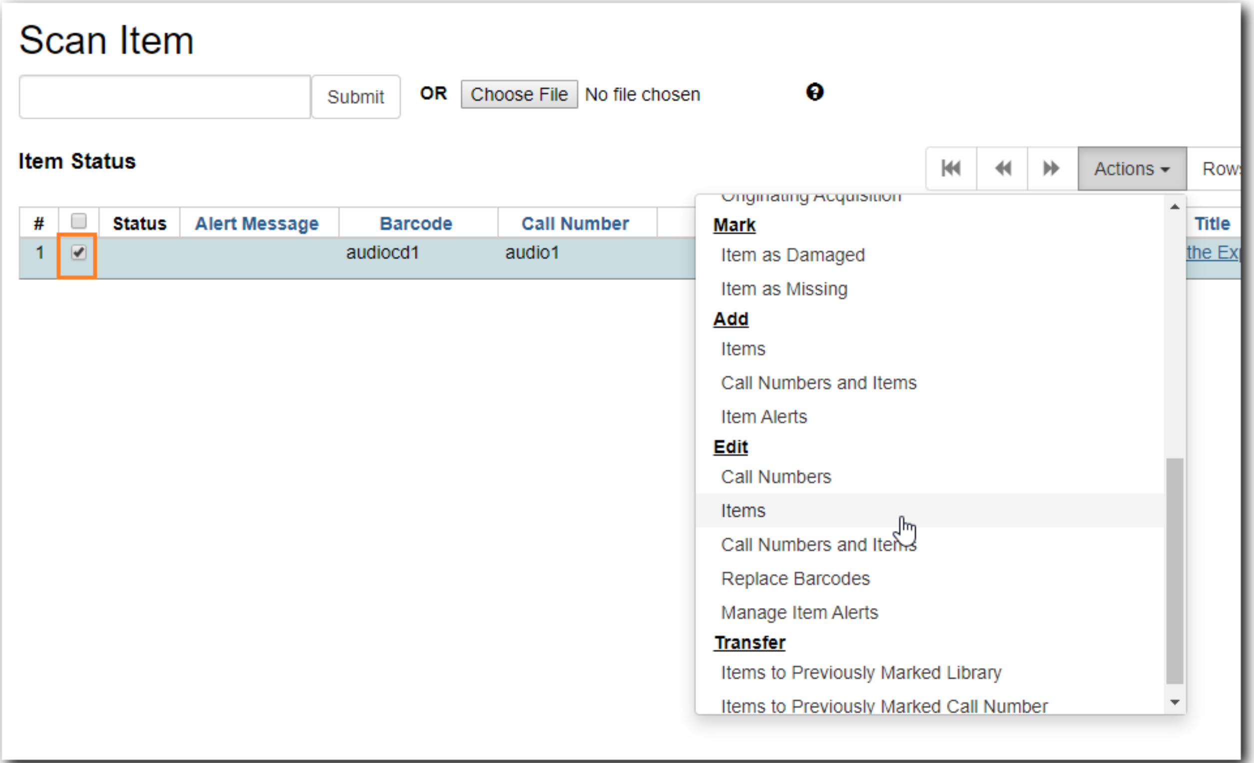
In Evergreen, the local call number is kept in a separate record, called call number record. Items under the same title with the same call number share the same call number record. Item records and call number records can be edited at several places.

16.5.1. Editing Holdings via Item Status

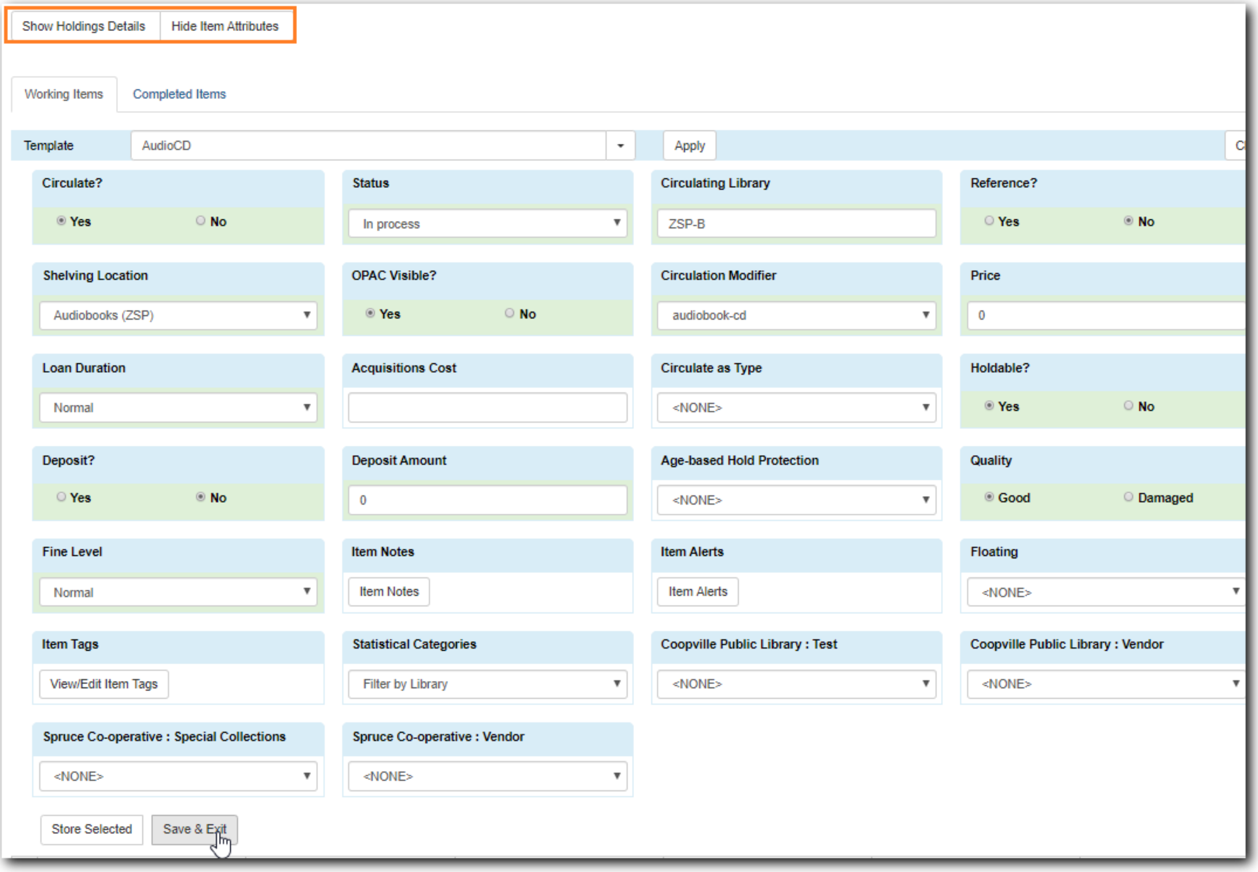
1. Go to **Circulation** → **Item Status**



2. Scan or enter the barcode to retrieve the item. Select the item on the list. Click **Actions** dropdown list. Scroll down to **Edit**, then select **Call Numbers**, **Items** or **Call Numbers and Items**. In this example, we choose **Items**.



3. The Item Editor opens in a new tab. Make the changes, then **Save & Exit** to close the tab.

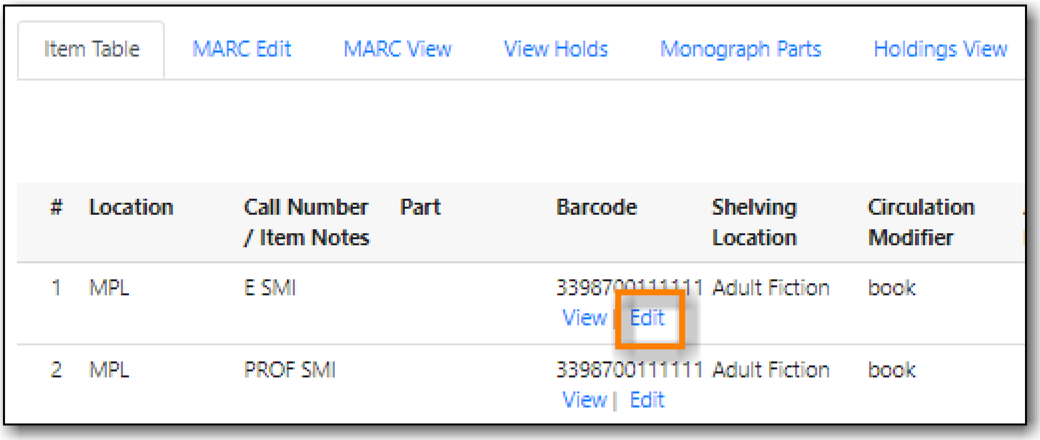


TIP Use the **Show Holdings Details** and **Hide Item Attributes** buttons to choose to display call number or copy only, or both call number and item at the same time.

16.5.2. Editing Holdings via the Item Table Tab

You can access the Holdings Editor in the catalogue from the **Item Table** tab in a record.

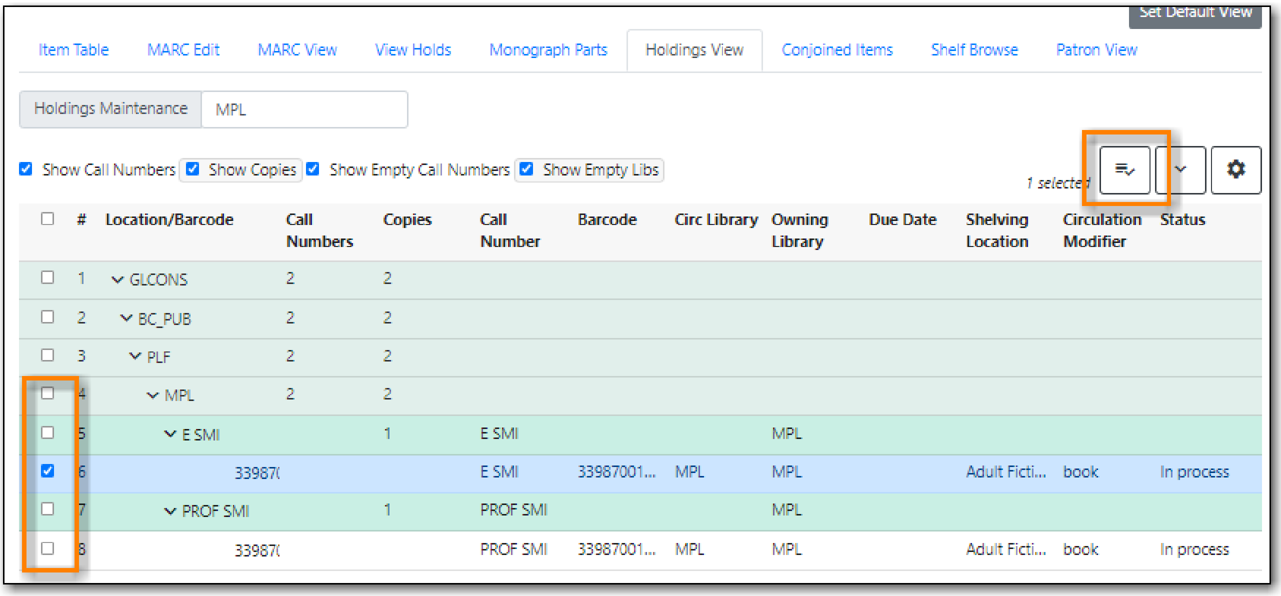
1. Click **Edit** beside the item barcode that you want to edit. The Item Editor opens in a new tab.



16.5.3. Editing Holdings via the Holdings View Tab

You can access the Holdings Editor in the catalogue from the **Holdings View** tab in a record.

1. Select the item you want to edit and click the **Actions** button.



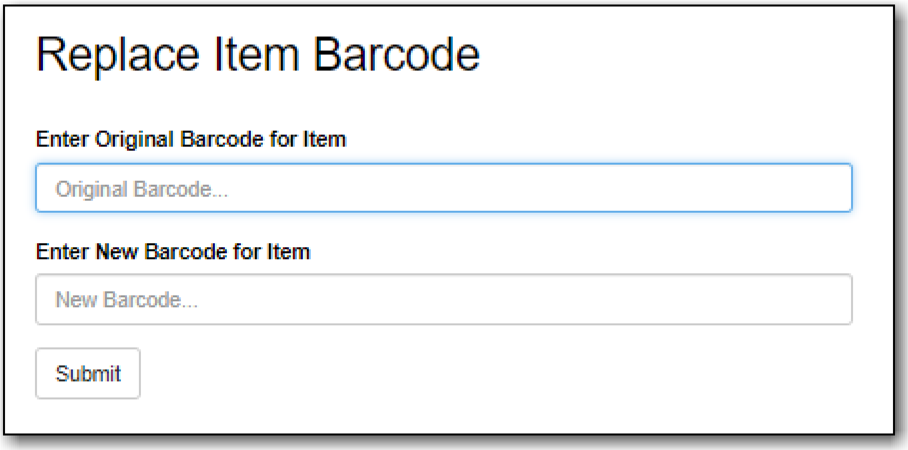
2. Scroll down to **Edit**. and click **Edit Call Numbers**, **Edit Items** or **Edit Call Numbers and Items**.

16.6. Replacing a Barcode

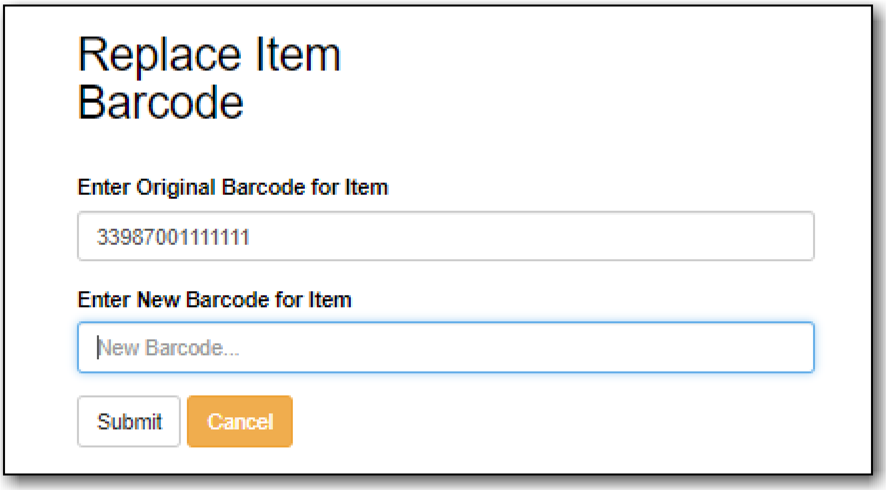
[Sitka Snippet Video - Replace Barcode (1:26)]

The replace barcode function can be accessed from the Circulation menu, as well as the Actions menus in Item Status and the Holdings View tab in a bibliographic record. The function will look slightly different depending on where it is accessed from.

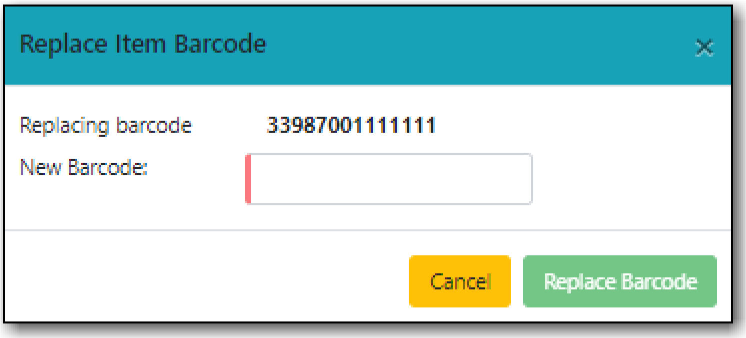
1. Select **Replace Barcode** from your preferred menu.
2. When accessed from the Circulation menu, enter the original and new barcode and click **Submit**.



3. When accessed through the Item Status Actions menu, the original barcode is prefilled. Enter the new barcode and click **Submit**.



4. When accessed through the Holdings View tab, the original barcode is prefilled. Enter the new barcode and click **Replace Barcode**.

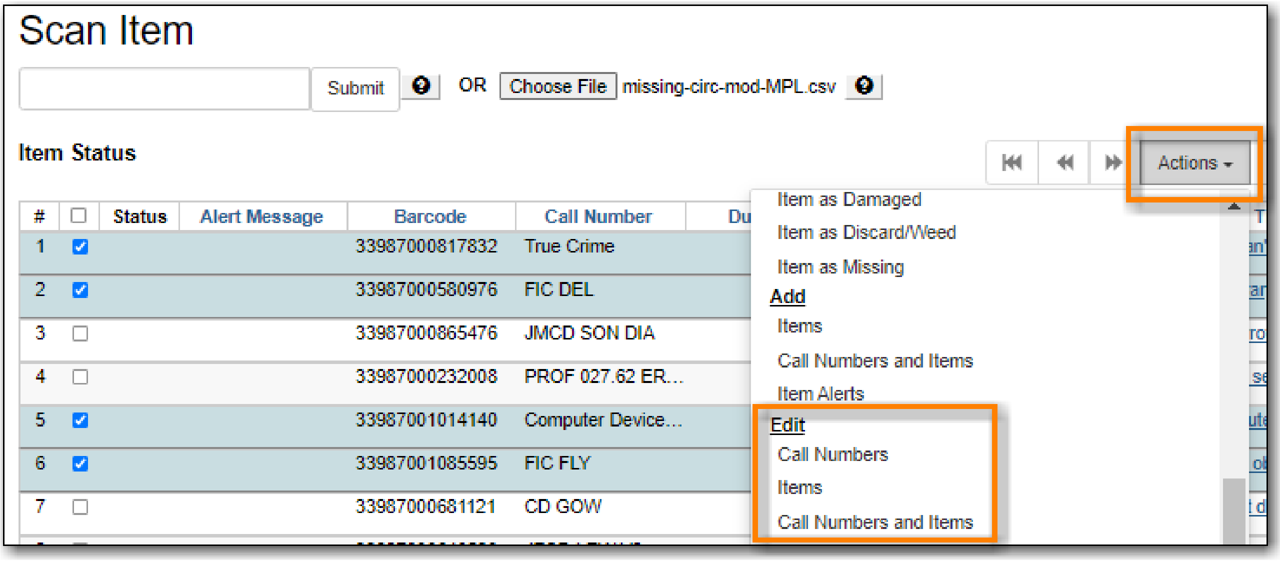


16.7. Batch Editing Items

You can edit items in batch on the *Item Status* screen, or in an *Item Bucket*. On *Holdings View*, you can edit a few selected Items under the same title.

16.7.1. Batch Editing Items via Item Status

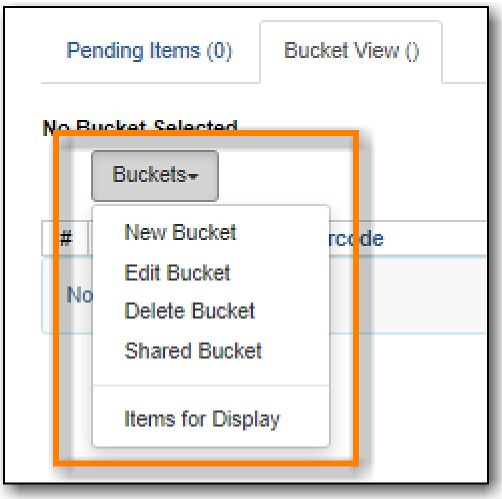
1. Select **Cataloguing** → **Item Status** or **Circulation** → **Item Status**.
2. Scan the barcodes to retrieve the items you want to edit, or click **Choose File** to load items from a file of a list of barcodes.
3. Select the items you would like to edit.
4. From the **Actions** menu scroll to **Edit** and select **Call Numbers**, **Items**, or **Call Numbers and Items** depending on what you wish to edit.



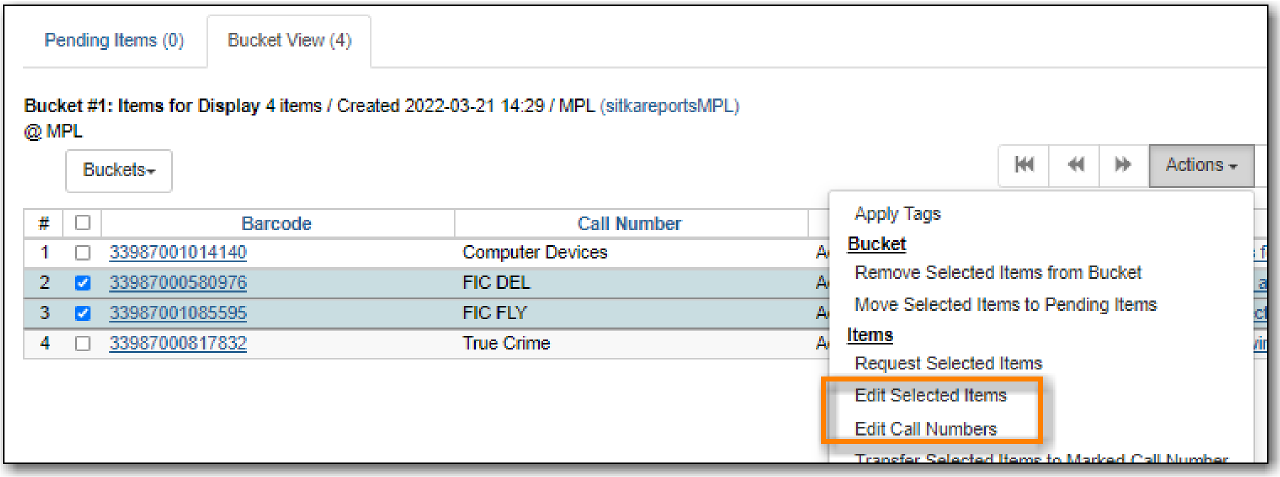
5. The Holdings Editor will open in a new tab.

16.7.2. Batch Editing Items via Item Buckets

1. Select **Cataloguing** → **Item Buckets**.
2. Select an item bucket from the **Buckets** dropdown list.



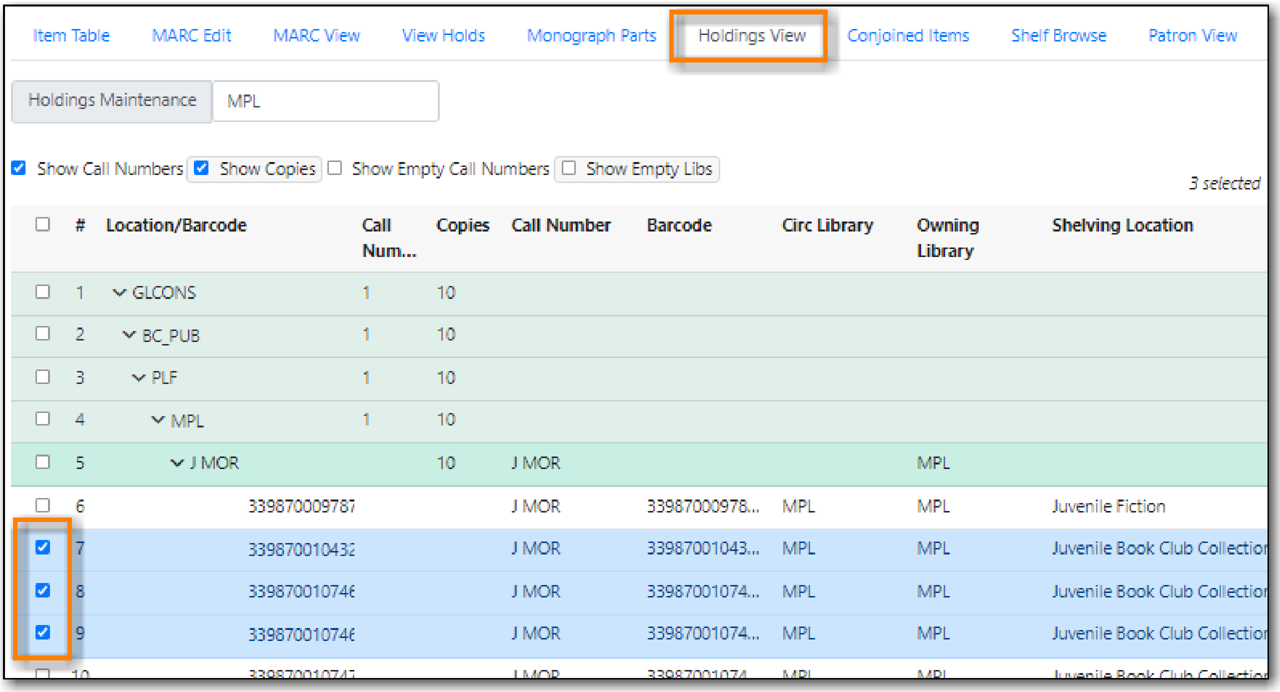
3. Select the items you wish to edit.
4. From the **Actions** menu select **Edit Selected Items** or **Edit Call Numbers** depending on what you wish to edit.



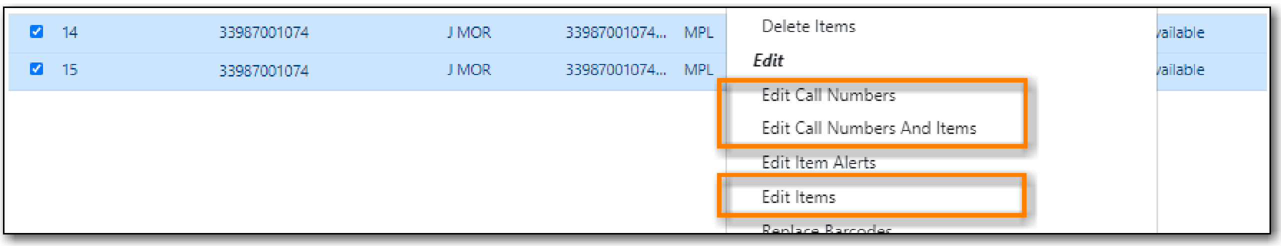
5. The Holdings Editor will open in a new tab.

16.7.3. Batch Editing Items via Holdings View

1. Open the desired record in the staff catalogue.
2. Go to the **Holdings View** tab.
3. Select the items you wish to edit.



4. From the **Actions** menu scroll to **Edit** and select **Edit Call Numbers**, **Edit Items**, or **Edit Call Numbers and Items** depending on what you wish to edit.

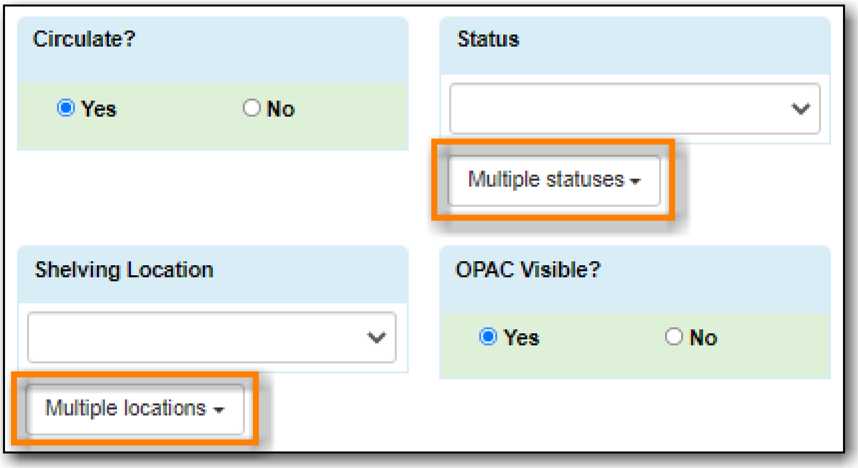


5. The Holdings Editor will open in a new tab.

16.7.4. Batch Editing in the Holdings Editor

There are some important differences in the *Holdings Editor* when editing in batch versus editing a single item.

- When editing, only one value can be entered for each item attribute. Items that should be updated with different values for particular item attributes should be edited separately.
- If the selected items have differing values for an item attribute a button indicating there are multiple values for the attribute will display.

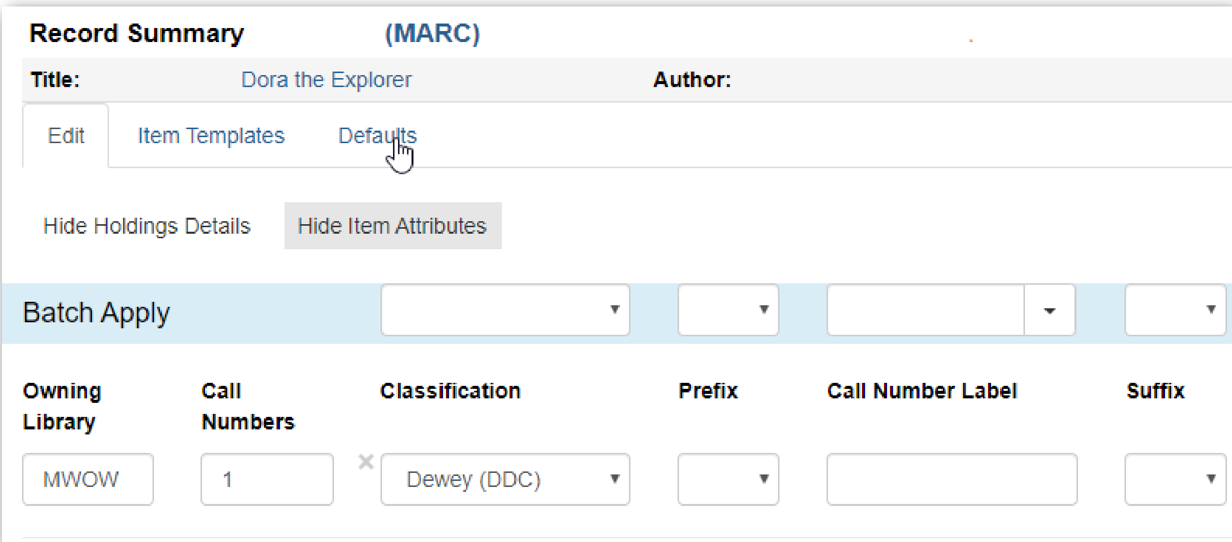


16.8. Spine/Pocket Labels

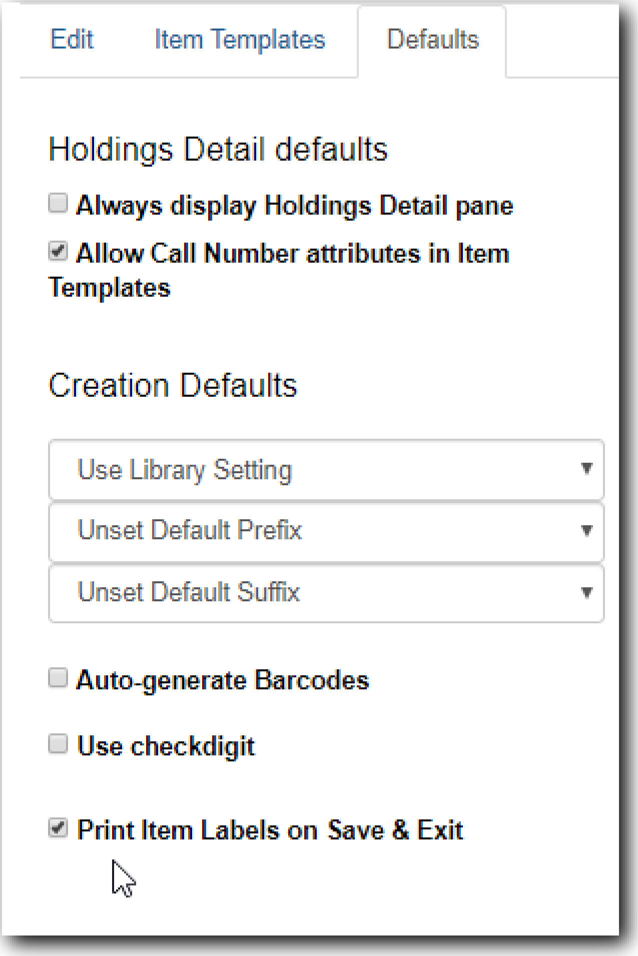
Printing Spine Labels during Cataloguing

You may choose to print spine labels during the cataloguing process. On saving item records, you will be automatically directed to the printing item label screen. However, you need to set it up first.

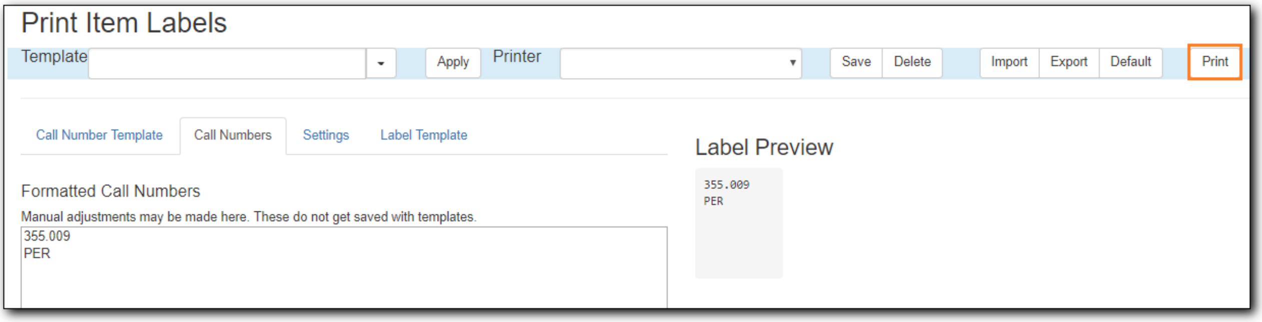
1. Go to **Defaults** on Holdings Editor.



2. Select **Print Item Labels on Save & Exit** checkbox.

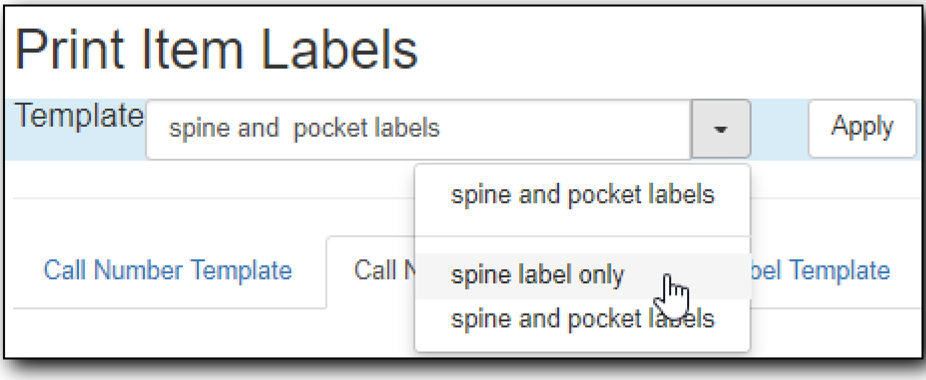


3. With the above setting in place, when you finish editing item records and click **Save & Exit**, the **Print Item Labels** screen will open up in a new tab.
4. Make any required adjustments and click **Print**.



TIP

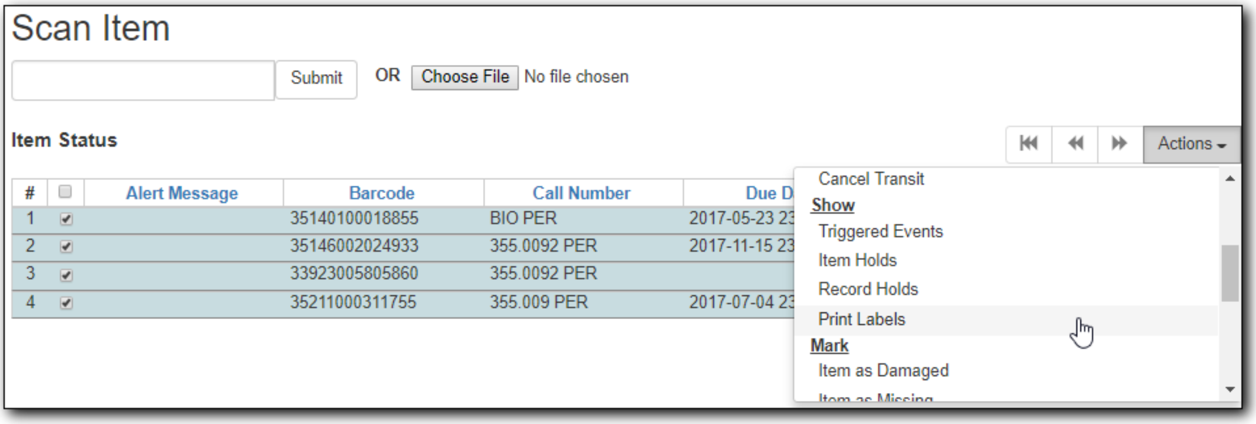
If you have spine label templates, select one from the dropdown list, and click **Apply**.



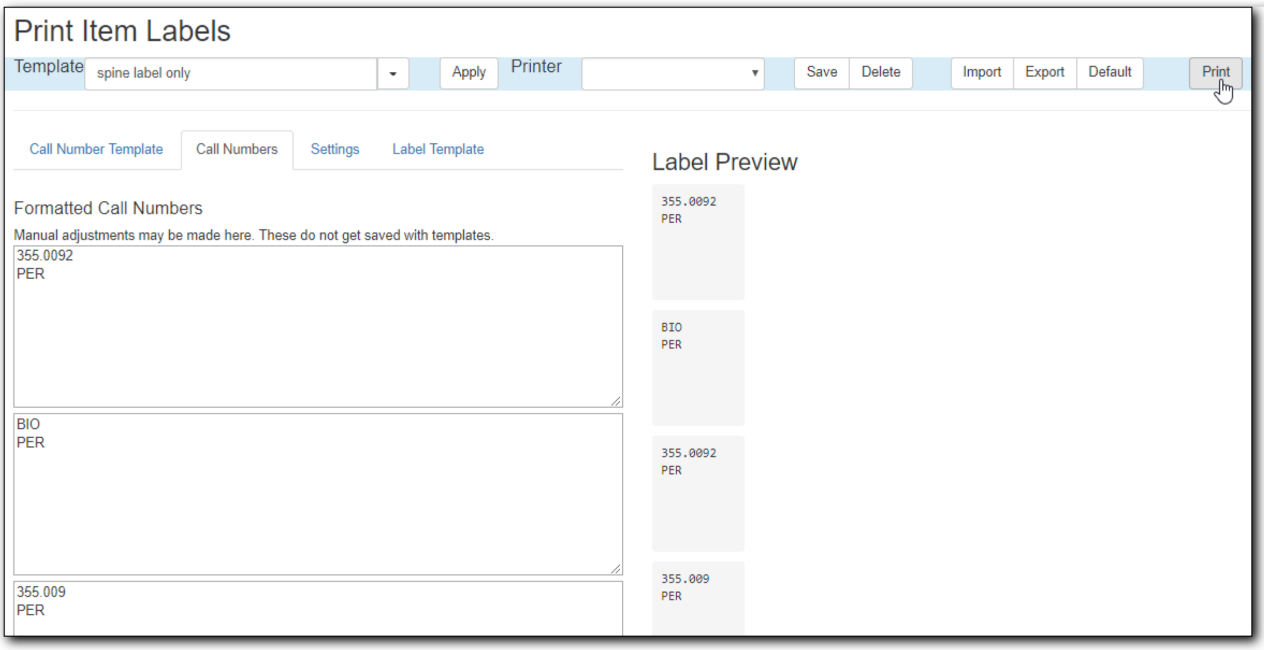
Printing Spine Labels by Batch

You may choose to print spine labels after cataloguing a batch of items.

1. Scan the items on **Items Status** screen and select them.
2. Click **Actions** → **Show** → **Print Labels**.

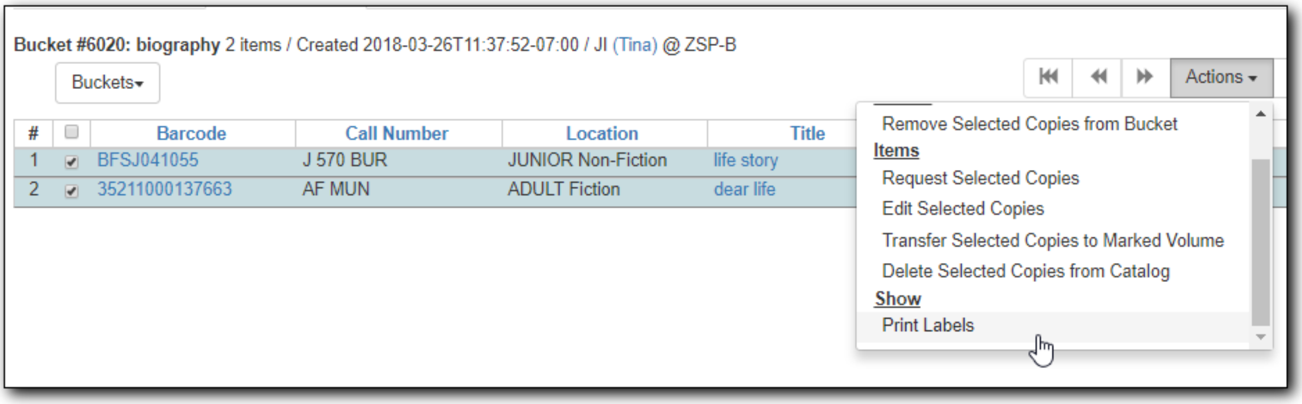


3. Choose a template, if needed.
4. Click **Print**.



Printing Spine Labels from Item Buckets

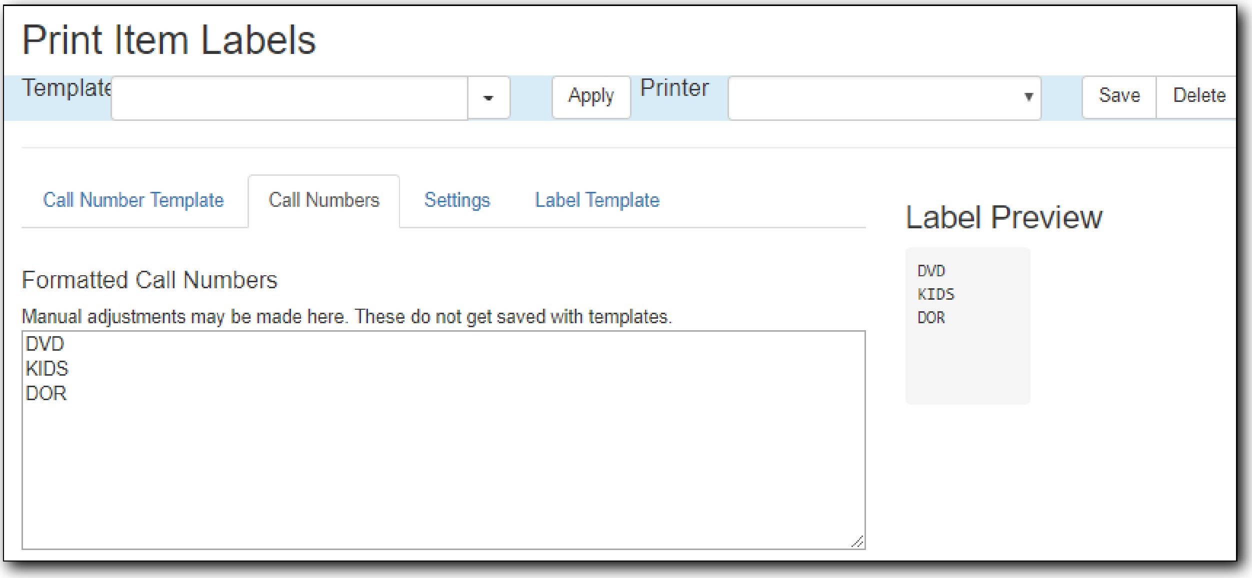
You can also print labels from **Item Buckets**.



16.8.1. Configuring Label Printing

You configure label printing on the **Print Item Labels** screen. There are four tabs on this screen.

1. **Call Number Template** shows the template used to extract information for the spine label. The default includes call number prefix, copy location prefix, call number label, call number suffix, and shelving location suffix.
2. **Call Numbers** shows the spine label generated for the item based on the above template. For individual spine labels, you may edit them temporarily for the current printing only.



3. **Settings** is the place where you set up the format of the printing and the label. Settings here will override the group of settings under Item Print Label on Library Settings Editor. Here you may configure the following:
   a. Print Feed Option: click the radio button to choose to use sheet labels or roll labels (continuous).
   b. Starting Position on Label Grid: specify the starting row and column.
   c. Label Set Configuration: click the Spine Label and/or Pocket Label radio button(s) to print

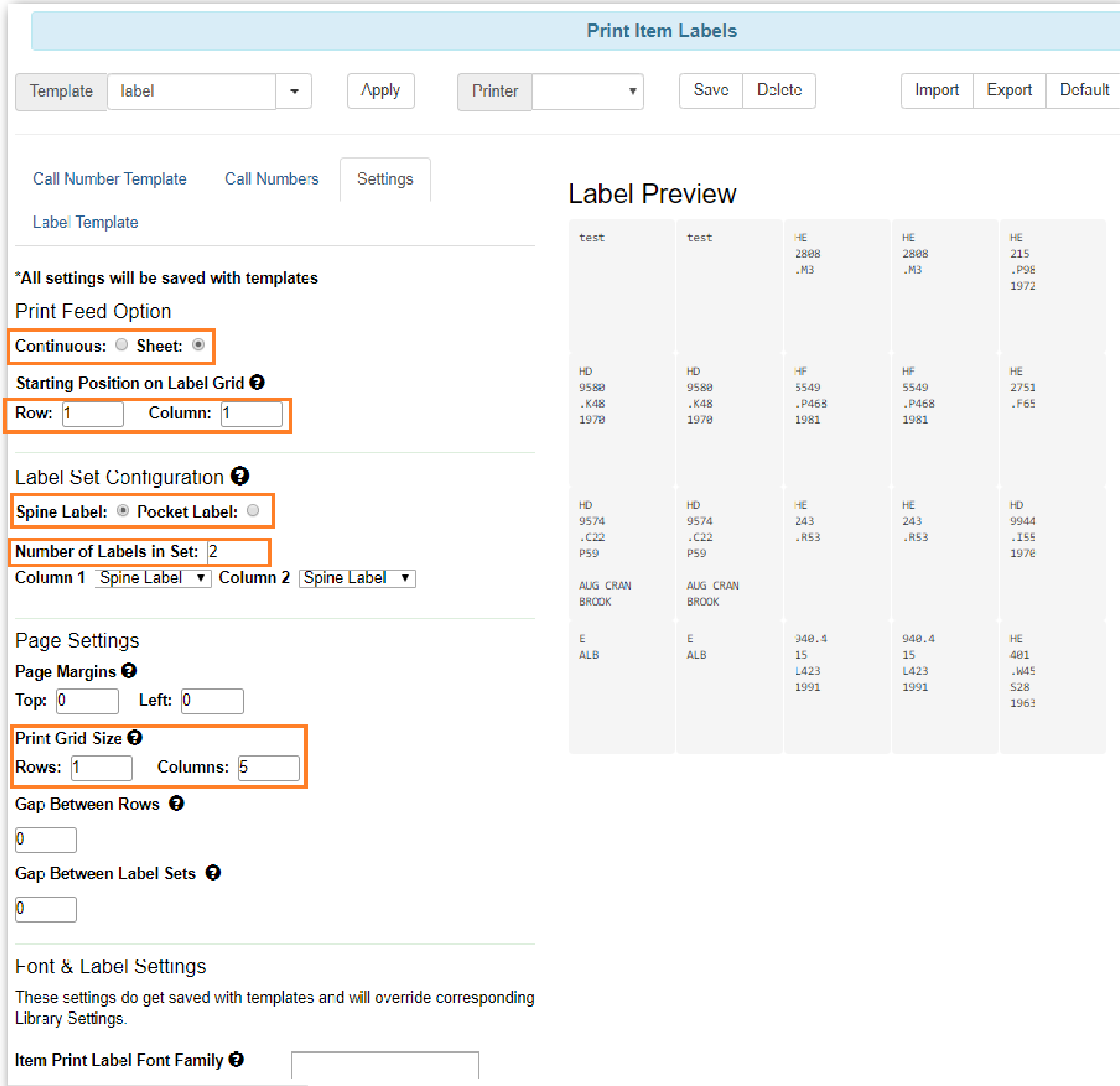
spine or pocket label only or both. Each call number is considered a label set. You may specify the number of labels in each set and which label (spine label or pocket label) to be printed in which column. The screenshot shows two labels to be printed for each call number.

d. Page Settings section allows you to specify the position of the labels on the page: the page margin, number of rows and columns of labels on each page and gaps between labels.

e. Font & Label Settings: here you define the size of the label, position the printed content in the label and format the print.

   i. The setting *Item Print Label - Inline CSS* allows you to add CSS into the template to further adjust where your text displays on your labels. For example, this centers the text and adds padding to the top of the label.

```
.spine {text-align:center; padding-top: 20px;}
```

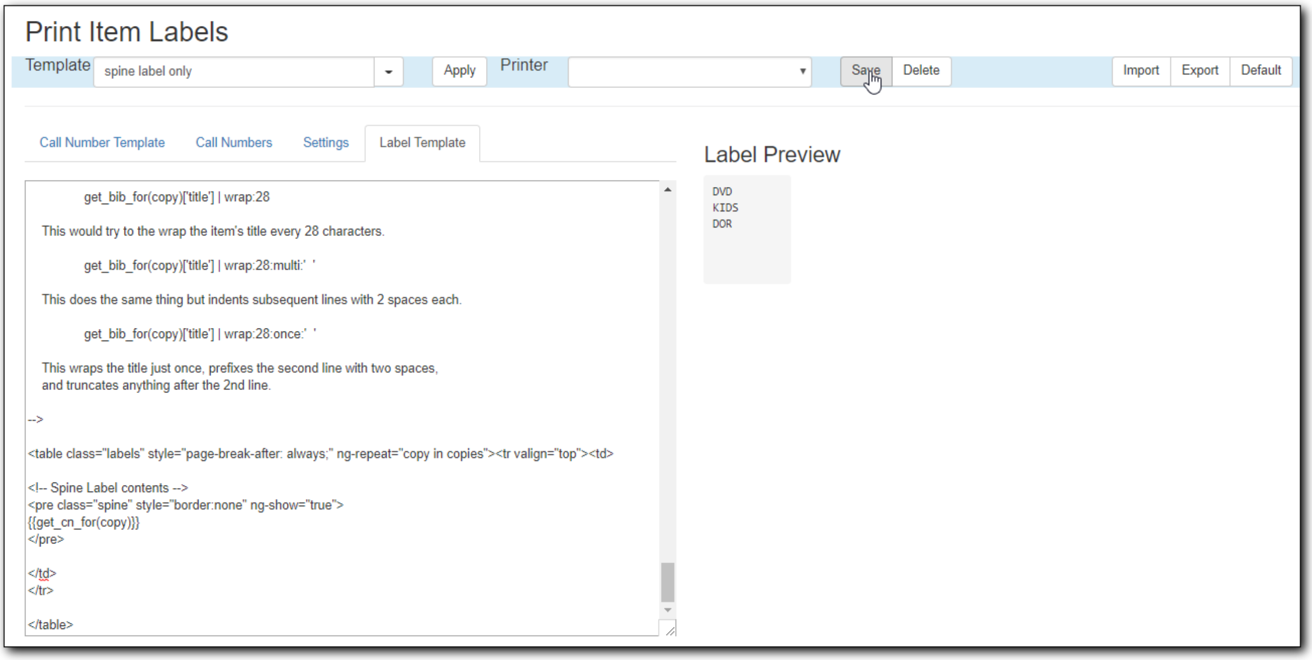


1. **Label Template** includes the script used to do the printing job. The top portion is the explanation. The lower portion is the code for printing. Changes in Settings will be reflected in the code. You do not edit the code directly.

Label Printing Template

You can save your adjustments on label printing settings to a label printing template. For example, if you usually print spine labels only, but sometimes print both spine and pocket label, you can create two templates: one for spine label only, the other for both labels. When printing the labels, you just need to choose the appropriate template from the list, then click **Apply**.

To create a label printing template, make the necessary adjustment on any or all tabs. Once done, type in a name in the **Template** box, and click **Save**.



TIP	Label printing templates are linked to login accounts. To share templates, you can export them, and send them to your colleagues for them to import into their own accounts.

16.9. Transferring Holdings

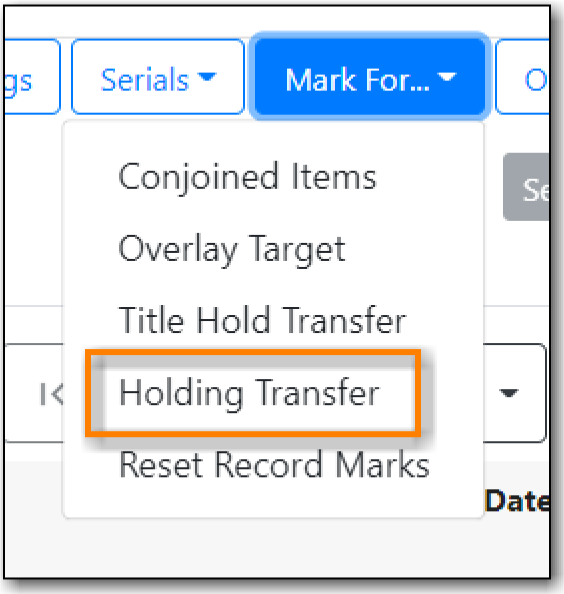
There are times when you need to move item records from one title record to another, or move items from one call number to another under the same or another title record. There are functions in Evergreen to allow you to do so. The critical step is to ensure that you first mark the destination record, then move the source record with the corresponding transfer function. Co-op Support recommends you read through the process first before starting, as each scenario has different characteristics.

16.9.1. Transferring Holdings

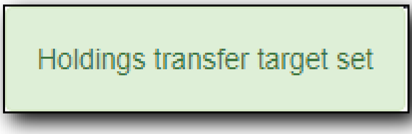
When you want to transfer all items under one call number to another title record or another library under the same title, you use the **Transfer Holdings** function. Evergreen will transfer both the call number record and all items under it to the new title and/or library.

Transferring Holdings to Another Title Record

1. Find the destination or target record. On **Mark for** dropdown list, select **Holding Transfer**.

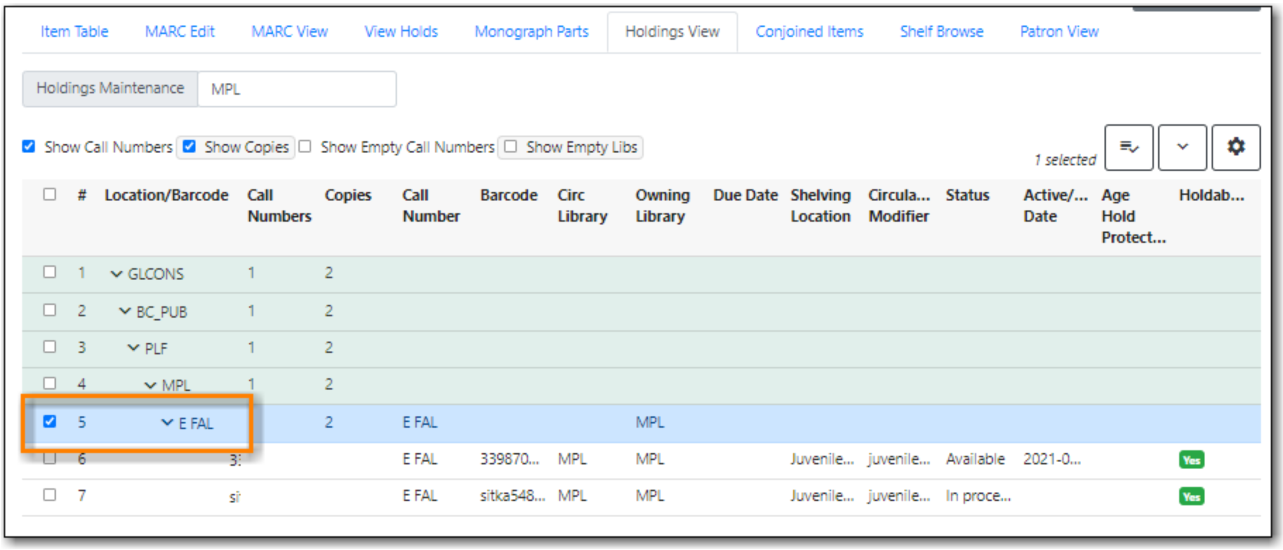


2. Confirmation appears at bottom right of the screen.



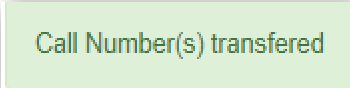
NOTE Transfer target is kept until it is reset (via **Reset Record Marks** on **Mark for** list) or a new target is marked.

3. Go to **Holdings View** of the source title. Select the call number you want to transfer. Click **Actions** list.



4. Scroll down to **Transfer**. Choose **Transfer Holdings to Marked Destination**.

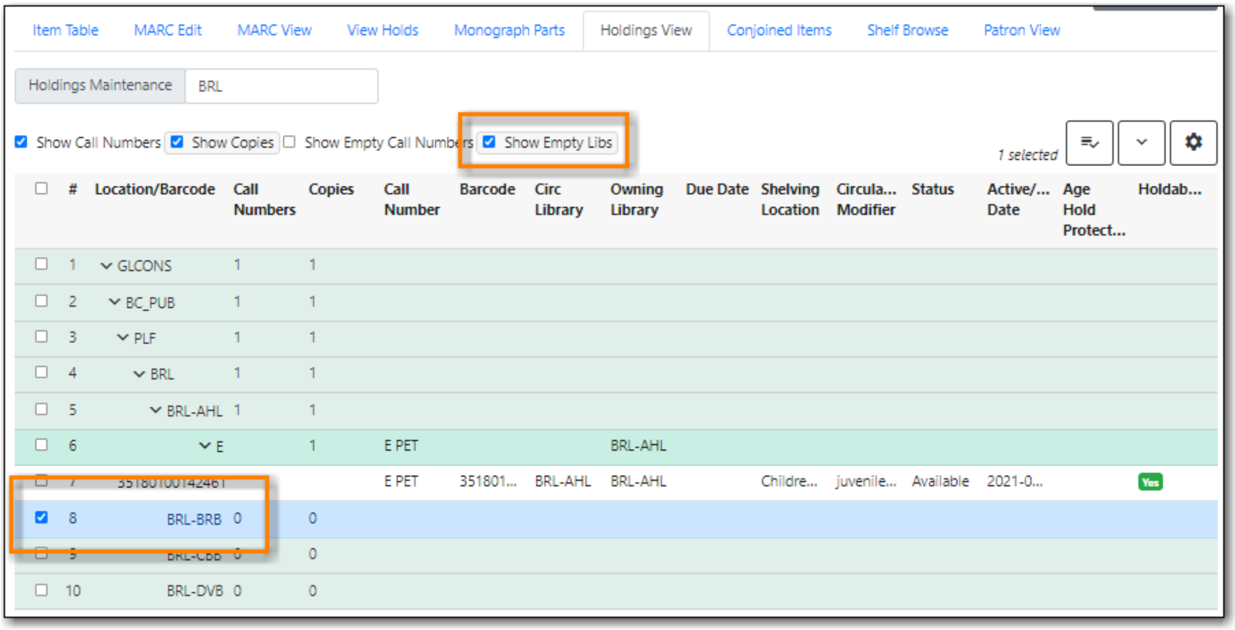
5. The confirmation pop-up appears on bottom right of the screen.



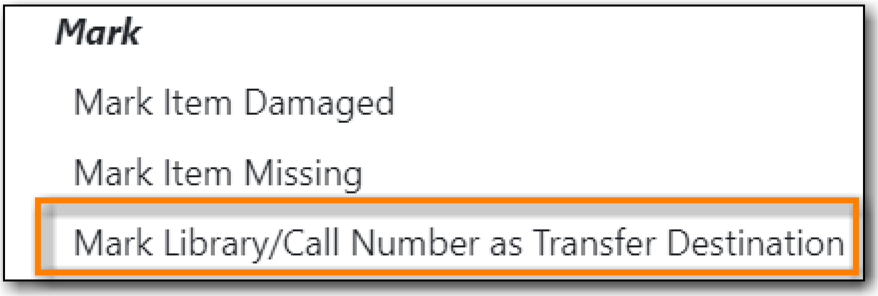
NOTE Your call number's owning library and items' circulation library will not be changed during the transfer. If you already have call numbers under the destination record and the call numbers are the same, the call numbers will be merged.

Transferring Holdings to Another Library

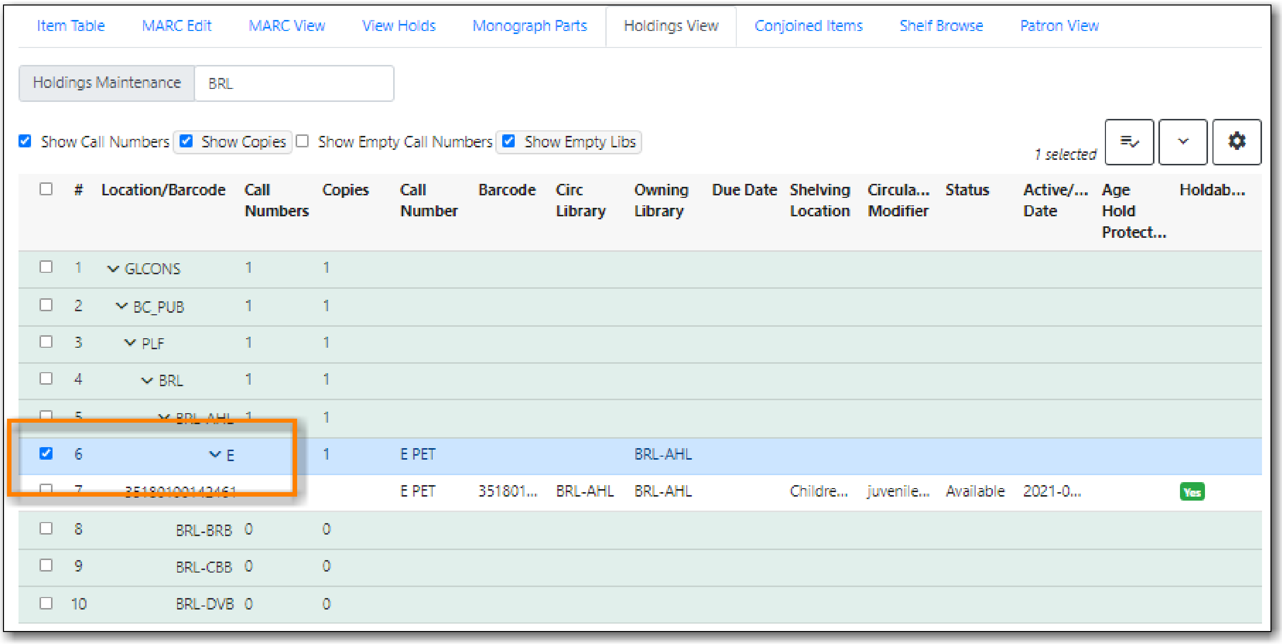
1. On **Holdings View** of the target title record, select the destination library.
   a. You may need to select **Show Empty Libs** to see your destination.



Click **Actions** dropdown list. Scroll down to **Mark**. Select **Mark Library/Call Number as Transfer Destination**.



2. Confirmation appears at the bottom right corner of the screen.
3. Find the source title. Select the source volume on **Holdings View**.



4. Click **Actions** dropdown list. Scroll down to **Transfer**. Select **Transfer Holdings to Marked Destination**.

5. Confirmation appears at bottom right of the screen.

TIP	If the destination library has a call number with the same call number, the call numbers will be merged during the transfer.

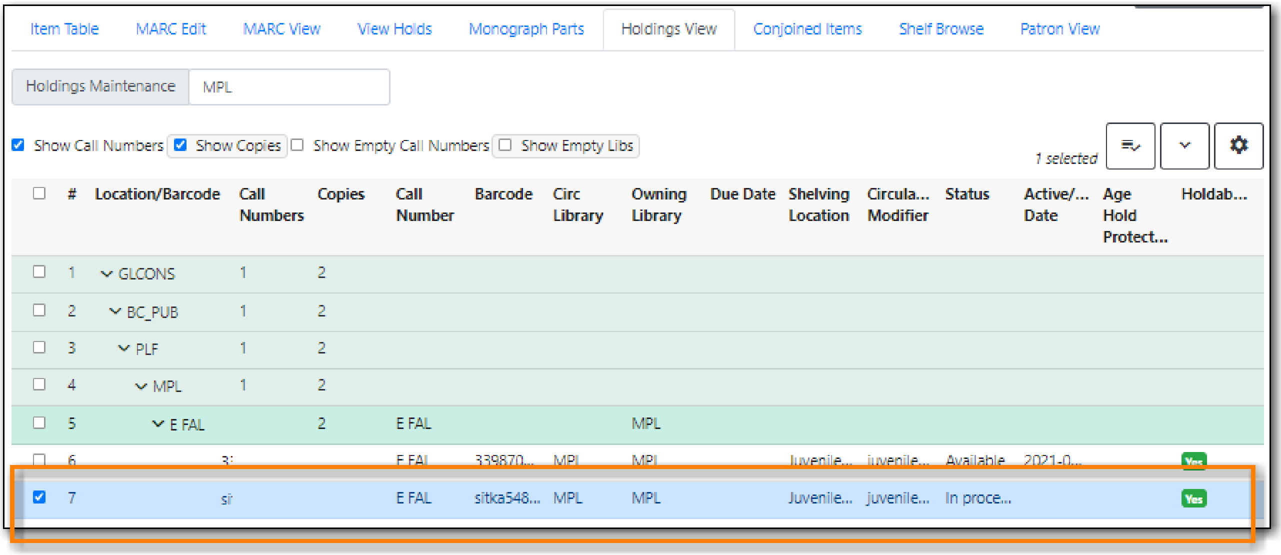
16.9.2. Transferring Items

You may want to transfer some of the items under one call number to another call number or transfer all items under one call number to another with a different call number. You use the **Transfer Items** function.

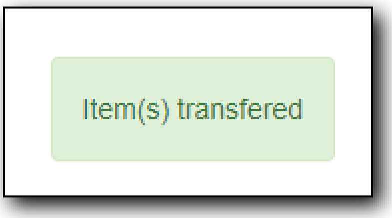
Transferring Items to Another Call Number/Library

1. Find the destination title record. On **Holdings View**, select the destination call number/library. Click **Actions** dropdown. Go to **Mark** to select **Library/Call Number as Transfer Destination**.

2. Go to the source record, if different from the destination. On **Holdings View**, select the items you wish to transfer. Click **Actions** dropdown list. Go to **Transfer** to select **Items to Previously Marked Destination**.



3. The source item disappears, if destination is under another record. The confirmation pops up at the bottom right of the screen.



16.10. Deleting Holdings

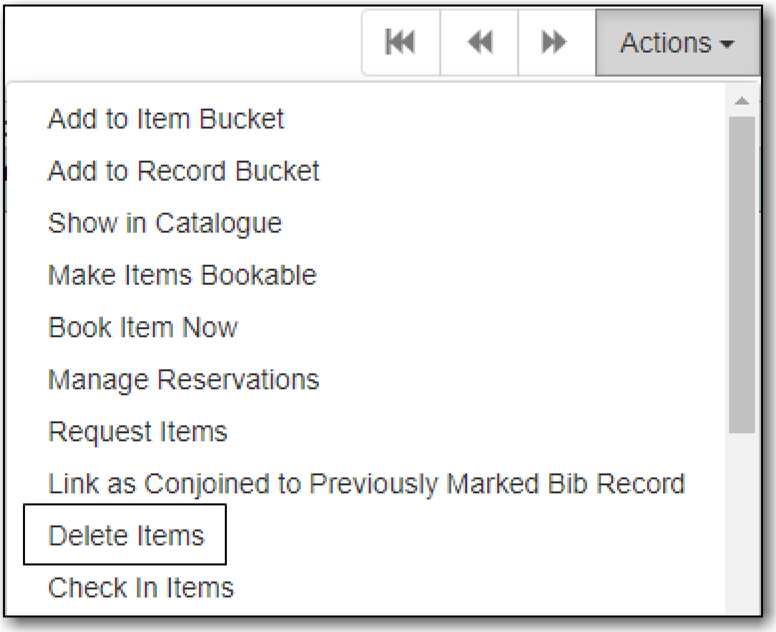
When adding items to the catalogue, you need to have a bibliographic record first, then you create a call number and an item record. When you delete holdings you follow the reverse order. You need to delete item records first. By design and Sitka's configuration, Evergreen will also attempt to delete the call number and bibliographic record. These records will be deleted if they are not used by other items/call numbers. If you delete your library's last item, the call number record will be deleted together with the item. If this is also the last item for the title (no other libraries have an item), the bibliographic record will be deleted, too. So, for most cases, you just need to delete the item records. . If possible, Evergreen will delete the call number and bibliographic records automatically. Occasionally you may want to delete an "orphan" call number (without any item) or bibliographic (without any call number) record.

16.10.1. Deleting Items

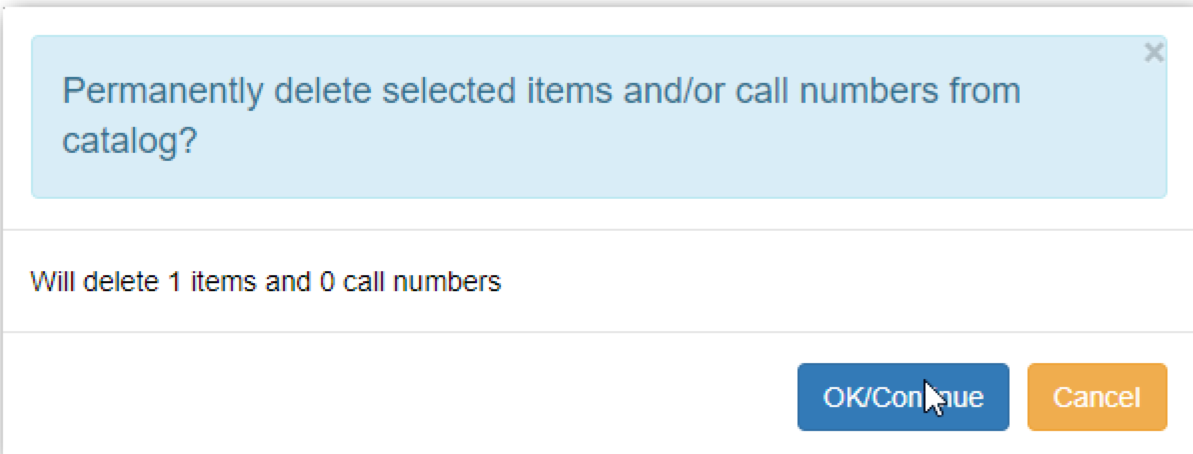
Deleting Items on Item Status Screen

If you have the item in hand, the quickest way to delete an item is to scan the item into Item Status screen.

1. When items are displayed on Item Status screen, select those you want to delete. Click **Actions** dropdown list to select **Delete Items**.



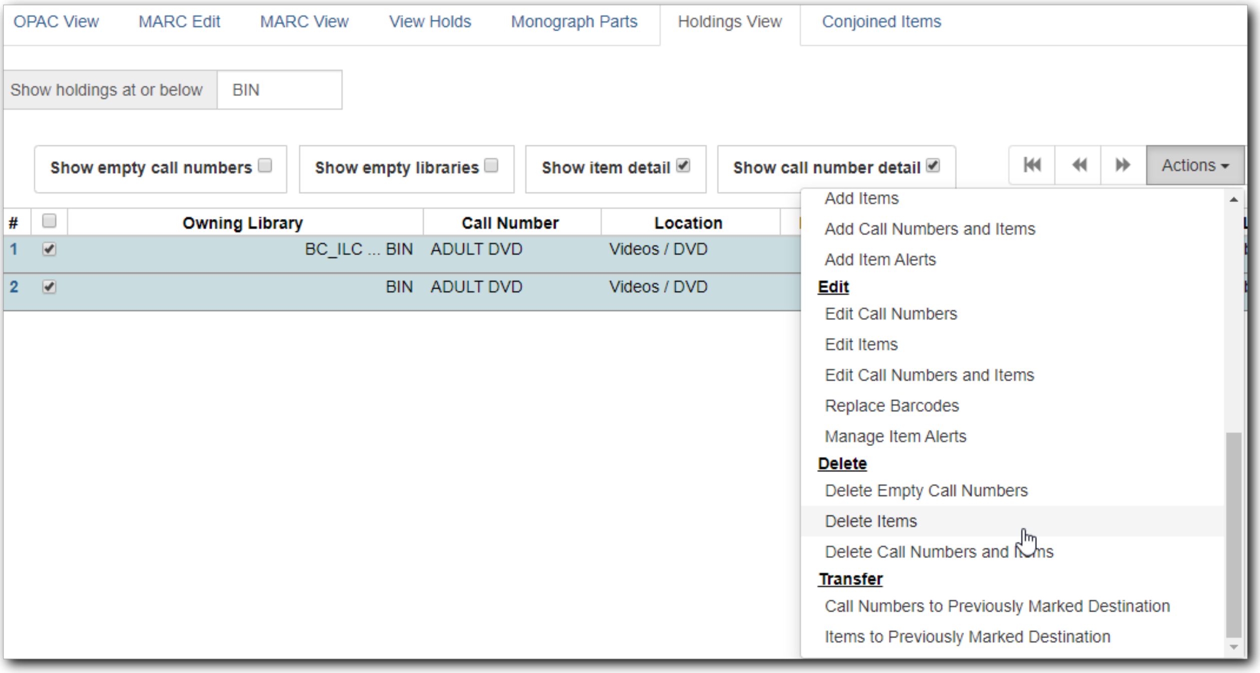
2. You are prompted to confirm deleting the items and call numbers, if any.



NOTE You will see **Item not Found** in a red box showing up after the deletion. You can ignore it.

Deleting Items on Holdings View

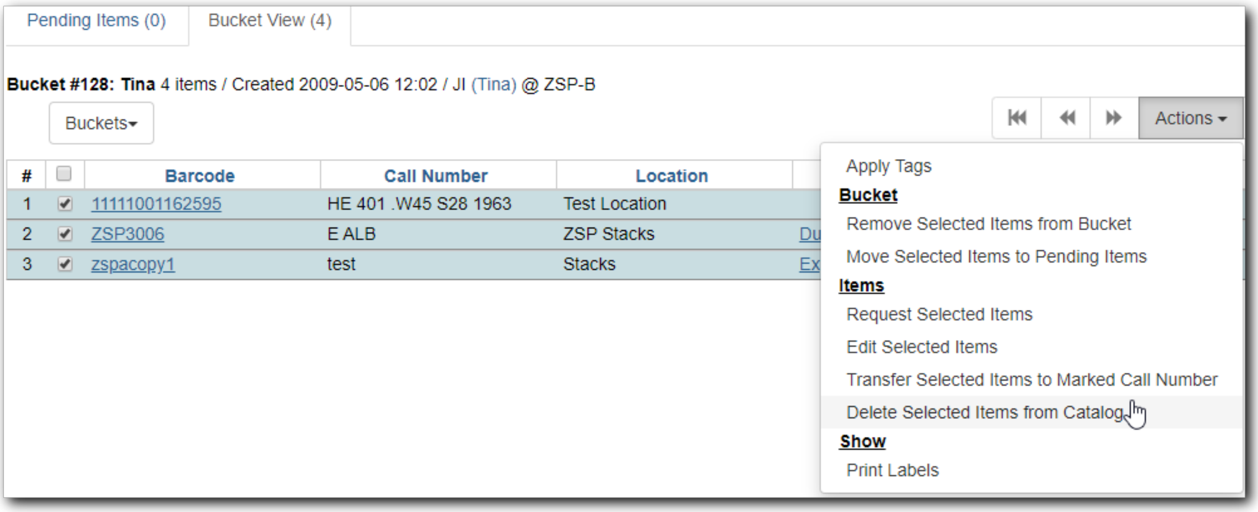
1. On the catalogue, in Holdings View, select the items you want to delete. Click **Actions** dropdown list.
2. Scroll down to **Delete** to select **Delete Items** or **Delete Call Numbers and Items**.



Deleting Items in Item Buckets

If your items are in an Item Bucket, you can delete them from there.

1. Select those items you wish to delete.
2. On **Actions** dropdown list, under **Items**, click **Delete Selected Items from Catalogue**.

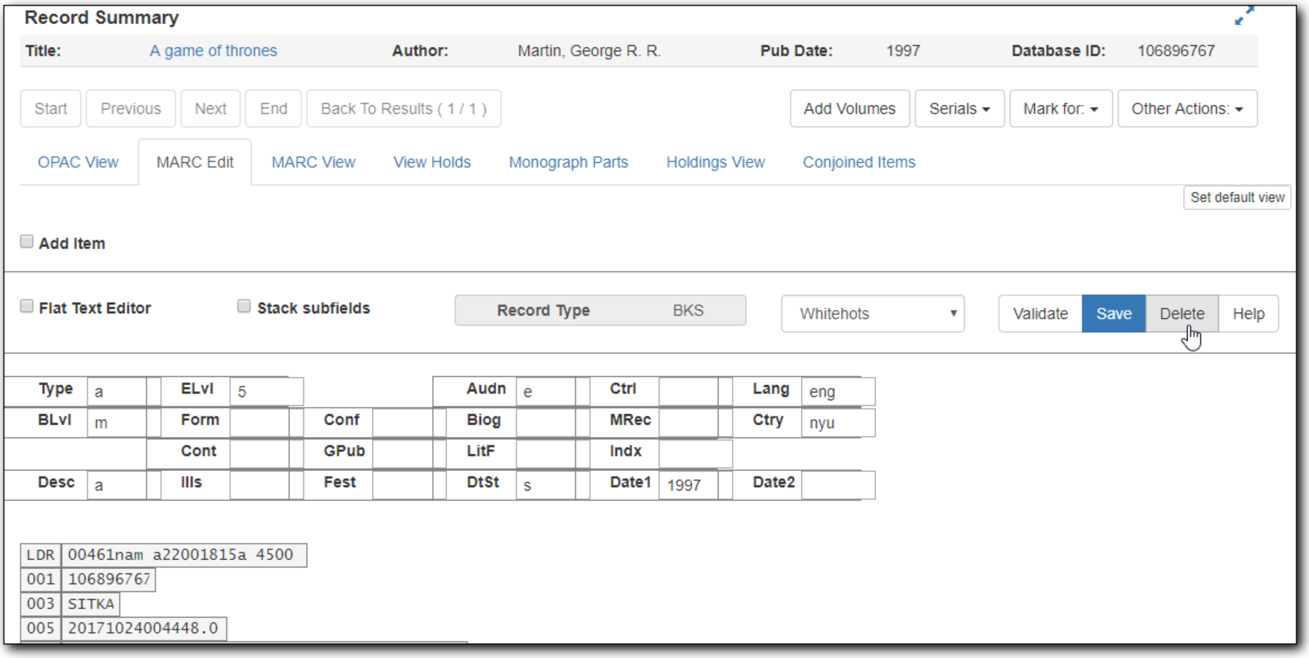


16.10.2. Deleting Call Numbers without Items Attached

Occasionally you may want to delete a call number record without items attached to it. For example, you created a call number record, but did not add an item to it. To delete it, you need to find the title. Go to Holdings View. Highlight the "orphan" call number record, select **Actions** → **Delete** → **Delete Empty Call Numbers**. If this is the last call number record attached to the bibliographic record, the bibliographic record will be deleted, too.

16.10.3. Deleting Bibliographic Record without Call Number/Item Attached

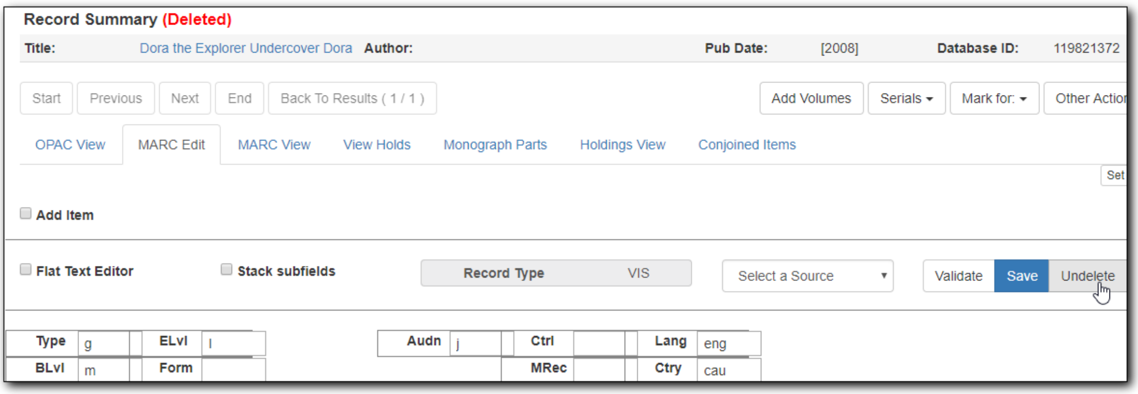
You may have created/imported a MARC record, but did not use it for your item. In such a scenario you should delete the record. Find the title on the catalogue, go to **MARC Edit**, click **Delete**. You are prompted to confirm the deletion. Once done, the record will be deleted.



If you do not see any itemss under the record, but are prompted that the record can not be deleted, very likely there are "orphan" call number records still under the title. You need to go to Holdings View to locate and delete the call number records. The MARC record will be deleted when you delete the last call number.

TIP

Deleted MARC records can be retrieved and undeleted if you know the record's database id. Select **Cataloguing** → **Retrieve Title via Database ID**. Type in the record id. Once the record is displayed (with a red coloured background), go to **MARC Edit**. Click **Undelete**.



Co-op Support regularly deletes call number records without items and bibliographic

> records without items or call numbers.

Chapter 17. Item Buckets

Sitka Snippet Video - Item Buckets (4:33)

Buckets is the name for a batch change functionality in Evergreen, or for a function that groups records in one place. Batch changes allow you to group together many records and enact changes on them all at once, instead of individually editing them. Buckets can also be used to create pull lists. Buckets allow you to track and work with your materials in arbitrary ways and more easily collaborate with others.

This chapter will demonstrate a variety of ways in which you can manage your items with Buckets.

Currently there are item and title record buckets. You may work on item records with Item Buckets and MARC records with Record Buckets.

Some possible uses for buckets are batch editing items, deleting items, and grouping like items temporarily to change their status or to create bibliographies and pull lists. While you can batch edit records a variety of ways in Evergreen, using common Windows functions such as select all and edit, buckets are useful for keeping records together over a period of time. For example, if you scan 20 items into the Item Status screen you can batch edit or delete from there by selecting all, but you have to enact those changes right then while records are all together on the screen. By utilizing Evergreen's bucket functionality, you can create a bucket and add records to that bucket, and they stay there until you are ready to work with them, whether that be immediately or days later. Adding items to a bucket is like creating and saving a query. The record being in a bucket does not affect normal library functions such as circulation, as being in a bucket is not a status.

Buckets can be shared or private, and are associated with a login account.

TIP

Deleted records are not automatically removed from buckets. It is recommended that you always display **Deleted?** field in Bucket View.

When a bucket is retrieved, all information about the records in it is transferred to the workstation. It consumes the computer's resources. It is recommended that an item bucket contain no more than a few hundred records.

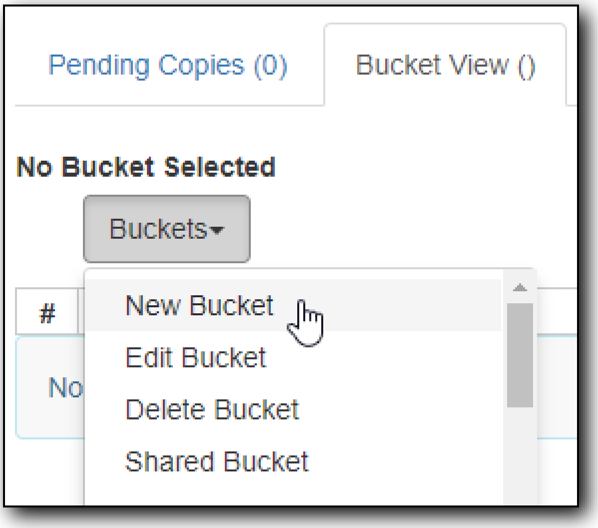
17.1. Creating/Deleting Item Buckets

Create Item Buckets

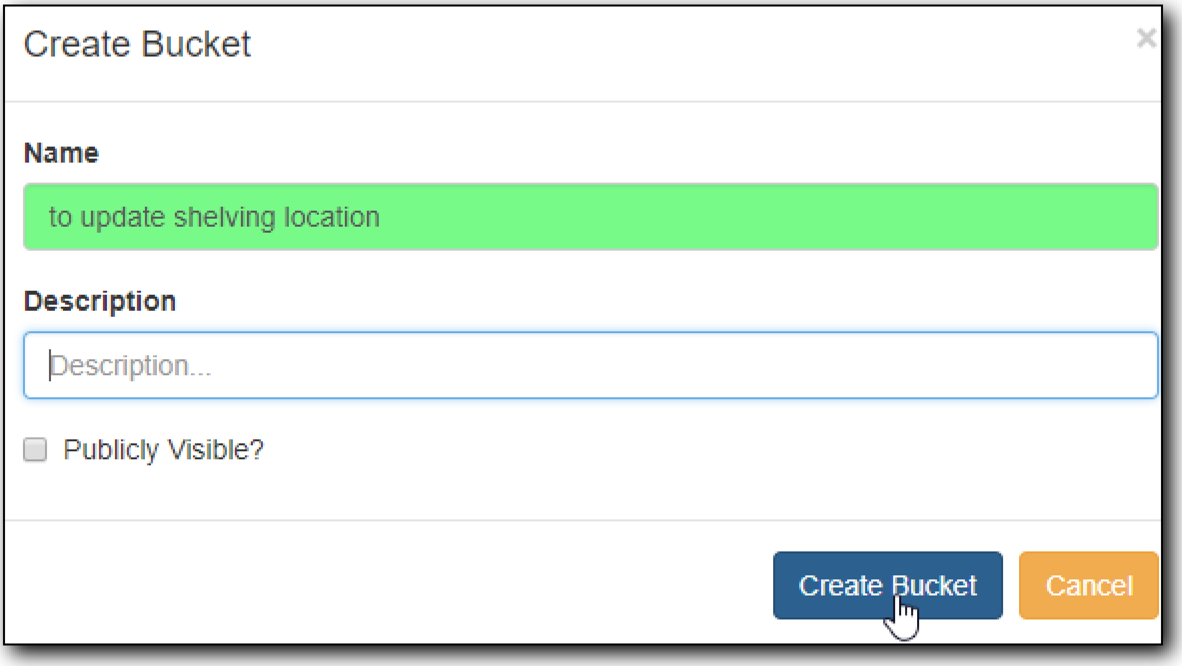
There are two ways to create an item bucket. You can either create a bucket first, without accessing any copies, or you can access an item record and choose to create the bucket from that view. We will demonstrate both methods here.

Create an Item Bucket on Item Buckets view

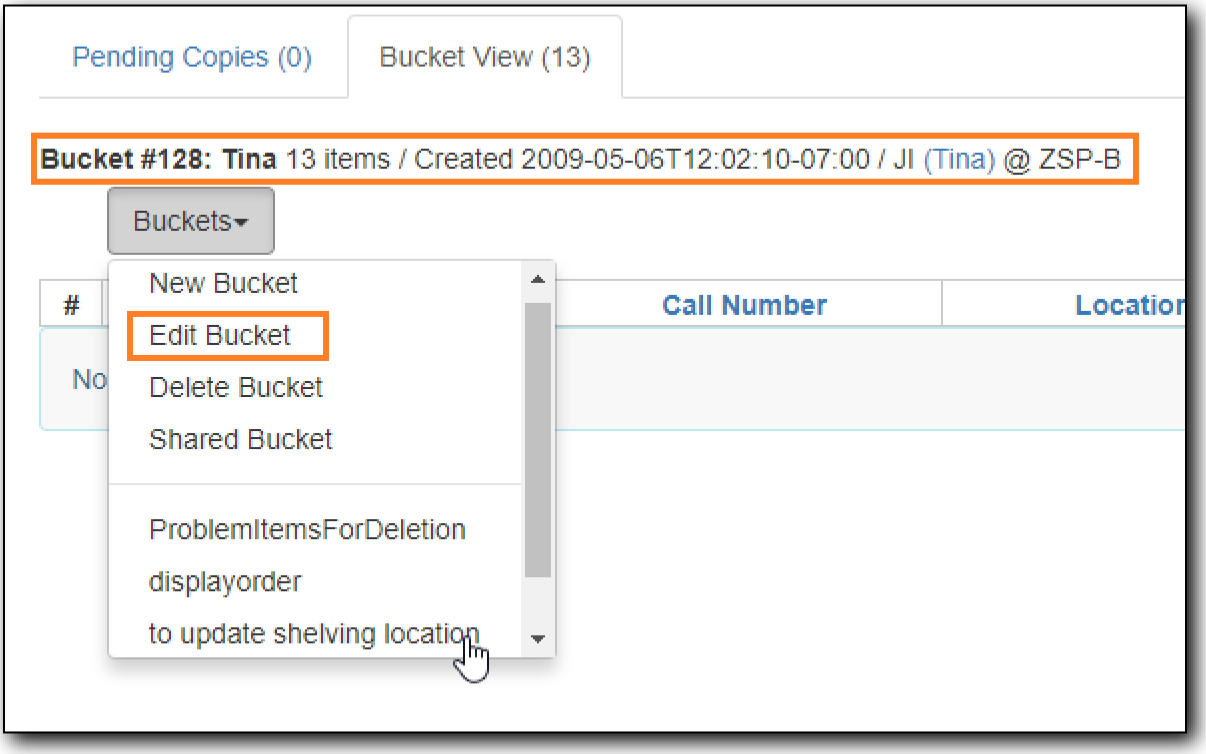
1. Select **Cataloging** → **Item Buckets** from the menu bar.
2. Select **New Bucket** from the **Buckets** dropdown list.



3. Type in a name and some description, if needed. Click **Create Bucket**.



4. The newly created bucket is the active bucket in Bucket View. Note that the bucket is numbered, and creator/owner identified.



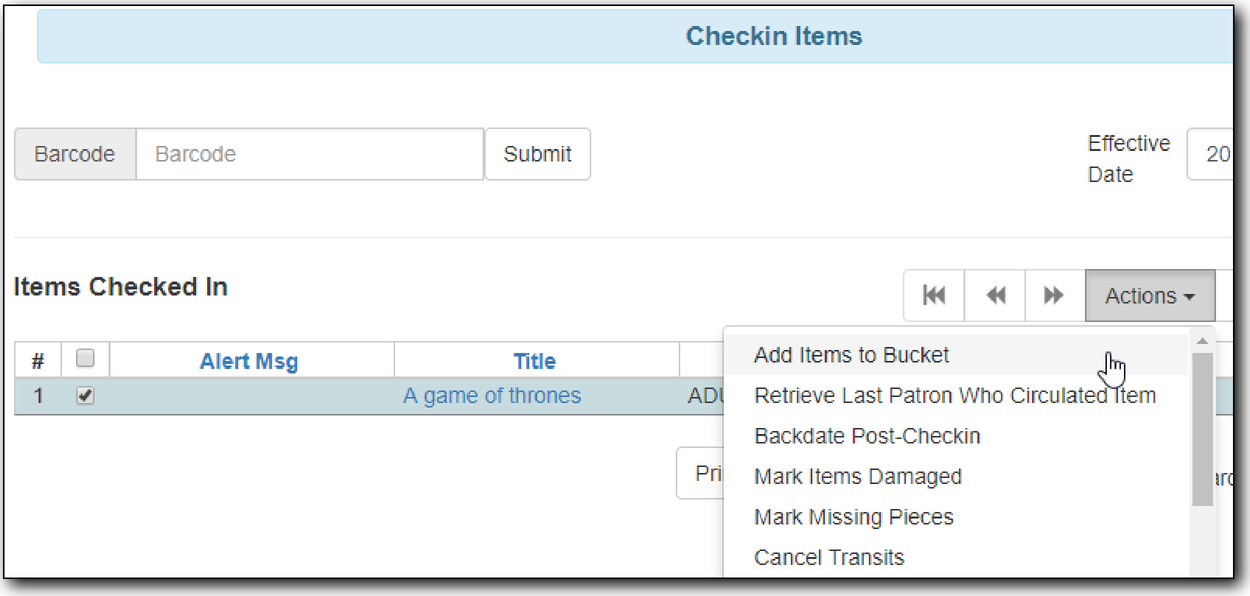
5. Click the **Buckets** dropdown list to see the bucket. You can edit the bucket's name or description by clicking on **Edit Bucket** on the list.

TIP	• Only buckets created by the login account are listed. But those created by other people can be retrieved via bucket number, if shared with you. Click **Shared Bucket** to type in the number to retrieve it. • Ignore the check box for **Publicly Visible** - this function does not work as expected.

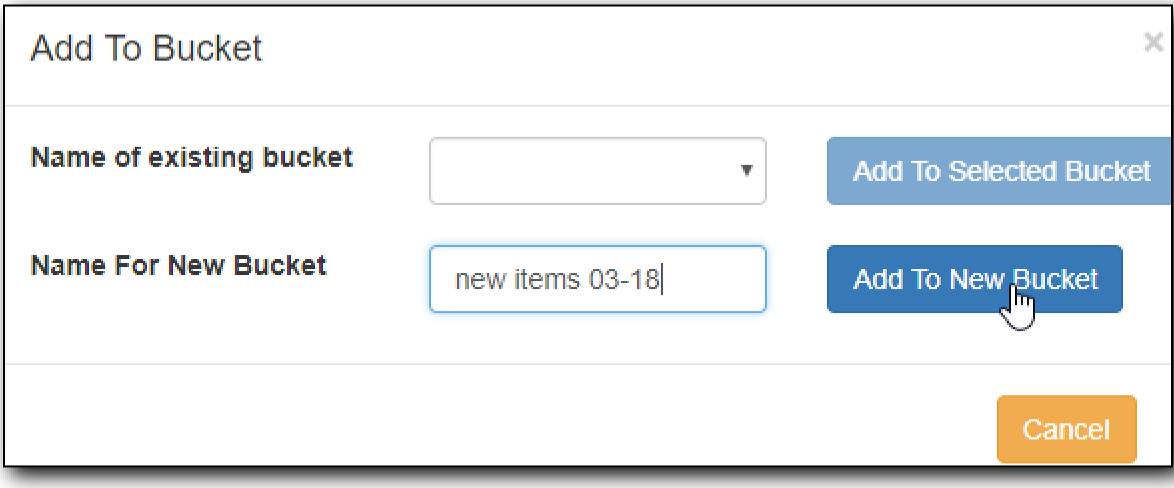
Create an Item Bucket when Adding an Item Record to a Bucket

You can also create a bucket from within an item record.

1. When an item is displayed on a screen such as **Checkin** or **Item Status**, you can add it to an item bucket by choosing **Actions** → **Add Items to Bucket**.

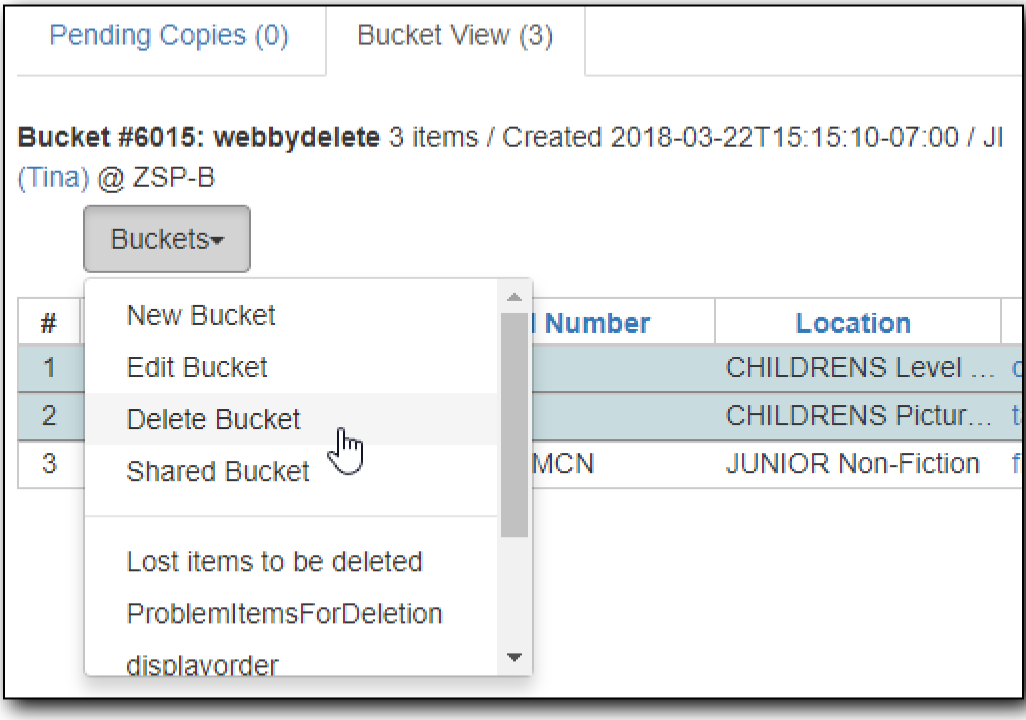


2. You are prompted to add the record to an existing bucket or a new one. To add to a new bucket, type in a name in **Name For New Bucket** box, then click **Add to New Bucket**.



Delete Item Buckets

To delete an item bucket, retrieve it on Bucket View, then select **Delete Bucket** on **Buckets** dropdown list.

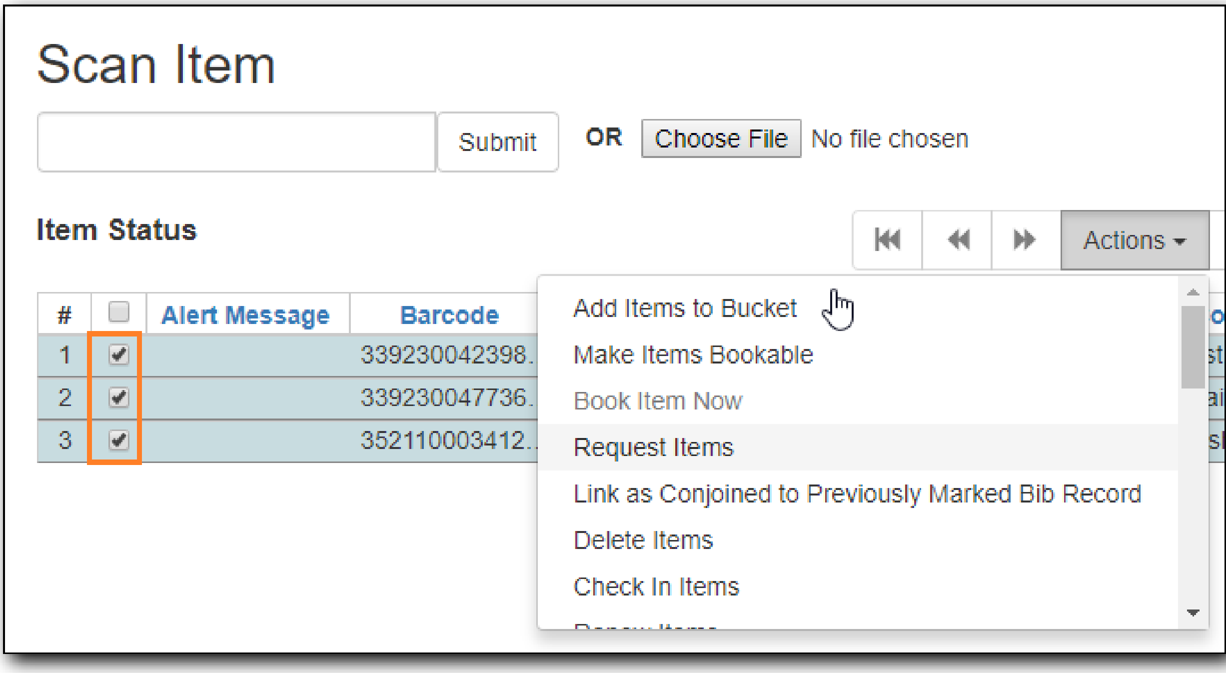


17.2. Adding/Removing Item Records to/from a Bucket

Add Items to a Bucket

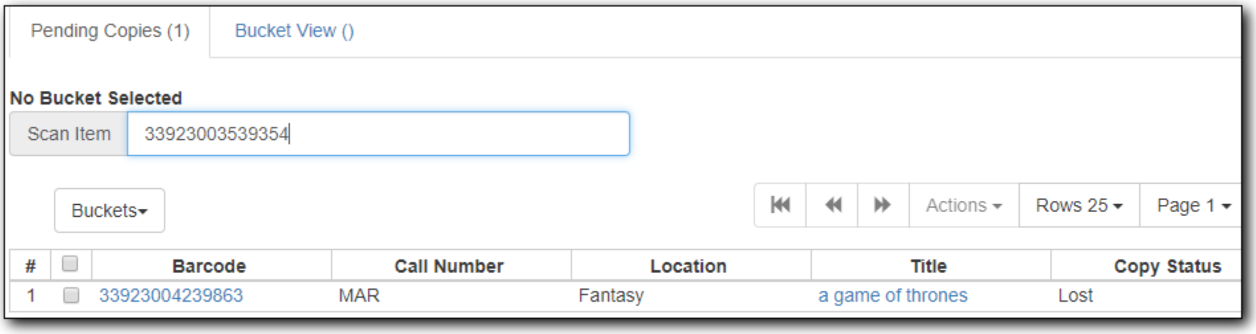
Items can be added to a bucket when they are displayed on **Checkin**, **Item Status** and **Holdings View** screen.

1. You can select multiple items and add them to an item bucket at one time. . Click **Actions** → **Add Items to Bucket**.

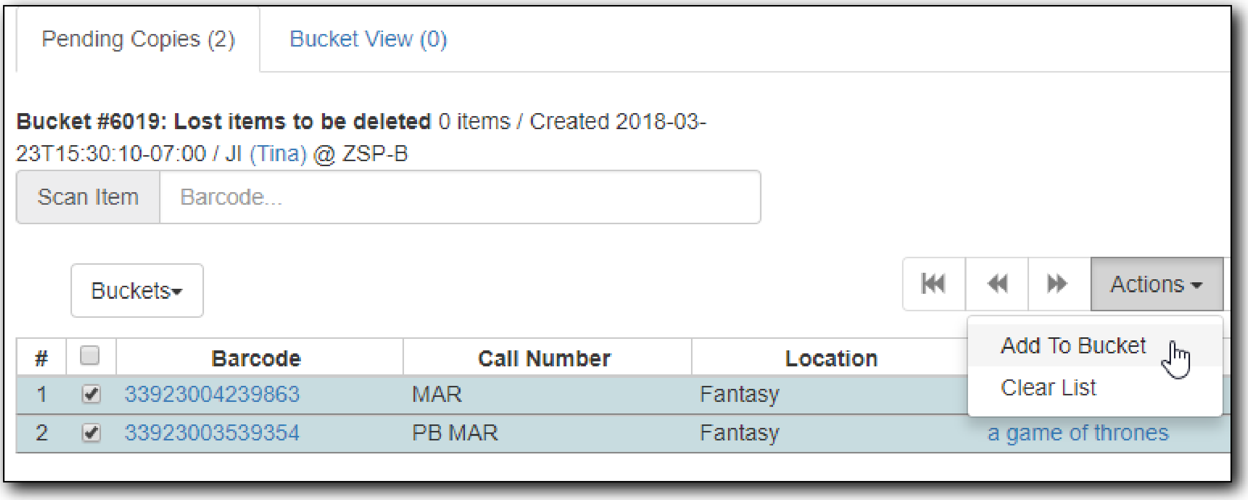


You can add items to a bucket on **Item Bucket View**.

1. Go to **Pending** tab to scan or type in item barcodes.

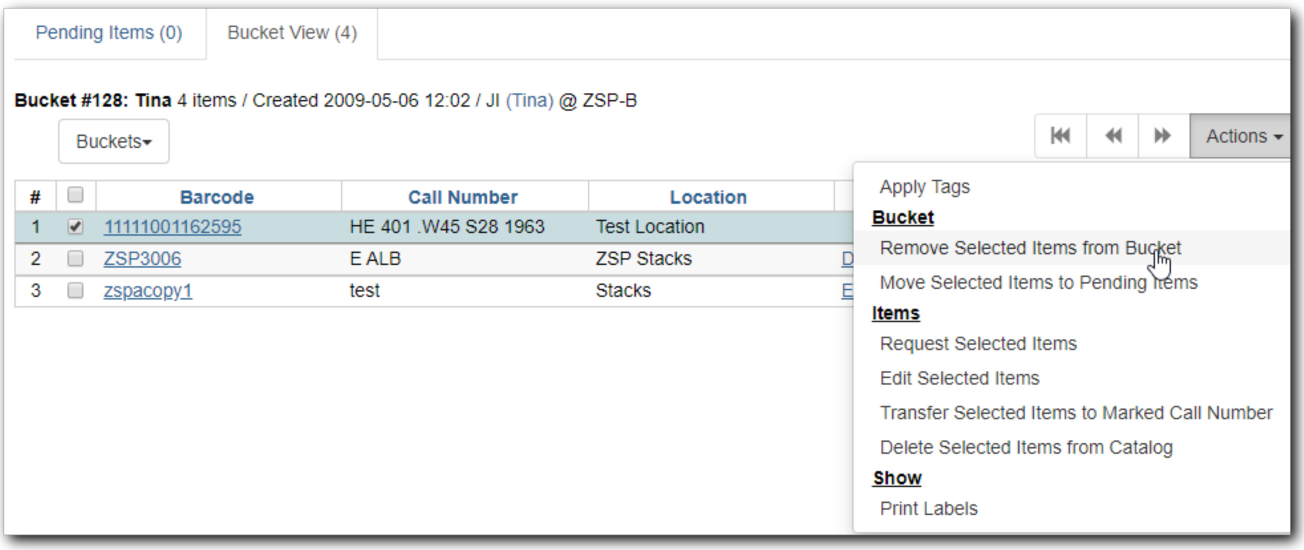


2. Click the **Buckets** dropdown list to open or create a bucket, if not done yet.
3. Select records that you want to add to the bucket.
4. Click **Actions** → **Add to Bucket**.



Remove Items from a Bucket

To remove items from a bucket, retrieve the bucket, select the items, choose **Actions** → **Bucket** → **Remove Selected Items from Bucket**



17.3. Working with Items in a Bucket

You can apply the following functions to selected items in a bucket.

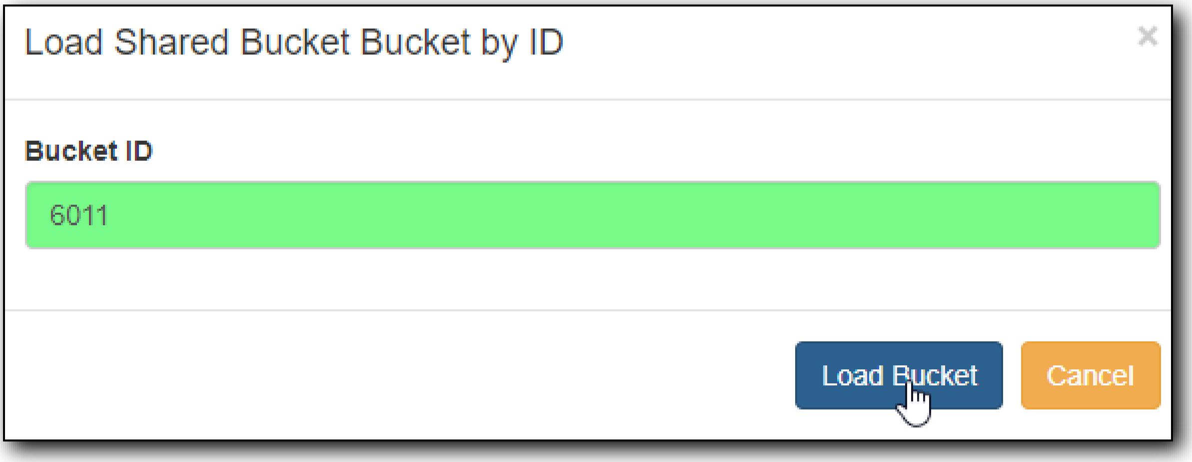
- **Delete Item Records**
- **Edit Item Records**
- **Transfer Items to a Selected Volume**
- **Print Labels**

To apply these functions, retrieve the bucket, select items, then choose the function from the **Actions** list.

17.4. Retrieving Shared Buckets

On the **Buckets** list, you can find all buckets created by yourself. You can retrieve your co-workers' buckets if they share them with you by telling you the bucket number.

To retrieve a shared bucket, click **Shared Buckets** on the Buckets list. Type in the bucket number on the prompt, then click **Retrieve Bucket**.



Chapter 18. Adding Bibliographic Records

When there is no matching MARC record for your item, you may import one from the Z39.50 sources or the files supplied by your vendors. Or you may create a new MARC record if you can not find one from other sources.

18.1. Importing Bibliographic Records via Z39.50 Interface

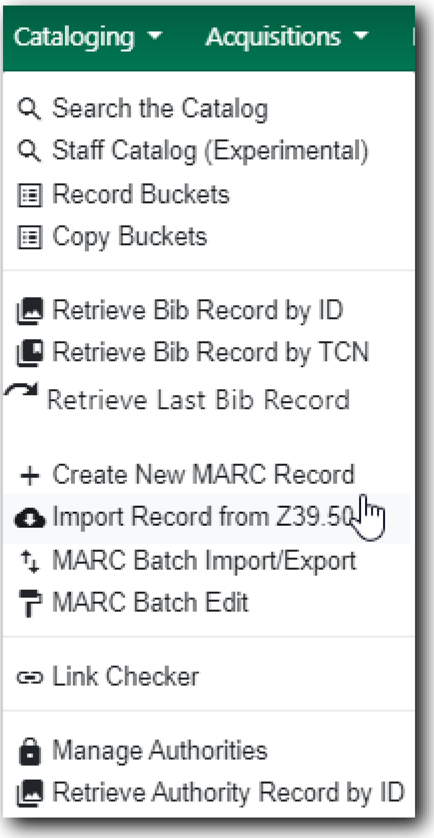
Sitka Training Video - Z39.50 (7:58)

It is required practice and Sitka policy to check the Evergreen database for existing records before importing a record. You can search the catalogue first, or you can configure the Z39.50 screen to search the Evergreen database as well as Z39.50 targets at the same time. If searching Evergreen via the Z39.50 screen and you find a record, it is required practice and Sitka policy to find that record in the catalogue and attach your holdings to it. If you have confirmed that there is no record in Evergreen that matches the item in your hand, but have found a record in another database, simply import the new record into Evergreen and then attach holdings.

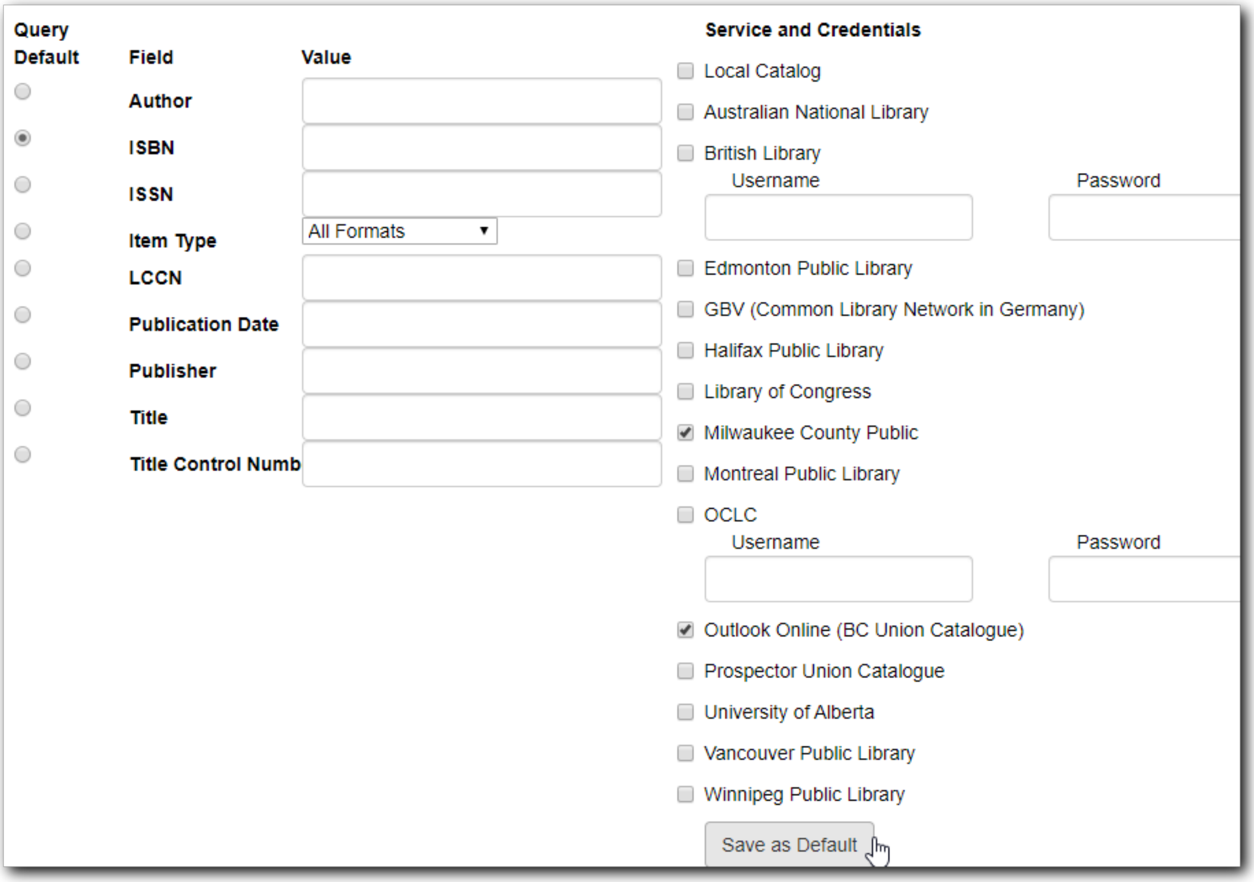
18.1.1. Importing Bibliographic Records via Z39.50

Sitka Snippet Video - Importing Bibliographic Records via Z39.50 (2:54)

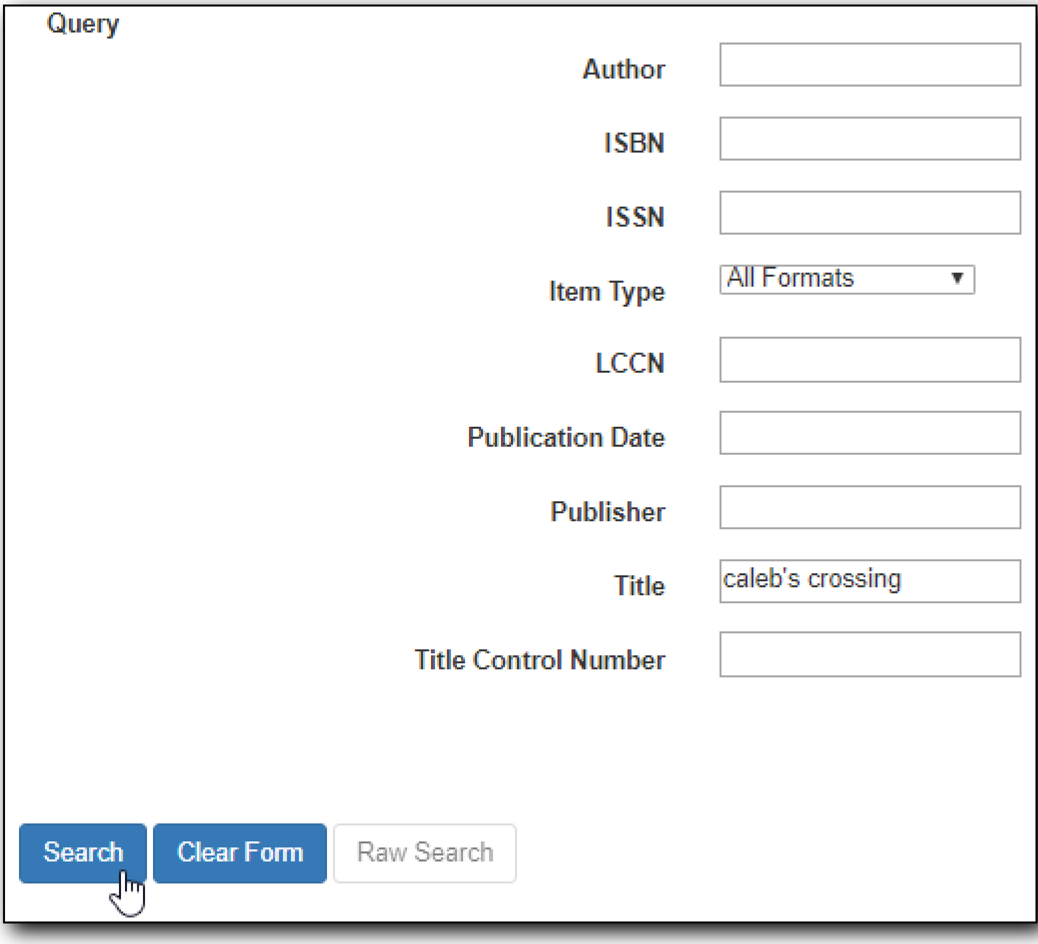
1. To access the Z39.50 interface, select **Cataloguing** → **Import Record from Z39.50**.



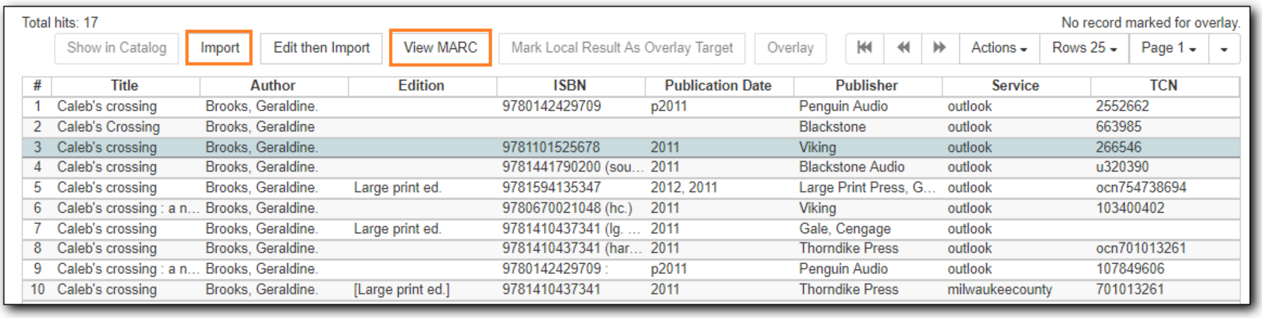
2. Select single or multiple pre-configured Z39.50 targets from the list. Note that most free targets do not have a User name or Password field. Some free targets and the subscription services held by some Sitka libraries require login. Once you have made your choices, click **Save as Default** to save the services you usually search and the user names and passwords you have entered. They will be automatically selected next time you open the Z39.50 screen.



3. Fill in preferred search criteria and click **Search**. Note that the active search fields will change depending on the targets you select. Different targets may support different search types. For instance, Keyword and Subject will only be active if the local catalogue is selected. When you select multiple targets to search, an active box may apply to only one target.

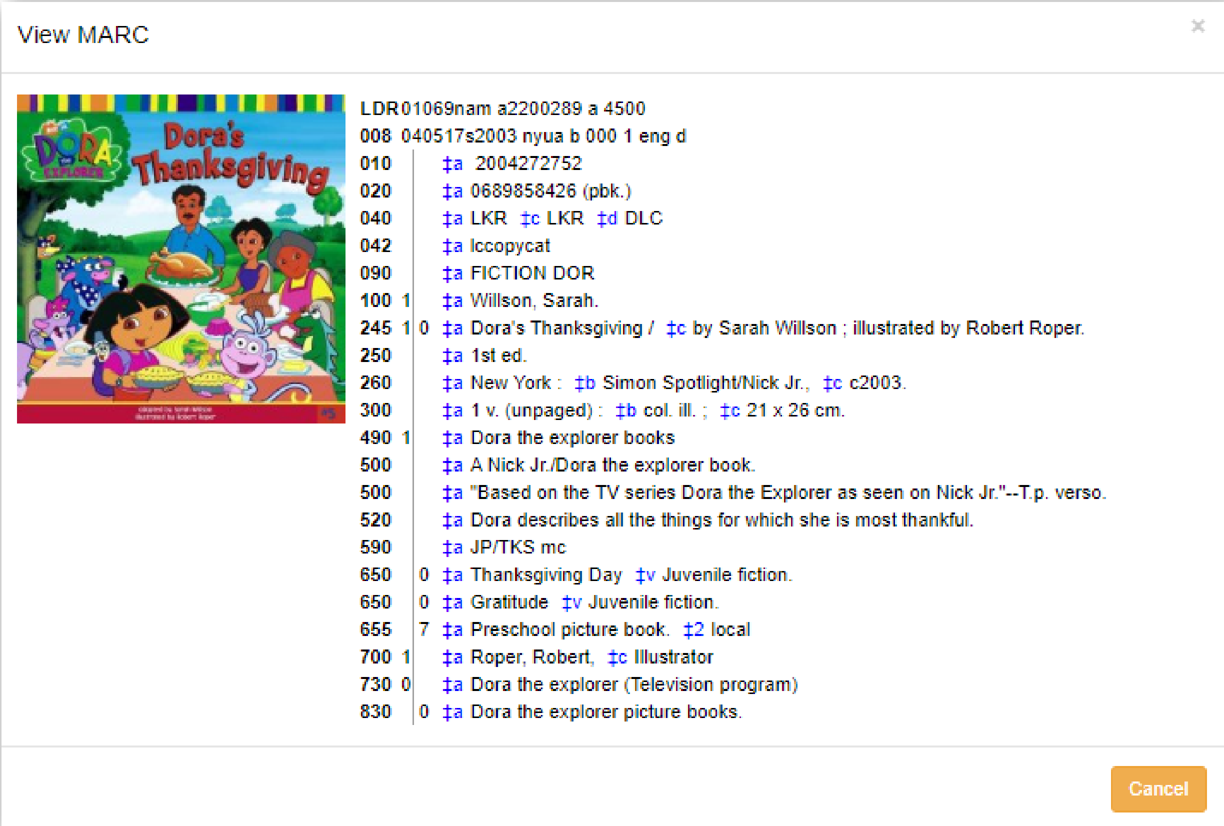


4. Search results are displayed in the lower pane. You can hide the top pane to bring up the result list or simply scroll down to it. Information about each retrieved record appears on a separate summary line, with various columns of information. The **Service** column indicates where the record was found. If "native-evergreen-catalog" is listed in this column, the record is in Sitka's Evergreen. If there are many results, you can navigate to the next page. You can view MARC records, and choose to import or overlay MARC records. This example demonstrates importing a record.

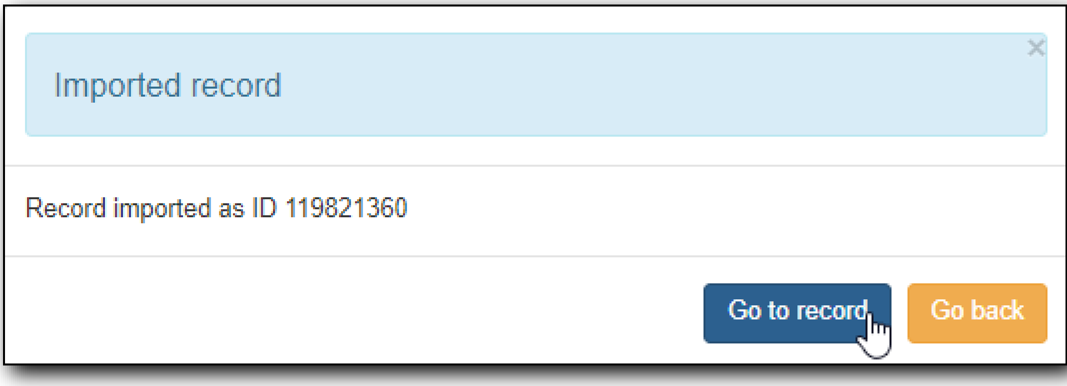


#	Title	Author	Edition	ISBN	Publication Date	Publisher	Service	TCN
1	Caleb's crossing	Brooks, Geraldine.		9780142429709	p2011	Penguin Audio	outlook	2552662
2	Caleb's Crossing	Brooks, Geraldine				Blackstone	outlook	663985
3	Caleb's crossing	Brooks, Geraldine.		9781101525678	2011	Viking	outlook	266546
4	Caleb's crossing	Brooks, Geraldine.		9781441790200 (sou…	2011	Blackstone Audio	outlook	u320390
5	Caleb's crossing	Brooks, Geraldine.	Large print ed.	9781594135347	2012, 2011	Large Print Press, G…	outlook	ocn754738694
6	Caleb's crossing : a n…	Brooks, Geraldine.		9780670021048 (hc.)	2011	Viking	outlook	103400402
7	Caleb's crossing	Brooks, Geraldine.	Large print ed.	9781410437341 (lg. …	2011	Gale, Cengage	outlook	
8	Caleb's crossing	Brooks, Geraldine.		9781410437341 (har…	2011	Thorndike Press	outlook	ocn701013261
9	Caleb's crossing : a n…	Brooks, Geraldine.		9780142429709 :	p2011	Penguin Audio	outlook	107849606
10	Caleb's crossing	Brooks, Geraldine.	[Large print ed.]	9781410437341	2011	Thorndike Press	milwaukeecounty	701013261

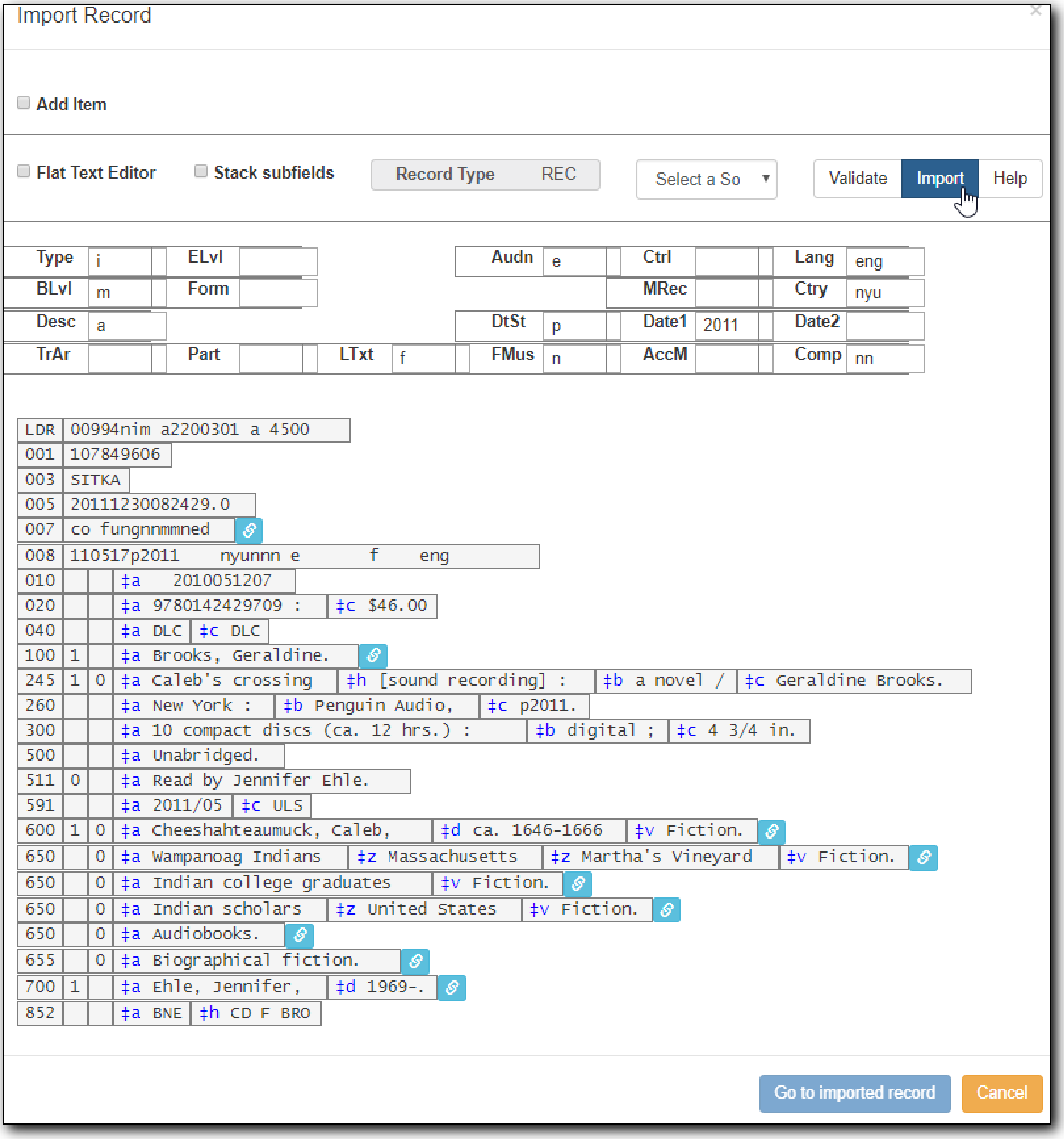
5. To import a record, choose the record from the results list that you would like to import. You should view the record first by clicking on **View MARC**. MARC record is displayed in a pop-up window. If a cover image is available, it will display as well. Click **Cancel** to go back to the result list.



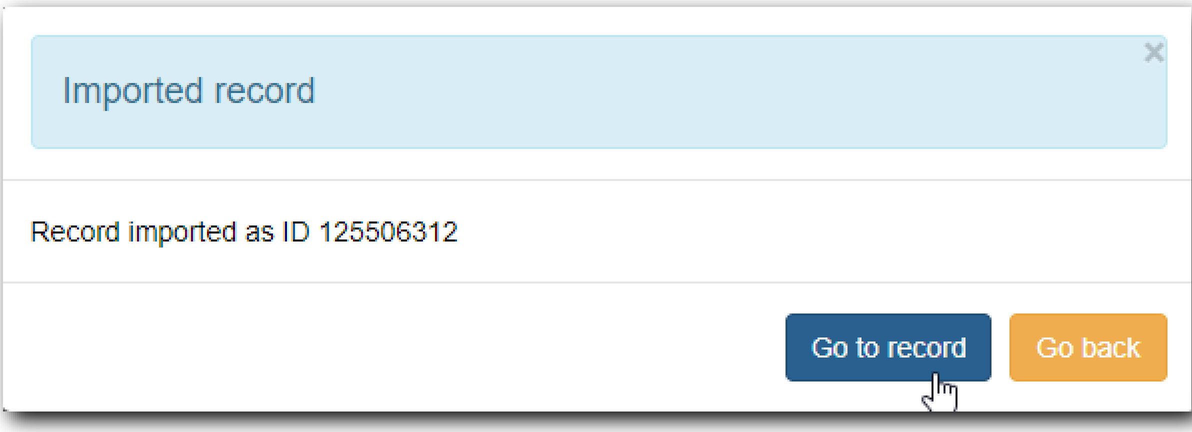
6. When you are sure you have chosen the correct record to import, click **Import**, if you do not want to edit the record or edit it after importing. The record is imported. A pop-up window appears with the new record ID and a link to it in the catalogue. Click **Go to Record** to add holdings.



7. You may also choose to **Edit then Import** a record. The MARC record is displayed in a pop-up window. Edit the MARC record, then click on **Import**.



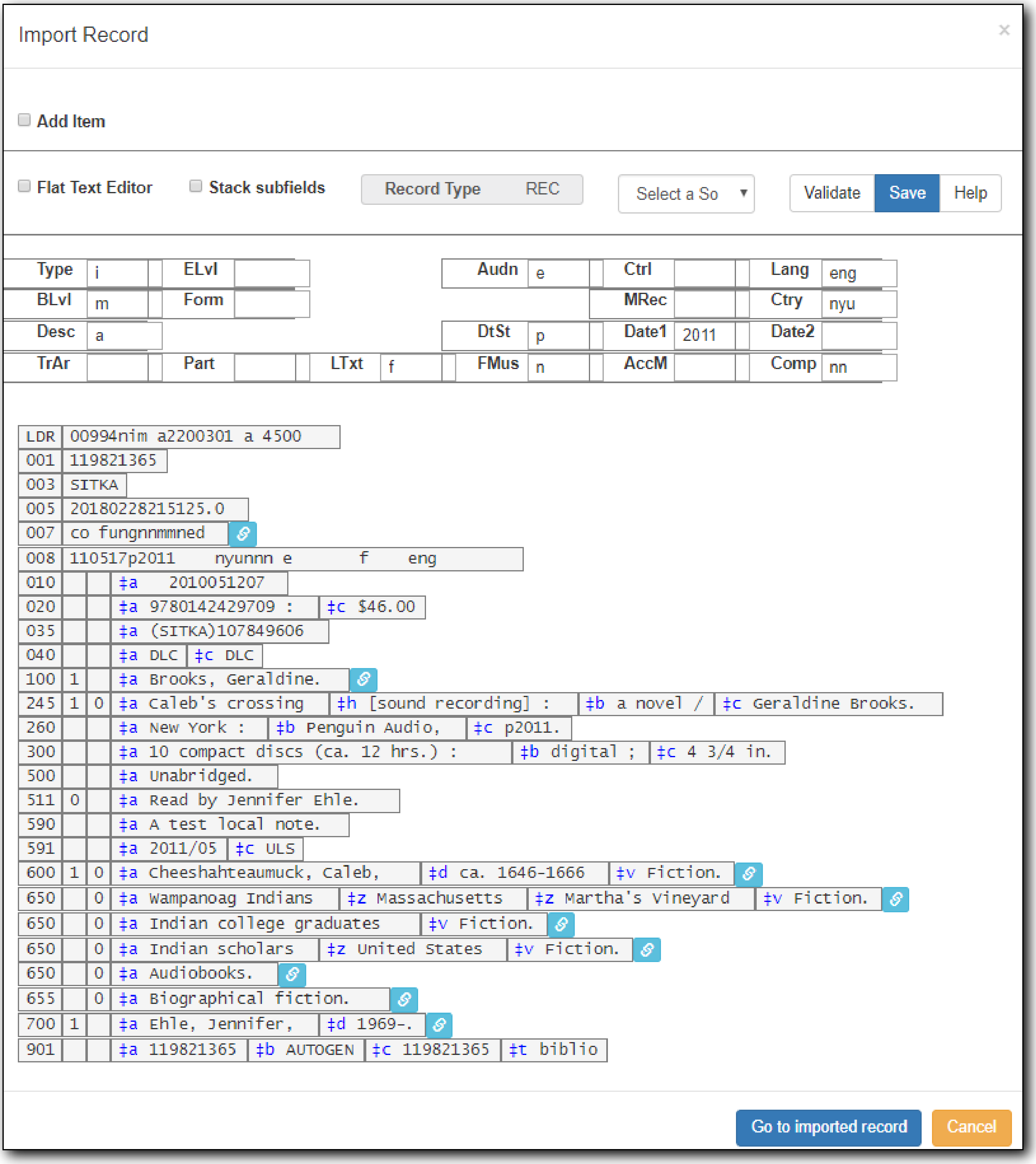
8. Confirmation pops up with options to **Go to record** or **Go back** to the import record window.



9. Choose **Go back** to Import Record window. You can continue to edit the record. . Click **Save** once

done editing.

10. Click **Go to Imported Record** to add holdings.



TIP	Co-op Support has profiled certain fields, primarily 9xx fields, to be automatically stripped when records are imported through Z39.50. The default fields that are stripped are 906, 923, 925, 936, 948, 955, 959, 963.

18.1.2. Overlaying Records via Z39.50 Interface

Sitka Snippet Video - Overlaying Bibliographic Records via Z39.50 (4:02)

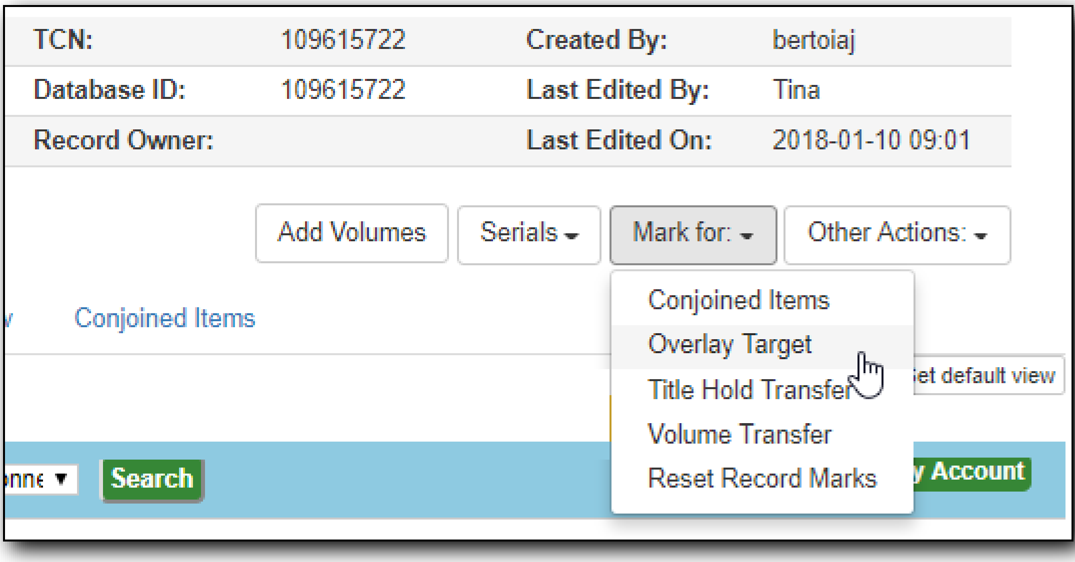
There are times when it is necessary to overlay an existing MARC record in Evergreen with a better

MARC record from a Z39.50 target. This section will demonstrate the steps required to achieve an overlay. Overlaying a MARC record replaces an existing MARC record and leaves all holdings, and corresponding holds, active circulations, bills, and fines intact. As overlay affects all libraries sharing a MARC record it is critical that this procedure be done judiciously and correctly. Please refer to Sitka's cataloguing policy, Co-op Support, or your library's cataloguing mentor, if in place, for more information about this process and its effect on the shared database.

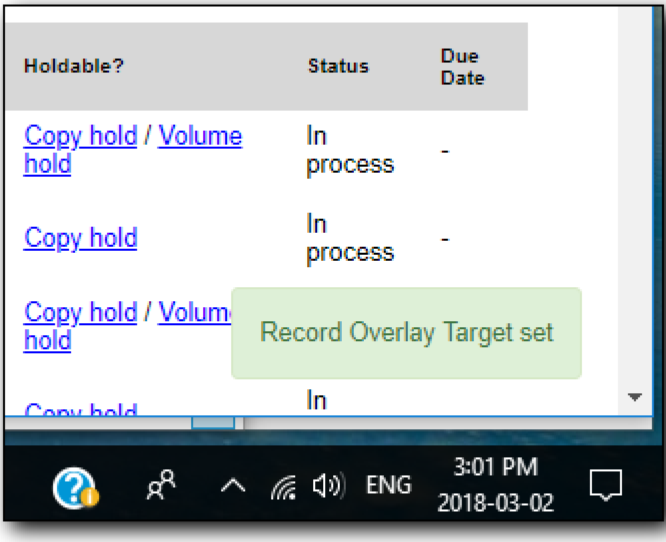
Marking a Record for Overlay

You must first identify the MARC record which you wish to overlay. You do this by "marking" it for overlay. Only one record can be marked at a time. When you mark another record, the previous record is unmarked. Once a record is marked, it stays marked until it is overlaid, or has been reset. Therefore, you can mark and overlay one record at a time, following through the entire process to completion before moving on to another record.

1. To mark a record for overlay, find it in the catalogue first.
2. On record details screen, click **Mark for** → **Overlay target**.



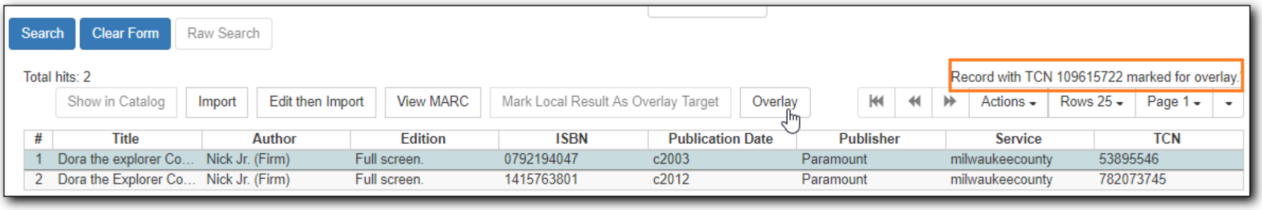
3. Confirmation appears at the right bottom corner of the screen.



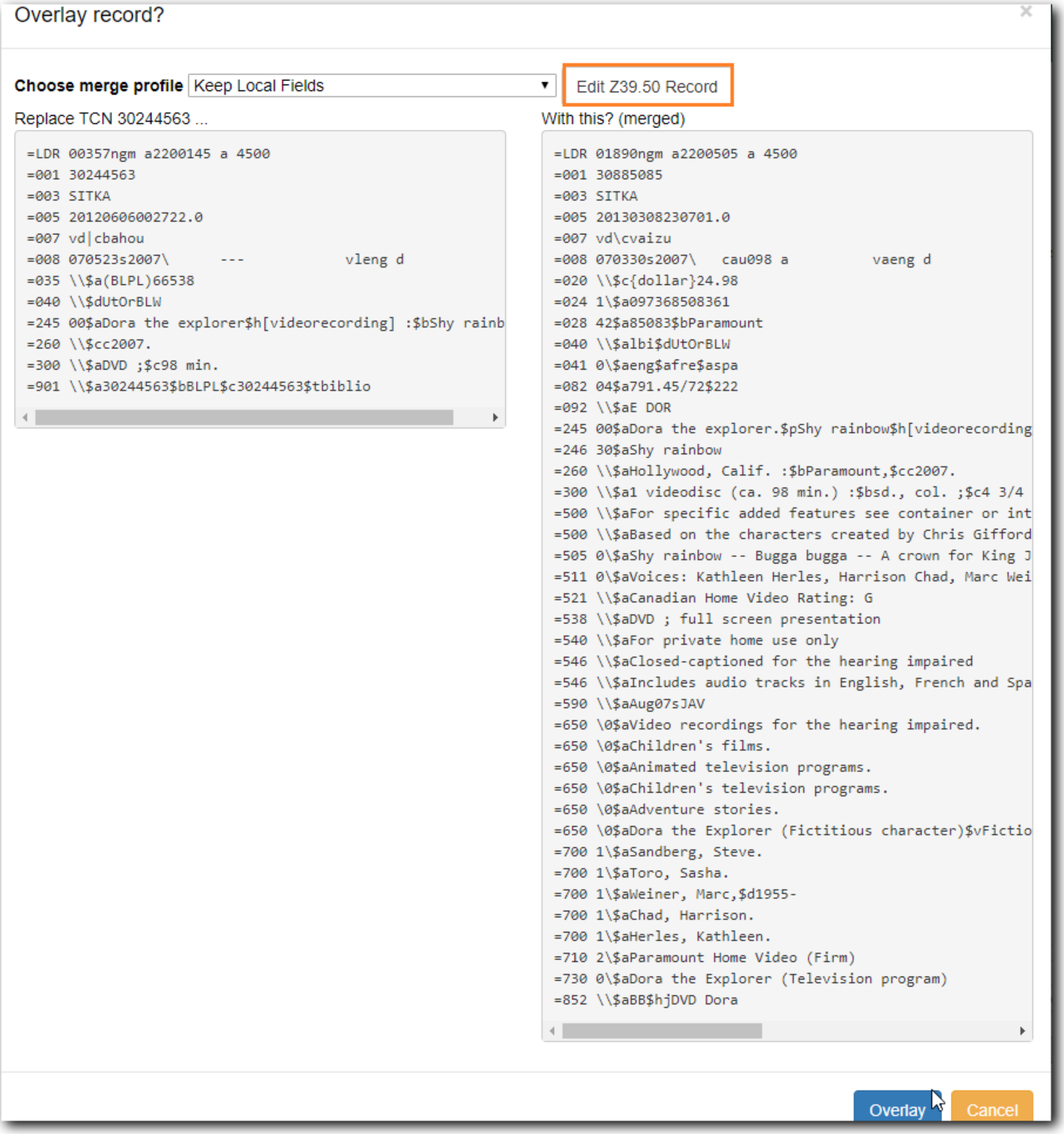
CAUTION Overlay target remains even after you log out of Evergreen. After you re-log in, the target is still in effect.

Overlaying Using Z39.50

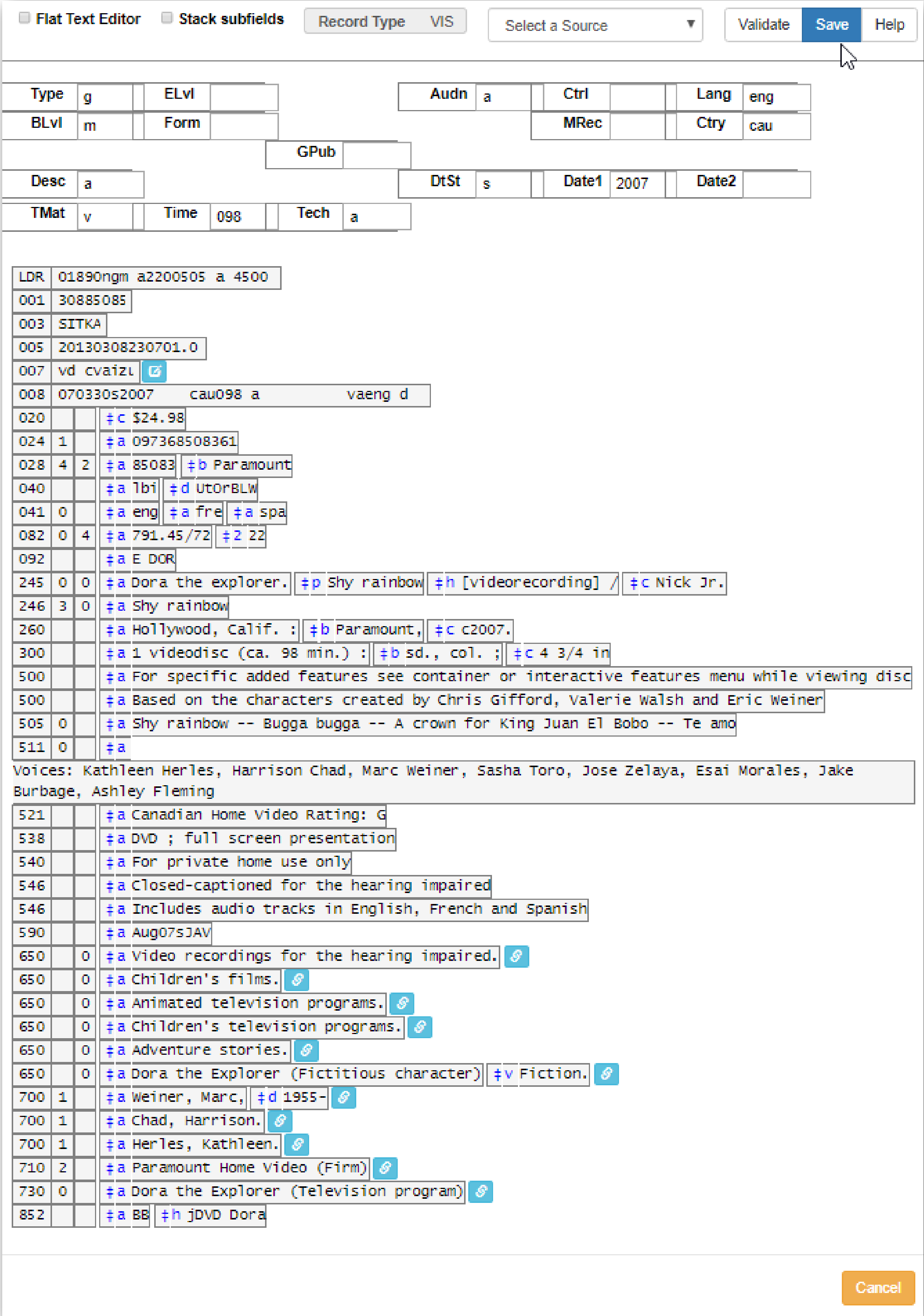
1. To overlay a record, go to **Cataloguing** → **Import Record from Z39.50** to find a target record as described in Importing Bibliographic Records via Z39.50. This record should be a fuller and better catalogued record than the one you are overlaying. You can select potential records on the list based on the summary. Click on **View MARC** to see the full MARC record. Cancel the pop-up window, click on next record to view, or click **Overlay** once deciding on a record to import.



2. The overlay interface pops up in a new window. The default merge profile is Keep Local Fields, unless you chose another before. You can edit the Z39.50 record before importing it to overlay. Click **Edit Z39.50 Record**.



3. MARC Edit screen opens up. Edit the record. Once done, click **Save**. You are back on Overlay screen.



4. Click **Overlay** button at the bottom. The record is imported and displayed in a new tab.

CAUTION	You must select **Keep Local Fields** as the merge profile. You may encounter error if you choose others.

18.2. Batch Importing Bibliographic Records

Sitka Training Video - Uploading MARC Records via MARC Batch Import (3:49)

If the title records you need are not already in the Evergreen database, it is possible to upload vendor-supplied MARC files into Evergreen. Each file may contain one or more MARC records. During the uploading process, Evergreen matches each record in the file with existing records in Evergreen based on pre-defined match points called **Record Match Sets**. Records without matches may be imported directly into the catalogue. Records with matches must be examined by cataloguers. Due to the nature of Sitka's shared database, Co-op Support strongly advises against allowing Evergreen to select a merge target, and cautions you to adhere to instructions for selecting a match as outlined in this chapter.

Importing records involves two steps: 1. all records in the file are first uploaded to the server and kept outside the catalogue as a queue; 2. cataloguers view the records in the queue to import them into the Evergreen catalogue. Cataloguers can view both the incoming and existing matching records to decide which one to use by selecting an appropriate merge profile. You may merge the records with either the incoming or existing record as the lead, while keeping some MARC tags in both records. Overlay/Merge Profile decides how two records are merged.

Holding records can be created if the incoming MARC records contain holding information in a pre-defined format. Contact Co-op Support about the acceptable format if you want to load holding records.

All records in a queue can be exported to a CSV file or printed in non-MARC format (emailing is not available yet). All records imported from a single queue can be added to a Record Bucket.

TIP

There are some settings, namely Record Display Attributes, Record Match Sets, Merge/Overlay Profiles and Import Item Attributes on this screen that are reserved for Sitka server administration. You should not attempt to edit them as they affect all bibliographic records.

Record Display Attributes sets what fields will display on Inspect Queue screen, once a file of records has been loaded. Important descriptive MARC tags and control numbers are selected to display.

Record Match Sets are profiles set up by Sitka to allow for different match points to be used when loading records. The default profile is SitkaMatch. It matches on the 901c (record id), 020a (ISBN), 022a (ISSN), or 035a (System Control Number). It is used in the majority of record loads. The other profiles are only used to load special records. Please contact Co-op Support for which profile to use if your records require a set of different match points to load.

Merge/Overlay Profiles control how the incoming and existing MARC records are merged. Two profiles have been created for all Sitka libraries to use: Merge Using INCOMING Record and Merge Using EXISTING Record.

- Merge Using INCOMING Record: all tags in the INCOMING record will be brought into the final record. Tags: 050, 055, 590, 595, 690, 852 and 856 in the ORIGINAL record will be preserved in the final record. The rest will be removed.

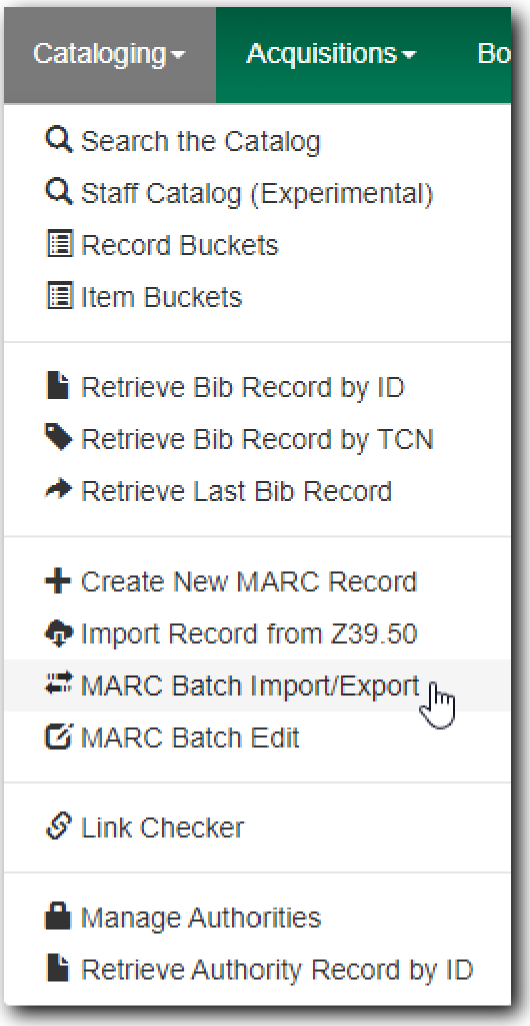
- Merge Using EXISTING Record: all tags in the ORIGINAL record will be kept. Tags: 050, 055, 590, 595, 690, 852 and 856 in the INCOMING record will be brought into the final record. The rest will be removed upon merge.

  These profiles ensure local data in these six fields in a merged MARC record is never overwritten, and holding records (in tag 852) can be loaded to either the existing MARC record or with the incoming record.

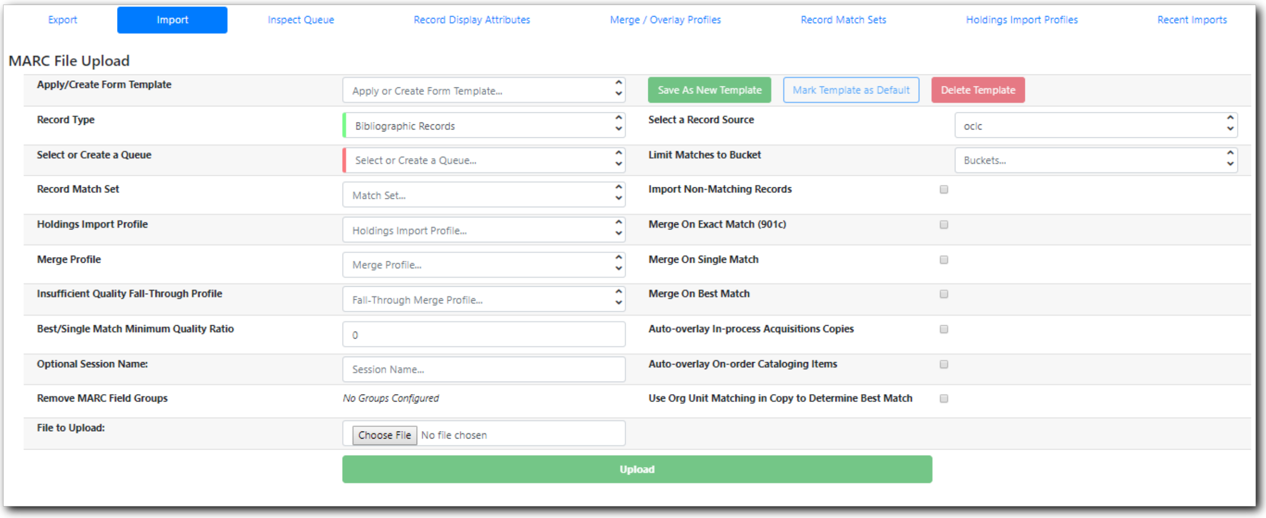
Holdings Import Profiles are profiles set up by Sitka to allow importing of item records with vendor supplied MARC records. The vendor will need to send item level information in a local MARC tag and subfields (eg. 9xx or 852), and this information can be mapped into item records when the bibliographic records are loaded. Please contact Co-op Support if you are interested in loading item records with your bibliographic records.

18.2.1. Uploading MARC Record Files

1. Select **Cataloguing** → **MARC Batch Import/Export**



2. The MARC File Upload screen opens.



TIP The top row allows you to apply/manage your import/upload templates. To create a template, select values for those fields you wish to set up, type in a name in **Apply or Create a Template** box, then click **Save as New Template**. To apply a template, click in the box to choose from the dropdown list. You may mark a template as default so that it will appear selected next time you load the MARC File Upload screen.

3. Keep "Bibliographic Record" in **Record Type**.
4. Select a **Record Source** from the dropdown list. The default is oclc, but choose the one that best matches your file (eg. ULS, Whitehots, etc.). Only commonly used vendors are on the list. Use **Other** or **Other E-records** if your vendor is not on the list.
5. You can create a new queue for the file you are to upload, or append the file's records to an existing queue. To create a new queue, type in a name in the **Select or Create a Queue** box. To append records to an existing queue, click in the box to choose a queue from the dropdown list.

CAUTION Do not use "/" or "\" (slash or backslash) in import queue name.

6. Choose **SitkaMatch** in Record Match Set box.

CAUTION The NoMatch profile matches records on tag 901$c only, and should only be used after a false match is detected using SitkaMatch as described below. Sitka cataloguing policy strives to avoid record duplication so Sitka policy requires batch imports use SitkaMatch first.

7. Choose a Holdings Import Profile from the dropdown list, if your MARC records include holdings information and you wish to load it.

CAUTION You need to contact Co-op Support for holding information format before asking your vendors to include it in the MARC records. Holdings may not be loaded if the format does not match Sitka's holding profile.

8. You do not need to choose a Merge Profile now.
9. You may type in a session name in **Optional Session Name** box if you import records. It will

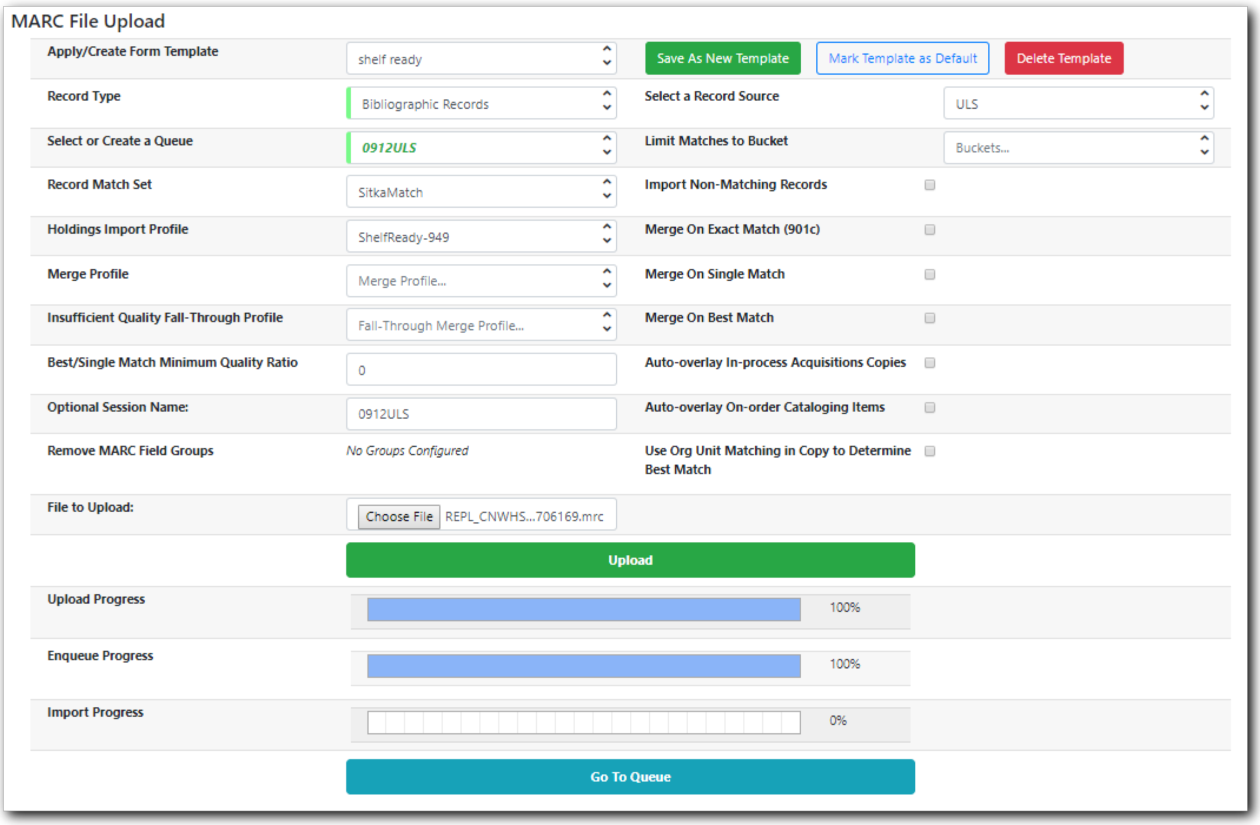
help you identify your import session when checking the status on Recent Imports.

10. Check **Import Non-Matching Records** box to automatically import records without matches into the catalogue.

CAUTION	Co-op Support strongly advises that you do not select other import options at this stage. These options allow Evergreen to automatically merge records before you inspect them. It is best practice to inspect the potentially merged records first.

TIP	If you want to view your incoming records first without importing any, leave the **Import Non-Matching Records** box unchecked. You will be able to view all records in the file on Inspect Queue and import all/selected records with/without matching records there.

11. You do not need to select any of the merge/overlay checkboxes.
12. Click **Choose File** to choose the source MARC file on your computer, then click **Upload**. The status bars show up for the processes. Depending on the size of the file, it may take a while for the uploading to finish. If you did not choose to import non-matching records, Import Progress will stay at 0%. In such a case you may click **Go to Queue** to examine and further process your records once Upload and Enqueue reach 100%.

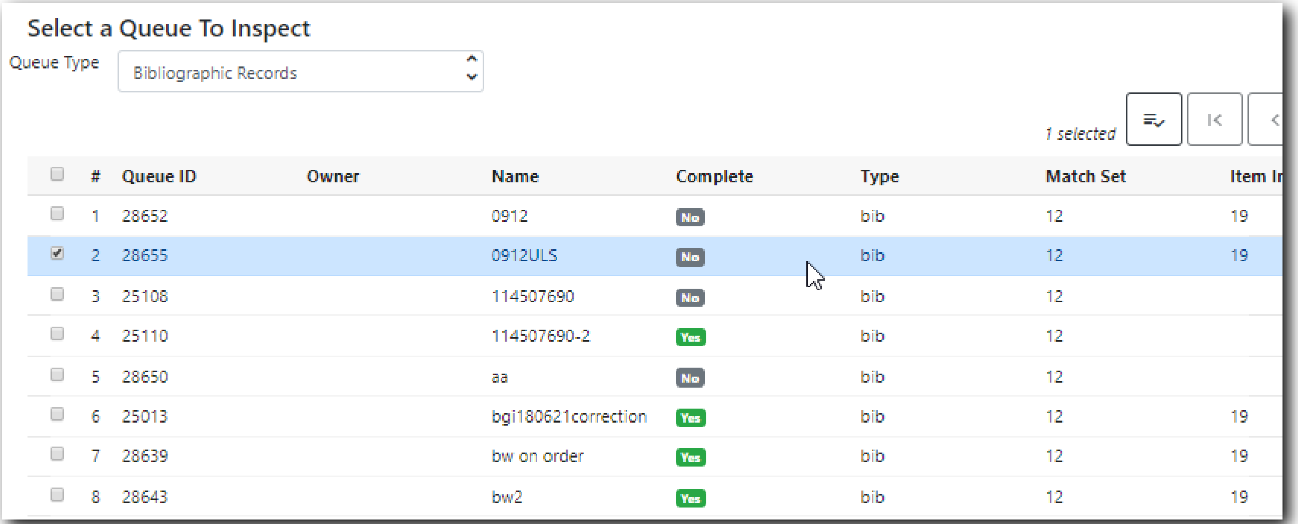


Do not load a MARC file of more than 500 records, as the importing process can time out. If you have more than 500 records, please break into multiple files.

TIP	Records in a queue are saved on the server, but are outside the catalogue. By importing, you bring the records into the catalogue.

18.2.2. Importing and Merging Records from Queues

If you want to import records from MARC files already uploaded, go to **Cataloguing** → **MARC Batch Export/Import**, then click **Inspect Queue**. Double click the queue that you wish to examine and import records from. The Queue Summary screen will open.



#	Queue ID	Owner	Name	Complete	Type	Match Set	Item I
1	28652		0912	No	bib	12	19
2	28655		0912ULS	No	bib	12	19
3	25108		114507690	No	bib	12	
4	25110		114507690-2	Yes	bib	12	
5	28650		aa	No	bib	12	
6	25013		bgi180621correction	Yes	bib	12	19
7	28639		bw on order	Yes	bib	12	19
8	28643		bw2	Yes	bib	12	19

If you continue to import records right after uploading the MARC file, click **Go to Queue** to load the Queue Summary.

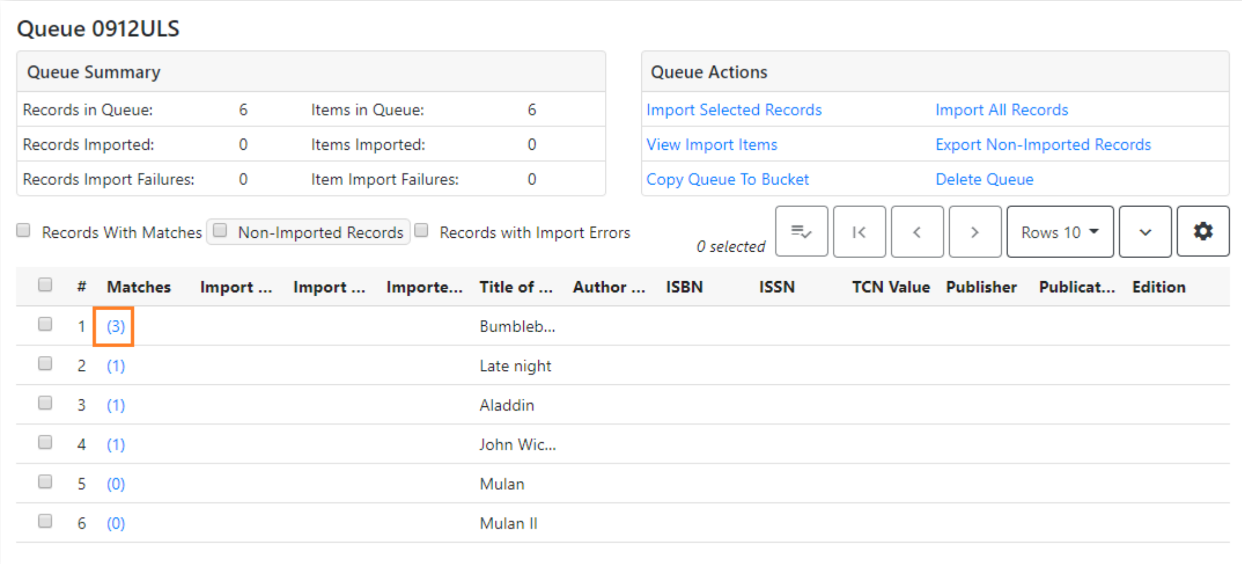
1. The **Queue Summary** shows the total number of MARC records in the queue, and items contained in these records, if any, how many of them have been imported, and how many of them encountered an error when Evergreen attempted to import them.

   The **Queue Actions** lists the actions you can take from this screen.

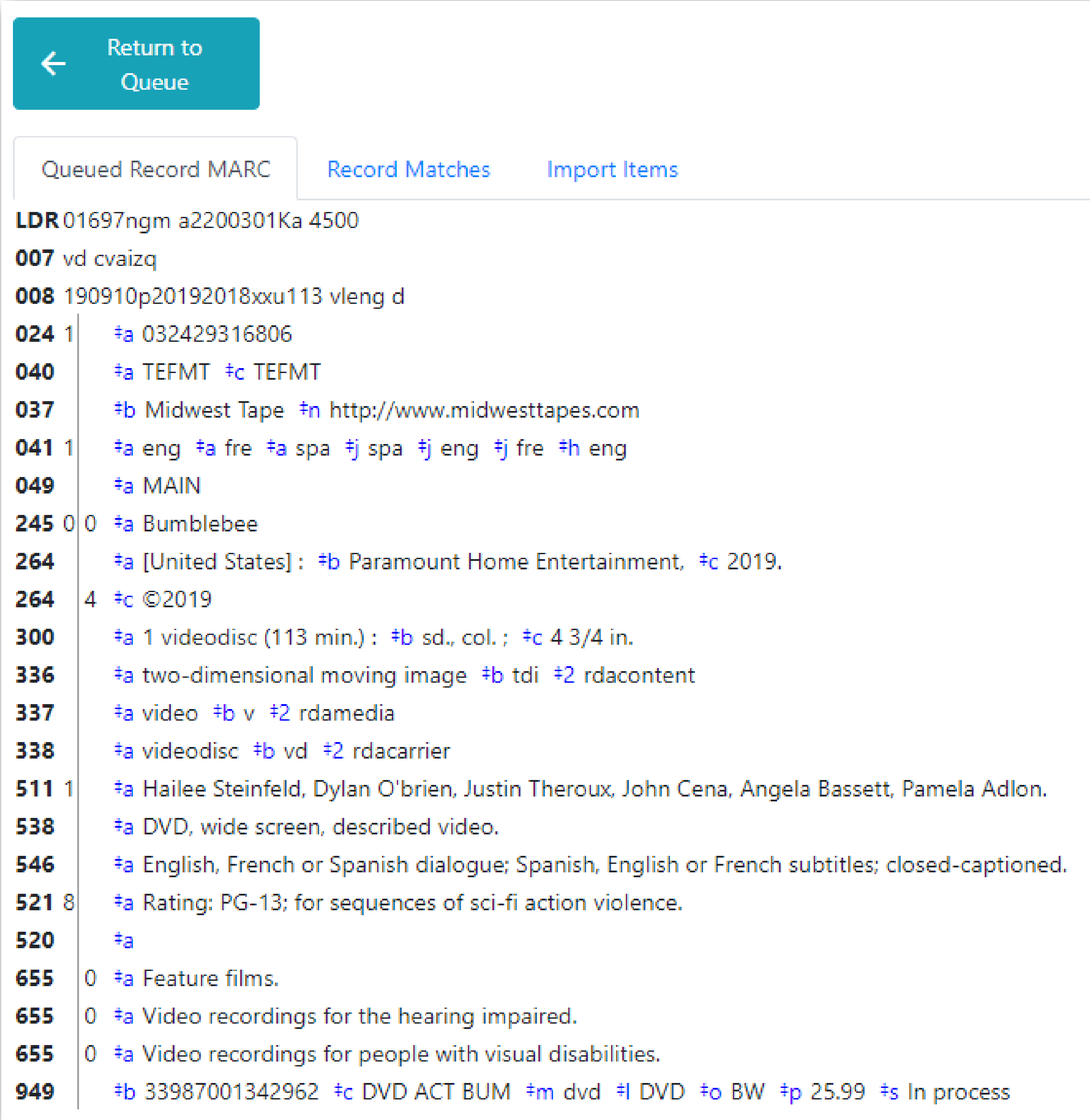
   If you imported holdings with the MARC records, you may click **View Import Items** to view them.

   You can export non-imported records to a MARC file by clicking **Export Non-Imported Records**. You can work on these records and load them later.

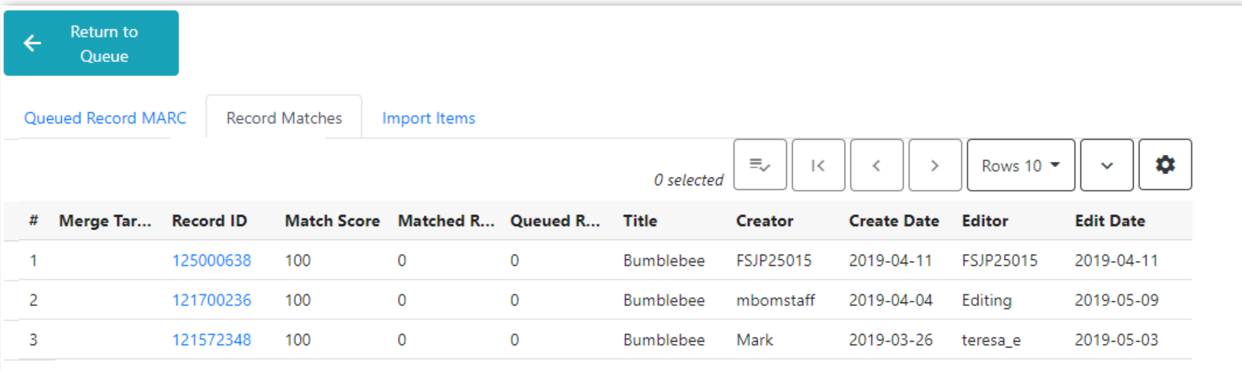
   You can add all imported MARC records in the queue to a Record Bucket by using **Copy Queue to Bucket**.



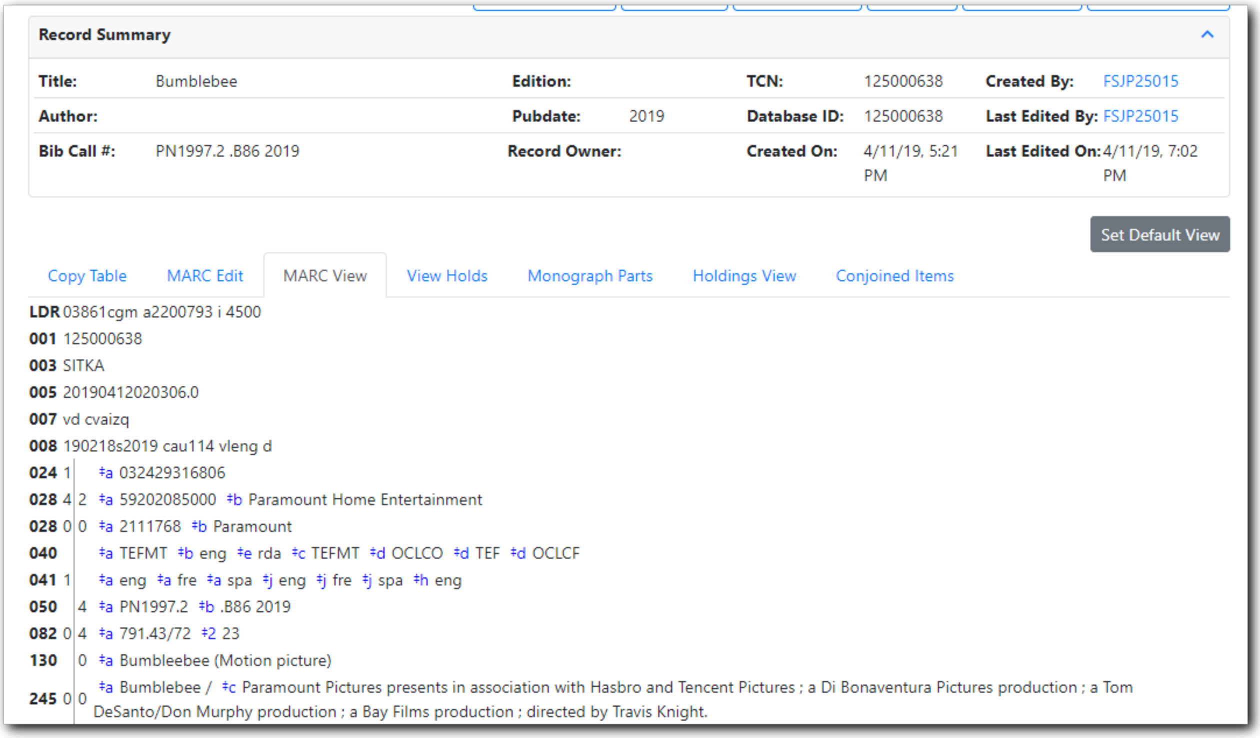
2. You should view both incoming and existing records to determine which one to use. To view the incoming record in the queue, double click a line.



3. To view match records, click the blue number in **Matches** column. You will see the match records' ID number and some non-MARC information.



4. Click the blue record id. The default tab is Copy Table. Click **MARC View** to view a record. Use browser's Go Back function to exit MARC View.



TIP

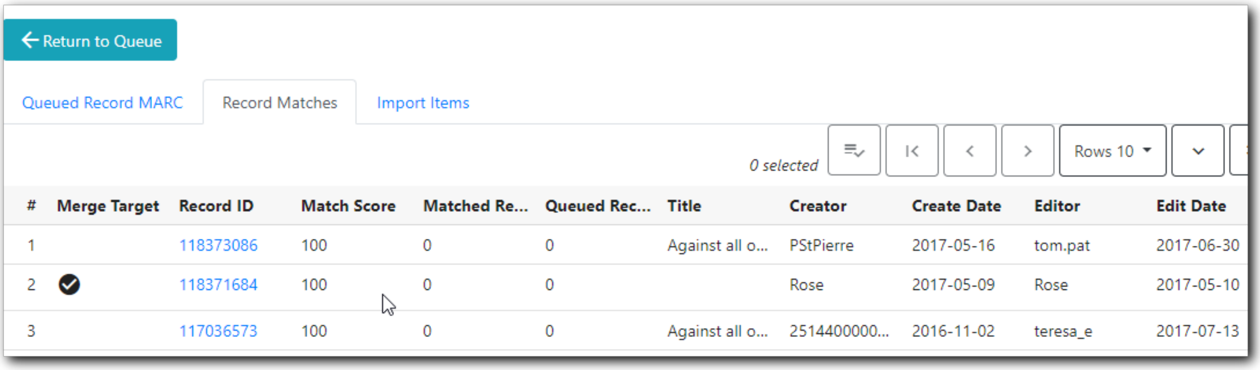
Match Score is the total score from all matched fields specified in the Record Match Set.

The list below shows the matching points and the scores assigned to each point of SitkaMatch. Match scores are used to indicate how well two records are matched. For example, if two records contain the same value in tag 010$a, highly likely they are matches. So tag 010$a is assigned a very high score. If the incoming and existing records match on tag 010$a and 020$a, the match score will be 600.

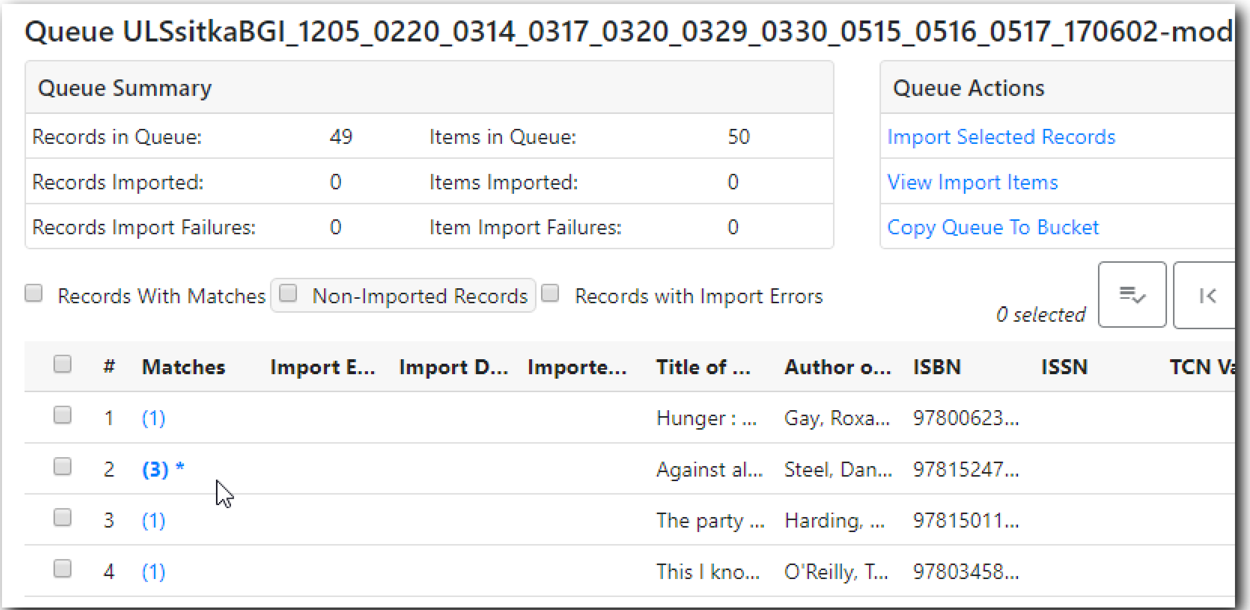
- 010$a: 500
- 020$a: 100
- 024$a: 100
- 022$a: 90
- 035$a: 25

If you see a score of 9999, it means the incoming record has the same value in tag 901$c, which is the record id in Evergreen. Likely you will see it when you load a record that was exported from Evergreen.

5. Upon inspecting both incoming and existing record(s), if the match record is a true match but a brief record, you may mark the match MARC record as a merge target by clicking the record. You will see the record is ticked in the Merge Target column. Click **Back to Import Queue** once done.



Records with specified merge target are marked by an asterisk.

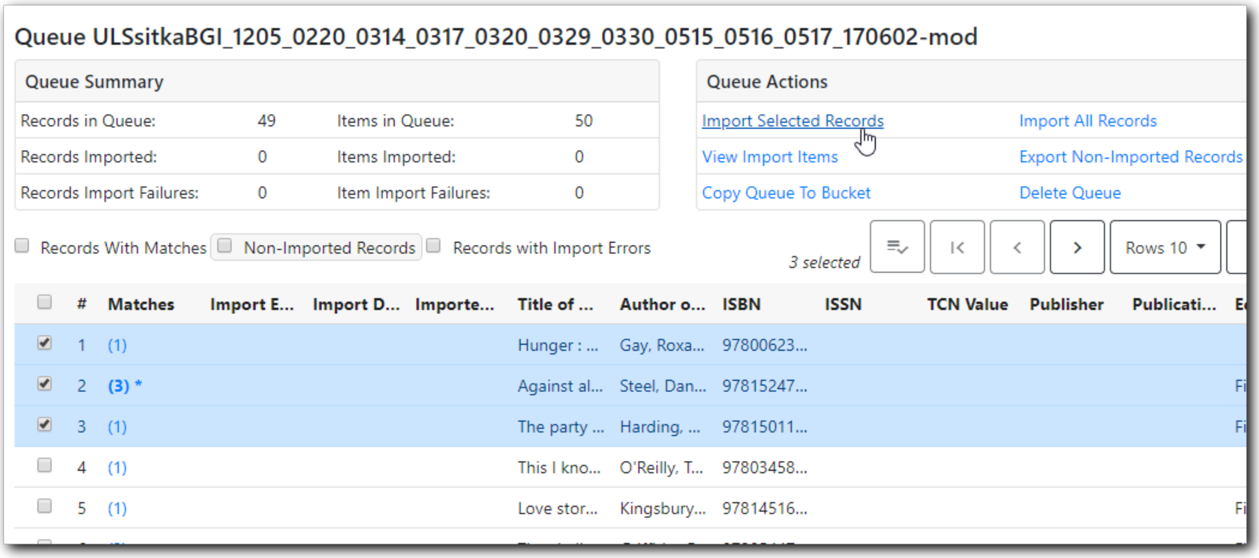


If the match record in Evergreen is a true match but a full record, Sitka policy requires you to use the existing record instead of importing another. Do not import the record.

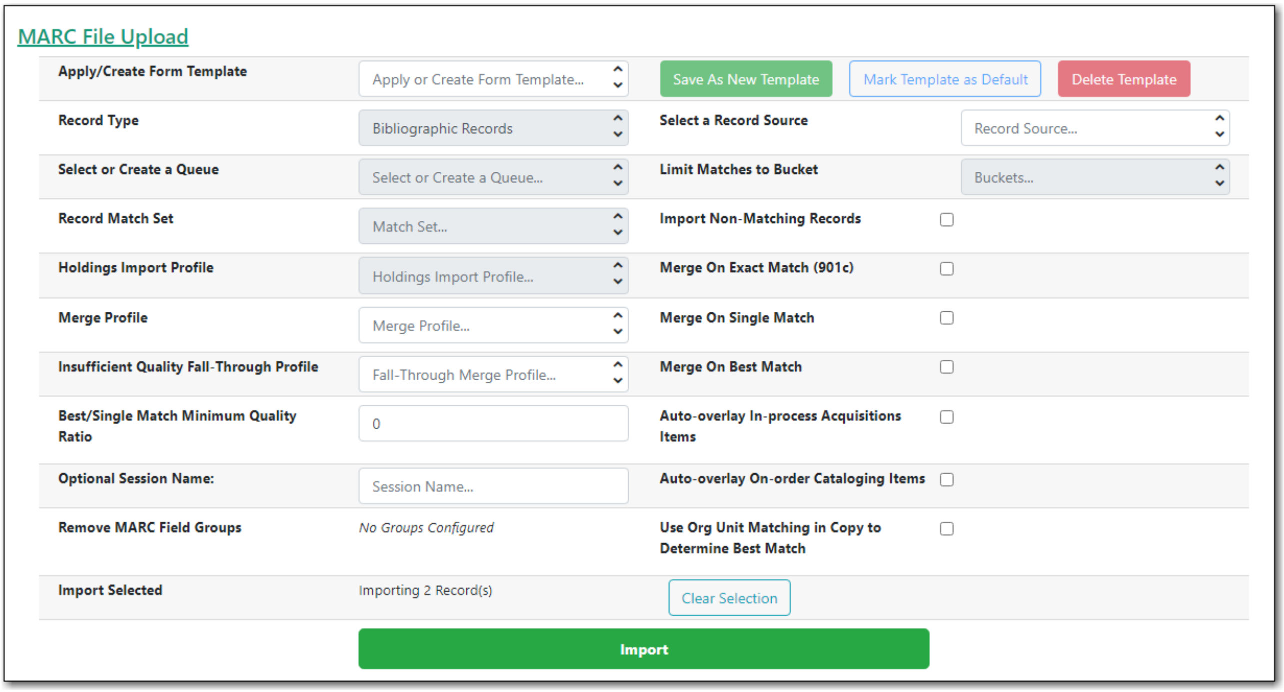
However, if the incoming record contains local information in tags 050, 055, 590, 595, 690, 852 or 856 that you want to bring into the existing record, such as loading holding records to existing MARC records, you need to mark the match record as a merge target. In this scenario you would use the **Merge Using EXISTING Record** merge profile in next step. If you are interested in loading holdings/item information, please contact Co-op support to set it up.

6. After you have marked a merge target, you may select the record once you are back on the Record Queue screen.

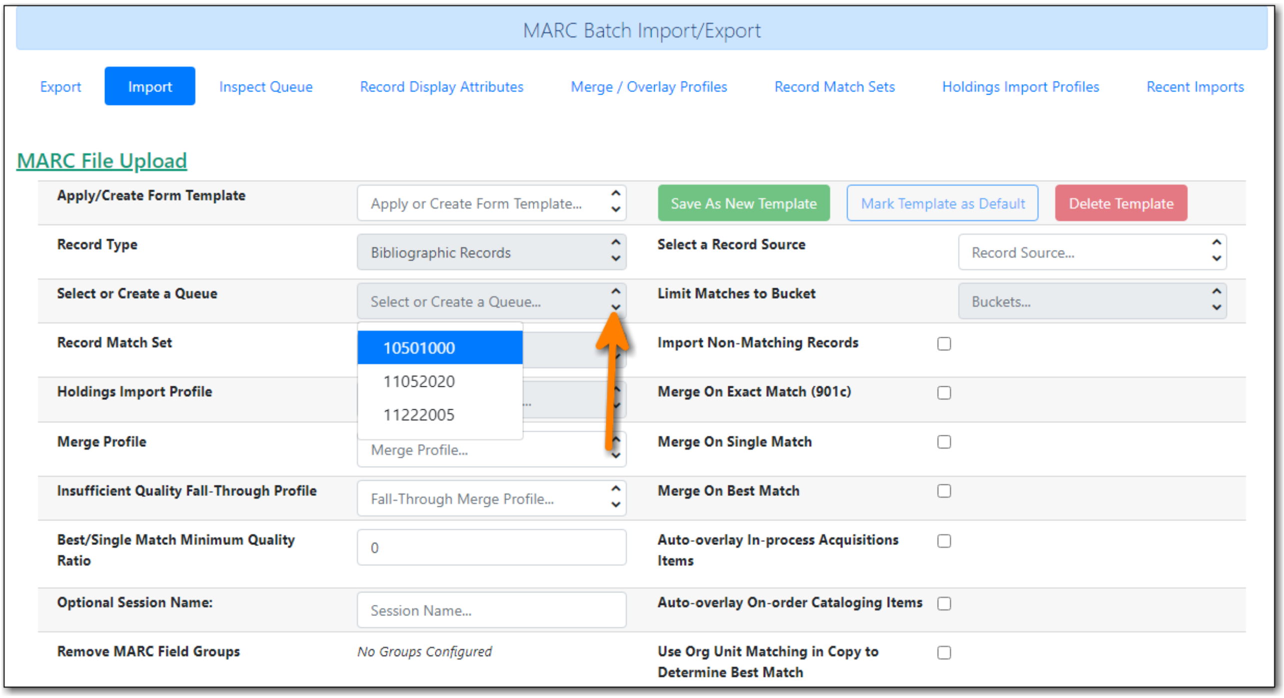
   You may inspect other records on the list. Once finished inspecting the list, click **Import Selected Records** under Queue Actions.



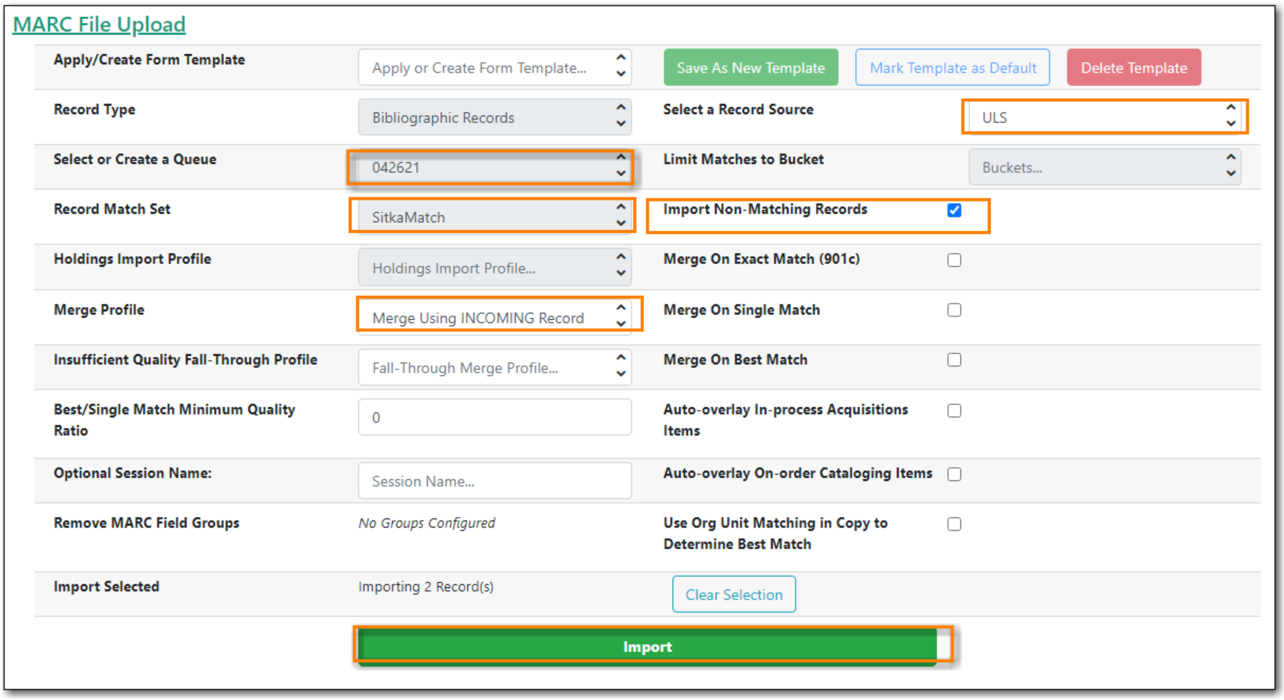
7. You are back on MARC File Upload screen.



8. Choose your import options, you must click the arrows to enable the drop down menus and make your choices.



9. Click **Upload** to import the records. If you wish not to carry on the import, you may click **Clear Selection**.



CAUTION

There is a bug where your original selections are cleared. You need to re-enter the required information before clicking **Import**.

Upload button remains inactive until all required import options are made. Keep **Importing Non-Matching Records** selected to enable **Upload** button, though you may not have non-matching records selected.

For Merge Profile, choose one of the following based on which record should be the lead.

- Merge Using INCOMING Record: uses the incoming record as the lead. Information in existing record in tags 050, 055, 590, 595, 690, 852 (holdings) and 856 will be kept.

- Merge Using EXISTING Record: uses the existing record in the catalogue as the lead. Information in the incoming record in tags 050, 055, 590, 595, 690, 852 (holdings) and 856 will be kept. Use this profile when you attach holdings in your MARC file to existing Evergreen MARC records.

If you have marked a merge target, you do not need to select any further import options. The marked target will be merged. If you have not already imported non-matching records you can now select Import Non-Matching Records.

TIP	Merge On Exact Match (901c), Merge On Single Match, and Merge On Best Match are designed to allow Evergreen to programmatically select the best match. Due to the nature of Sitka's shared database, Co-op Support strongly advises against allowing Evergreen to select a merge target and cautions you to adhere to instructions for selecting a match as outlined above.

Do not use Best/Single Match Minimum Quality Ratio or Insufficient Quality Fall-Through Profile at this time.

If you have on-order brief item records and wish to overlay them with full item records loaded via the MARC records, you need to select checkbox Auto-overlay On-order Cataloguing Copies. Evergreen will overlay the items having matching circulating library and On-order status.

If you load items for multiple branches or a branch other than your working location, you need to select the checkbox Use Org Unit Matching in Copy to Determine Best Match, too.

CAUTION	The option Auto-Overlay In-process Acquisitions Copies should only be used if you are working with on-order line items created in the Acquisitions module. For more details please see Auto-Overlay In Process Acquisitions Copies

Once the records are imported, the display is back on Queue Summary screen. You will see the Import Time column is filled in for the selected records. The imported record id is displayed in Imported As column.

TIP	A record can be imported only once. Sitka has profiled certain fields, primarily 9xx fields, to be automatically stripped when records are imported through Batch Import. The default fields that are stripped are 906, 923, 925, 936, 948, 955, 959, 963.

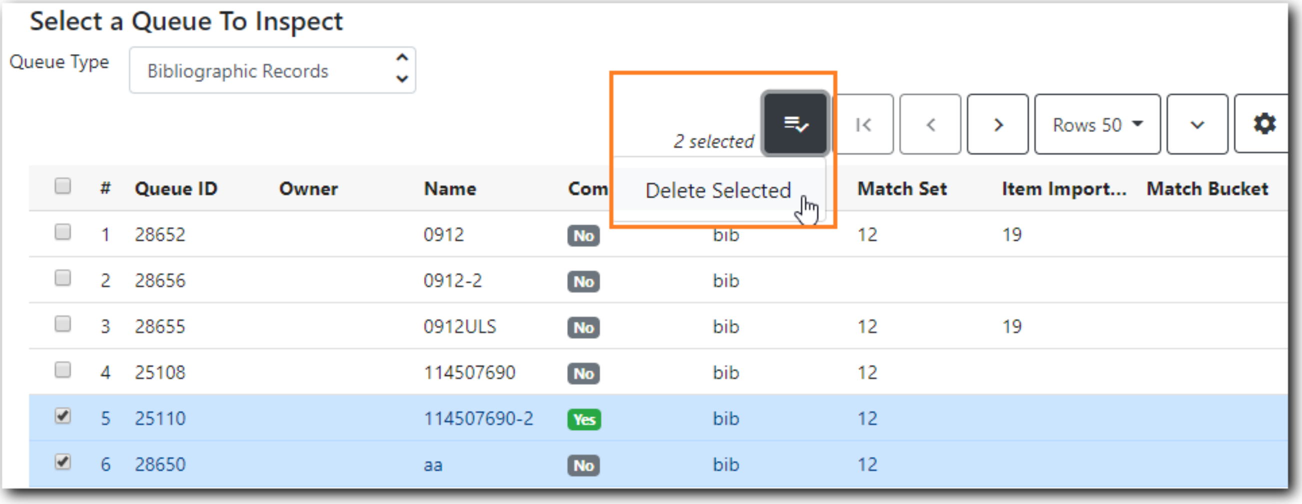
18.2.3. Managing Queues

Queues are viewable to the login account only. They will remain on the server until they are deleted. You can delete a queue after importing is finished, or you can keep it and delete it later.

To view a queue, go to **Cataloguing → MARC Batch Import/Export**. The default screen is Import Records. Click **Inspect Queue** tab to manage and view existing queues used in MARC Batch Import.

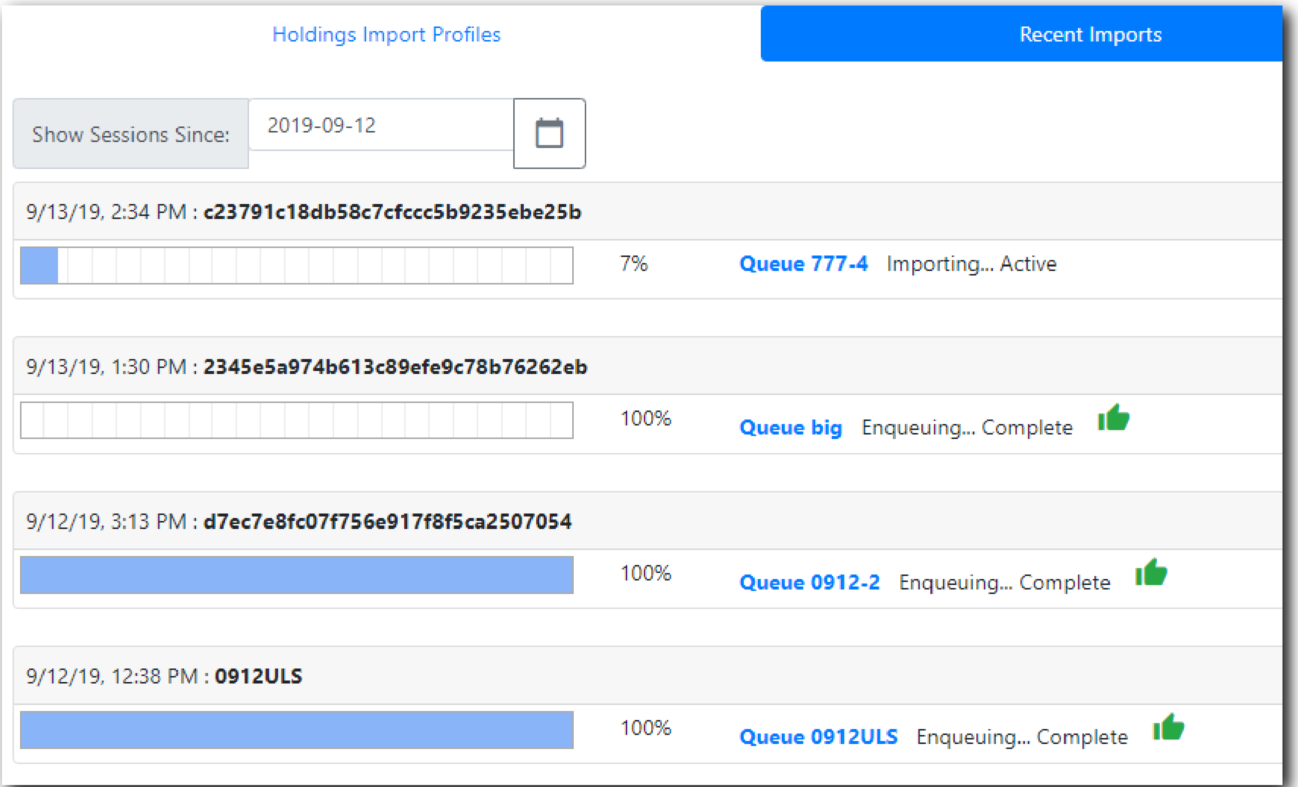
Under Inspect Queue you can click on an existing queue to view and import records that have already been queued for importing or simply view records that have already been imported.

To delete queues, select the checkbox in front of the queue name and click **Delete Selected** on the action list.



18.2.4. Import Status

You may start more than one import sessions. To check the status of these sessions, you may go to **Recent Import**. You may identify a session by session name or queue name.



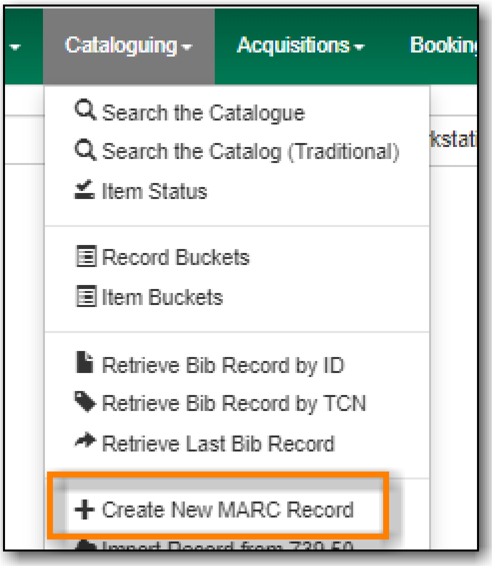
18.3. Creating New Bibliographic Records

When cataloguing bibliographic resources it's important to follow Sitka cataloguing policy to avoid creating duplicate records in the Sitka database. Original cataloguing should be done in Evergreen only if there is no record available in the Sitka catalogue, via Z39.50, or from your vendor.

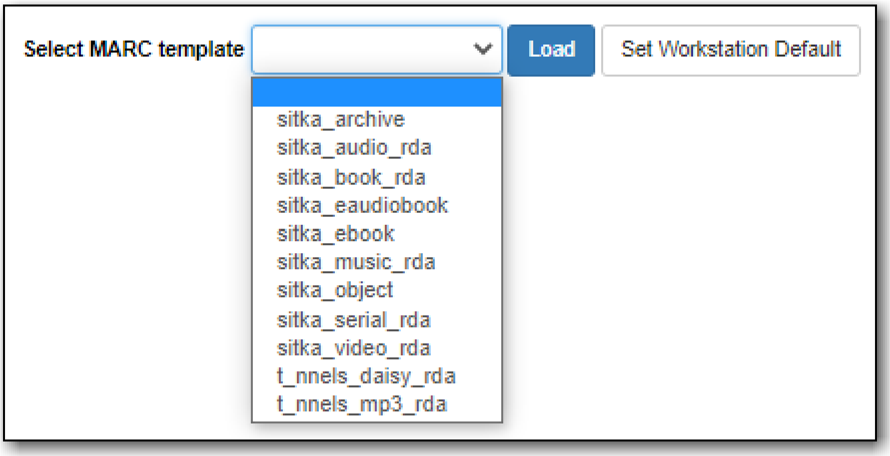
Sitka's Evergreen has global MARC templates for commonly catalogued types of resources with the most frequently used fields and subfields included. Libraries can also use a workaround to set up library specific templates.

For information about working with MARC records see Maintaining Bibliographic records.

1. To access the global MARC templates, go to **Cataloguing** → **Create New Marc Record**.

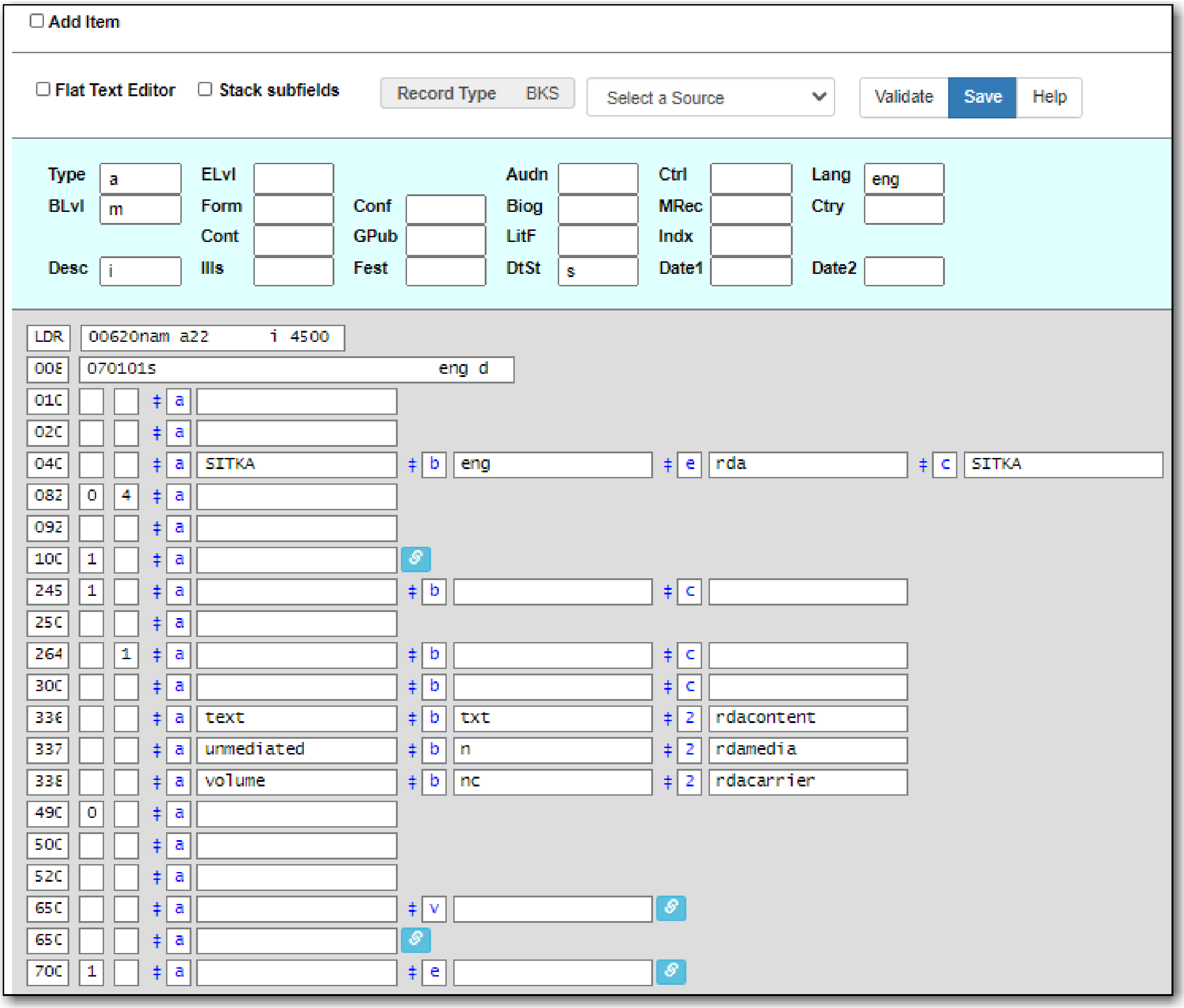


2. The MARC Template screen opens. Click into the drop down menu field to see the available templates. Note you can select one and set it as the default template for your workstation here.

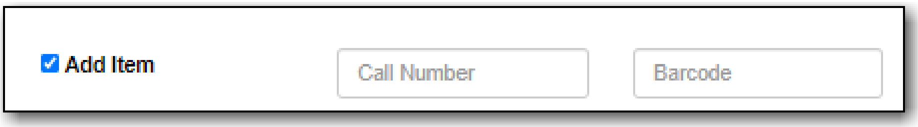


3. Select the appropriate template and click **Load**.

4. A blank MARC record will load with the fields and subfields most commonly used for the resource type. The Leader and 008 will be coded for the specified type of resource; this coding affect the format icon and search filters.



5. Complete the MARC record as per Sitka cataloguing policy. You can add and delete fields and subfields as required.
6. Check the box for Add Item if you wish to use the fast item add feature. You must have pop-ups allowed for this feature to work.



7. Click **Save**.
8. The record is created and will open up in your tab in the current default view.

NOTE

If you used **Add Item** the Holdings Editor will have opened in a new tab.

If you did not use **Add Item**, you may now attach holdings as described in Adding Holdings to Bibliographic Records.

18.4. Using Library Specific MARC Templates

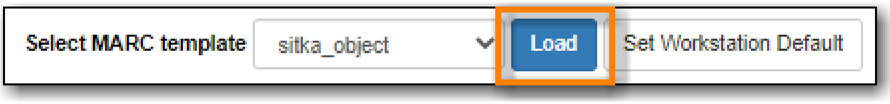
In addition to the global MARC templates Co-op Support has come up with a couple ways that libraries can create their own MARC templates which can be copied and edited.

This is useful if you are entering the same information on a regular basis when creating new records, such as with non-bibliographic records. You can also include hints for staff about what should go in particular fields but you'll want to make sure staff know to delete those hints before saving the new record.

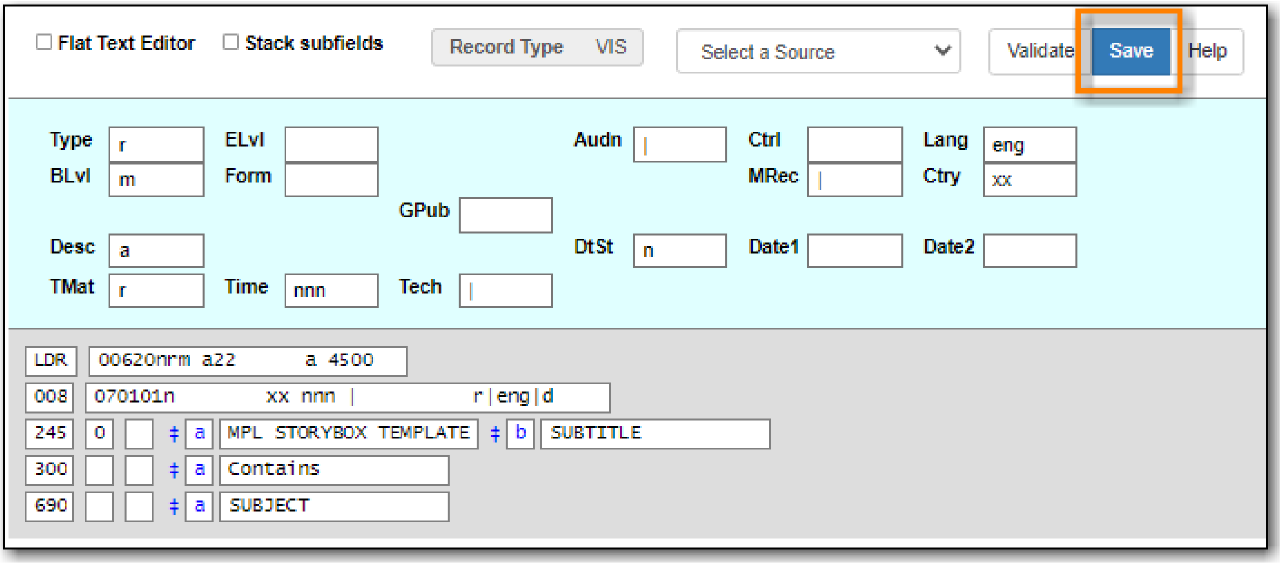
18.4.1. Template Records Saved Within Evergreen

Template Set Up

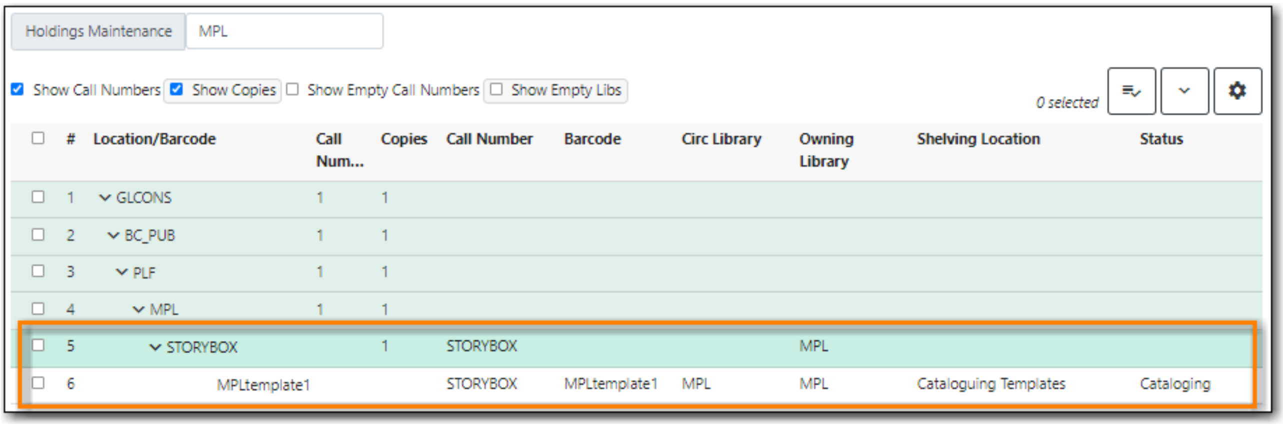
1. Go to **Cataloguing** → **Create New Marc Record**.
2. Select the appropriate template and click **Load**.



3. Edit the existing template to suit your needs. Make sure you include a unique title, that includes your library code, so you can retrieve your template later.
4. Click **Save**.



5. Add a fake OPAC invisible item to the bibliographic record. This will prevent the record from being automatically deleted as part of the routine orphan bib deletion.



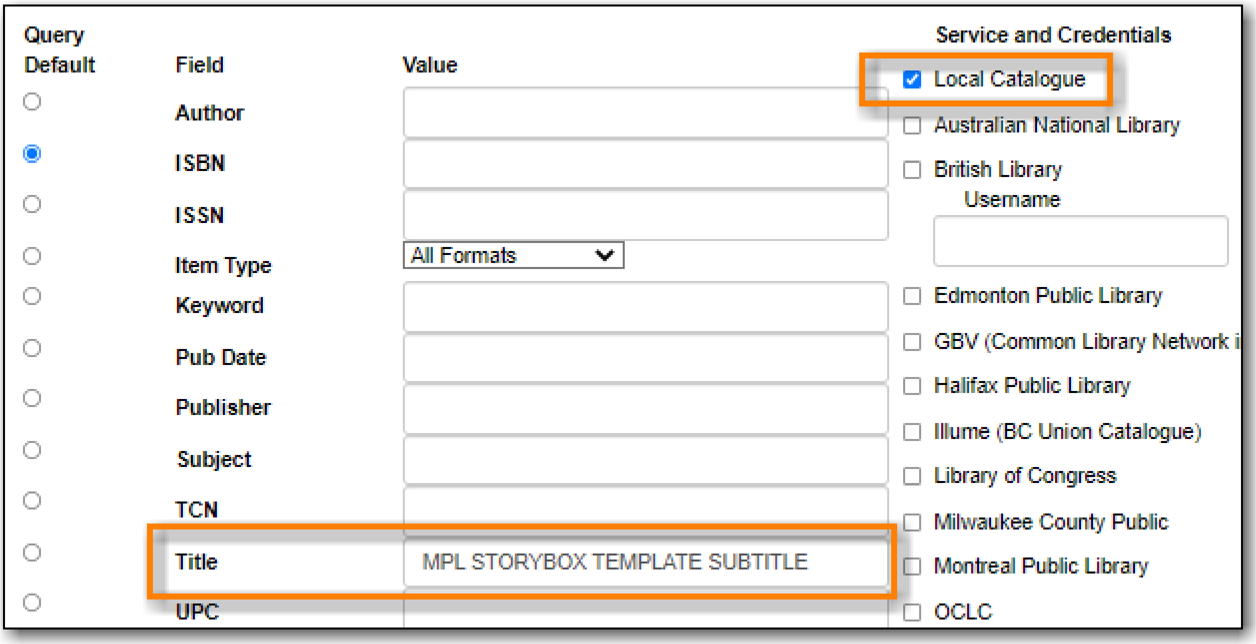
NOTE

For your fake items Co-op Support recommends:

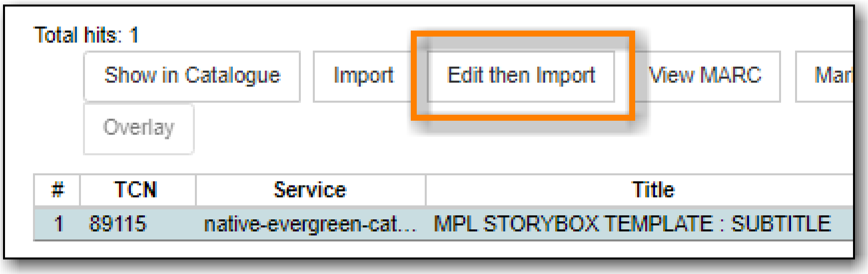
- Set up a shelving location that is OPAC invisible, not holdable, and not circulatable.
- Use the Status *Cataloging*.
- Use real barcodes from your range or use the format LIBRARYCODEtemplateNUMBER to ensure there is no conflict with other barcodes in the Sitka.

Using the Template

1. Go to **Cataloging** → **Import Record from Z39.50**.
2. Make sure the service **Local Catalogue** is selected.
3. Do a title search for your template.



4. Select the template record and click **Edit then Import**.

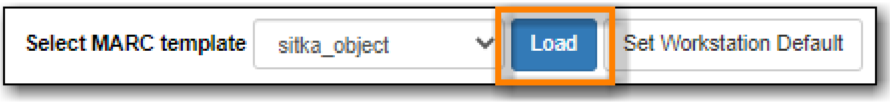


5. Complete the MARC record as per Sitka cataloguing policy. You can add and delete fields and subfields as required.
6. Click **Go to imported record**.
7. You may now attach holdings as described in Adding Holdings to Bibliographic Records.

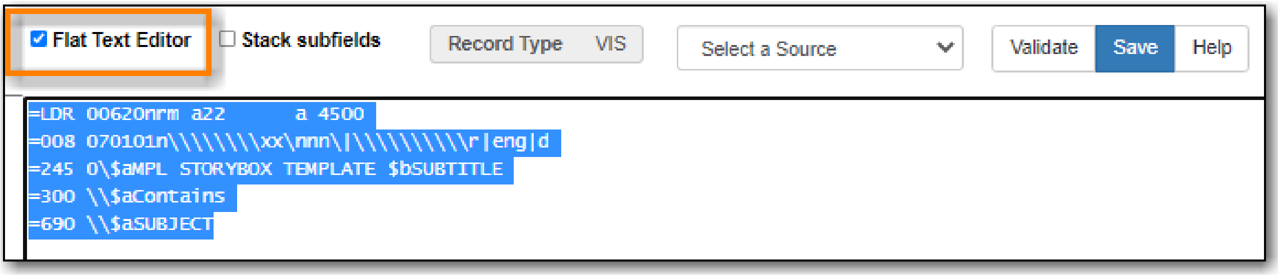
18.4.2. Template Records Saved Outside of Evergreen

Template Set Up

1. Go to **Cataloging** → **Create New Marc Record**.
2. Select the appropriate template and click **Load**.



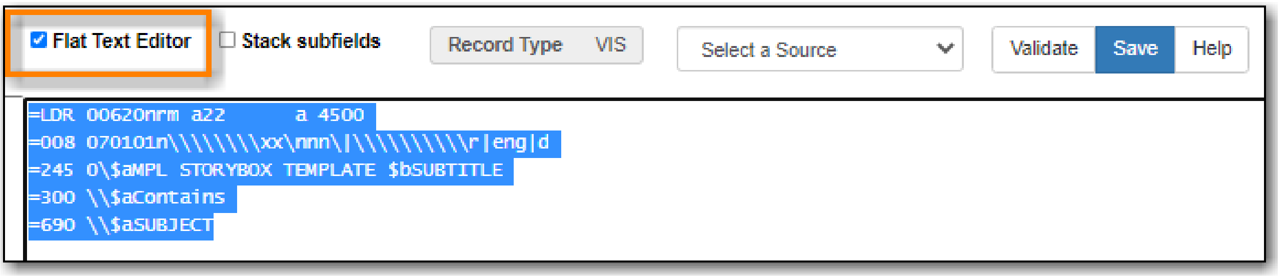
3. Edit the existing template to suit your needs.
4. Using the **Flat Text Editor** copy the template and save it as a text file on your computer or network using a program like Notepad.



5. Close the tab in Evergreen without saving.

Using the Template

1. Open the appropriate text file with the applicable program on your computer.
2. In Evergreen, go to **Cataloging** → **Create New Marc Record**.
3. Using the **Flat Text Editor** copy and paste the template from the text file into **Create New Marc Record**.



4. Complete the MARC record as per Sitka cataloguing policy. You can add and delete fields and subfields as required.
5. Click **Save**.
6. You may now attach holdings as described in Adding Holdings to Bibliographic Records.

18.5. Sitka's Minimum MARC record

As there is an approved minimum level for original MARC records, the following may assist you when creating original MARC records in Evergreen. For more detailed information on MARC and

RDA standards, the Library of Congress has the authoritative website at http://www.loc.gov/marc/ & https://www.loc.gov/aba/rda/.

Here is an example of a MARC record that meets and exceeds minimum cataloguing standards for a book in a series.

LDR	01174nam a2200301 i 4500		
001	118378791		
003	SITKA		
005	20180308002952.0		
006	a e 000 f		
007	ta		
008	170424t20182018nyu e 000 f eng d		
020			‡a 9780735217171
035			‡a (OCoLC)sitkaBS02286709
040			‡a YDX ‡b eng ‡c YDX ‡d BDX ‡d ABJ ‡d NOG ‡d OCLCO
092			‡a WOO ‡5 BMK
100	1		‡a Woods, Stuart, ‡e author.
245	1	0	‡a Unbound / ‡c Stuart Woods.
264		1	‡a New York : ‡b G.P. Putnam's Sons, ‡c 2018.
300			‡a 311 pages ; ‡c 24 cm
336			‡a text ‡b txt ‡2 rdacontent
337			‡a unmediated ‡b n ‡2 rdamedia
338			‡a volume ‡b nc ‡2 rdacarrier
490	1		‡a A Stone Barrington novel
650		0	‡a Barrington, Stone (Fictitious character) ‡v Fiction.
650		0	‡a Private investigators ‡v Fiction.
655		7	‡a Mystery fiction. ‡2 gsafd
800	1		‡a Woods, Stuart. ‡t Stone Barrington novel.

Standard Numbers:

- 010 Library of Congress Control Number (LCCN) is the control number for MARC records distributed by the Library of Congress. Can often be found in the Cataloging in Publication (CIP) information on verso page of a book. Can be useful searching number.
- 020 International Standard Book Number (ISBN) is a unique number assigned to items by publisher. Can be 10 or 13 digit number. Sitka support and training team recommend searching Evergreen and Z39 targets, by both numbers, if present on item, before proceeding to original cataloguing. When cataloguing an item, if both numbers are present, enter both in separate 020 tags.
- 022 International Standard Serial Number (ISSN) is a unique number assigned to a serial title.
- 024 Universal Product Code (UPC) is a twelve digit number often assigned to sound recordings and videos.
- 028 are Publisher Control Numbers, formatted numbers used for sound recordings, printed

music, and videorecordings.

Classification Numbers: Evergreen does not display call numbers from the shared MARC record, but the data is useful for searching, matching, and assessing quality of a MARC record. Evergreen uses each library's volume record for local call number display, and will give you the option to auto-fill your number from the MARC record if you want to use that call number as yours.

- 05X are standard classification (call) numbers that are, or can be, present in a MARC record. The most common are the 050, which is the Library of Congress Classification Number (LCC), assigned by the Library of Congress, and the 055, which is the Canadian LCC.
- 082 is the Dewey Decimal Classification number (DDC).
- 090 and 092 are tags reserved for a library's local call number. This data is not used by Evergreen for call number display, but you will often see data there from a different library whose system may use the MARC record for call number display.

Title: 245 tag contains all the important title information and General Material Designations (GMD). 245 subfields a and b are title and sub-title respectively, 245c contains the statement of responsibility, and 245h is for approved GMDs. Note, for RDA records, the GMD is no longer used; instead the tags of 336, 337 and 338 are used (see below).

Edition Statement: 25X tags contain important descriptive information about the item being described. This information includes edition statement, imprint and other publication source information.

Publication Information: 264 tag and subfields a, place of publication, b, name of publisher, and c, year of publication, contain critical publication information and should be as complete as possible. When assessing record, matching the 264/260 tag should always be considered. Note, the second indicator of 264 should be filled: 1 for publication, 2 for distribution, etc.

Physical Description of Item: 300 tag is used to physically describe an item as completely as possible.

Content, Media and Carrier type: 336, 337, 338 tags are used for RDA records only. The fields of content, media and carrier collectively replace the GMD (245$h). For 336, subfield $a is content term and $2 rda content. For subfield 337, $a is media term and $2 is rdamedia. For 338, $a is carrier term and $2 is rdacarrier. See here for appropriate RDA terms.

Series Information: 440 and 490 are used to describe relevant series. 440 was officially made obsolete in 2008, but you will still find it used in records that predate 2008, but for correct, current series cataloguing use the 490 tag.

Notes: 5xx tags are useful, keyword searchable notes tags, which assist in description and retrieval of items. Use the 500 tag for a note that cannot be placed in any other 5xx tag as per MARC standards.

Subjects: 6xx contain subject headings that follow standards for personal, topical, geographical, and genre terms. Use 690 for local, non-standard subject headings.

18.6. Cataloguing Non-physical Resources

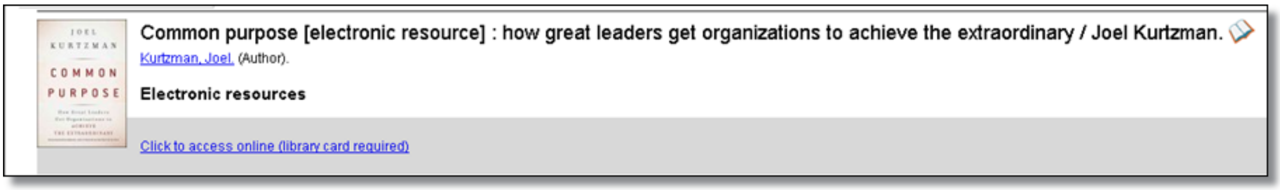
Ordinary bibliographic records are only visible in the OPAC when holdings records are attached, but it is also possible to catalogue non-physical resources such as websites, online journals, or downloadable audiobooks, etc. by adding an 856 tag with subfield $9. The steps below describe how to catalogue a non-physical resource so it appears in OPAC searches.

NOTE	These instructions are for adding individual records. To upload a batch of records (e.g. from an e-book subscription), please contact Co-op Support. For libraries that subscribe to OverDrive, Co-op Support creates and updates bibliographic records automatically.

1. Locate, import, or create a bibliographic record as described in the preceding chapters.
2. Click the title link to go to record details. Click **MARC Edit**.
3. Add an 856 tag to the MARC record. Place the cursor in the desired location and press CTRL+Enter to add an empty row. Enter the tag number (856). You must set the first indicator to 4, and the second indicator to 0 or 1. The indicators cannot be left blank. For information about indicators see http://www.loc.gov/marc/bibliographic/bd856.html.
4. Add applicable subfields from the table below.

Subfield code	Description	Example	OPAC Display
$u	Required; the URL or link to the resource	http://www.linktoresource.ca	Appears as a link in the OPAC display; the link text is the URI unless subfield $y is specified
$y	Recommended; a display label for the link	Click for access	Appears as the text of the link instead of the URL defined in $u
$z	Optional; a public note providing more information about the resource	library card required	Appears in parentheses to the right of the link
$9	Required; your library code	BBI	Not displayed in the OPAC but required for the record to be included in searches scoped to your library

5. After the 856 tag is added, the record will be displayed as search result on OPAC for the library in $9. The image below shows a sample 856 tag and the corresponding OPAC display. This record would appear in OPAC searches of the Bowen Island Public Library catalogue (BBI).



TIP

> A separate 856 tag should be added for each library that catalogues the resource. Multi-branch libraries may add a single 856 tag using the code for the library system (e.g. SCRL, BCREK) if all branches are allowed to access the resource.
>
> Evergreen creates an invisible call number for each 856 tag with subfield 9 with the code in subfield 9 as the owning library. This call number, like a copy record, is used for scoping the seach result to a selected library.
>
> To remove a non-physical record from your library's collection, you need to delete your library's 856 tag. If your library's 856 tag is the only one, you may delete the MARC record. See Deleting MARC records for more information.

18.6.1. Related Resources

Related resources can be resources such as table of contents or custom cover art. These can be linked to the main resource using a 856 tag.

To link a related resource:

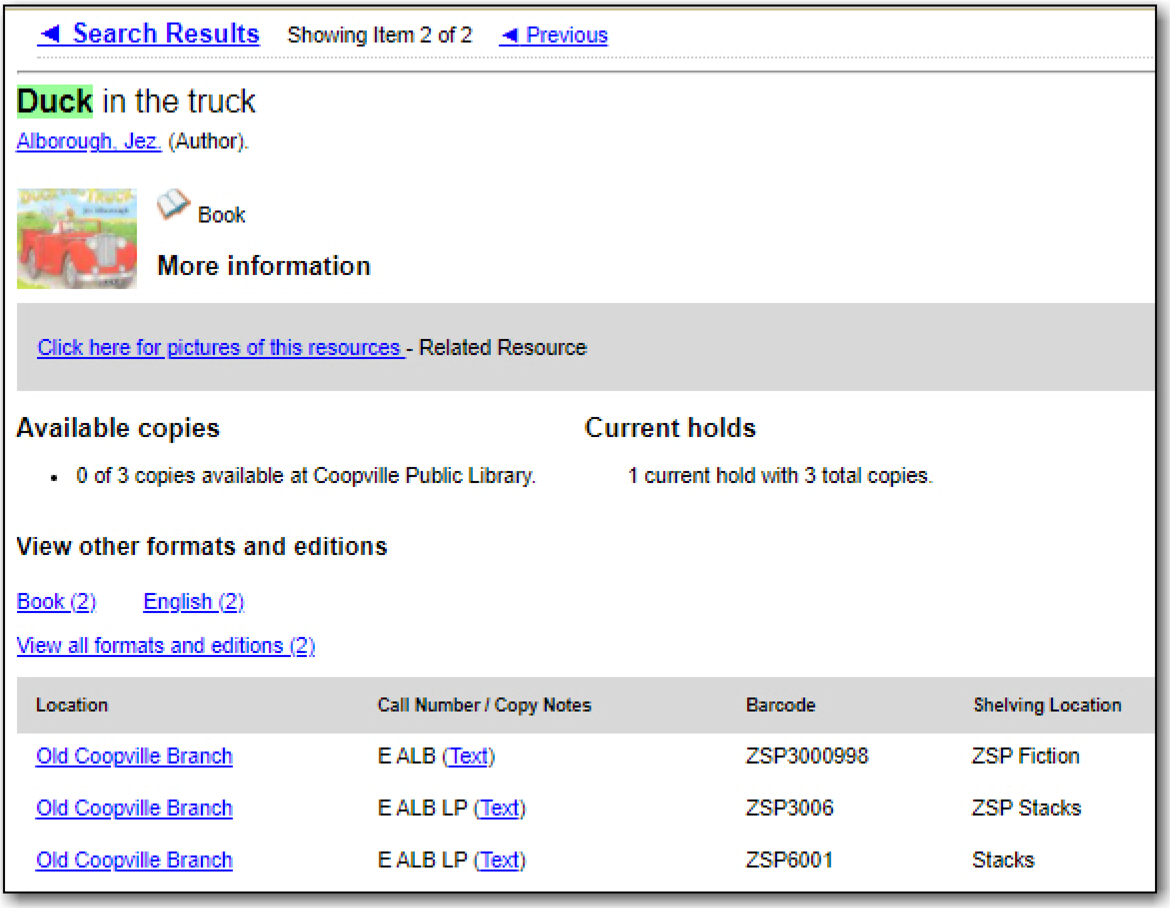
1. Locate, import, or create a bibliographic record as described in the preceding chapters.
2. Click the title link to go to record details. Click **MARC Edit**.
3. Add an 856 tag to the MARC record. Place the cursor in the desired location and press CTRL+Enter to add an empty row. Enter the tag number (856). You must set the first indicator to 4, and the second indicator to 2. The indicators cannot be left blank. For information about indicators see http://www.loc.gov/marc/bibliographic/bd856.html.
4. Add applicable subfields from the table below.

Subfield code	Description	Example	OPAC Display
$u	Required; the URL or link to the related resource	http://www.linktoresource.ca	Appears as a link in the OPAC display; the link text is the URI unless subfield $y is specified
$y	Recommended; a display label for the link	Click for access	Appears as the text of the link instead of the URL defined in $u
$3	Optional; a description of what the related resource is	Cover Art	Appears as text beside the link or display label.

Subfield code	Description	Example	OPAC Display
$9	Required; your library code	ZSP-A	Not displayed in the OPAC but required for the related resource to display.

NOTE If an 856 tag has both a $3 and a $z neither will display in the public catalogue. We recommend always using $y instead of $z.

5. After the 856 tag is added, the link will display when the record is viewed in your public catalogue. The image below shows a sample 856 tag and the corresponding public catalogue display.



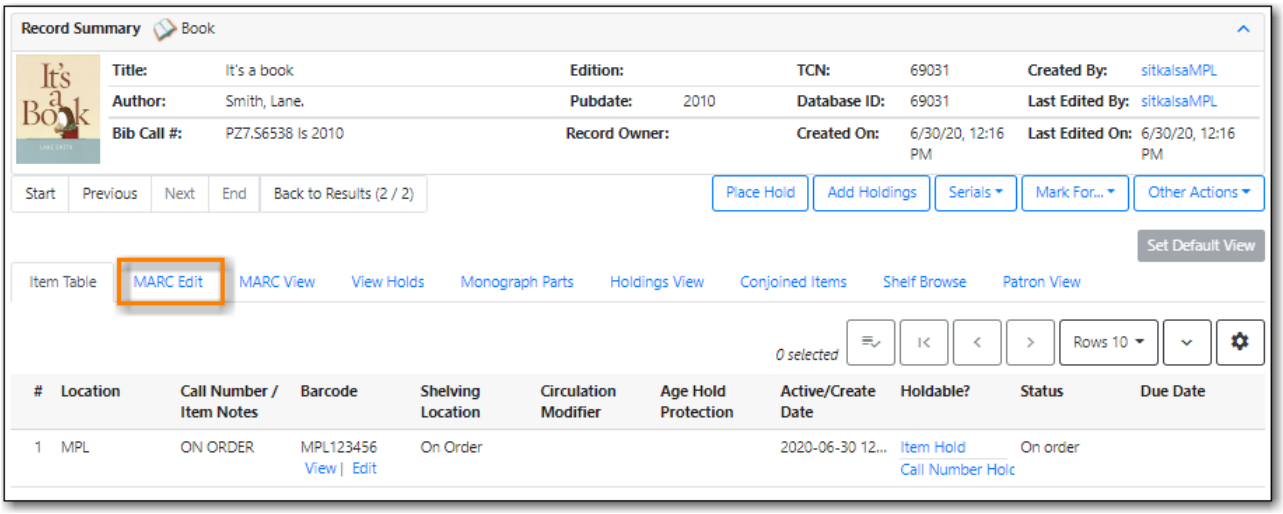
Chapter 19. Maintaining Bibliographic records

The appropriate title information displayed on the OPAC relies on correct MARC coding. For example, format icons for text, moving pictures, and sound, rely on MARC coding in the leader, 007, and 008 tags, as do OPAC search filters, such as publication date, item type, or target audience. Bibliographic record matching and de-duplicating also relies on correct MARC coding and consistency in use of, and contents in, particular MARC tags. The ability to edit and manage MARC records is very important to maintaining database integrity.

Evergreen allows you to edit MARC tags, sub-fields, and indicators, as well as an easy entry box to edit parts of the leader and 008 field on a built-in form called the MARC Editor. It also provides a text based editor, which allows you to easily add or remove tags, and/or edit the fields. You need to pay close attention to the position of the tags, indicators, and spacing required to preserve the record structure.

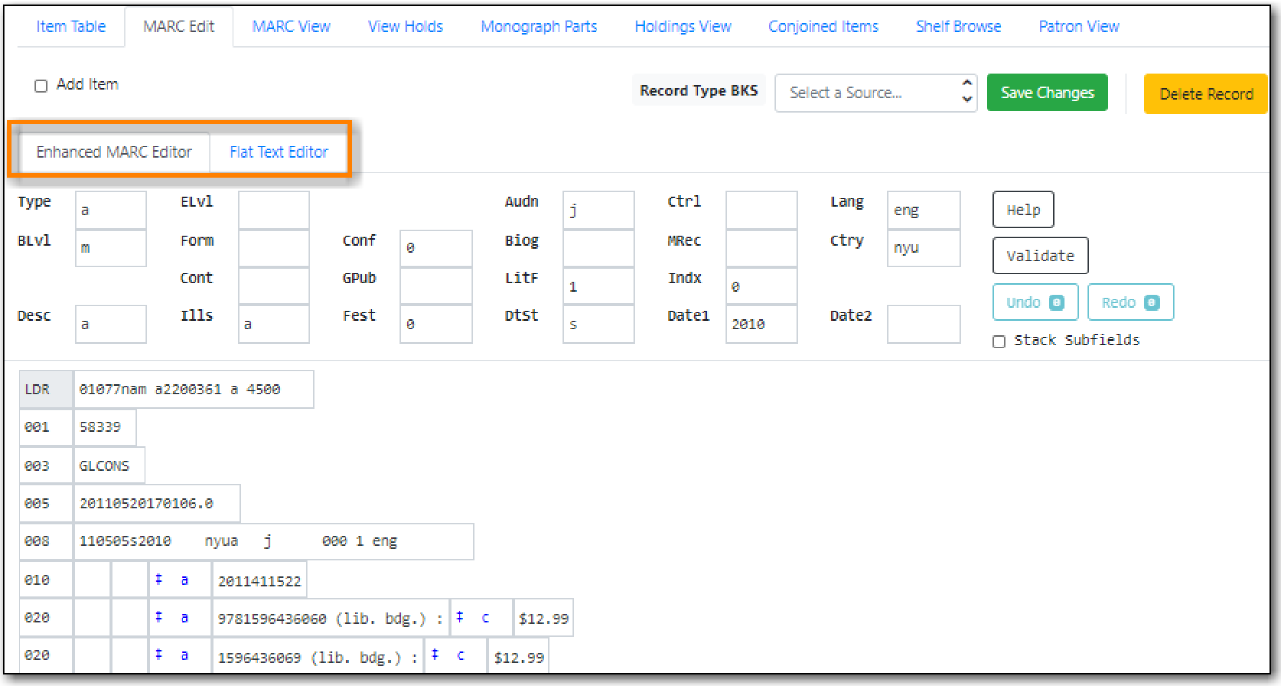
19.1. Editing MARC Records

1. To edit a MARC record, retrieve it on the catalogue. Once record is displayed on Record Details screen, click **MARC Edit**.



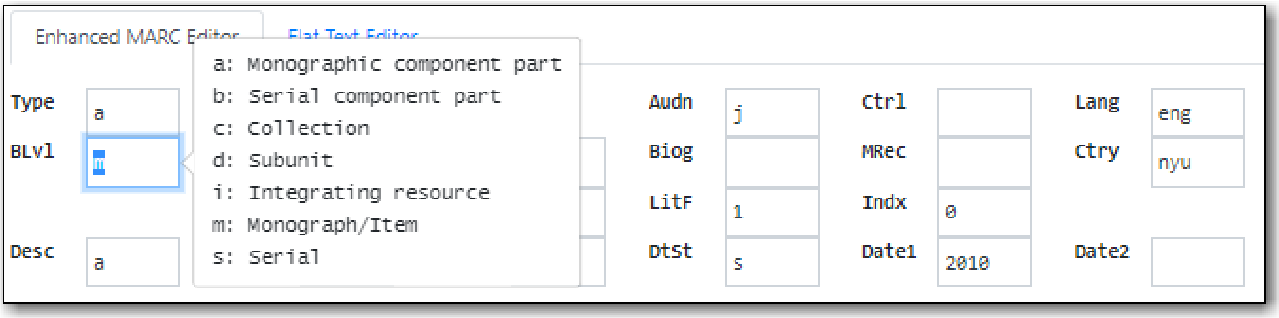
TIP	You can set the displayed view as the default by clicking **Set Default View**. Individual records will be loaded in this view when selected/retrieved.

2. The MARC record is displayed. You can use either the *Enhanced MARC Editor* or the *Flat Text Editor* to edit the record.

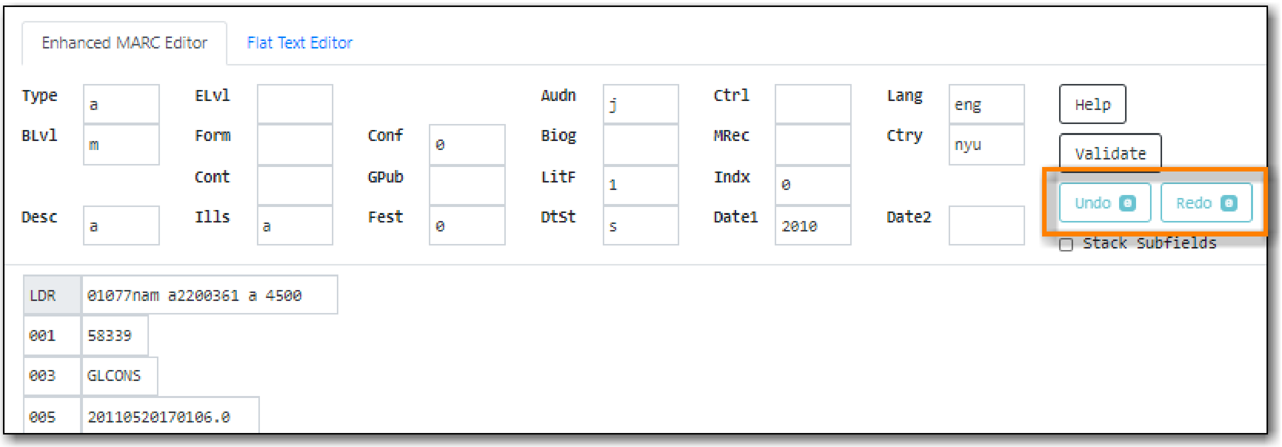


19.1.1. Enhanced MARC Editor

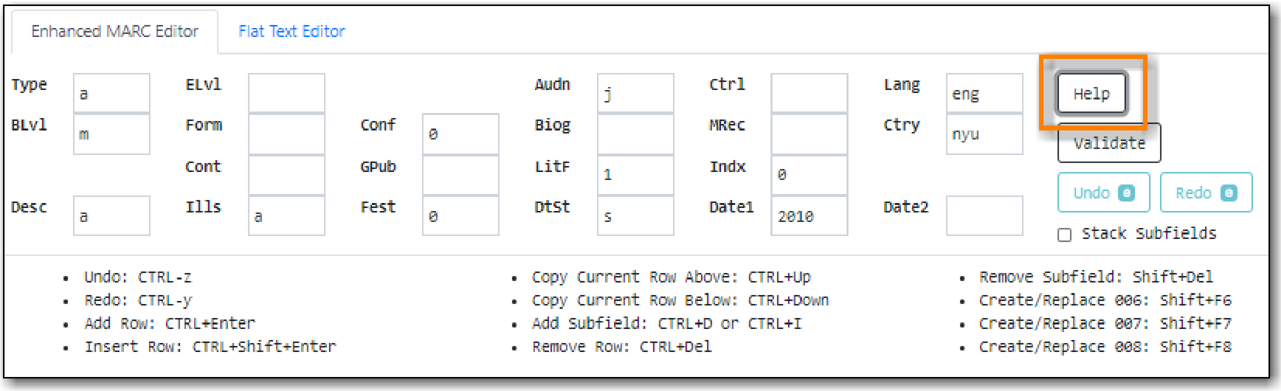
- The grid at the top of the Enhanced MARC Editor can be used to edit characters for the Leader and 008 fields. Right-clicking in a field will display a list of the possible values for that character.



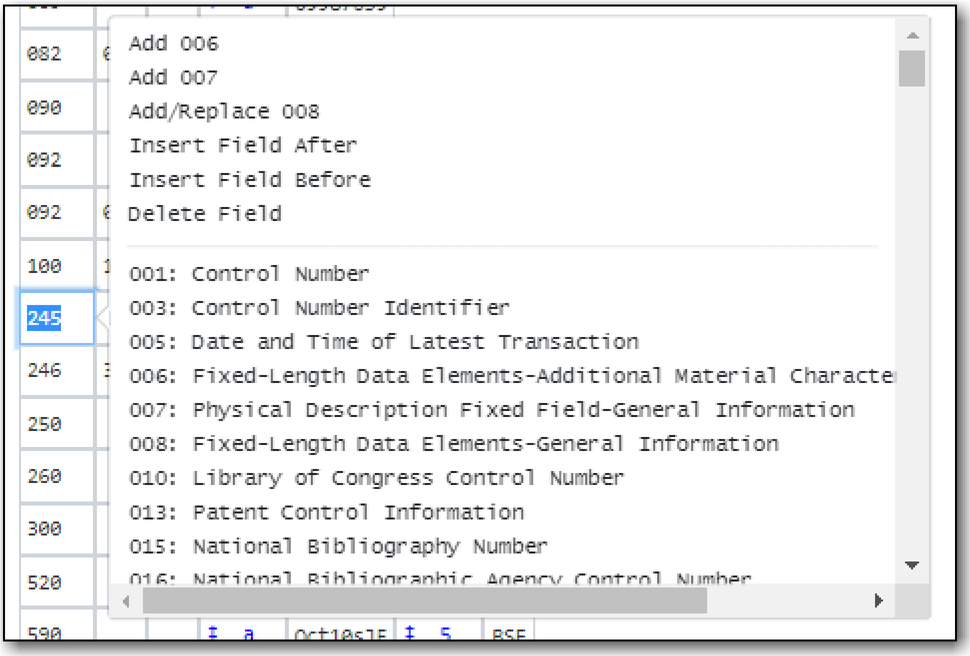
- The **Undo** and **Redo** buttons can be used to undo and redo changes that haven't been saved yet.



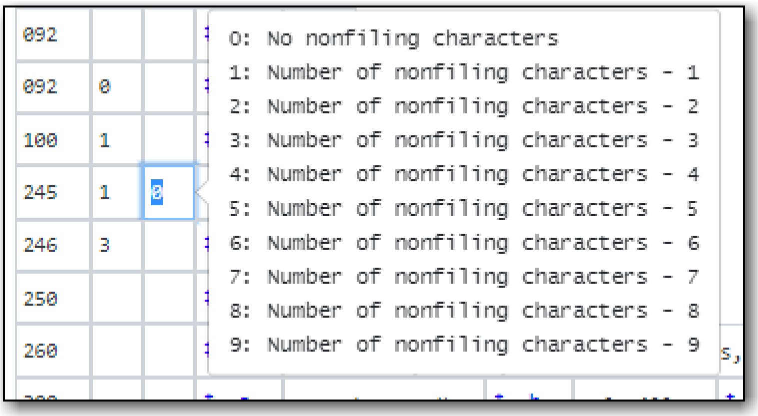
- Clicking the **Help** button will display the available keyboard shortcuts.



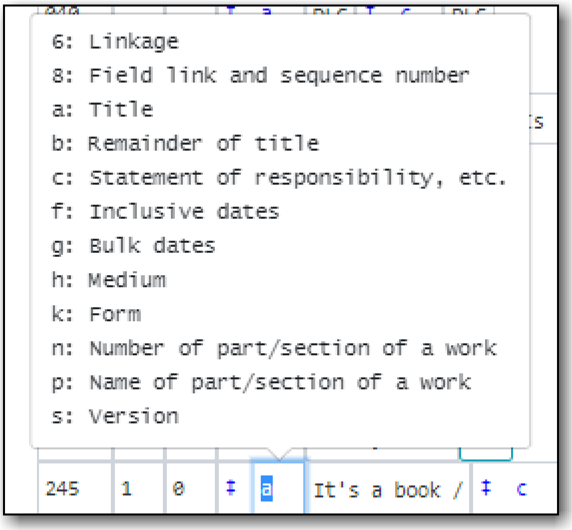
- Right-clicking in the MARC tag field will list potential fields and provide options for adding and removing fields.



- To edit indicators, click or tab into the required field, and right click to view correct indicators and enter appropriate data.

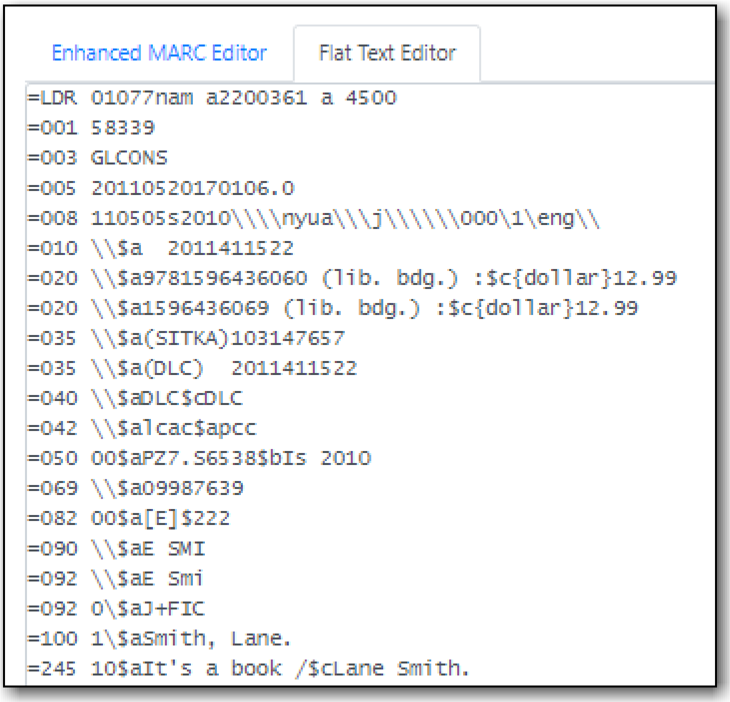


- Right-clicking in a subfield will display the possible subfield values for the particular field.



19.1.2. Flat Text Editor

The text of the MARC record can be edited directly in the Flat Text Editor.




```
=LDR 01077nam a2200361 a 4500
=001 58339
=003 GLCONS
=005 20110520170106.0
=008 110505s2010\\\\nyua\\\j\\\\\\000\1\eng\\
=010 \\$a  2011411522
=020 \\$a9781596436060 (lib. bdg.) :$c{dollar}12.99
=020 \\$a1596436069 (lib. bdg.) :$c{dollar}12.99
=035 \\$a(SITKA)103147657
=035 \\$a(DLC)  2011411522
=040 \\$aDLC$cDLC
=042 \\$alcac$apcc
=050 00$aPZ7.S6538$bIs 2010
=069 \\$a09987639
=082 00$a[E]$222
=090 \\$aE SMI
=092 \\$aE Smi
=092 0\$aJ+FIC
=100 1\$aSmith, Lane.
=245 10$aIt's a book /$cLane Smith.
```

- The fields, indicators, and values are in fixed positions in the Flat Text Editor.
- Each MARC field begins with a = followed by the 3 digit tag for the field.
- If there is no value for an indicator "\" is used to fill the space.
- The "\" is also used in the control fields (Leader, 006, 007, and 008) for characters where no value is specified.

19.2. Editing MARC Record Leader and Fixed Field 008

The Leader and 008 field can be edited directly via the Flat Text Editor in MARC Edit or using the grid at the top of the Enhanced MARC Editor.

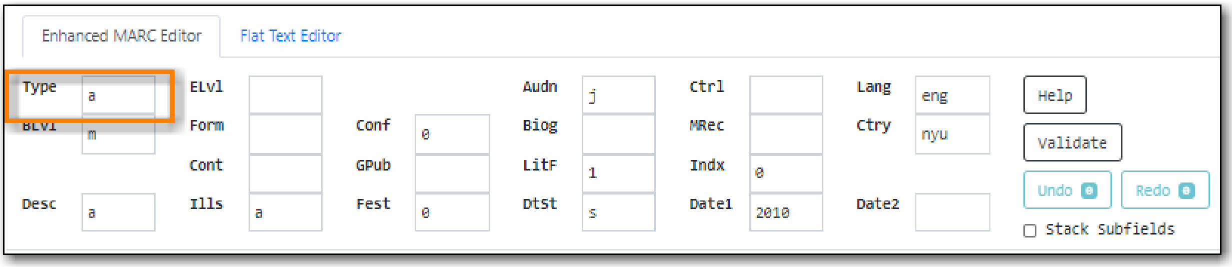
Information about the Leader and the 008 can be found on the Library of Congress's MARC

Standards page at http://www.loc.gov/marc/

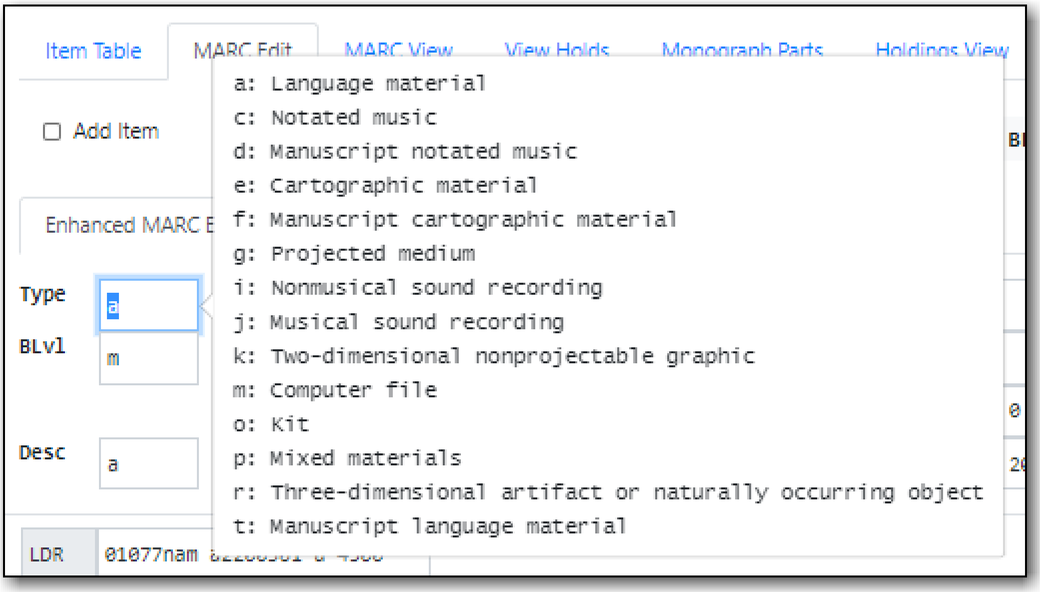
To edit the fixed fields, it is easiest to use grid in the Enchanced MARC Editor. In the Flat Text Editor, you must count characters and make sure you place the cursor at the correct position in the field.

TIP The search filters and format icons in the public catalogue rely on accurate coding in the Leader, 007 and 008 fields. Please see the format filter and icon specifications in Search Filters and Format Icons.

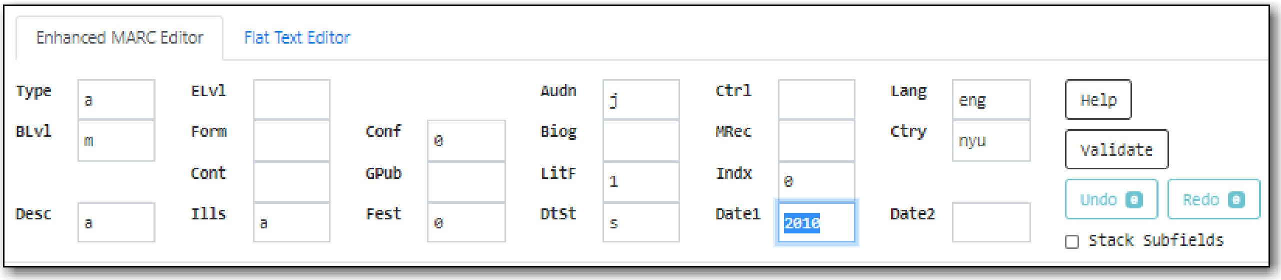
1. Retrieve and display the record in MARC Edit.
2. Click into any box displayed in the fixed field editor. In this example we are editing the first position, the Type or Format box, to describe the format of the resource, textual material, by use of an "a".
   a. Some fields have spaces as values so you need to backspace your cursor to the very beginning of the box in order to type in a new value.



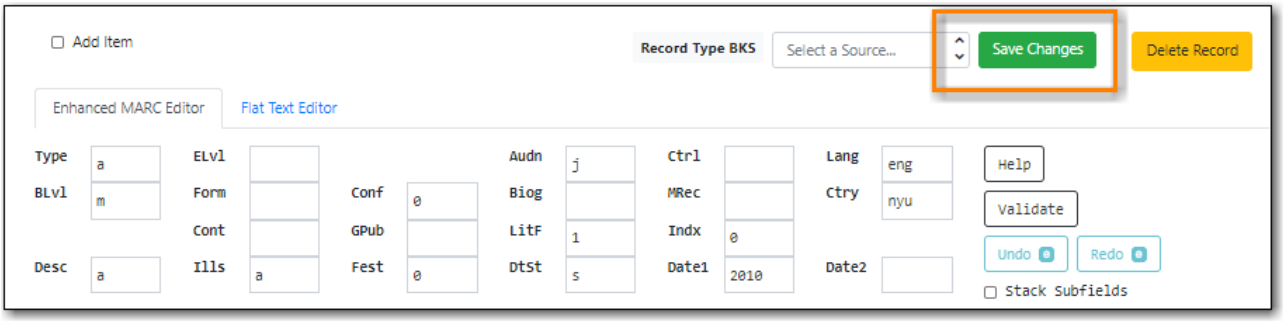
3. For some fields, right-clicking in the box will show a list of possible values (eg. BLvl, Type, Form Audn, and Lang). Choose from this list to populate the box.



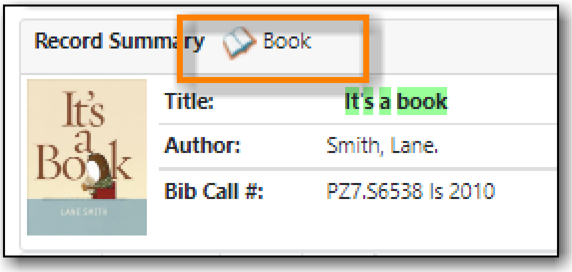
4. You can press the **Tab** key or use the mouse to click through to each field, and can delete and add text as required by backspacing or highlighting existing text and over typing. Here the publication date is being edited; catalogue searches filtered by date rely on correct coding in the 008.



5. Click **Save Changes**.



6. The OPAC icon for textual materials is displayed as in the example below.



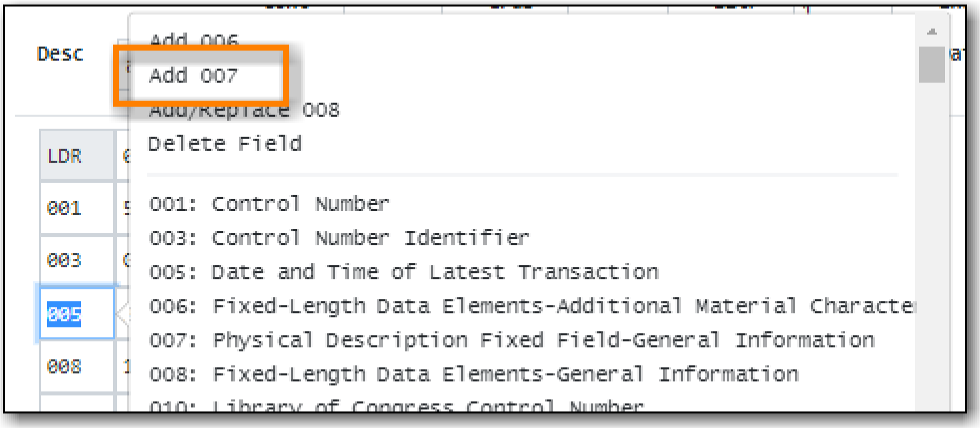
19.3. Fixed Field 007 Physical Characteristics Wizard

Sitka Snippet Video - Physical Characteristics Wizard (3:52)

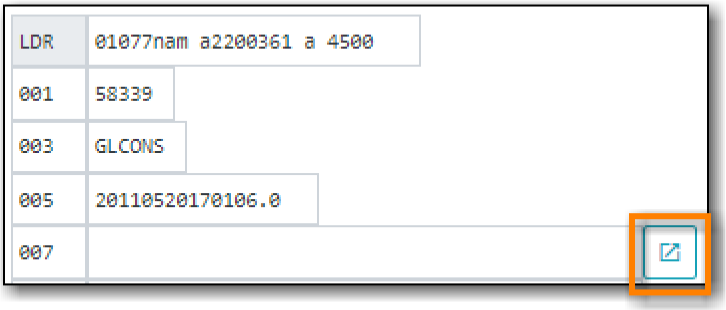
The MARC Fixed Field 007 Physical Characteristics Wizard enables catalogers to interact with a database wizard that leads the user step-by-step through the MARC 007 field positions. The wizard displays the significance of the current position and provides drop down lists of possible values for the various components of the MARC 007 field in a more user-friendly way.

To Access the Physical Characteristics Wizard for a Record that Does Not Already Contain the 007 Field (i.e. Creating the 007 Field from Scratch):

1. Within the bibliographic record that needs to be edited go to the **Enhanced MARC Editor**.
2. Right-click in the MARC field column and click **Add 007**.



3. Click the blue icon to the right of the 007 field.



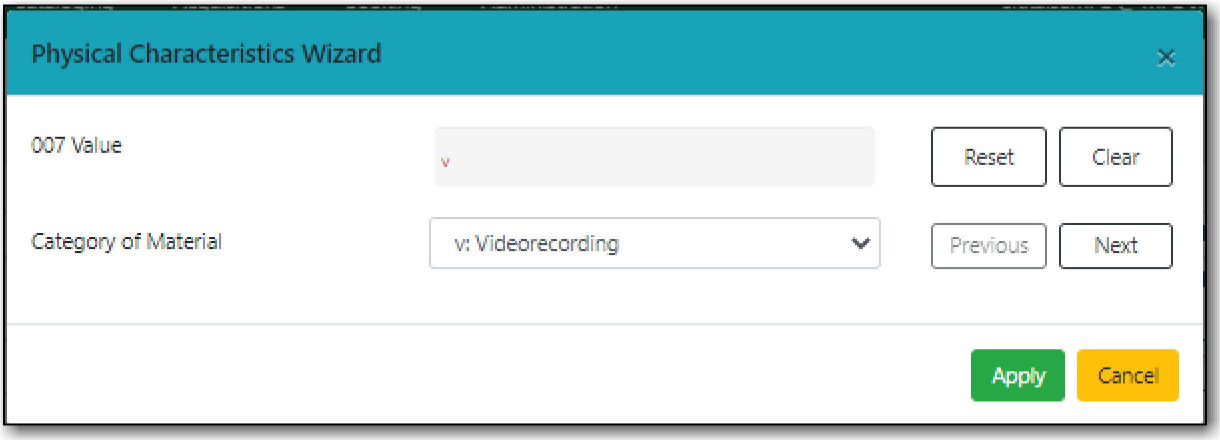
4. The **Physical Characteristics Wizard** will open.

Using the Physical Characteristics Wizard:

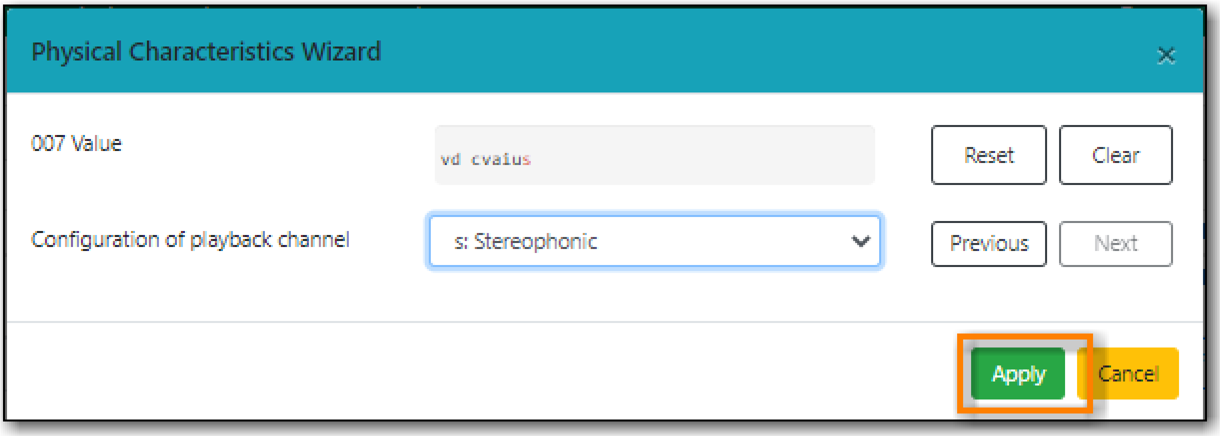
As the user navigates through the wizard, each position will display its corresponding label that describes the significance of that position. Each position contains a selection of drop down choices that list the possible values for that particular position. When the user makes a selection from the drop down options, the value for that position will also change.

The first value defines the **Category of Material**. The choices within the remaining character positions will be appropriate for the Category of Material selected.

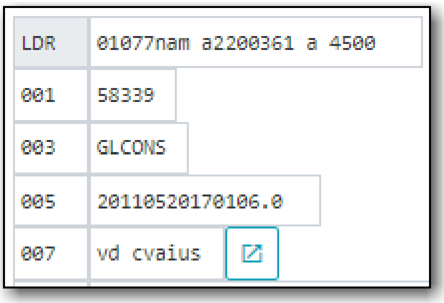
1. Select the Category of Material for the given record by choosing an option from the **Category of Material** drop down menu.
2. Once the Category of Material is selected, click **Next**.
3. Evergreen will display the result of each selection in the preview above. The character of your current position will be in red.



4. By clicking either the **Previous** or **Next** buttons, the user may step forward and backward, as needed, through the various positions in the 007 field.
5. Once the user enters all of the applicable values for the 007 field and is ready to exit the wizard, click **Apply**.



6. All of the values selected will be stored and displayed within the 007 field of the bibliographic record.



7. Continue editing the MARC record, as needed. When finished, click **Save Changes**.

19.4. Search Filters and Format Icons

Evergreen utilizes the coded information entered into the leader and control fields in the MARC record for search filters and format icons. These fields need to be accurately coded so that the correct format icons display and expected records are included in search results.

NOTE	The new catalogue presently includes search filters that are different from those

> available in the traditional catalogue. Further work is required in the new catalogue to enable it to use our custom filters.

Evergreen looks at the following positions in the leader and control fields:

Format Filter Groups and Format Icons are configured at the Sitka level.

- item_type (Type) is Leader position 06
- bib_level (BLvl) is Leader position 07
- item_form (Form) is 008 position 23, except when item_type is g, 008 position 29
- vr_format is 007 position 04
- sr_format is 007 position 03

19.4.1. Search Filters

Languages - relies on characters 35-37 of the 088 field.

Audience - relies on character 22 of the 008 field (for the relevant material configurations).

Literary Forms - relies on character 33 of the 008 field (only applicable to books).

Formats - currently includes formats not included in our regular format list. These are marked as *(hidden)* in the list.

The format filter is used by the catalogue to allow staff and patrons to limit their search by material format. The following table shows the fixed fields associated with each format filter value.

Label	Fixed Fields
All Audiobooks	item_type(i)
All Books	item_type(a,t) AND bib_level(a,c,d,m) but NOT item_form(a,b,c,f)
All Videos	item_type(g)
Audiobooks (electronic)	item_type(i) AND item_form(o,s)
Audiobooks (physical)	item_type(i) AND sr_formt(l,f)
Books (electronic)	item_type(a,t) AND bib_level(a,c,d,m) AND item_form (o,q,s)
Books (large print)	item_type(a,t) AND bib_level(a,c,d,m) AND item_form(d)
Books (physical)	item_type(a,t) AND bib_level(a,c,d,m) and NOT item_form (a,b,c,f,o,q,s)
Kits and Mixed Materials	item_type(o,p,k)
Maps	item_type(e,f)
Music (CD, cassette)	item_type(j)

Label	Fixed Fields
Music Scores	item_type(c,d)
Pictures	item_type(k)
Preloaded Audio	item_type(i) AND item_form(q)
Serials and Magazines	bib_level(b,s)
Serials and Magazines (electronic)	bib_level(s) AND item_form(q,o,s)
Software and Video Games	item_type(m)
Toys, Puzzles and Equipment	item_type(r)
Videos (electronic)	item_type(g) AND item_form (o,q,s)
Videos (physical)	item_type(g) AND NOT item_form (o,q,s)

19.4.2. Format Icons

The format icons show in the search results and record display in the catalogue. The following table shows the fixed fields associated with each format icon.

Label	Fixed Fields
Video (shown if format, eg. vhs, dvd, is unknown)	item_type(g) and NOT vr_format(v,s,b)
E-video	item_type(g) and item_form(o, s, q)
DVD	vr_format(v)
VHS	vr_format(b)
Blu-ray	vr_format(s)
Audiobook (shown if format, eg. cassette, disc, is unknown)	item_type(i) and NOT item_form(o,q,s) and NOT sr_format(a,b,c,d,e,l,f)
E-audiobook	item_type(i) and item_form(o,s)
CD Audiobook	item_type(i) and sr_format(f)
Cassette audiobook	item_type(i) and sr_format(l)
Phonograph audiobook	item_type(i) and sr_format(a,b,c,d,e)
Book	item_type(a,t) AND bib_level(a,c,d,m) and NOT item_form (a,b,c,d,f,o,q,r,s)
E-Book	item_type(a,t) AND bib_level(a,c,d,m) AND item_form (o,q,s)
Large print book	item_type(a,t) AND bib_level(a,c,d,m) AND item_form(d)
Braille	item_type(a) AND item_form(f)
Kit or mixed material	item_type(o,p)
Map	item_type(e,f)

Label	Fixed Fields
Music (shown if format, eg. cassette, disc, is unknown)	item_type(j) and NOT sr_format(a,b,c,d,e,f,l)
Phonograph music	item_type(j) AND sr_format(a,b,c,d,e)
CD music	item_type(j) AND sr_format(f)
Cassette music	item_type(j) AND sr_format(l)
E-music	item_type(j) AND item_form(o, s)
Music score	item_type(c,d)
Preloaded Audio	item_type(i) AND item_form(q)
Picture	item_type(k)
Serial or magazine	bib_level(b,s) and NOT item_form (o, s, q)
E-Serial or magazine	bib_level(b,s) AND item_form (o, s, q)
Software or video game	item_type(m)
Online	bib_level(i) AND item_form (o, s, q)
Toys, puzzles or equipment	item_type(r)
Picture	item_type(k)
Microform	item_form(a,b,c)

19.5. Merging Bibliographic Records

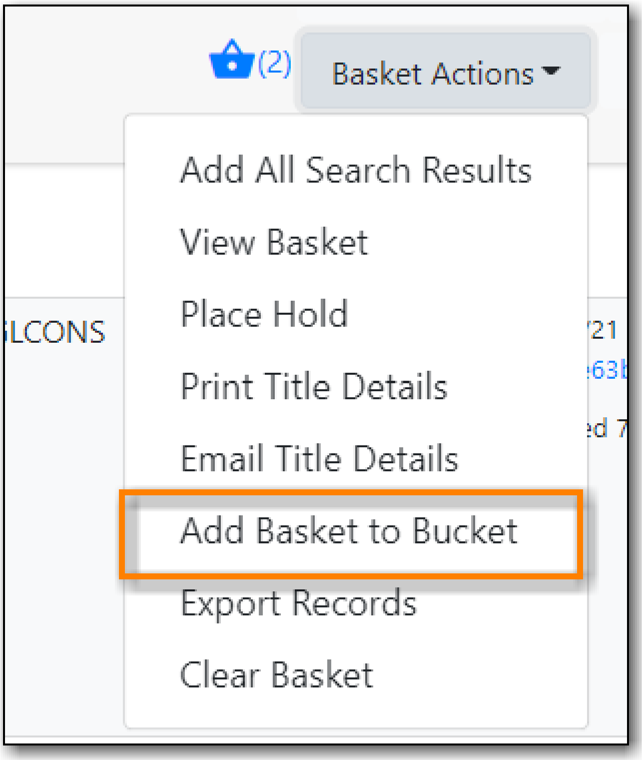
Sitka Training Video - Merging Duplicate Bibliographic Records (5:10)

This section will demonstrate merging bibliographic records in the catalogue. A common application for this functionality is to replace brief records with full records to keep one bibliographic record for one title.

Any call number and item records, or holds, associated with the non-lead records will be transferred to the lead record upon merging.

1. Through a catalogue search identify records to be merged and add them to your basket by checking the boxes beside the relevant records in the search results list.

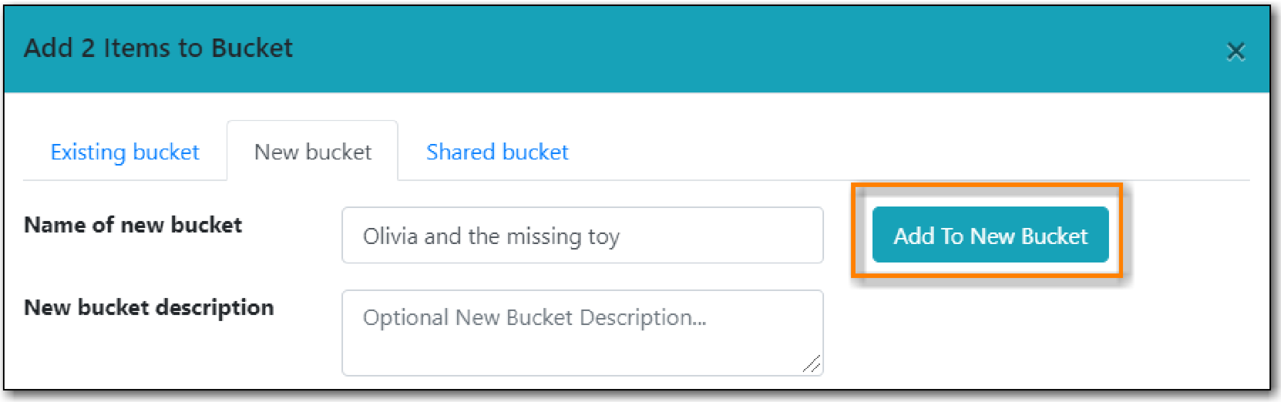
2. From the Basket Actions drop down menu select **Add Basket to Bucket**.



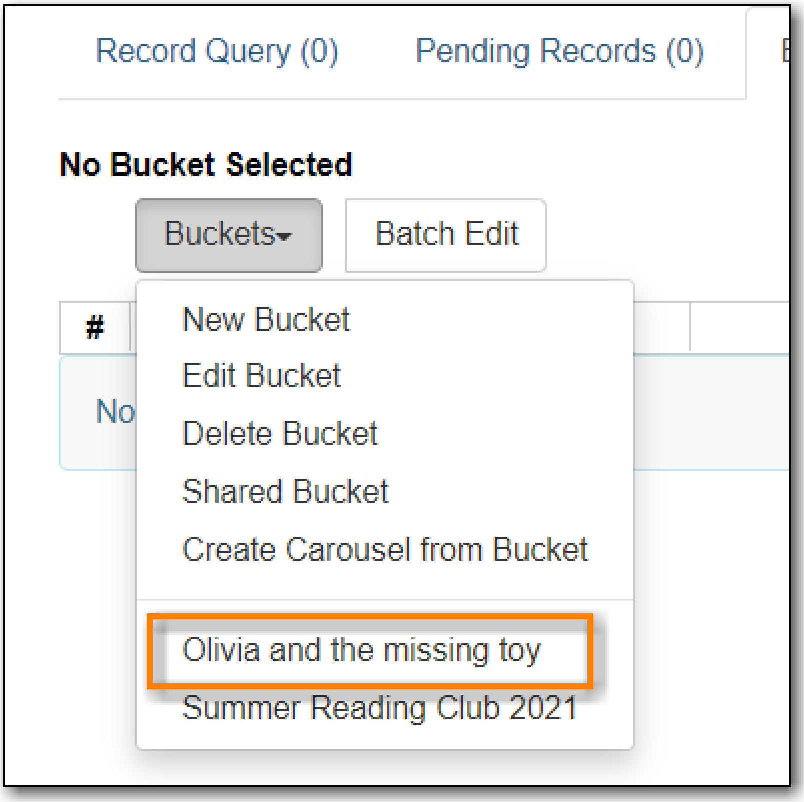
3. On the pop-up that appears select the **New Bucket** tab.
4. Enter a name for your bucket. Support recommends using the title of the records you are

merging.

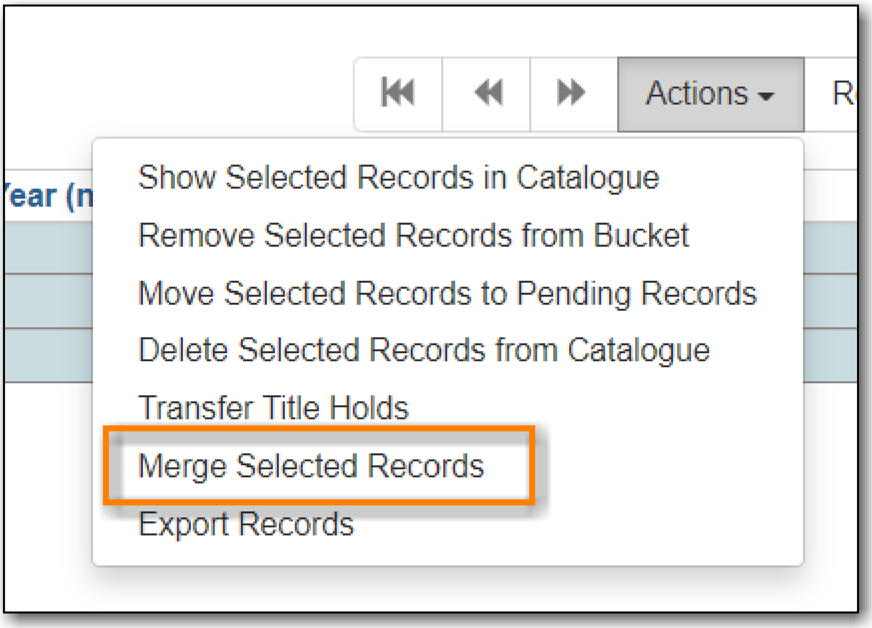
5. Click **Add to New Bucket**.



6. Retrieve the bucket by selecting **Cataloguing** → **Record Buckets** on the menu bar.
7. Click the drop down arrow beside **Buckets**, then select the bucket containing the records to be merged.



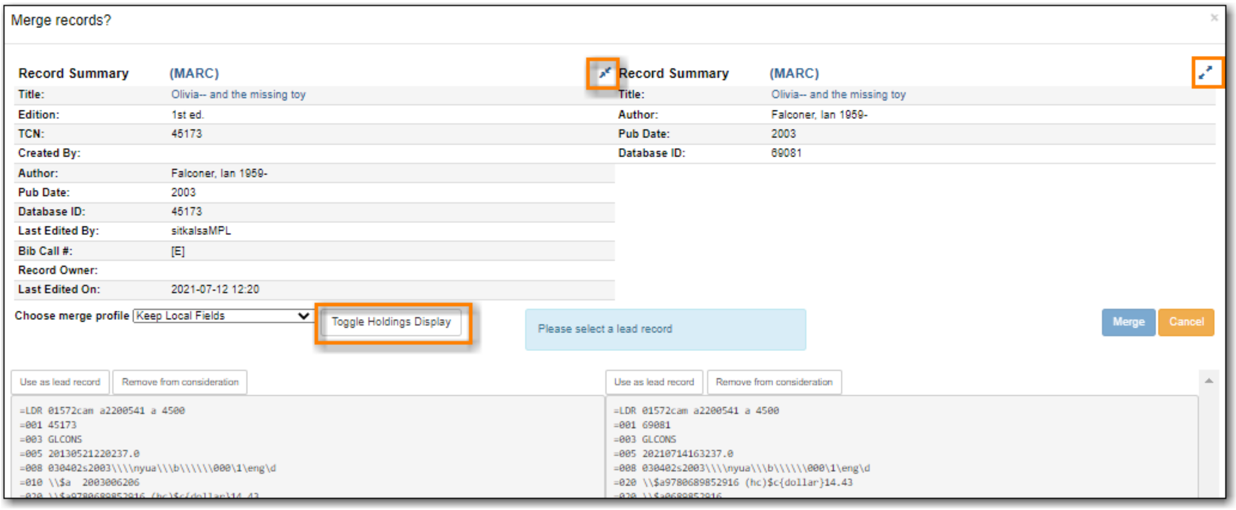
8. Select the records you wish to merge. Click **Actions** → **Merge Selected Records**.



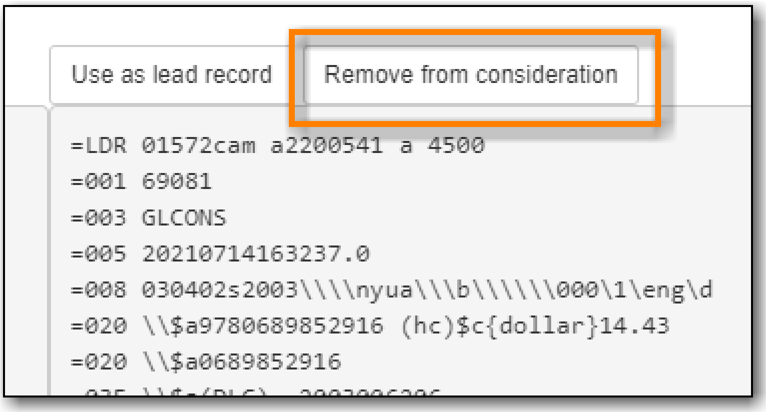
9. The merge screen opens in a pop-up window.

   a. The record summary is listed above. You may shorten it by clicking the double arrows.

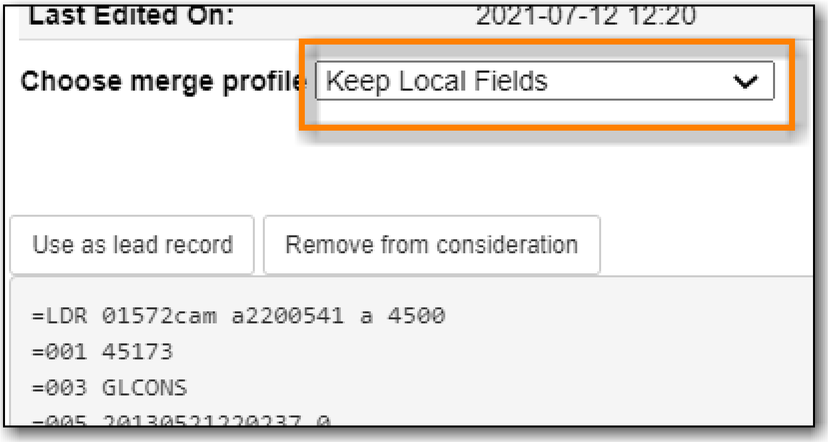
   b. Clicking **Toggle Holdings Display** will display the holdings information below each MARC record.



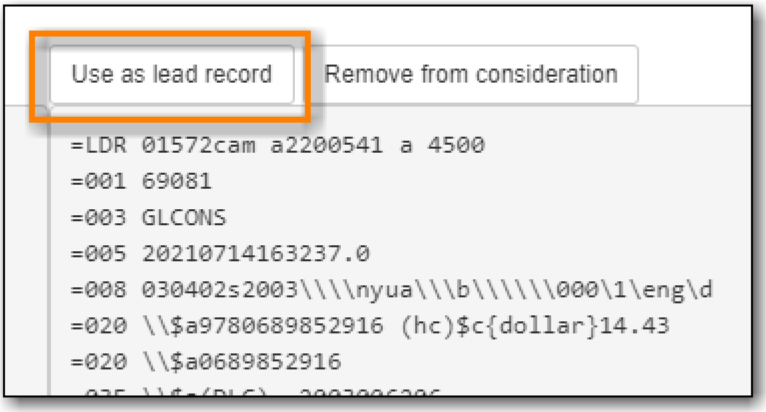
10. If after comparing the MARC records you determine that any of them are not a match for merging click **Remove from consideration**. The record will no longer be included in the merge.



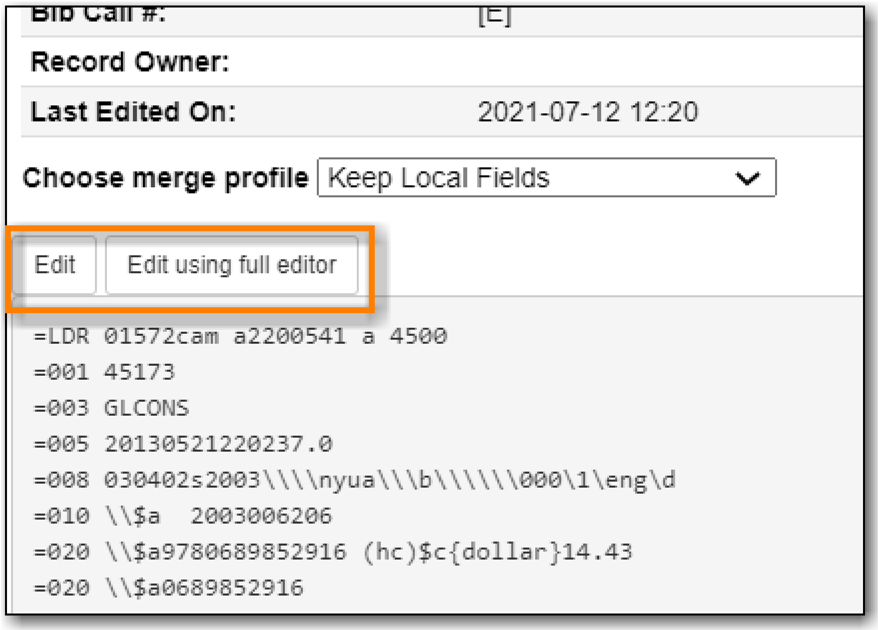
11. Leave the merge profile as "Keep Local Fields". Any 050, 055, 092, 590, 595, 690, 852, and 856 fields from non-lead records will be moved to the lead record.



12. From the remaining records determine which is the best record and click **Use as lead record**.



13. Edit buttons will appear for the lead record. You can edit the record if edits are necessary. Any edits need to follow Sitka Cataloguing Policy.



14. Click **Merge**. The lead record will open in the catalogue in a new tab.

NOTE While you can edit call numbers and/or items from the merge screen, Co-op Support recommends you focus on bibliographic records here. After the merging is done, you can edit your call numbers and items through the Holdings Editor.

CAUTION

Deleted records will remain in a record Bucket. We recommend you merge records right after you add them to the bucket. If you merge them later, good practice is to check the **Deleted** column in the bucket before merging to avoid merging records into a deleted record.

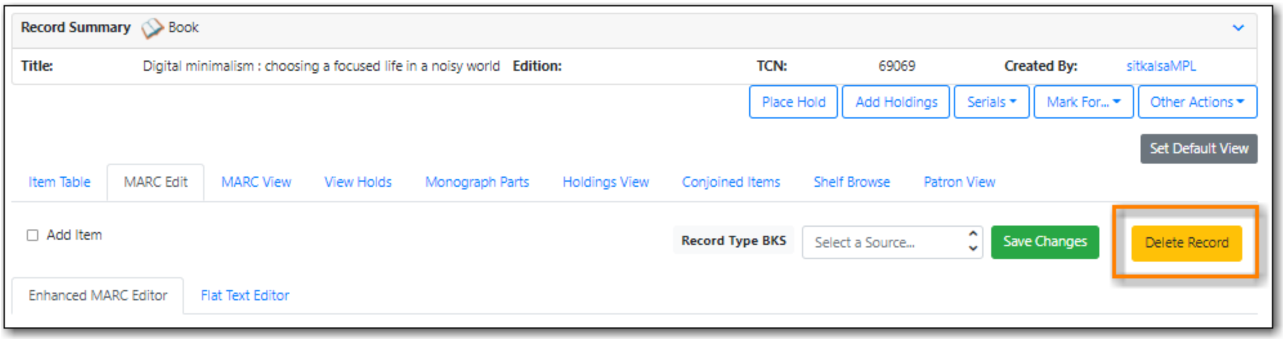
19.6. Deleting Bibliographic Records

Due to cascading record deletion on sole copies, you may find you do not need to delete bibliographic records very often, as Evergreen does this for you.

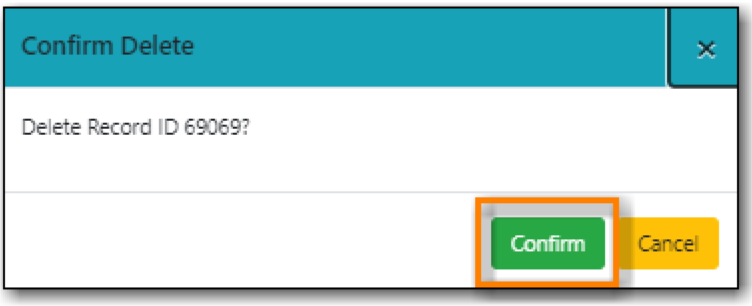
Remember that Sitka's Evergreen is configured to always delete a MARC record when the only copy attached to it is deleted and you can only delete a MARC record if there are no holdings attached to it. This may happen if you have imported a new MARC record in error, and have not attached any holdings to it, or some other error or conversion circumstance that leaves a MARC record in the database with no holdings attached.

You can delete a MARC record directly from the **MARC Edit** tab in the bibliographic record.

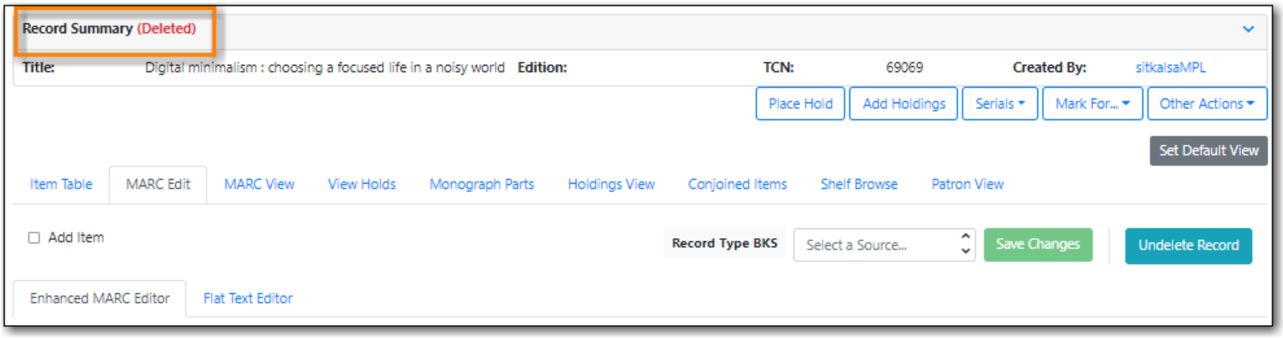
1. Find the record in the catalogue and go to Record Details, and click on the **MARC Edit** tab.
2. Click **Delete Record**.



3. A confirmation window will pop up. Click **OK/Continue**.



4. Record is now deleted and inactive and only retrievable by a TCN (title control number) search or bibliographic record id (presented at deletion confirmation prompt).

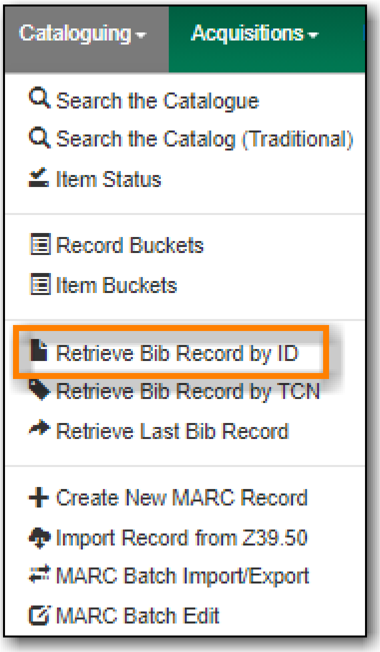


You can also delete bibliographic records from a Record Bucket.

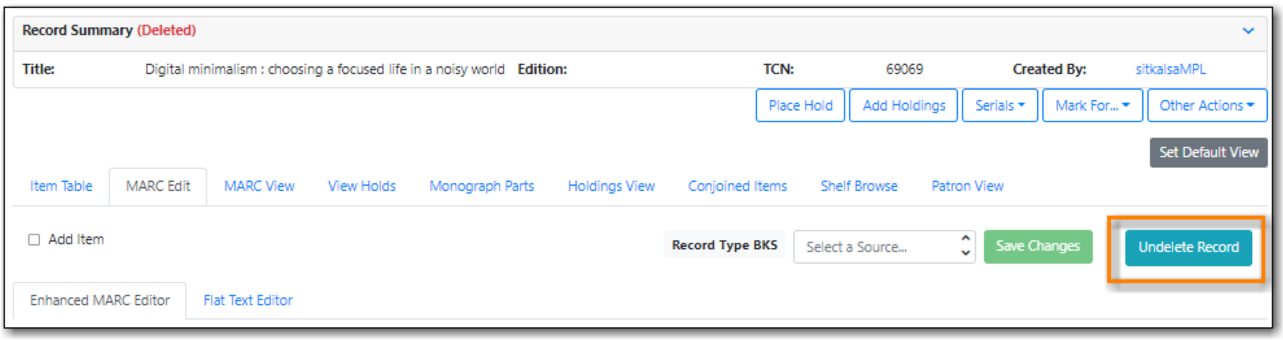
19.6.1. Undeleting Bibliographic Records

Deleted records can be undeleted if you know the record ID.

1. Retrieve the record by its database ID.



2. Click on the **MARC Edit** tab.
3. Click **Undelete Record**.



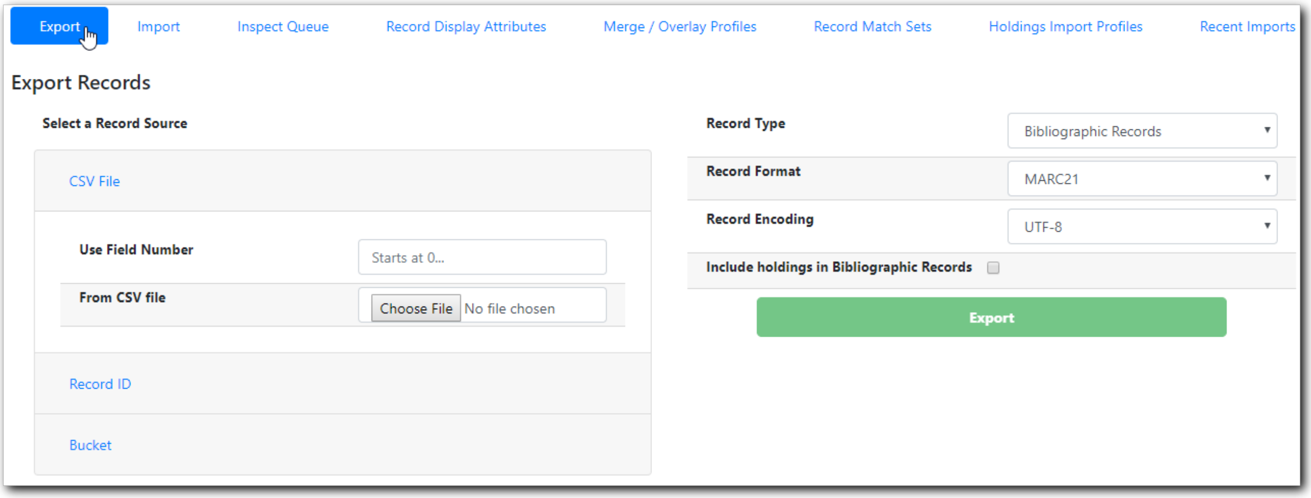
19.7. Exporting Bibliographic Records

There are times when you may want to export MARC records from Evergreen. Evergreen allows you to do so via the Record Bucket and the MARC Batch Import/Export interface. You may include the holdings information in the MARC records. Based on Sitka's configuration, the holdings information will be in tag 852, including the copy's circulating library, shelving location, barcode, call number, status, and others saved in the copy record.

MARC records can be exported from Evergreen in MARCXML, UNIMARC, MARC21/USMARC or Evergreen Record Entry format. You need to choose one from the dropdown list. The exported records can be encoded in either UTF-8 or MARC8.

Export MARC Records from MARC Batch Import/Export

To export MARC records on MARC Batch Import/Export interface, click Cataloguing → MARC Batch Import/Export. The default screen is Import Records. Click **Export Records** tab to open the export interface.



If you want to export more than one record at a time, the records need to be saved in a Record Bucket or their IDs saved in a CSV file. If the CSV file contains other information than just record ids, specify which column is the record id by filling it into the Use Field Number box. Note that the field number starts from 0. If the second column in the CSV file is record id, the field number is 1.

If you export one record only, you may click **Record ID**, then type in the record ID directly on the Export interface.

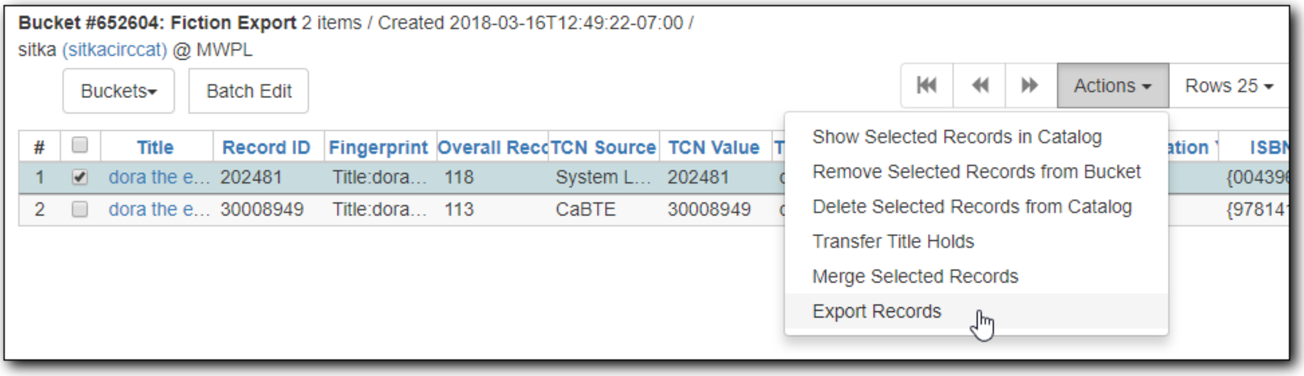
If your records are in a Record Bucket and you know the bucket id, you may click on **Bucket** to type in the bucket id.

Once you have completed the above form, you need to choose **Record Format** and **Encoding**, then click the **Export** button at the bottom. You will be prompted to browse the records, and then save them, or save them directly into a file.

NOTE	Holding records can be exported in tag 852, but this includes all item records across the Sitka consortium, not just your library's holdings.

Export MARC records from Record Bucket

To export MARC records from Record Bucket, go to Cataloguing → Record Bucket. Retrieve the bucket containing the records that you wish to export. Select a record, then click **Action** → **Export Records**.



NOTE All records in the bucket are exported, not just the one you selected.

Select the exported record format and encoding, and whether to include holdings. Once done, click **Export**. You will be prompted to save the file.

Chapter 20. Record Buckets

Record buckets allow you to build a list of titles that you may process in batch. It is also the interface for merging records. Records, even after being deleted, remain in a bucket until they are removed from it.

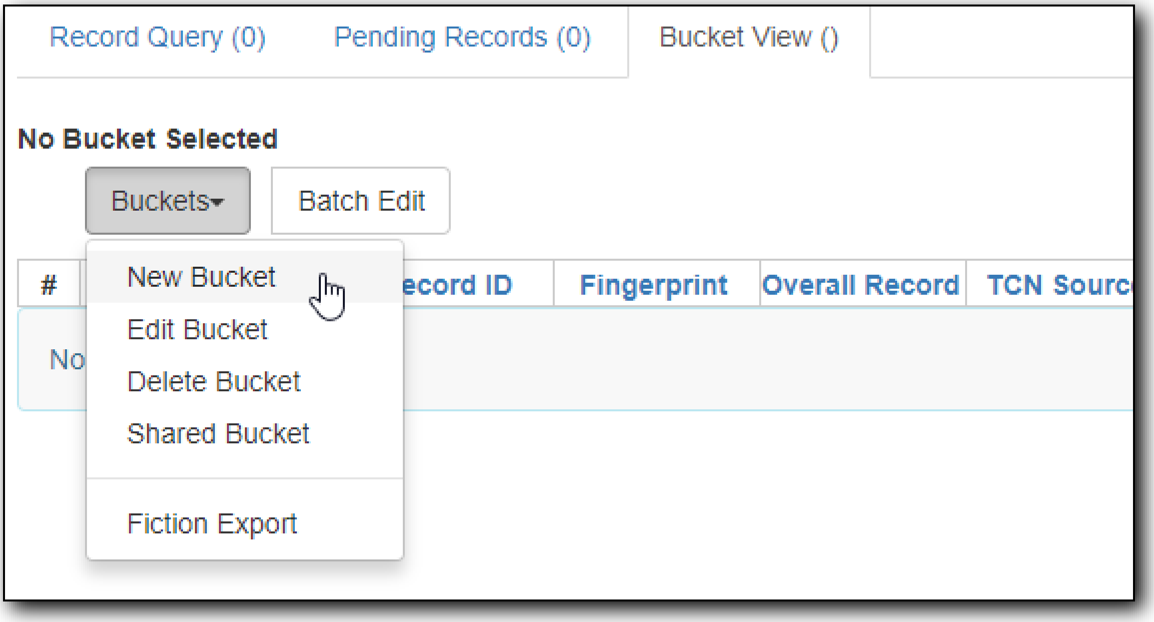
We will demonstrate how to create and manage bibliographic record buckets. It is very important when working with buckets to ensure you are working with the correct type of record for the corresponding bucket. You cannot add copy records to bibliographic record buckets and vice versa.

20.1. Creating Record Buckets

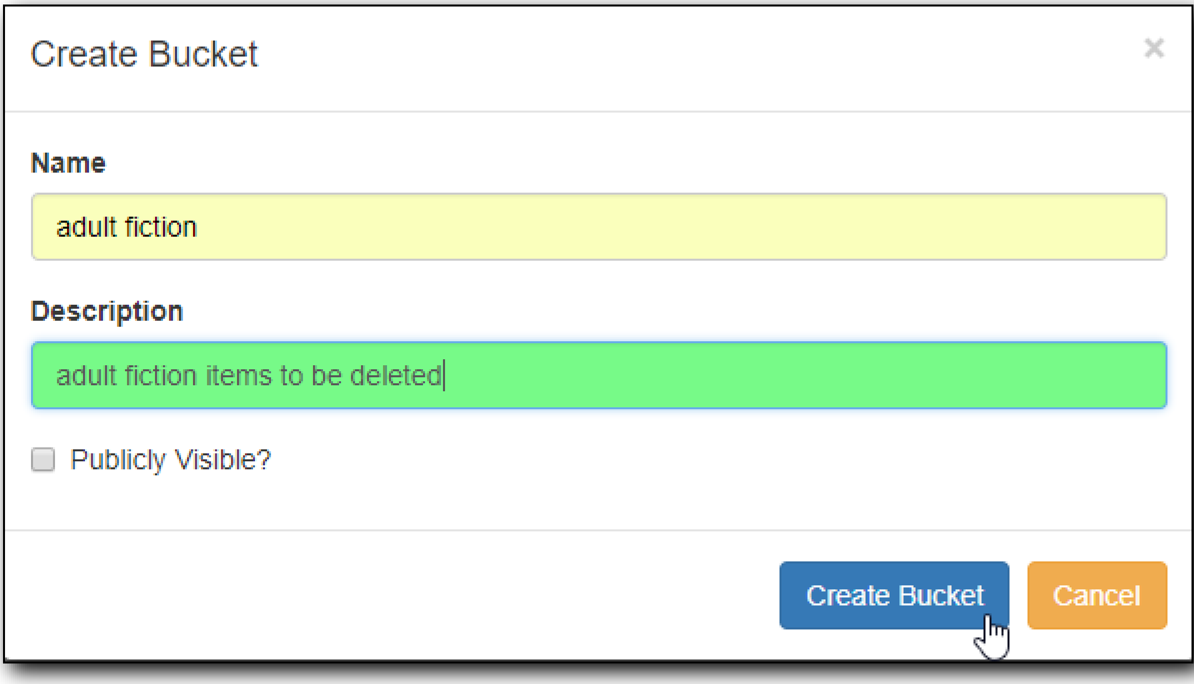
There are two ways to create a record bucket. You can either create a bucket first, without accessing any records, or you can access a record and choose to create the bucket from that view. We will demonstrate both methods here.

Creating a Record Bucket on Record Buckets view

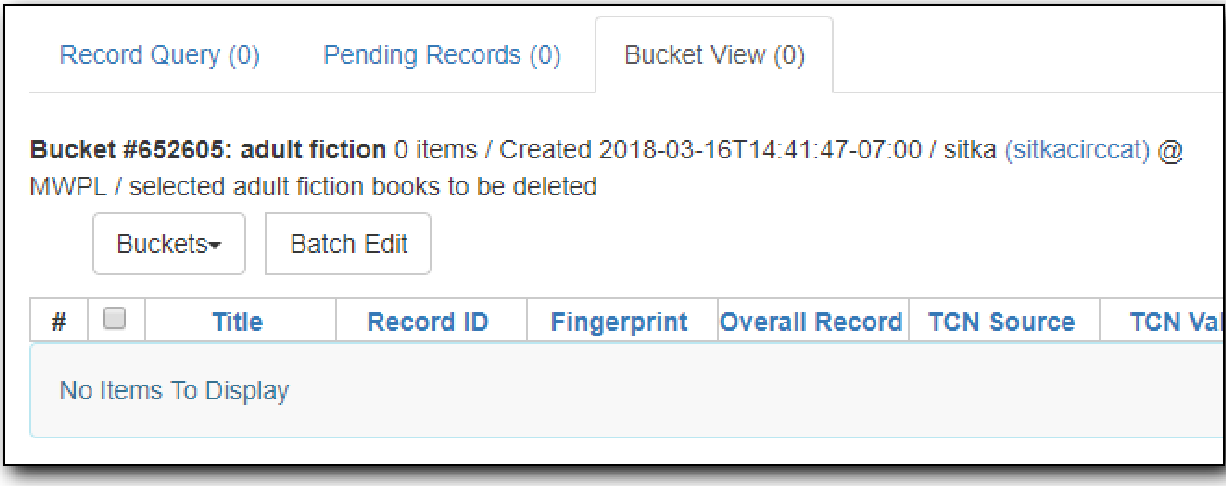
1. Select **Cataloging** → **Record Buckets** from the menu bar.
2. Select **New Bucket** from the **Buckets** dropdown list.



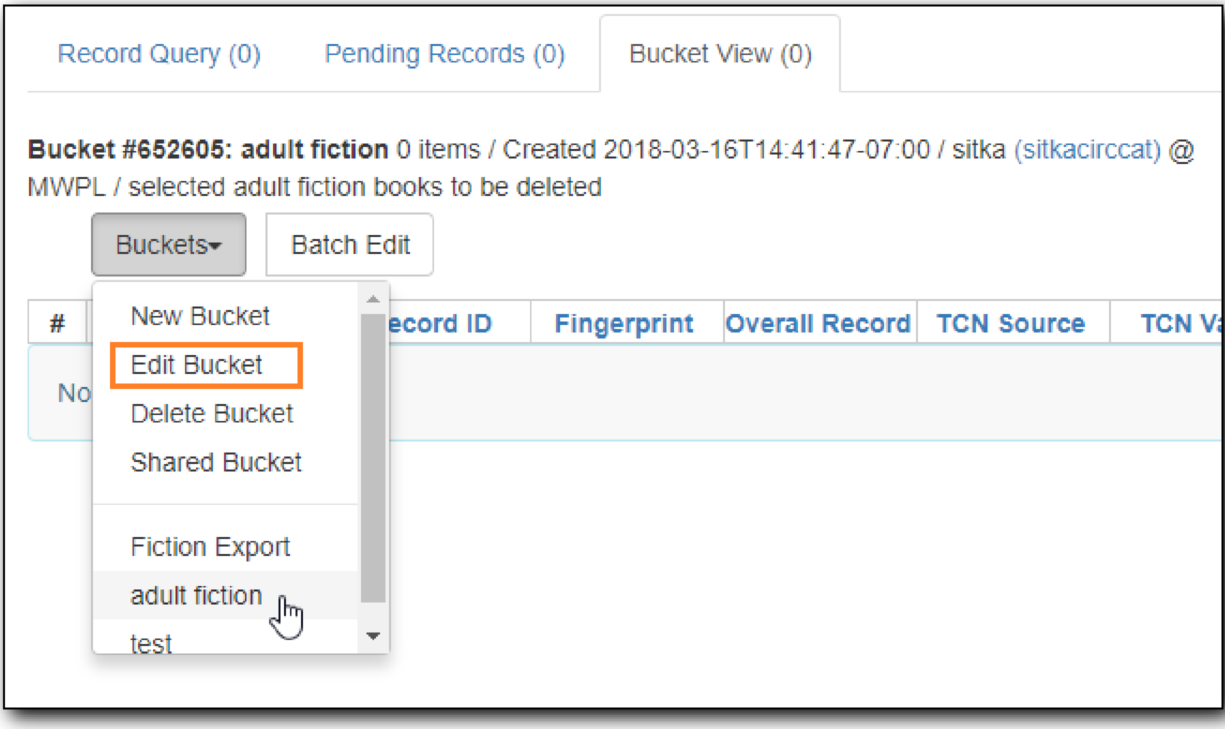
3. Type in a name and some description, if needed. Click **Create Bucket**.



4. The newly created bucket is the active bucket in Bucket View. Note that the bucket is numbered, and creating owner identified.



5. Click the **Buckets** dropdown list, you will see the bucket on the list. You can edit the bucket's name or description by clicking on **Edit Bucket** on the list.

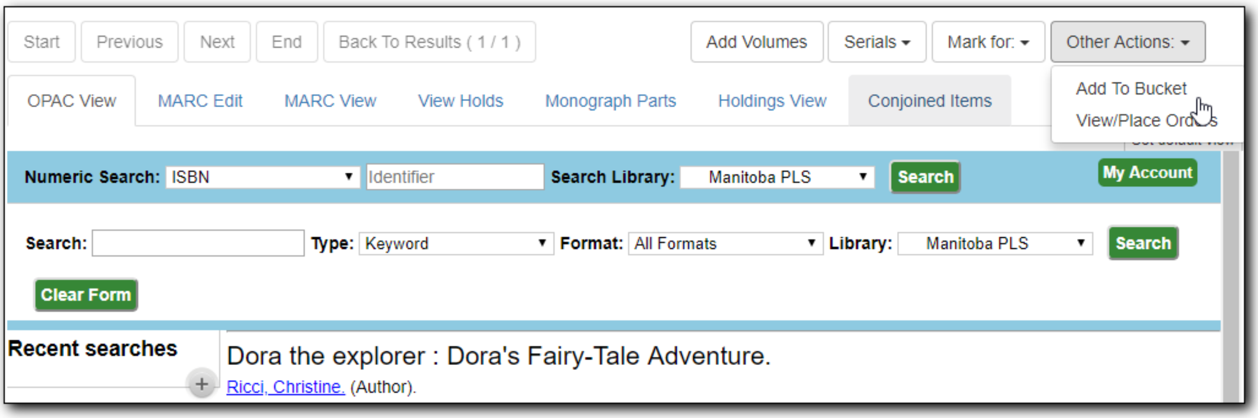


TIP	Only buckets created by the login account are listed. But those created by other people can be retrieved via bucket number, if shared with you. Click **Shared Bucket** to type in the number to retrieve it.

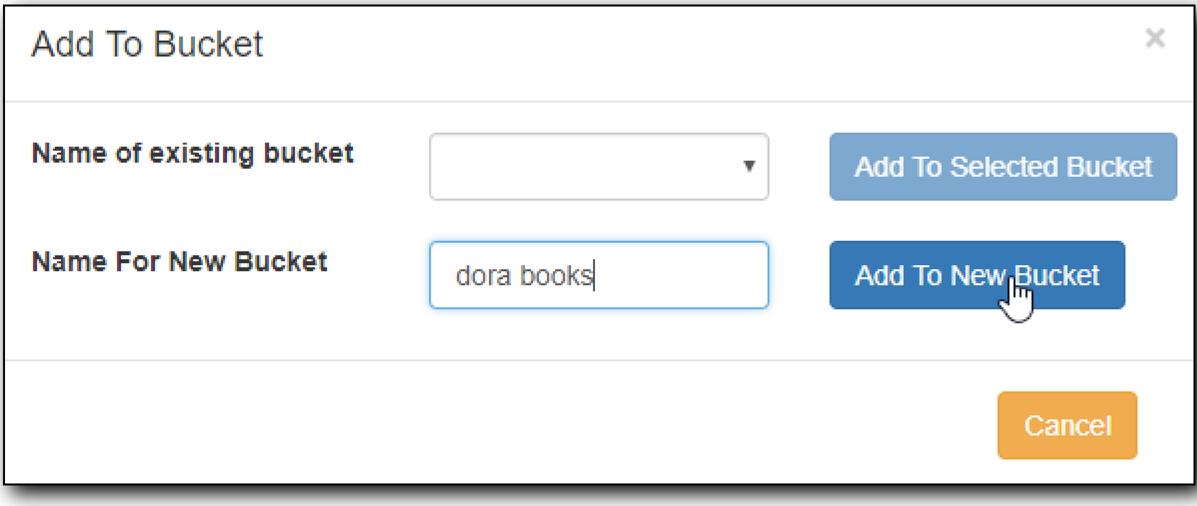
Creating a Record Bucket when Adding a Record to a Bucket

You can also create a bucket from within a record.

1. Search for, retrieve, and display any bibliographic record, then choose **Other Actions** → **Add to Bucket**.



2. You are prompted to add the record to an existing bucket or to a new one. To add to a new bucket, type in a name in **Name For New Bucket** box, then click **Add to New Bucket**.



20.2. Adding Records to a Record Bucket

You can add records to a bucket in a few places.

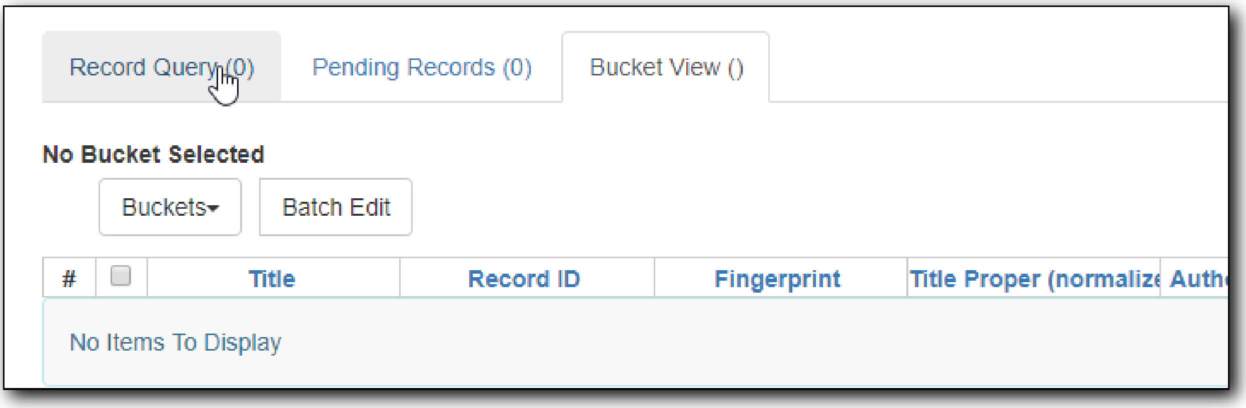
Adding Records to a Bucket on the Catalogue

Once you retrieve a record on the catalogue, select **Other Actions** → **Add to Bucket** to add it to a record bucket.

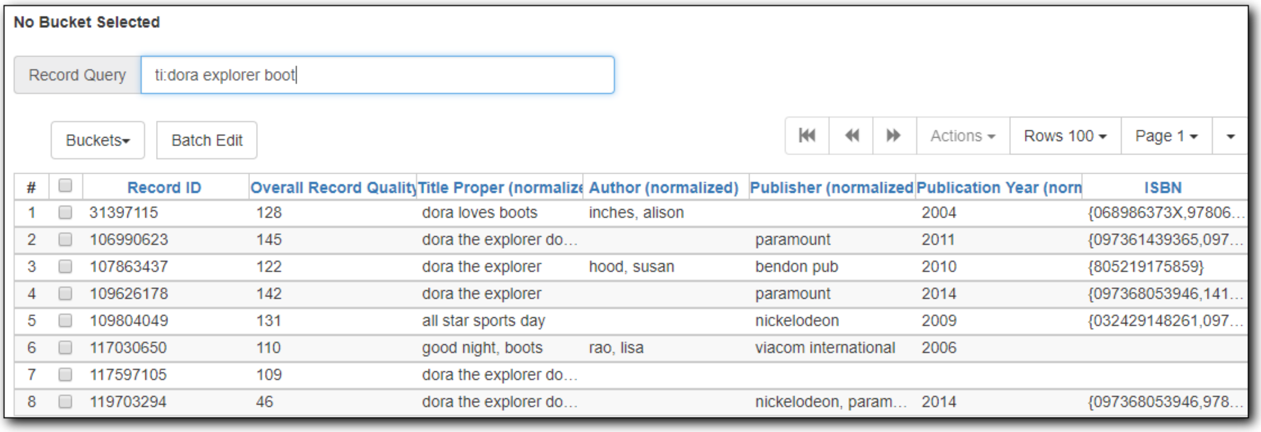
Add Records to a Bucket on Record Bucket View

You can run a search, then select records from the result list to add to a bucket on Record Bucket view.

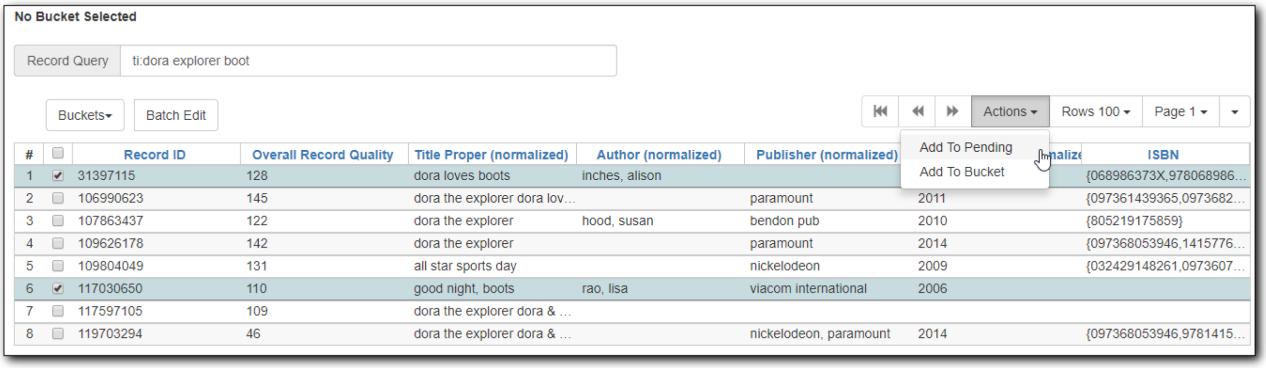
1. Go to Record Bucket by choosing **Cataloguing** → **Record Bucket**.
2. Create or select a bucket by using the **Buckets** dropdown list on Bucket View tab now or later.
3. Click **Record Query**



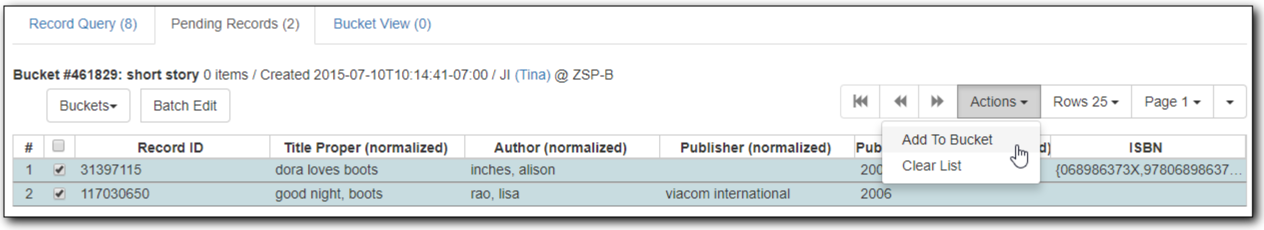
4. Type in your search term, then hit **Enter** key to start the search.



5. Select records on the result list, then click **Action** → **Add to Pending** or **Add to Bucket**, if a bucket has been selected.



6. You can continue to search for more records and add them to the Pending tab or the Bucket. Once done, you may go **Bucket View** to create or select a bucket, if not done yet. You can select, then add records, on Pending Records tab, if any, to a bucket.



TIP

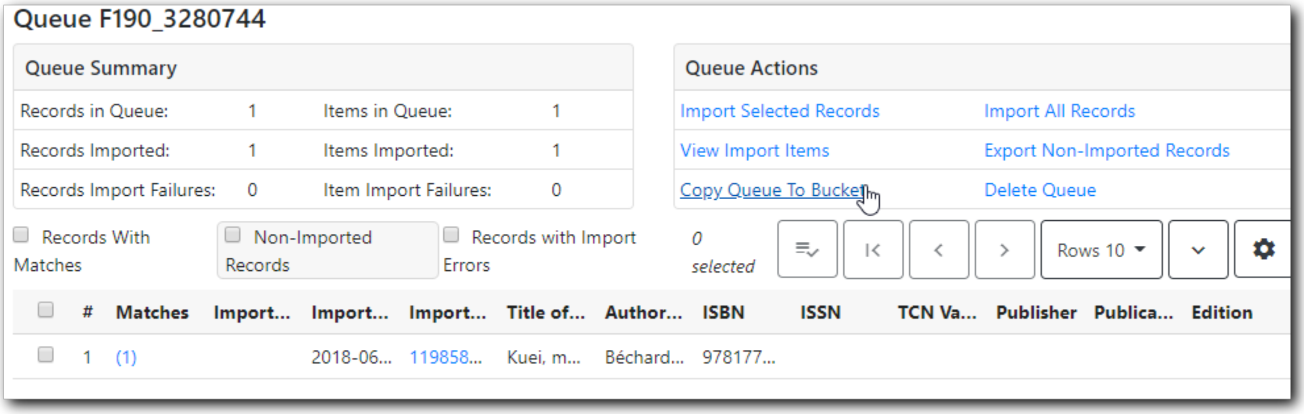
Multiclass Search Help

Search Key	Definition
keyword/kw	search keyword(s)
author/au/name	search author(s)
title/ti	search title
subject/su	search subject
series/se	search series
lang	limit by language (specify multiple langs with lang:l1 lang:l2 …)

site	search at specified org unit, corresponds to actor.org_unit.shortname, e.g. ti:dora explorer site:BFSJ
sort	sort type (title, author, pubdate)
dir	sort direction (asc, desc)
available	if set to anything other than "false" or "0", limits to available items
	keyword, title, author, subject, and **series** support additional search subclasses, specified with a |. For example: title|proper:gone with the wind

Adding Imported Records on MARC Batch Import/Export

MARC records that have already been imported via MARC Batch Import/Export can be added to a bucket.



20.3. Working with Records in a Record Bucket

You can apply the following functions to selected records in a bucket.

- **Show Selected Records in Catalogue**
- **Delete Selected Records from Catalogue**
- **Merge Selected Records** (Refer to Merging Bibliographic Records)
- **Export Records** (Refer to Export MARC records from Record Bucket)

To apply these functions, retrieve the bucket, select titles, then choose the function from the **Actions** list.

Public Catalogue

Chapter 21. Search the Public Catalogue

NOTE

A patron friendly version of this section can be found at https://help.libraries.coop/catalogue. The **Help** link in the footer of your public catalogue will also take users to this site.

The public catalogue can be accessed online from any location via the Internet and is available in English and French.

The language selector in the top-right allows your users to switch between English and French as desired.

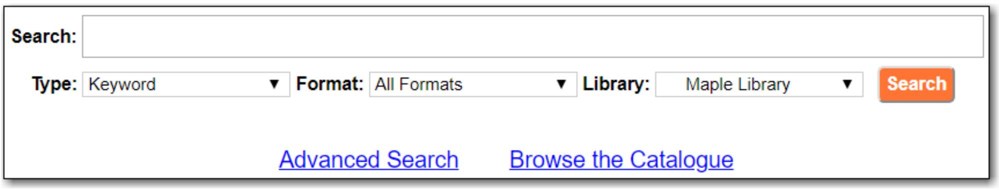
The generic public catalogue which searches all of Sitka is https://catalogue.libraries.coop. This catalogue is also used in the staff client for searching the catalogue.

Each library has a public catalogue using their logo and colours. The default URL for all library specific public catalogues is https://LIBRARYCODE.PROVINCECODE.catalogue.libraries.coop.

21.1. Basic Search

The public catalogue defaults to the Basic Search where you can search for books and other items at your library or other libraries in the consortium.

Basic Search contains a single search box for you to enter a search term.



You can select to search by:

- Keyword — finds the terms you enter anywhere in the entire record for an item, including title, author, subject, and other information.

* Title — finds the terms you enter in the title of an item.
* Journal Title — finds the terms you enter in the title of a serial bibliographic record.
* Author — finds the terms you enter in the author of an item.
* Subject — finds the terms you enter in the subject of an item. Subjects are categories assigned to items according to a system such as the Library of Congress Subject Headings.
* Series — finds the terms you enter in the title of a multi-part series.

21.1.1. Formats

You can limit your search by format. Some of the more popular formats in the list are the following:

* For Books, you can choose *All Books*, which includes regular print books, large print books, and e-books, *All Audiobooks*, which includes audiobooks on physical media and e-audiobooks, OR you can choose the individual format. The individual choices are: *Books (physical)*, *Books (large print)*, *Books (electronic)*, *Audiobooks (physical)* or *Audiobooks (electronic)*.
* For Videos, you can choose *All Videos* which includes video formats such as DVD,VHS, Blu-ray, and E-video. OR you can choose the individual format. The individual choices are: *Videos (electronic)* or *Videos (physical)*.
* *Music* will search music on CD or other media.
* *Serials/Magazines* will search for physical magazine, serial, or journal titles only.
* *Serials/Magazines (electronic)* will search for electronic magazine, serial, or journal titles only.
* *Software/Video Games* will search on games, databases, and other software.

TIP The format filter uses values from the Leader, 007, and 008 fields of the MARC record to determine which records to include in your search results. More information can be found in Search Filters and Format Icons.

21.1.2. Library

The current search library is displayed in the *Library* box.

The default search library is your library or borrowing zone. If your library system has multiple branches or a borrowing zone that includes multiple libraries you can use the *Library* box to select different branches or libraries.

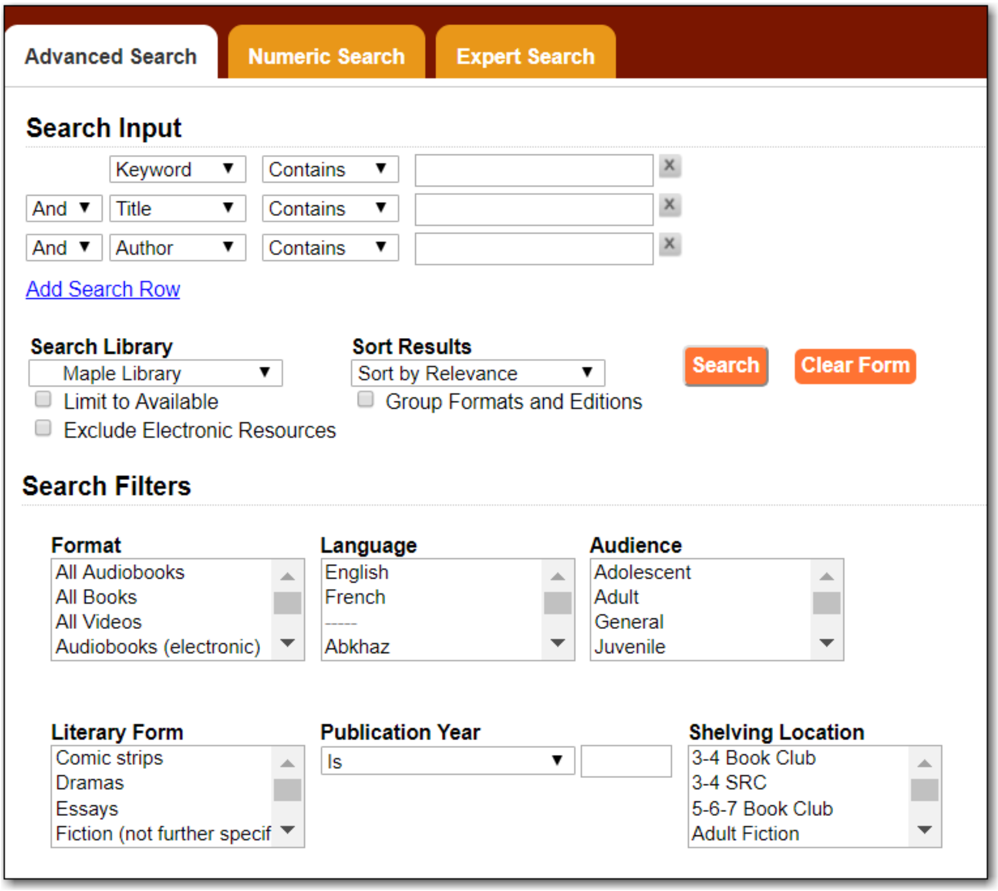
If your library has multiple branches, your search results will display items available at your branch and all branches of your library system separately. If your library participates in Interlibrary Connect resource sharing, the results may display items available across the larger borrowing zone.

If you access the catalogue from https://catalogue.libraries.coop you may scope your search result to Sitka, regional libraries, a library system, or a library branch by clicking into the *Library* box on the catalogue homepage and selecting the target library from the drop down list. You will then be able to see how many copies of a title are available in all Sitka member libraries across Sitka, or within the regional libraries, or within the library system, or within the branch, depending on search scope selected.

21.2. Advanced Search

You can access the Advanced Search by clicking **Advanced Search** on the catalogue homepage or search results screen.

The available search options are the same as in Basic Search, but you may use one or more of them simultaneously. If you want to combine more than three search options, use the **Add Search Row** button to add more search input rows. Clicking the **X** button will close the search input row.



21.2.1. Search Library

The current search library is displayed in the *Search Library* box.

The default search library is your library or borrowing zone. If your library system has multiple branches or a borrowing zone that includes multiple libraries you can use the *Search Library* box to select different branches or libraries.

If your library has multiple branches, your search result will display items available at your branch and all branches of your library system separately. If your library participates in Interlibrary Connect the results may display items available across the larger borrowing zone.

If you access the catalogue from https://catalogue.libraries.coop, your default search library is Sitka or the library you have selected on the homepage. You may use the *Search Library* box to select a different library or regional libraries, or all libraries in Sitka to search.

21.2.2. Sort Results

By default, the search results are in order of greatest to least relevance. See Order of Results in. In the *Sort Results* box you may select to order the search results by relevance, title, author, publication date, or popularity.

21.2.3. Limit to Available

When the *Limit to Available* checkbox is checked search results are limited based on an item's current circulation status. Titles without available items in the selected search library will not be displayed.

Item statuses that show as available are: *Available*, *On Display*, *Onsite Consultation*, *Reserves*, and *Reshelving*.

21.2.4. Group Formats and Editions

When the *Group Formats and Editions* checkbox is checked all formats and editions of the same title are grouped as one result. For example, the DVD and the first and second print editions of *Harry Potter and the Chamber of Secrets* will appear together.

21.2.5. Exclude Electronic Resources

When the *Exclude Electronic Resources* checkbox is checked electronic resources are not included in the search results.

21.2.6. Search Filter

You can filter your search by:

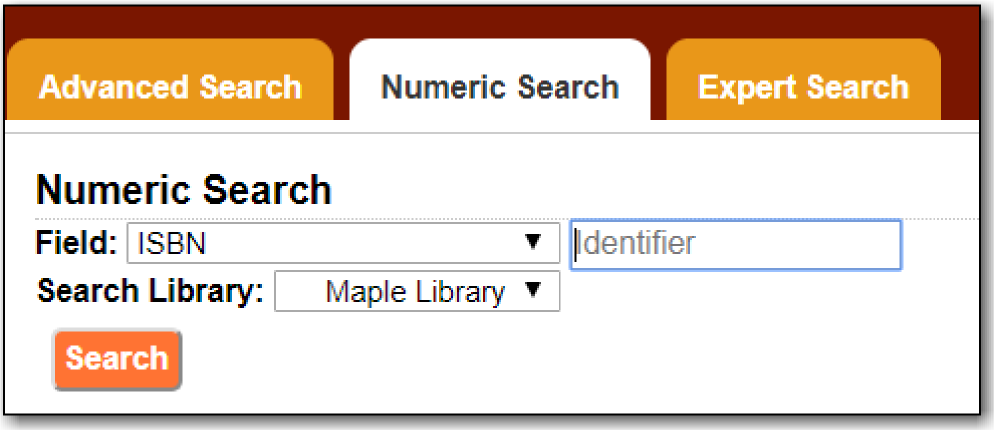
- Format
- Language
- Audience
- Literary Form
- Publication Year
  - Publication year is inclusive. For example, if you set Publication Year Between 2005 and 2007, your result items will be published in 2005, 2006 and 2007.
- Shelving Location
  - Shelving Locations that are not OPAC visible will not be displayed

TIP All the search filters, with the exception of Shelving Location, rely on values entered into the Leader, 007, 008, or 041 fields of the MARC record. Records with incorrect coding will not filter correctly.

21.3. Numeric Search

You can access the Numeric Search by clicking on the **Numeric Search** tab on the *Advanced Search* screen.

1. Use the drop-down menu to select ISBN, UPC, ISSN, Call Number, LCCN, TCN, or Item Barcode.
2. Enter the information and click **Search**.



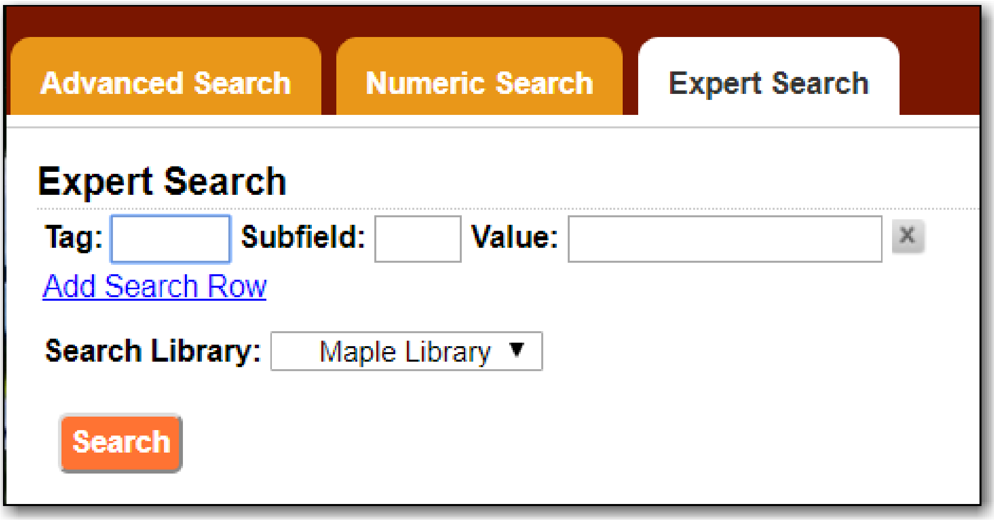
TIP Searching by Call Number will take you to the Shelf Browser.

21.4. MARC Expert Search

You can access the MARC Expert Search by clicking on the **Expert Search** tab on the Advanced Search screen.

If you are familiar with the MARC standard, you may search by specific MARC tags in the Expert Search.

1. Enter the three-digit tag number, the subfield (if relevant), and the value or text that corresponds to the tag. For example, to search by publisher name, enter 264 b Random House.
   a. To search several tags simultaneously, use the **Add Row** option.
2. Click **Search** to run the search.



21.5. Browse the Catalogue

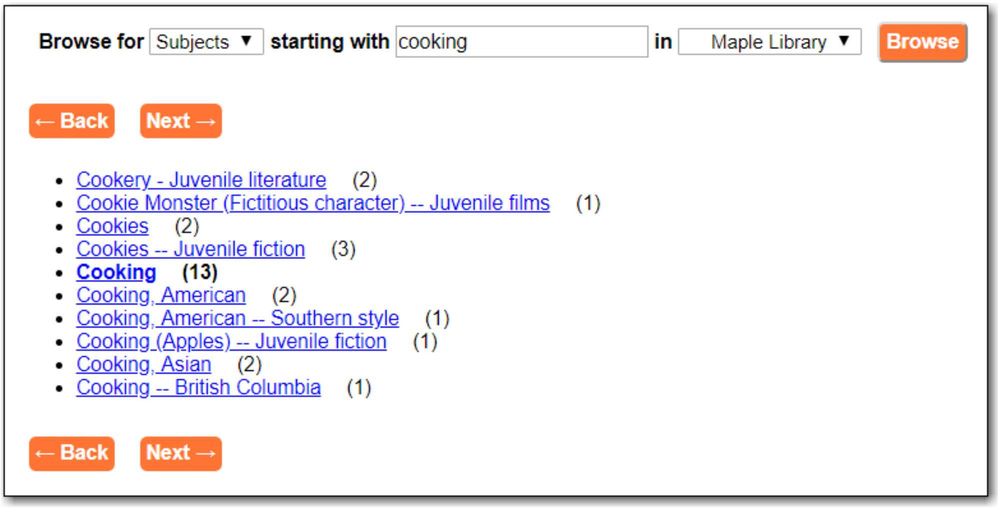
You can access the browse search by clicking **Browse the Catalogue** on the Basic Search or search results screen.

The following fields are browsable:

- title
- author
- subject
- series

The browse is constructed by the term *starting with*.

1. Click **Browse the Catalogue**.
2. Select a field to browse, enter a keyword, and click **Browse**.
3. A list of results will appear.
4. Click on the bolded text to view bibliographic records.



Click **Back** or **Next** to move through results. Note results are alphabetical, with results prior to the search term, and after, listed.

21.6. Search Tips

You do not need to enter an author's last name first, nor do you need an exact title or subject heading as all searches are keyword search. Evergreen is also forgiving about plurals and alternate verb endings, so if you enter *dogs*, Evergreen will also find items with *dog*.

- Do not use an AND operator to join search terms.
  - An AND operator is automatically used to join all search terms. So, a search for *golden compass* will search for entries that contain both *golden* and *compass*.
  - Boolean operators such as *and*, *or*, *not* are not considered special and are searched for like any other word. So, a title search for *golden and compass* will not return the title *golden*

compass. Putting it another way, there are no stop words that are automatically ignored by the search engine. So, a title search for *the*, *and*, *or*, *not* (in any order) yields a list of titles with those words.

- Don't worry about white space, exact punctuation, or capitalization.
  - White spaces before or after a word are ignored. So, search for *golden compass* gives the same results as a search for *golden compass*.
  - A double dash or a colon between words is reduced to a blank space. So, a title search for *golden:compass* or *golden—compass* is equivalent to *golden compass*.
  - Punctuation marks occurring at the front or end of a word are removed.
  - Diacritical marks, &, or | located anywhere in the search term but not within a word are removed. Words linked together by . (dot) are separated into two words. So, a search for *|golden.compass&* is equivalent to *golden compass*.
  - Upper and lower case letters are equivalent. So, *Golden Compass* is the same as *golden compass*.
- Enter your search words in any order. A search for *compass golden* gives the same results as a search for *golden compass*. Adding more search words gives fewer and more specific results.
  - This is also true for author searches. Both *David Suzuki* and *Suzuki, David* will return results for the same author.
- Use specific search terms. Evergreen will search for the words you specify, not the meanings, so choose search terms that are likely to appear in an item description. For example, the search *luxury hotels* will produce more relevant results than *nice places to stay*.
- Search for an exact phrase using double-quotes. For example, "golden compass".
  - The order of words is important for an exact phrase search. *"golden compass"* is different than *"compass golden"*.
  - White space, punctuation and capitalization are removed from exact phrases as described above. So a phrase retains its search terms and its relative order, but not special characters, such as a + (plus), and not case.
  - Two phrases are joined by AND, so a search for *"golden compass" "dark materials"* is equivalent to *"golden compass"* and *"dark materials"*.
  - To prevent stemming, use double quotes around a single word or a phrase. So, a search for *parenting* will also return results for *parental* but a search for *"parenting"* will not. See Stemming in.
- Use * (asterisk) as a wildcard to truncate search terms, e.g. *comp* golden* may return the same results for *compass golden* and more.
- Exclude a term from the search, using - (minus) . For example, *vacations –britain* will search for materials on vacations that do not make reference to Britain.
  - Two excluded words are joined by *AND*. So, a search for *-harry -potter* is equivalent to *-harry* and *-potter*.
  - A + (plus) leading a term has no role and is removed. So, *+golden +compass* is equivalent to *golden compass*.

You can form more complex searches using the Advanced Search features.

21.6.1. Improving a Search With No Results

If no results were returned from your search, you will see Keyword Search Tips for expanding or altering your search.

21.7. Search Methodology

21.7.1. Stemming

A search for *dogs* will also return results with the word *dog* and a search for *parenting* will return results with the words *parent* and *parental*. This is because the search uses stemming to help return the most relevant results. That is, words are reduced to their stem (or root word) before the search is performed.

The stemming algorithm relies on common English language patterns - like verbs ending in ing - to find the stems. This is more efficient that looking up each search term in a dictionary and usually produces desirable results. However, it also means the search will sometimes reduce a word to an incorrect stem and cause unexpected results. To prevent a word or phrase from stemming, put it in double-quotes.

Understanding how stemming works can help you to create more relevant searches, but it is usually best not to anticipate how a search term will be stemmed. For example, searching for gold compass does not return for *golden compass* because the search does not recognize *gold* as a stem of *golden*.

21.7.2. Truncation

Use the wildcard * (asterisk) at the end of the word to truncate search term.

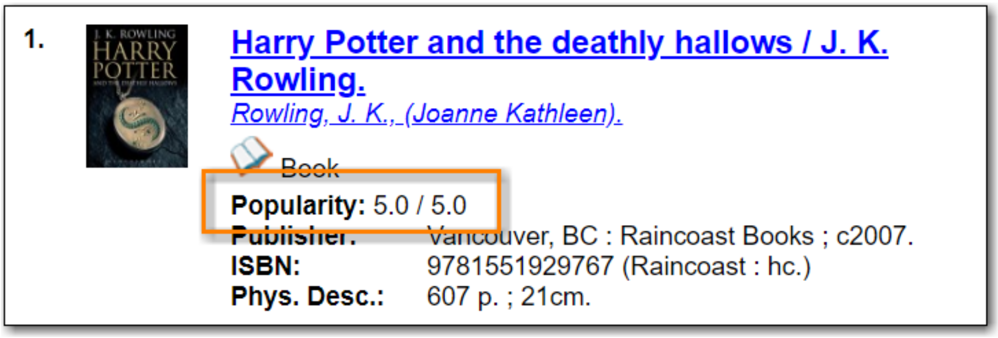
21.7.3. Order of Results

By default, the results in the Sitka catalogue are listed in order of relevance, similar to a search engine like Google. The relevance is determined using a number of factors, including how often and where the search terms appear in the item description, and whether the search terms are part of the title, subject, author, or series. The results that best match your search are returned first rather than results appearing in alphabetical or chronological order.

In the Advanced Search screen, you may select to order the search results by relevance, title, author, publication date or popularity before you start the search. You can also re-order your search results using the *Sort by* dropdown list on the search result screen.

21.7.4. Popularity

The popularity sort options can use factors such as circulation and hold activity, record and item age, and item ownership counts to generate popularity badges for bibliographic records. Each badge has a five-point scale, where more points indicates a more popular record. The average of the badge points earned by each record constitutes a "popularity rating". The number and types of badges break ties for average popularity, and relevance sorts items with like popularity.

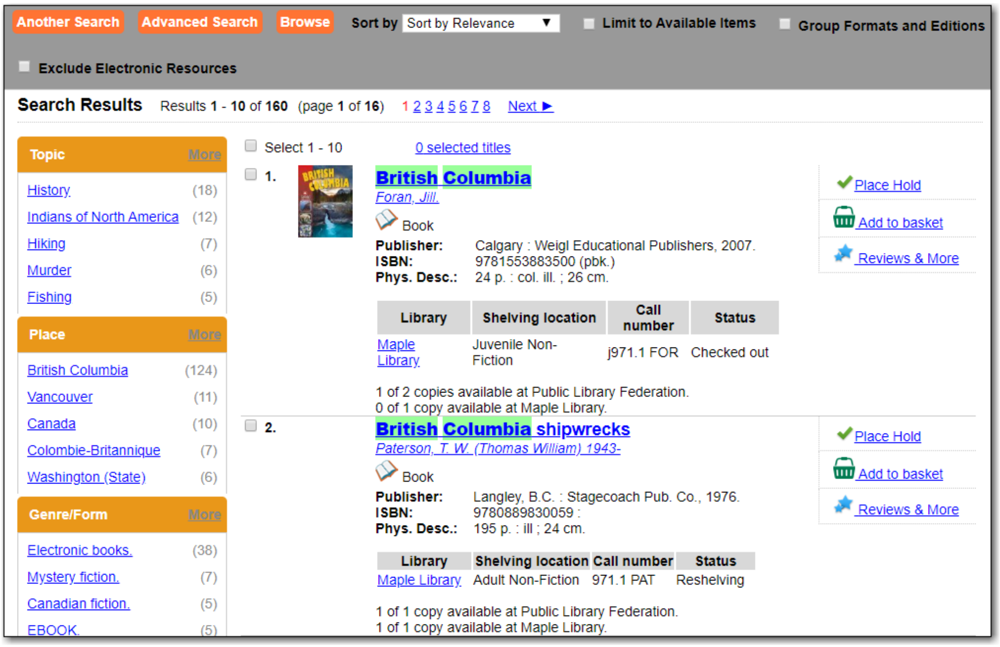


NOTE: Currently popularity badges have been set up in Sitka based on hold and circulation counts over the last 3 years.

21.8. Search Results

The search results are a list of relevant works from the catalogue. If there are many results, they are divided into several pages. At the top of the list, you can see the total number of results and go back and forth between the pages by clicking the Next or Previous at the top or bottom of the list or click the page number to go to that page directly.

Your search terms will be highlighted in both the search results and title details screens.



Information about the title, such as author, edition, publication date, call number, shelving location, status, etc., is displayed under each title. The icons below the title link indicate formats such as books, audiobooks, video recordings, and other formats. Hover your mouse over the icon, and a text explanation will show up in a small pop-up box.

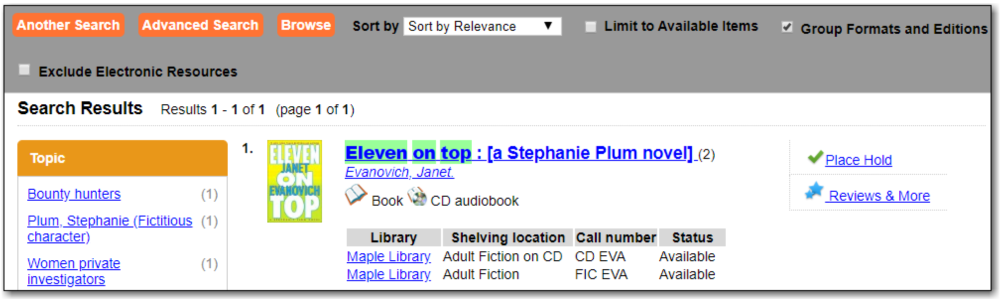
Clicking a title goes to the title details. Clicking an author searches all works by the author. If you want to place a hold on the title, click **Place Hold** to the right of the title information.

Above the results list there are *Limit to Available* and *Exclude Electronic Resources* checkboxes. Checking *Limit to Available* will filter out those titles with no available copies in the library or libraries at the moment. Checking *Exclude Electronic Resources* will filter out titles for electronic resources. Usually you will see your search results re-displayed with fewer results.

The *Sort by* dropdown list is beside the checkboxes. Clicking an entry on the list will re-sort your search results accordingly.

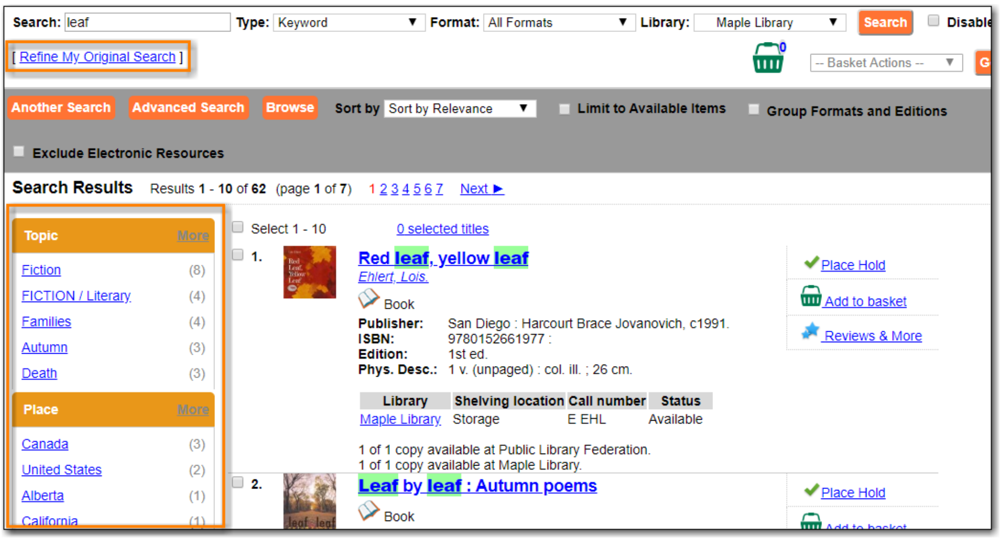
21.8.1. Formats and Editions

If you have selected *Group Formats and Editions* with your search, your search results are grouped by various formats and editions of the same title. Multiple format icons may be lit up.



21.8.2. Refine Your Search

You may refine your search results by *Topic*, *Place*, and *Genre*. Selecting one of these links on the left side of search results page narrows down the search results to that subject, author, or series. You may also refine your search by clicking the hyperlink labelled **Refine My Original Search** at top of search results. Refining a search this way allows you to add search filters such as Publication Date, Format, Language, etc., to your original search.



21.8.3. Expand Your Search

You may expand your search results by removing search limiters that you applied in your initial search. You can remove a limiter by clicking on the *X* beside it.

21.8.4. Availability

The number of available copies and total copies are displayed below the title details.

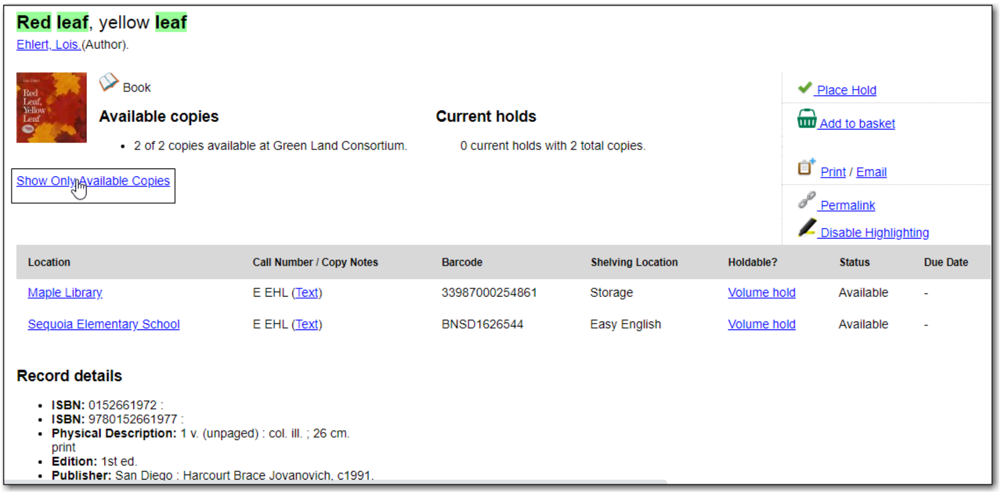
The availability will be scoped depending on your search library. If your library is a multi-branch system you can see how many copies are available in all branches. If your library participates in a larger borrowing zone you will see the available copies at your search library and the larger zone.

If you are searching multiple branches or libraries you will see the libraries with copies listed.

21.8.5. View a Title Record

Click on a title to view a detailed record of the title, including descriptive information, location and availability, and options for placing holds.

Click **Show Only Available Copies** to limit view to available items of that title. Click **Show All Copies** to see all items.



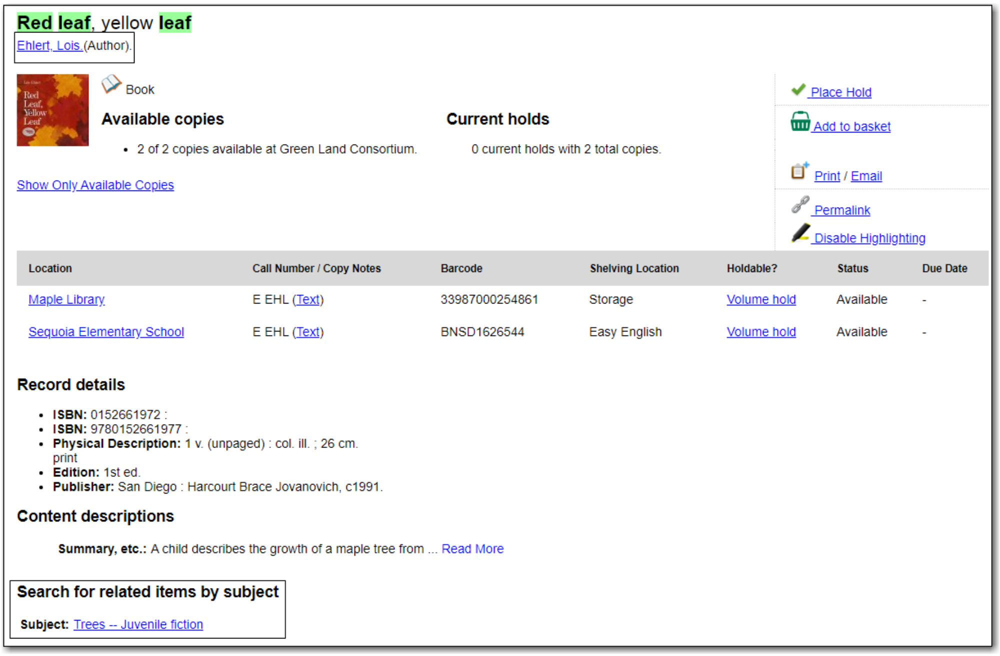
21.8.6. Title Details

The record view shows details such as the cover image, title, author, publication information, an abstract or summary, if available, how many copies are at the library or libraries you have selected, and whether they are available or checked out. It also displays the *Call number* and *Copy Location* for locating the item on the shelves. Click on **Text** beside the call number to send the item's call number by text message. Clicking the location library link will reveal information about owning library, such as address and open hours.

Below the local details you can open up various tabs to display more information. You can select *Reviews and More* to see the book's summaries and reviews, if available. You can select *Shelf Browser* to view items appearing near the current item on the library shelves. Often this is a good way to browse for similar items. You can select *MARC Record* to display the record in MARC format. If your library offers the service, clicking on *Awards, Reviews, and Suggested Reads* will reveal that additional information.

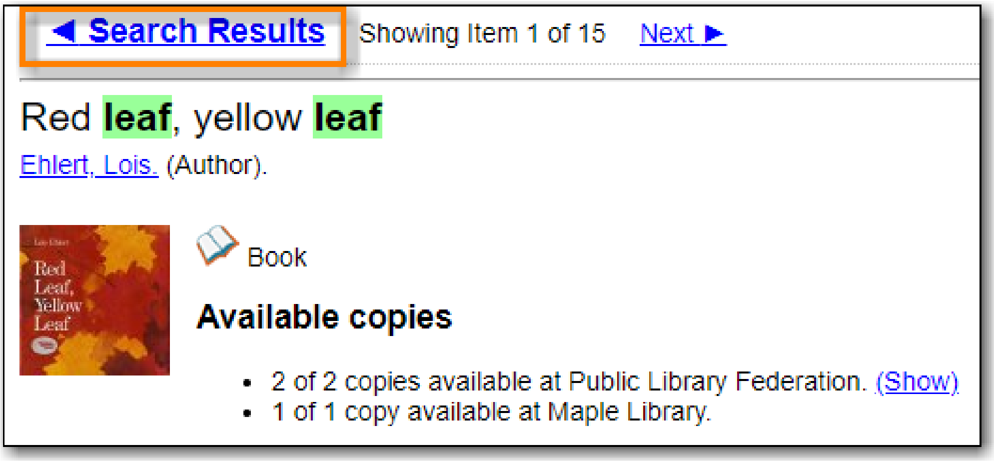
21.8.7. Search Additional Items by Author, Subject or Series

You can search for additional items by an author, one of the subjects in the record or other works in the same series. Click the author, subject, or series link to start a new search in the catalogue. You can do this from the results page, or from within the record details view.

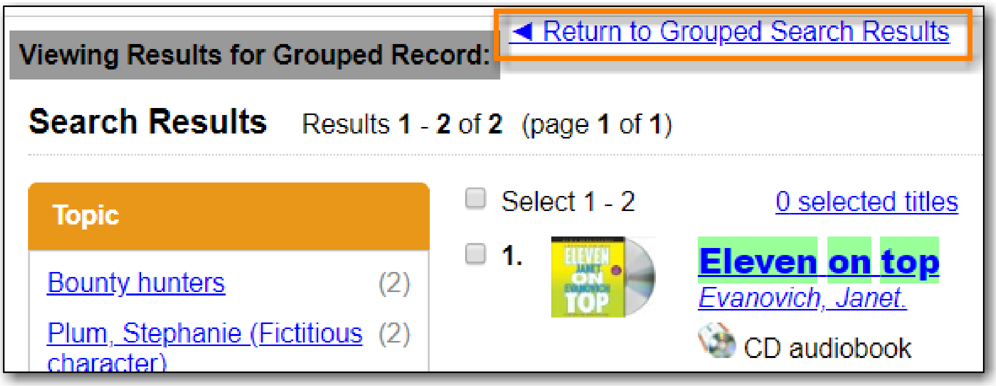


21.8.8. Go Back

When you are viewing a specific record, you can always go back to your title list by clicking the link **Search Results** on the left of the page.



If you have selected *Group Formats and Editions* with your search, your search results are grouped by various formats and editions of the same title under *My Search Results*. You can always go back to this page by selecting the link to **Return to Grouped Search Results**.



You can start a new search at any time by entering new search terms in the search box at the top of the page or by selecting the **Another Search**, **Advanced Search**, or **Browse** buttons at the top of the search results page.

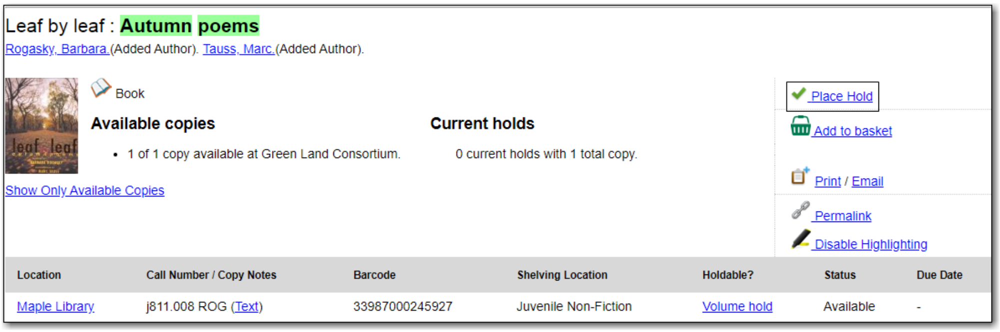
Chapter 22. Public Catalogue Holds

You and your patrons can place holds for a particular title or a specific volume on your public catalogue. If the item is available, it will appear on a library’s holds pull list and be pulled from the shelf and held for your patron. If the item is not available, the patron is placed on a waiting list and notified when the item become available.

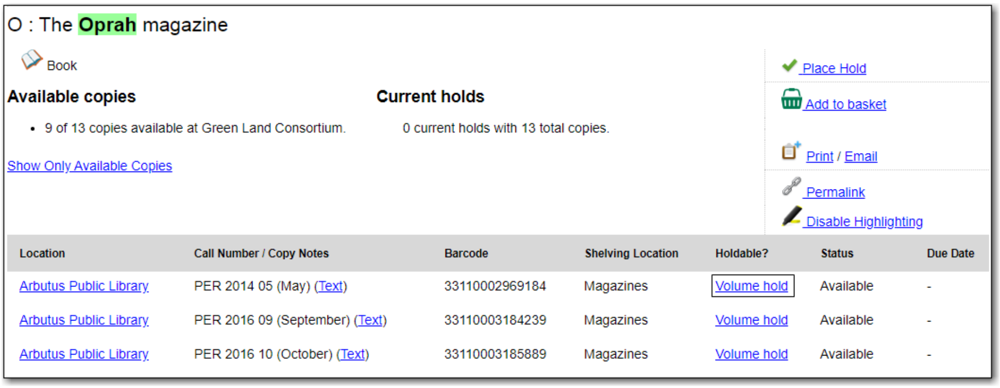
NOTE Some libraries do not allow holds to be placed on available items.

22.1. Title and Volume Holds

Best practice is to place holds using the **Place Hold** link in the search results view or on the title details page. Using either of these links means that any copy attached to the record will fill the hold. This is generally the best method when requesting an item, as the hold will be filled by any copy of the title record you are viewing.



If you want a specific issue of a magazine or a specific DVD in a set, select **Volume Hold** in the item details grid.



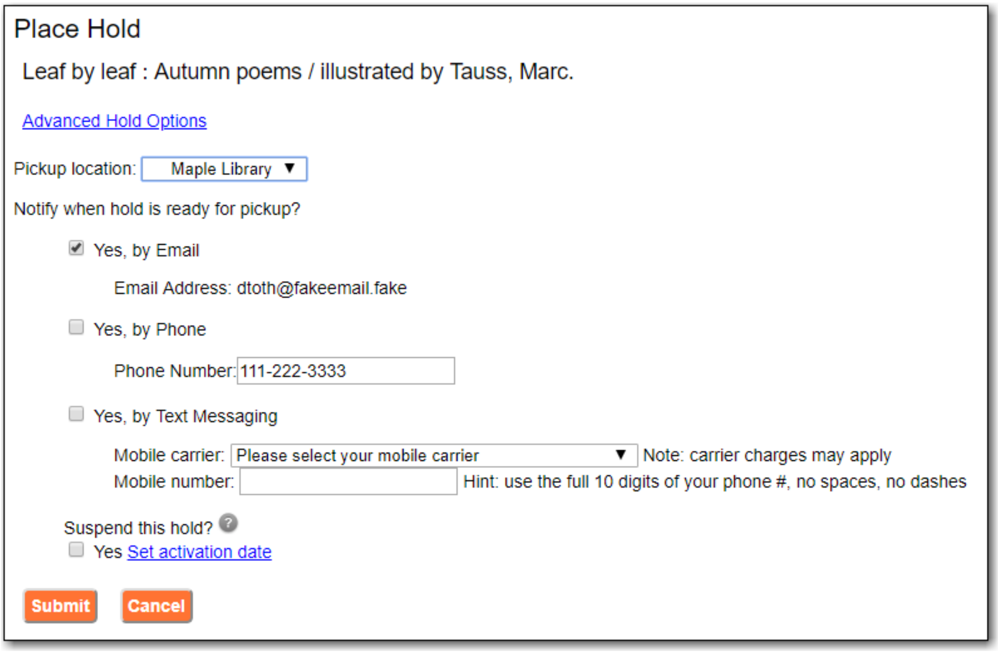
You will be prompted to log in with your library account, if you have not already done so.

If your library is multi-branch, or participates in resource sharing, you can choose the pickup location.

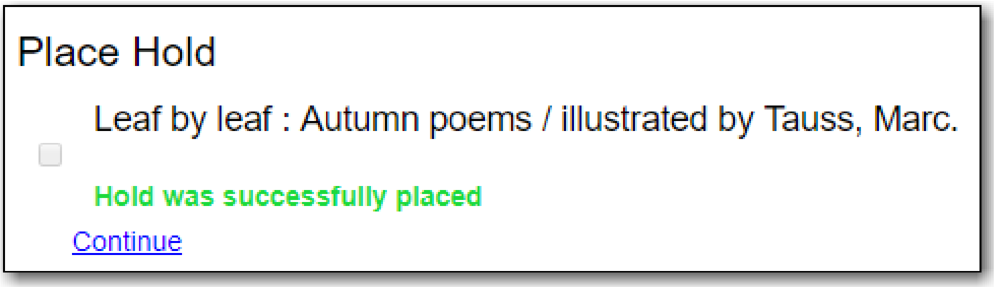
You can choose to be notified by phone, text message, or email. The notification method will be selected automatically if it is set in account preferences, but can be overridden on this screen.

The phone number and email in your account will be used to populate the notification options, but you can use a different phone number for phone or text notification when placing the hold.

You can suspend the hold to be activated at a later date.



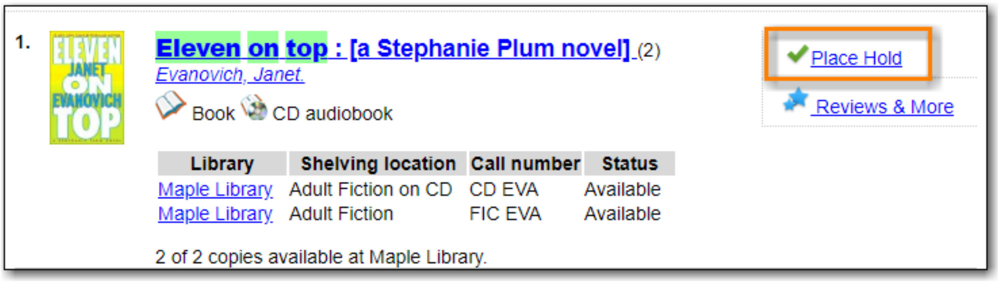
Once you click **Submit** a message will appear confirming the hold was successfully placed or indicating that the hold could not be placed.



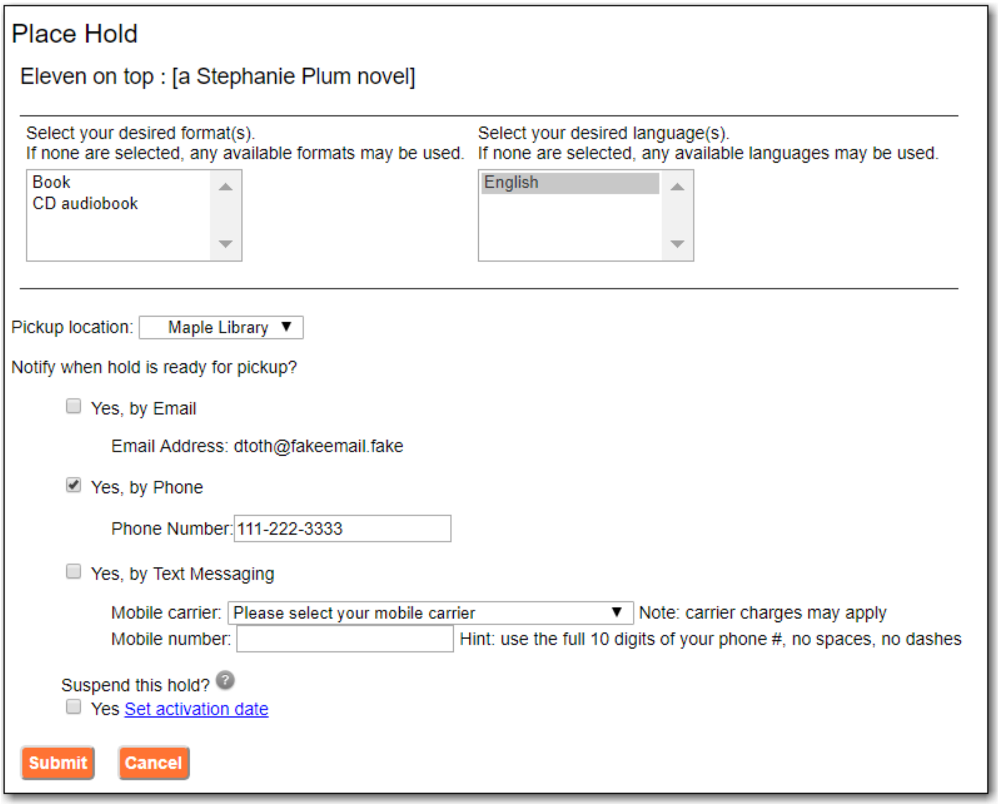
You can view and cancel your holds at anytime through My Account, and can edit, suspend, or activate your holds until they are captured for pick up.

22.2. Placing Holds on Multiple Records of the Same Title

If *Group by Formats and Edition* was selected when doing a search, you can place a hold on multiple records of the title, but of different formats or editions, by clicking **Place Hold** to the right of the meta record.



Select the acceptable formats on the place hold screen.



22.3. Unsuccessful Hold Messages

If a hold cannot be placed Evergreen will return the message "Hold was not successfully placed". This will be accompanied by a reason why the hold cannot be placed and in some cases the option to override.

Problem: The patron has reached the maxiumum number of holds - This indicates the patron has reached the maximum number of items they can have on hold at a time based on the library's hold policies.

Problem: All available copies are temporarily unavailable at your pickup library. Placing this hold could result in longer wait times. - This indicates that the item is under age-based hold protection set through the Holdings Editor and cannot currently fill holds at your library. If you override and place the hold it will eventually be filled when the item is no longer protected.

Problem: Holds are not allowed on this item by library's policy - This indicates that the item is under age-based hold protection set through the Hold Policies and cannot currently fill holds at your library. It can also indicate that the library has blocked holds placed by a particular patron type or on items using a particular circulation modifier through their hold policies.

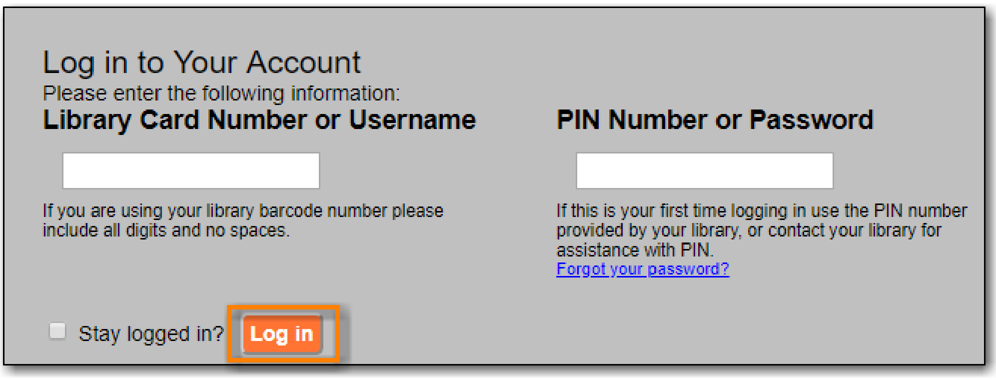
Chapter 23. My Account

Patrons and staff can access information about their account from any page in the public catalogue by clicking the **My Account** button at the top right of the page. Account information includes contact information, items checked out or on hold, fines, account preferences, notes left by the library (if any) and lists. For library staff accounts, editing information in their account in the public catalogue is the same as editing their account in the staff catalogue.

23.1. Logging into My Account

1. Click on the **My Account** link on any search page.

2. Enter your username or your library barcode.
    a. If this is your first time logging in, your username will be your library card number. You have the option to change your username on the *Account Preferences* screen.
3. Enter your password.
    a. You should have been given a password when you received your library card.
    b. If you do not have or cannot recall your password please contact your local library to have the password reset or use the **Forgot Your Password?** link.
4. Click **Login**.



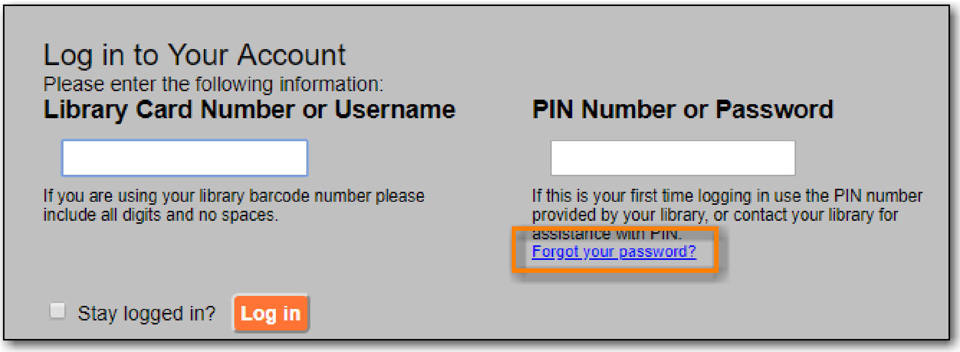
NOTE All patron and staff accounts in Evergreen can access *My Account* through the public catalogue.

23.2. Resetting Your Password

Sitka Snippet Video - Password Reset (1:20)

If you have an email address recorded in your library account you can use the **Forgot Your Password?** link in the event that you forget your password.

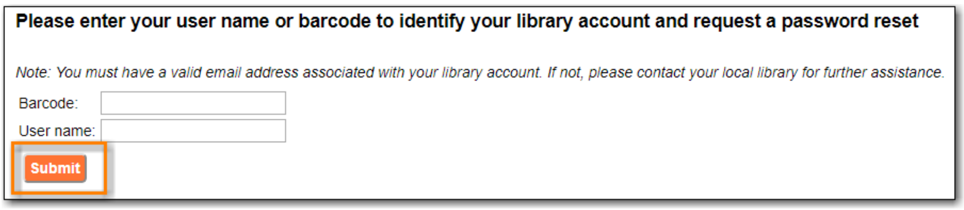
1. Click on the **Forgot Your Password?** link.



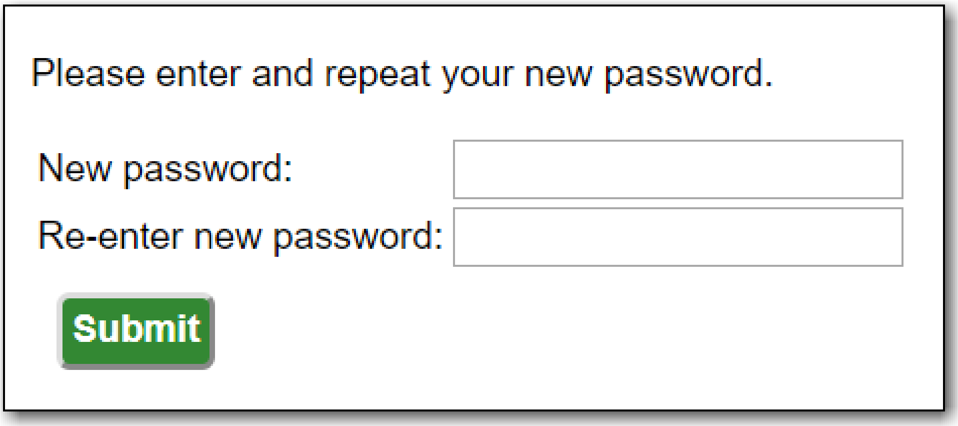
2. Enter your username or barcode into the appropriate field.

> **NOTE**
>
> You must enter only one value, this is an either or choice, as some people only use their barcode to access their account, while others only ever use a username.
>
> Some libraries also require that you enter the email address associated with the account. This is controlled by the library setting *Require matching email address for password reset requests*.

3. Click **Submit**.



4. Check your email account for the *Library Account Password Reset Request* email.
   a. Reset emails are sent every two minutes.
5. Open the link provided in the *Library Account Password Reset Request* email.
6. Enter your new password in the password reset form in the browser.



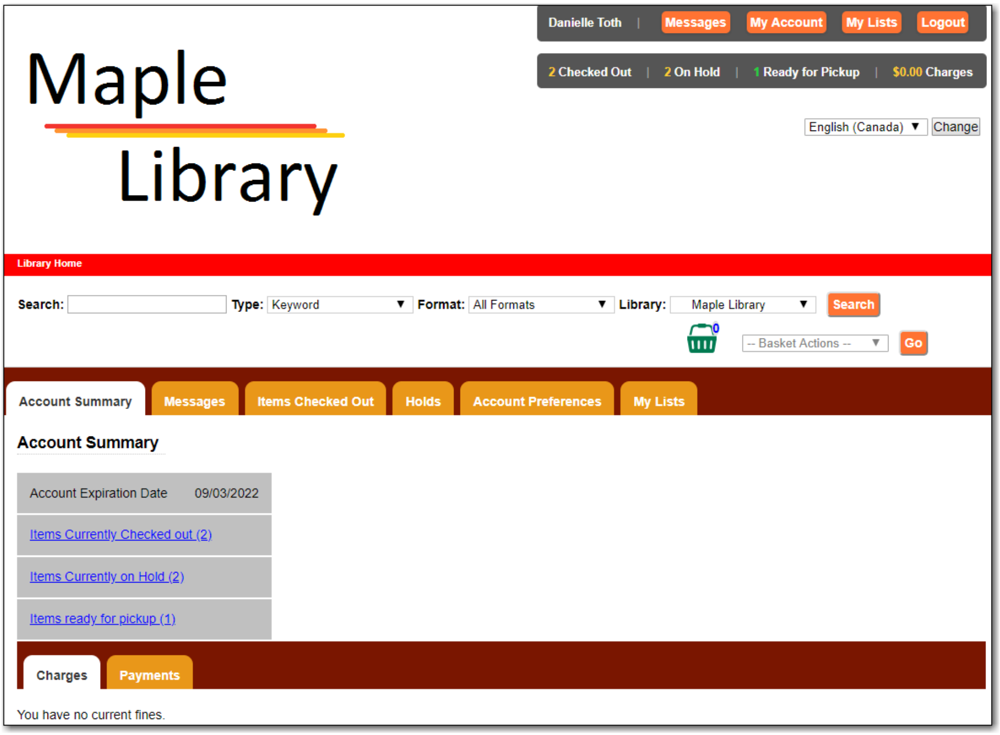
a. You must enter the password twice to ensure that you do not make a mistake. If the passwords match, you will then be able to log in to your library account with the new password.

7. Please contact your local library if you do not receive the *Library Account Password Reset Request* email or if you continue to be unable to login to your account.

TIP Library staff can reset the password for their staff account using this method if there is an email address recorded in their account.

23.3. Account Summary

The default view when you login to your account is the *Account Summary* page. This view gives you an overview of items checked out, items on hold and any fines you may have. You can access any of these screens by clicking on the relevant tab.



If your library subscribes to Overdrive additional information will display.

23.4. Account Preferences

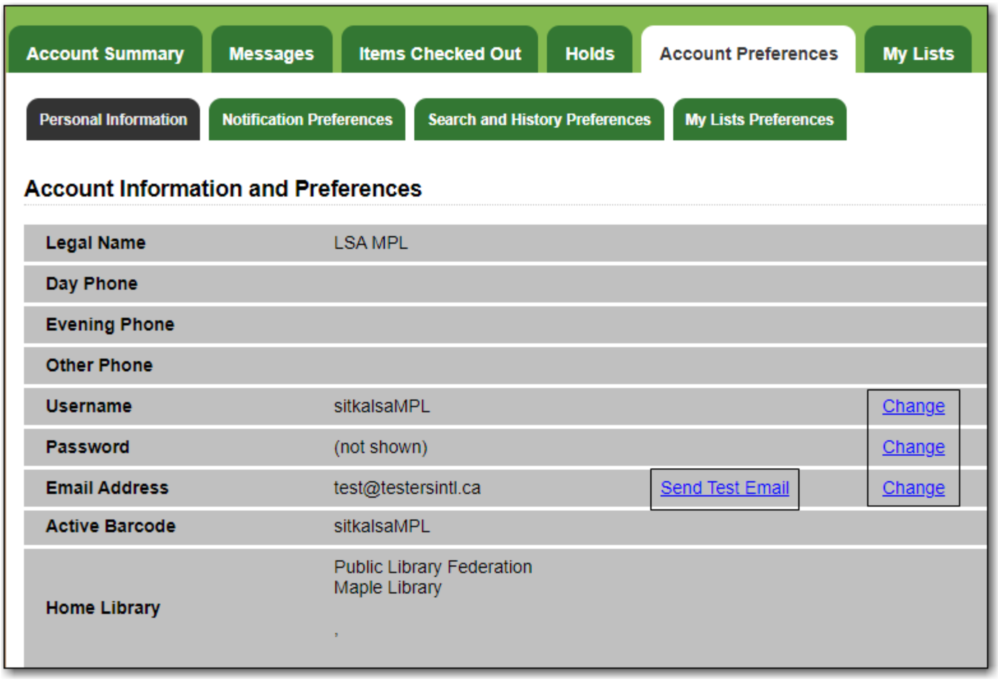
Select the *Account Preferences* tab at the top of the *My Account* area to access your preferences.

23.4.1. Personal Information

You can change the username and password that you use to log in to your library account, and the email address that the library uses to contact you, in the *Personal Information* tab.

Click the **Change** link next to the information you'd like to update.

To test that your email address works, click **Send Test Email**. An automated message will be sent. If you do not receive it, first check your spam folder and contact your library for further assistance.



NOTE Changing your username and password for a library staff account through My Account also changes it for logging into the staff client.

Depending on your library's policy, you may request a change to your address by submitting a new address in your account. Library staff will verify it and update your account.

If you need to make a change to other information, such as your phone number, please contact your local library.

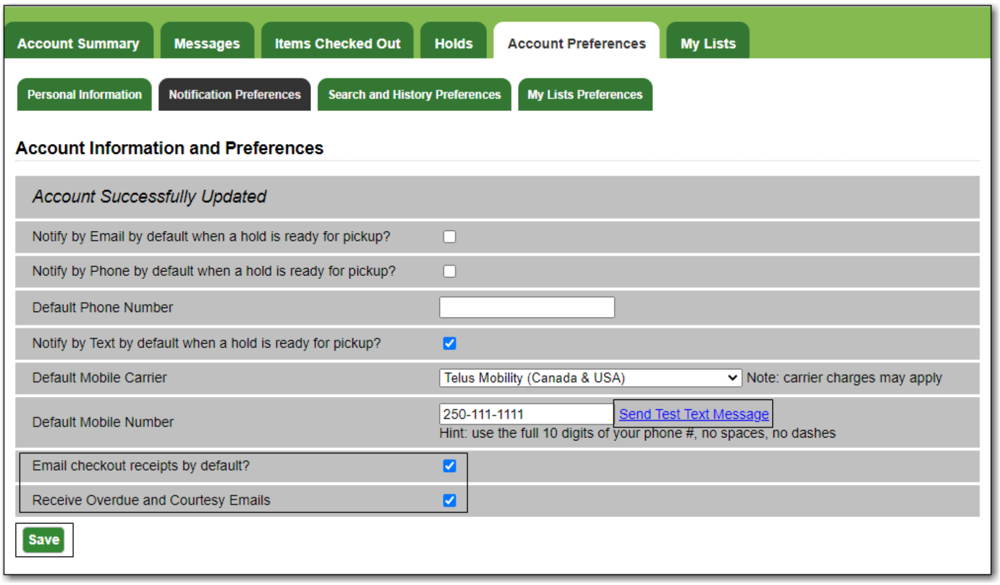
23.4.2. Notification Preferences

The *Notification Preferences* tab is where you set your preferences for holds notification. You can choose to be contacted by email, phone, or text message.

Click **Send Test Text Message** to test your SMS/Text number.

To opt-out of receiving courtesy and overdue email notices use the *Receive Overdue and Courtesy Emails* setting. Un-checking this box means your library will not send you any emails for items coming due or overdue. You are still responsible for returning items on time and paying any applicable fines.

To receive emailed checkout receipts by default, select *Email checkout receipts by default* .



23.4.3. Search and History Preferences

The *Search and History Preferences* tab allows you to configure settings around search results, history, and allowing others access to your account.

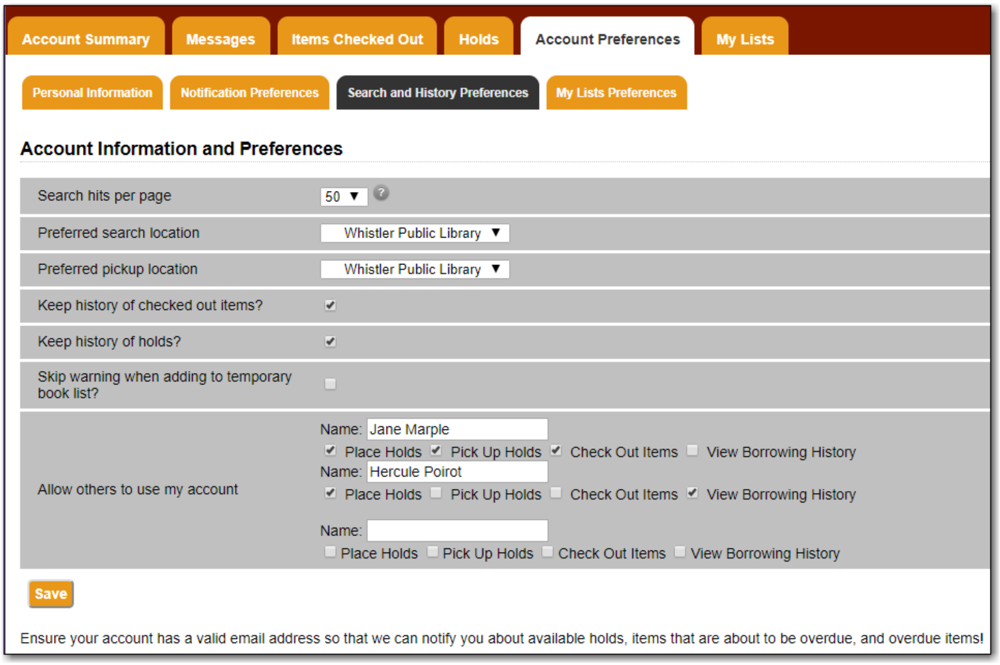
You can select how many search results are displayed per page on your catalogue searches as well as your preferred search location if your library is a multi-branch system or part of a larger borrowing zone.

You can also set your preferred pick up location if your library is a multi branch system or part of a larger borrowing zone.

Check Out and Hold history can be enabled on this screen. The check out and holds history is not retroactive; it takes effect once you choose to retain your history.

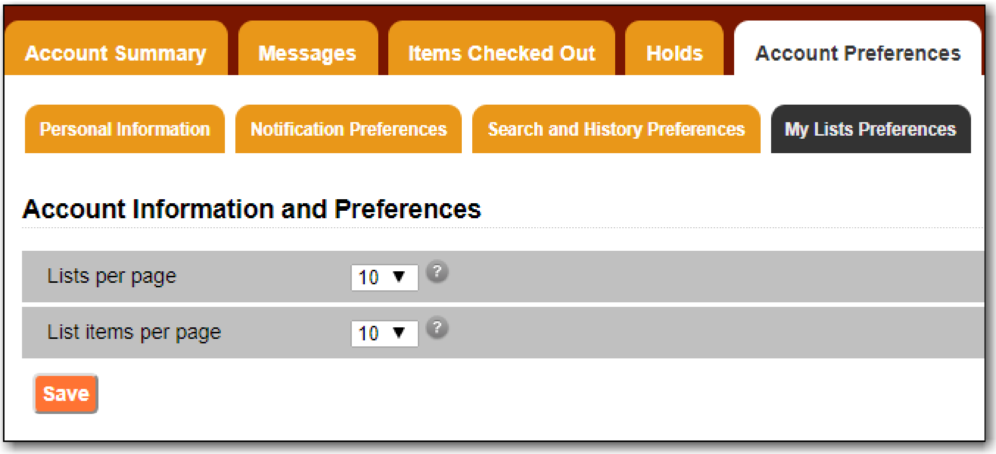
You may also choose to disable a warning about adding items to a temporary list.

You can specify who, if anyone, can access your account and what access you wish them to have. This is useful if you'd like someone else to be able to pick up your holds for you, for example.



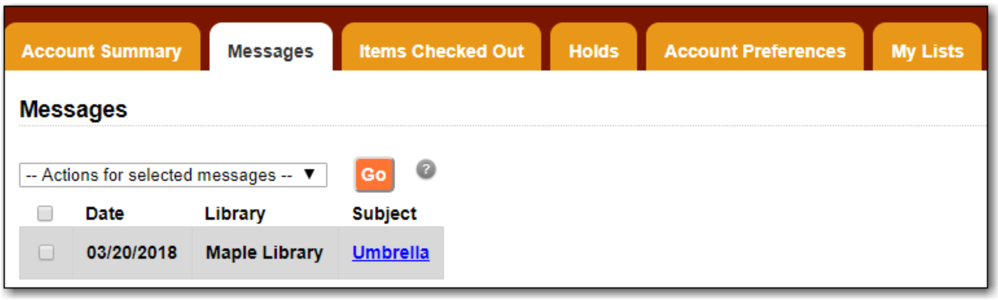
23.4.4. My Lists Preferences

The *My Lists Preferences* tab allows you to set how many lists you'd like to display per page, and how many items should be displayed per page in your lists.

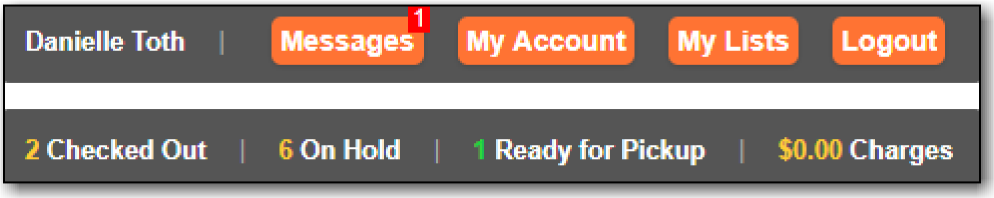


23.5. Messages

Select the *Messages* tab at the top of the *My Account* area to display any messages library staff have added to your account.

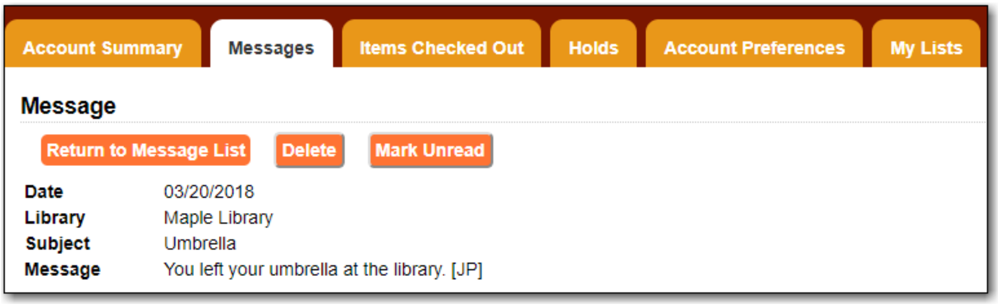


An indicator will also appear in the upper right corner when you have new messages.



You can set messages to read or unread, or delete them by selecting the message(s) and then choosing the desired action from the **Action for selected messages** menu and clicking **Go**.

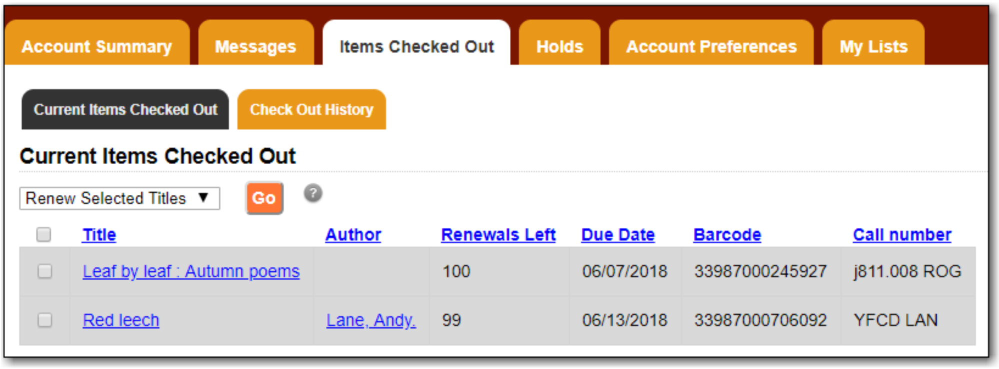
Unread messages appear with the subject bolded. Click on the subject to read the message.



23.6. Items Checked Out

23.6.1. Current Items Checked Out

Select the *Items Checked Out* tab at the top of the *My Account* area to display all of the items you currently have checked out.

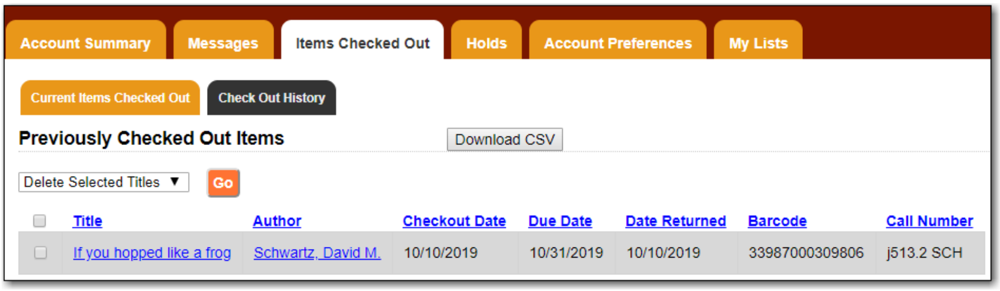


You can sort the list by Title, Author, Renewals Left, Due Date, Barcode, or Call number by clicking on the blue text. The first click sorts the list alphabetically in ascending order and a second click sorts the list alphabetically in descending order.

If you wish to renew items, select the items to renew and click **Go** beside *Renew Selected Titles*.

23.6.2. Check Out History

Select the *Check Out History* tab to display a list of items that you have previously checked out.



Check out history will only display if it has been enabled in your *Search and History Preferences*. History displays from the date you enabled it; items checked out prior will not be included in your history.

You can sort the list by Title, Author, Checkout Date, Due Date, Date Returned, Barcode, or Call number by clicking on the blue text. The first click sorts the list alphabetically in ascending order and a second click sorts the list alphabetically in descending order.

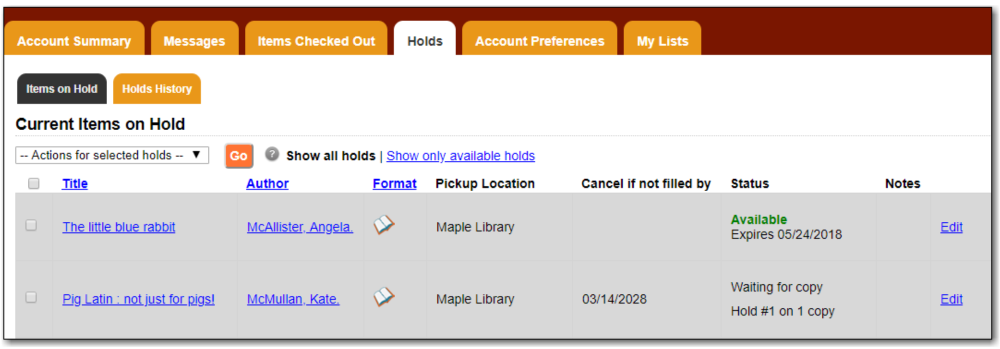
Click Download CSV to download your list in a file that can be opened in a spreadsheet program.

If you wish to delete individual titles from the list select the items you wish to delete and click **Go** beside *Delete Selected Titles*.

23.7. Holds

23.7.1. Items on Hold

Select the *Holds* tab to display a list of items you have on hold.



You can sort the list by Title, Author, and Format by clicking on the blue text. The first click sorts the list alphabetically in ascending order and a second click sorts the list alphabetically in descending order.

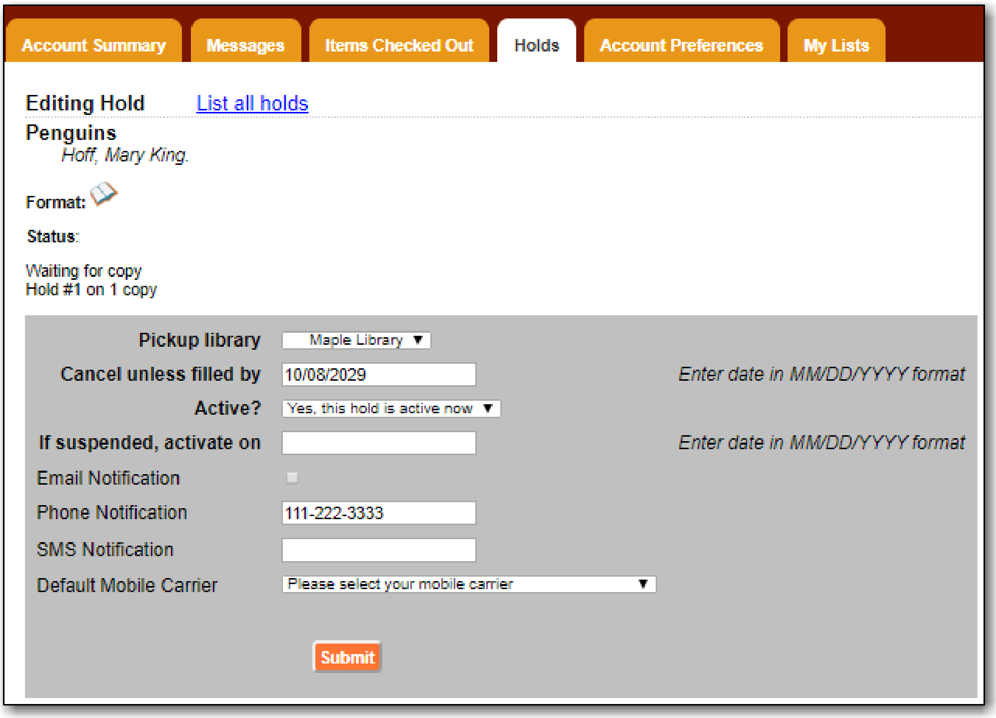
You can use the checkbox beside each hold to select the hold and the **Action for selected holds** drop down list to suspend, activate, or cancel the selected holds. You may set an activation date when you suspend your hold or leave the date blank and manually activate it later. A suspended hold will not lose its hold queue position.

The *Status* column shows whether or not your hold is currently available for pickup, if it has been suspended, and what your position is in the hold queue.

Your position in the hold queue is indicated by the first number in the status column. For example "Hold #3 on 1 copy" indicates you are third in the hold queue.

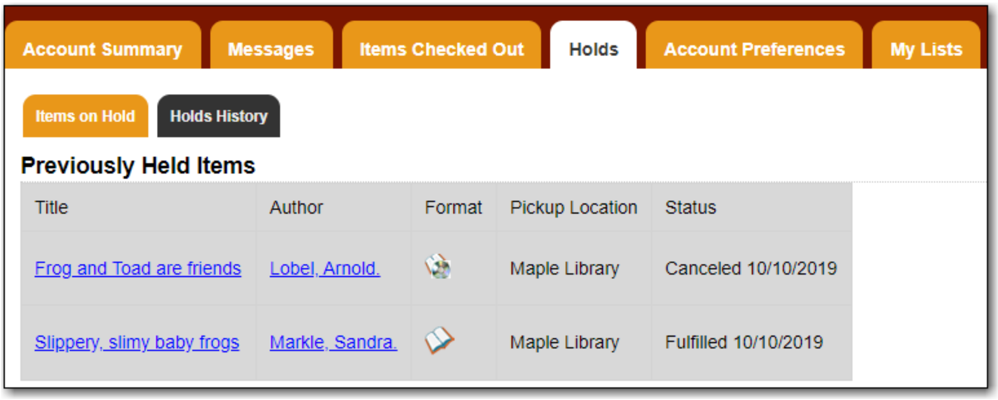
Clicking the **Edit** link will bring you to the hold editing screen. Here you can:

- change the pick up location if your a multi-branch library.
- activate the hold or suspend it hold, if not already captured.
- change the activation date or cancellation date.
- change the method of notification for the hold.



23.7.2. Holds History

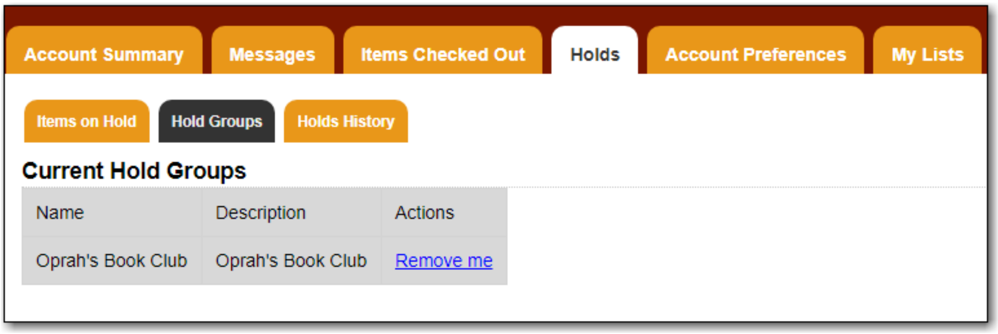
Select the Holds History tab to display a list of items that you have previously had on hold. History displays from the date you enabled it; holds placed prior will not be included in your history.



Holds history will only display if it has been enabled in your *Search and History Preferences*.

23.7.3. Hold Groups

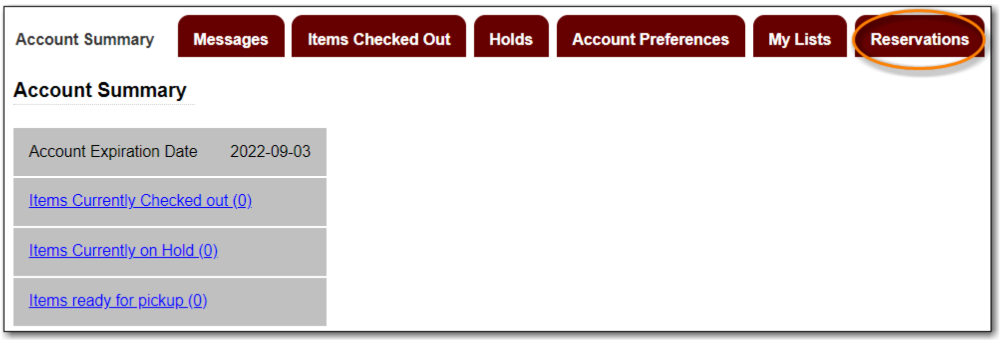
Select the Hold Groups tab to display a list of Hold Groups you are included in.



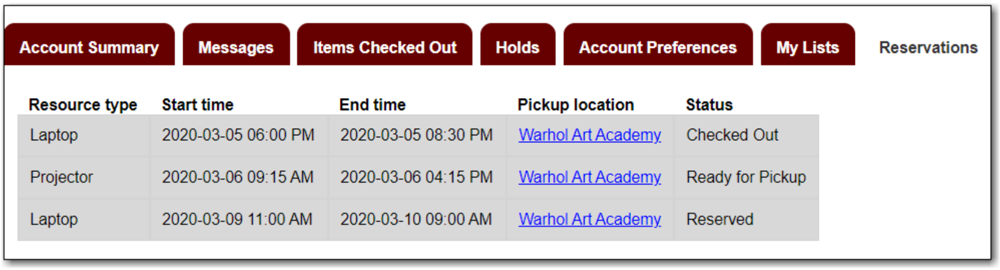
Click **Remove me** to remove yourself from the Hold Group.

23.8. Reservations

Patrons of libraries using the Booking Module will have a Reservations tab display in their account.



On the reservations tab patrons can view items they have reserved through the Booking Module and their status.

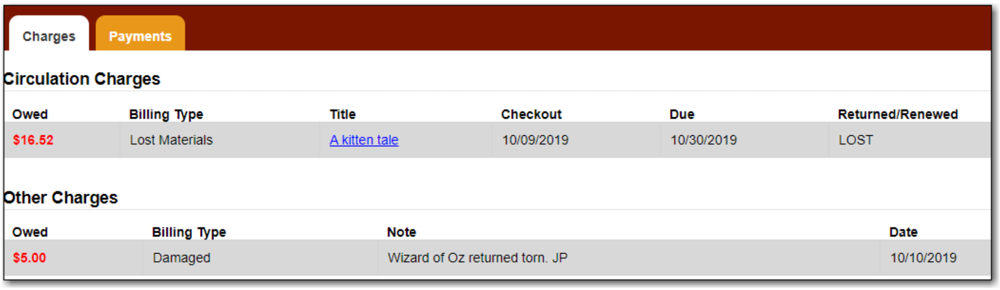


Account Summary	Messages	Items Checked Out	Holds	Account Preferences	My Lists	Reservations

Resource type	Start time	End time	Pickup location	Status
Laptop	2020-03-05 06:00 PM	2020-03-05 08:30 PM	Warhol Art Academy	Checked Out
Projector	2020-03-06 09:15 AM	2020-03-06 04:15 PM	Warhol Art Academy	Ready for Pickup
Laptop	2020-03-09 11:00 AM	2020-03-10 09:00 AM	Warhol Art Academy	Reserved

23.9. Fines and Payments

The *Fines and Payments* tab, at bottom of the *Account Summary* screen, displays any fines or fees accrued and the payments made. Fines are paid at the library.



Charges	Payments

Circulation Charges

Owed	Billing Type	Title	Checkout	Due	Returned/Renewed
$16.52	Lost Materials	A kitten tale	10/09/2019	10/30/2019	LOST

Other Charges

Owed	Billing Type	Note	Date
$5.00	Damaged	Wizard of Oz returned torn. JP	10/10/2019

Chapter 24. Baskets and Lists

The basket feature in your public catalogue enables patrons to add titles in batch to a temporary basket. From the basket, you can place holds, print and email title details, and add the titles to a new or existing list.

Lists are maintained in My Account and you must be logged in to use this feature. Lists can be used to keep track of what books have been read, to maintain a class reading list, to maintain a reading list for a book club, and more. Lists can also be used for maintaining publicly visible lists such as staff picks or themed lists that can be posted on a library's website. Lists are also used with Course Reserves module for post-secondary institutions.

Lists are accessed via the *My Lists* section of *My Account*.

24.1. Adding Titles to the Basket

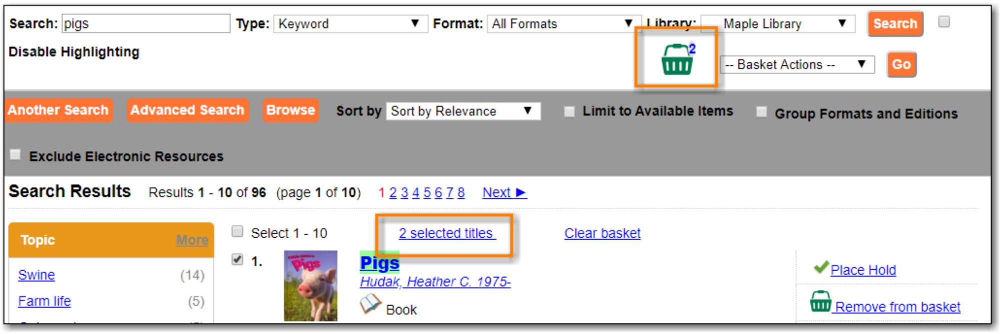
Titles can be added to the basket in three ways:

- by checking the box beside the search result. The entire page of results can be added by checking the select all box at the top of the results.

- by clicking **Add to basket** in the search results view.

- by clicking **Add to basket** on the title details page.

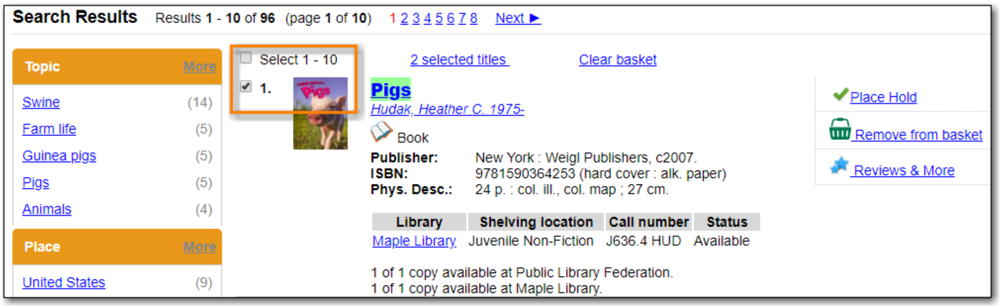
When titles are added to the basket the count at the top of the search results increases as does the count beside the basket icon.



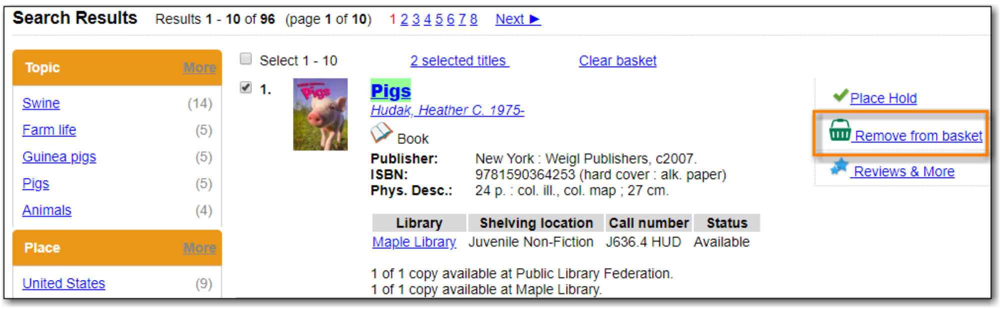
24.2. Removing Titles from the Basket

Titles can be removed from the basket in a number of ways:

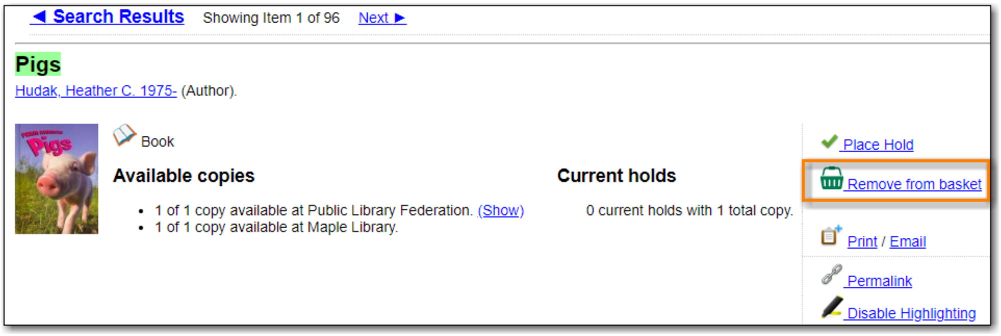
- un-checking the box beside the search results. The entire page of results can be removed by un-checking the select all box at the top of the results.



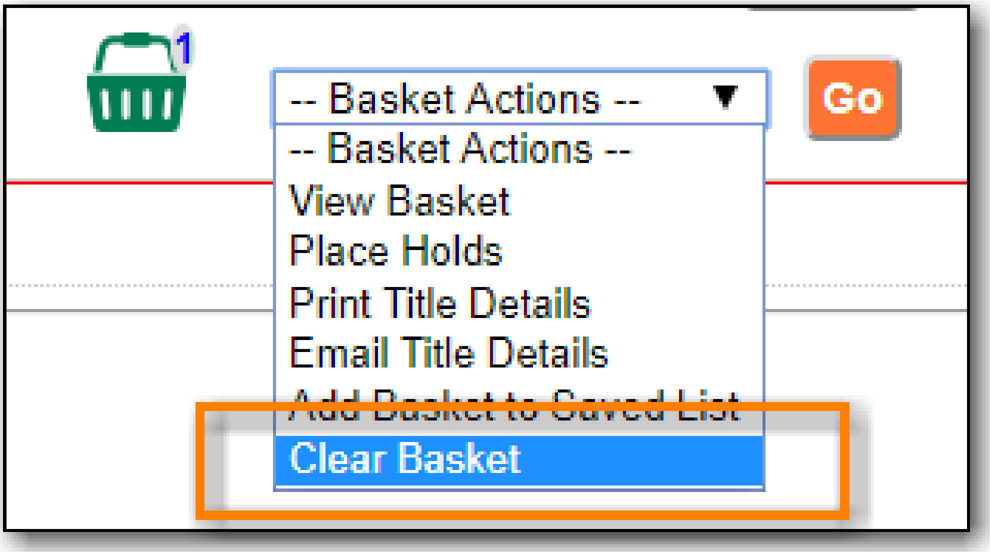
- by clicking **remove from basket** in the search results view.



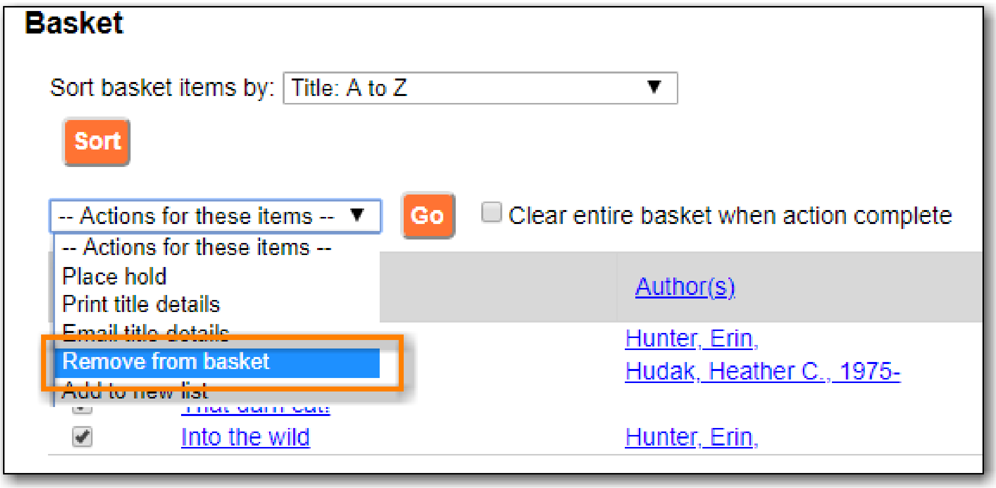
- by clicking **Remove from basket** on the title details page.



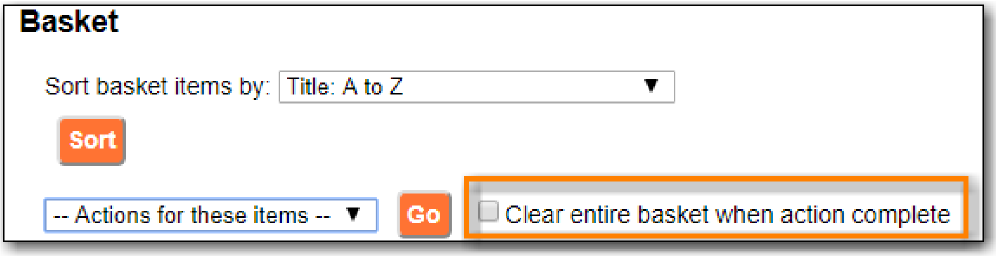
- by using the **Clear Basket** action from the menu located beside the basket icon.



- by selecting the titles you wish to remove and using the **Remove from basket** option in the basket view.



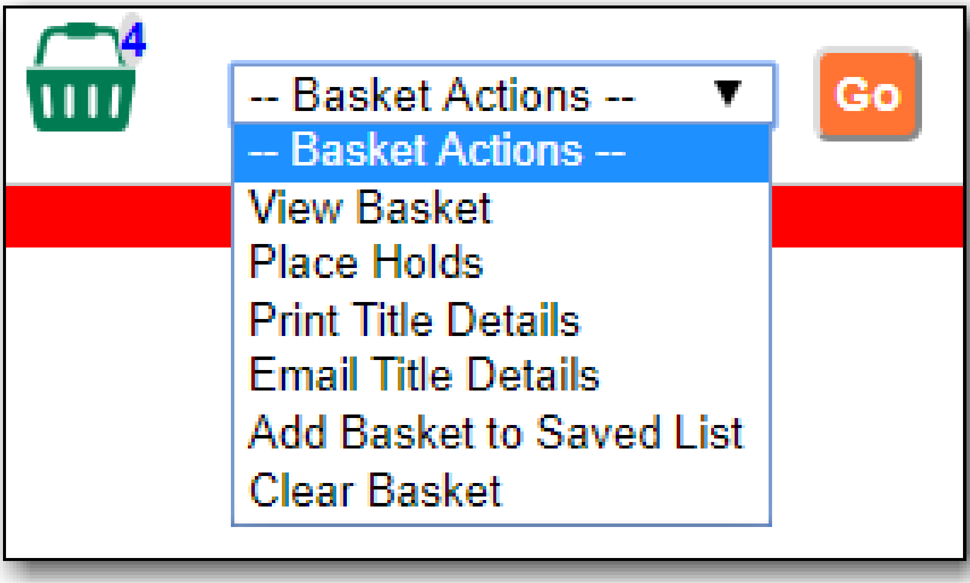
- by checking the box for **Clear entire basket when actions complete** before performing an action.



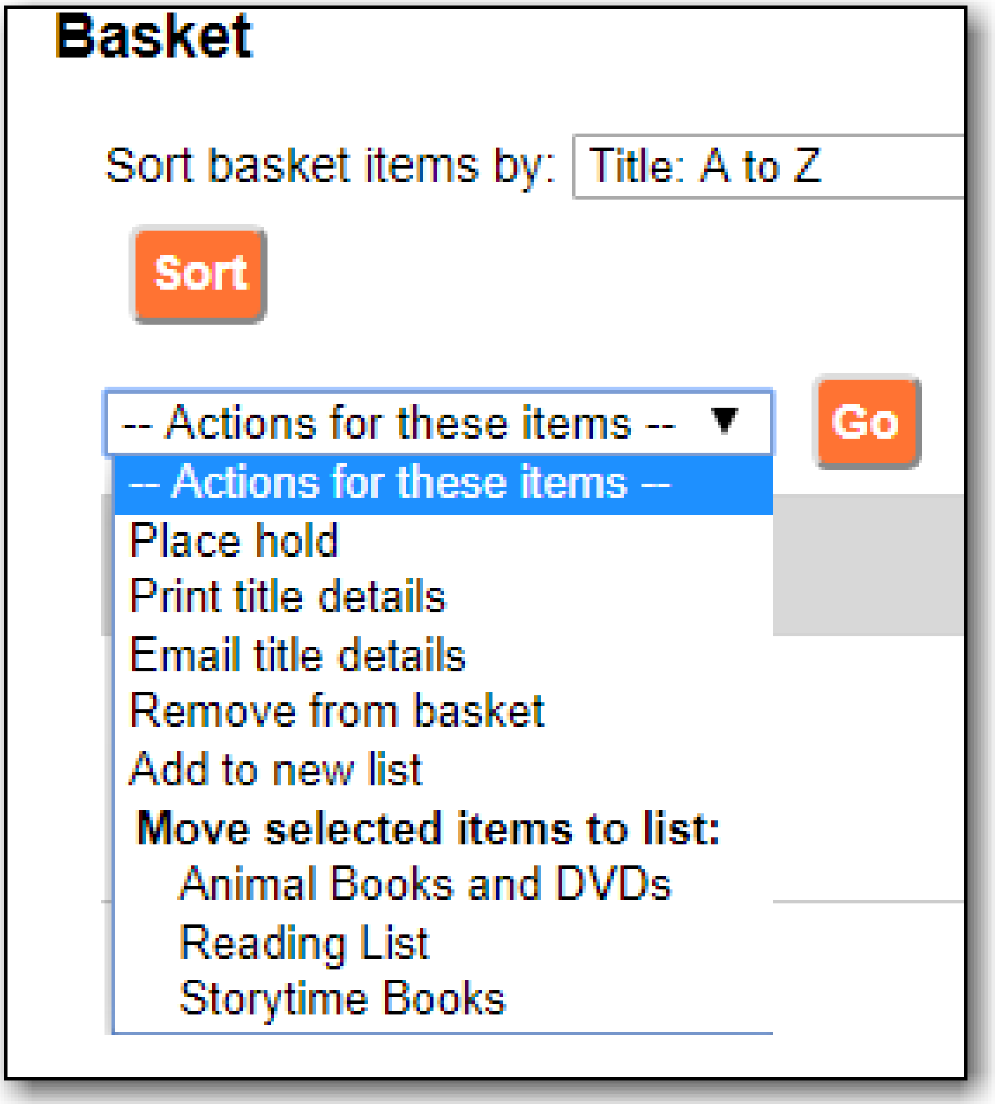
Additionally, the contents of the basket are cleared when you log out of your account.

24.3. Batch Actions Through the Basket

The **Basket Actions** menu, found beside the basket icon, lets you view the contents of the basket, batch place holds, print or email the title details for all titles, add the contents of the basket to a saved list, and clear the basket.

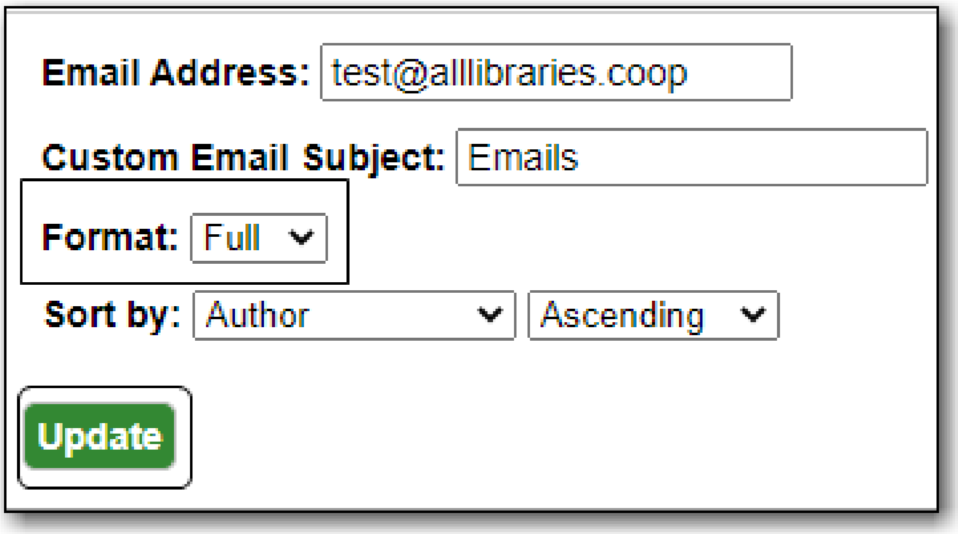


The action menu within the basket view also allows you to add the contents of the basket to a new list or specific existing list.

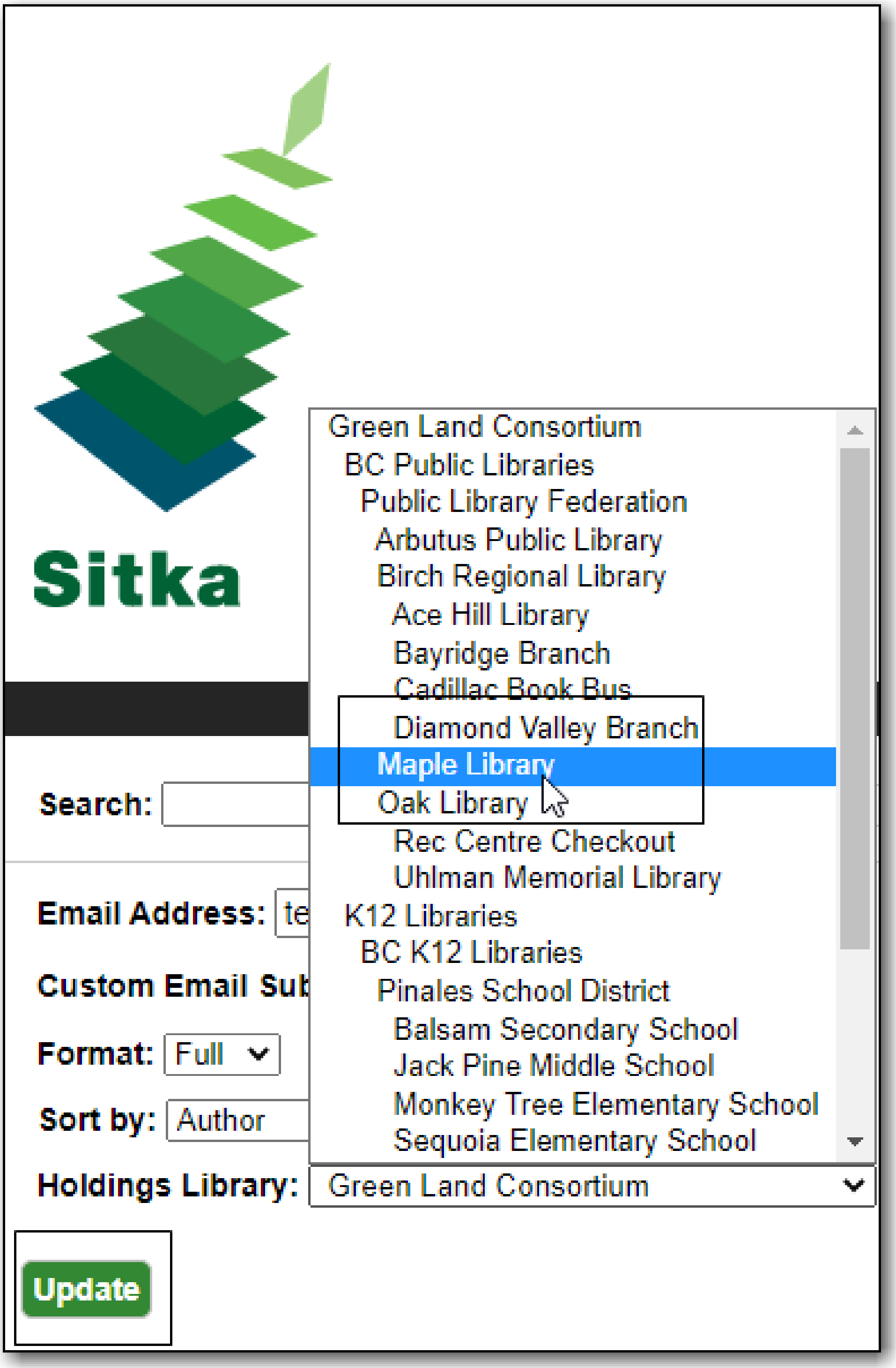


24.3.1. Email or Print from the Baskets

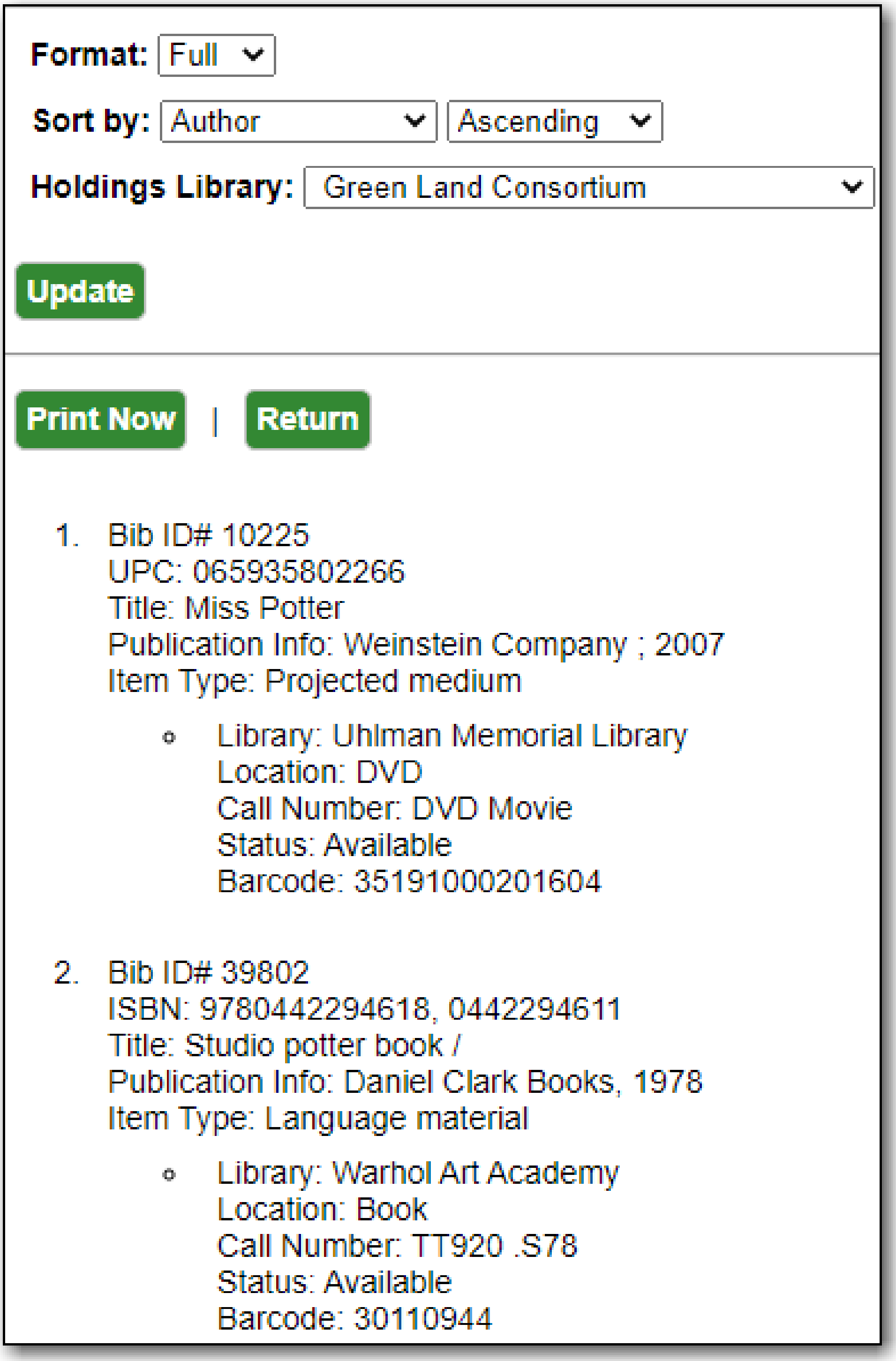
1. Select the titles and click the **Actions** menu.
2. Choose **Email** or **Print** for title details, and click **Go**.
3. You must be logged into **My Account** in order to email, and are prompted to do so if not.
4. The print and email preview and format editor opens.
5. Enter email address and subject if email is chosen.
6. Click into **Format** field, choose **Full** and click **Update**. This ensures the local call number and shelving information will be included.



7. If there are multiple libraries copies in the preview, choose required library in **Holdings Library** field, and click **Update** again.



8. The preview is presented.

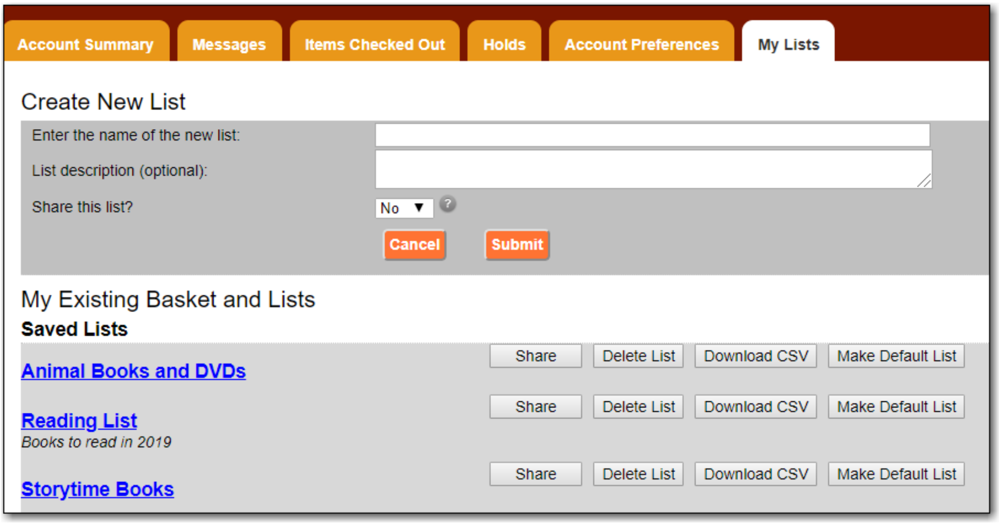


9. Click **Print Now**, or **Email Now**, and follow on screen instructions.

24.4. Creating Lists

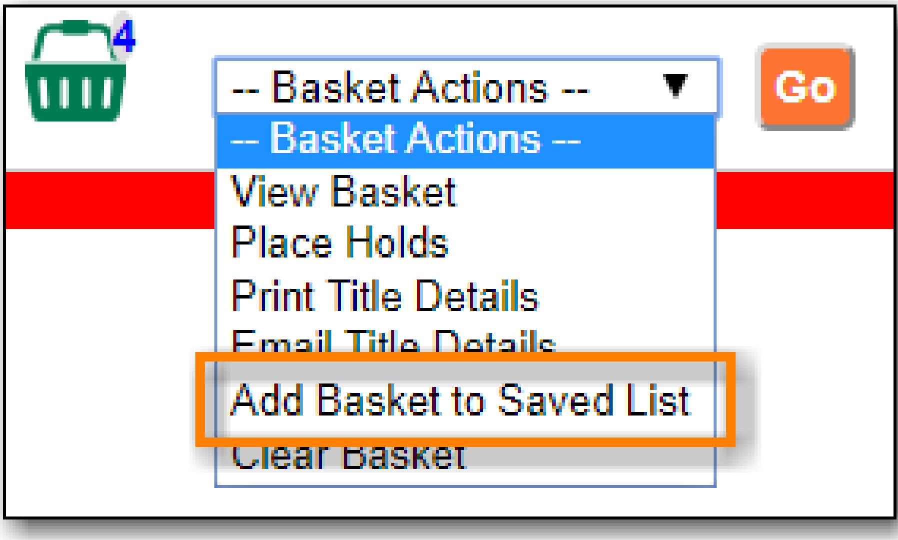
Best practice is to log in to **My Account** and create a list.

1. Select the *My Lists* tab at the top of the *My Account* area.
2. In the *My Account* area, click on **My Lists**.
3. In the *Create New List* section, enter a name and optional description for the list.
4. Click **Share** to share the contents of the list with other users.
5. Click **Submit**.

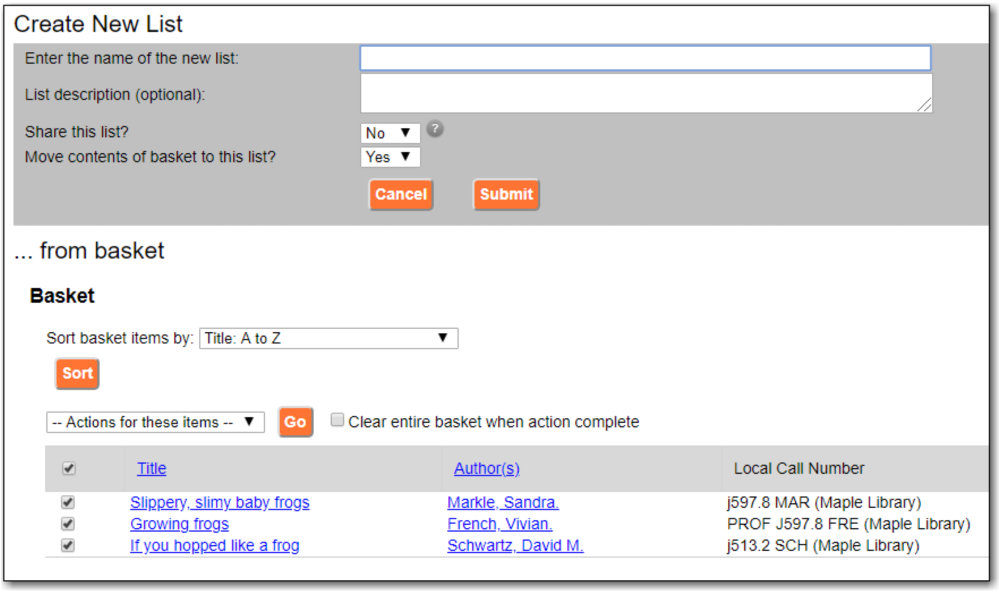


You can also create a new list from the basket.

1. Add titles to the basket.
2. Select **Add Basket to Saved List** from the basket action menu and click **Go**.
    a. If not logged in, a prompt appears.



3. In the *Create New List* section, enter a name and optional description.
4. Click **Share** to share the contents of the list with other users.
5. By default *Move contents of basket to this list?* is set to *Yes*.
    a. The contents of the basket displays below.
6. Click **Submit**.

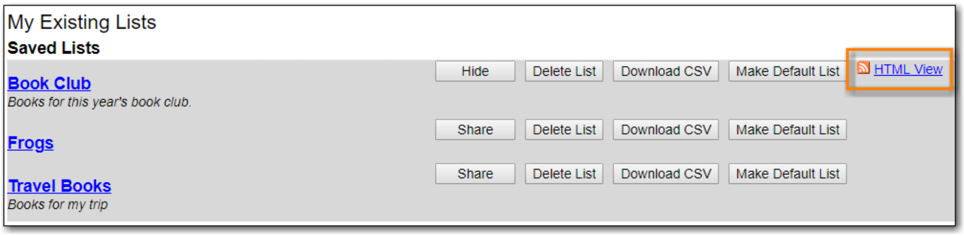


24.5. Sharing Lists

By default, all lists are private, and you must instruct the system to allow others to view the contents of a list by clicking **Share** beside the list name.

The address (URL) of the list is used to share it.

1. In the *My Lists* section there is an **HTML View link** for every shared list.

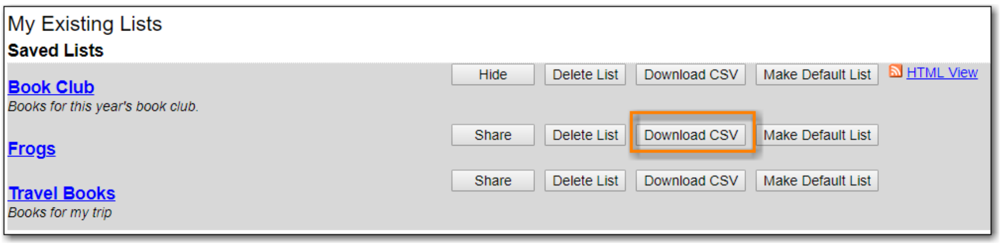


2. Click on that link and bookmark the resulting web page in your browser or copy and paste the address (URL) to share your list as required.

You can un-share a list by clicking **Hide**.

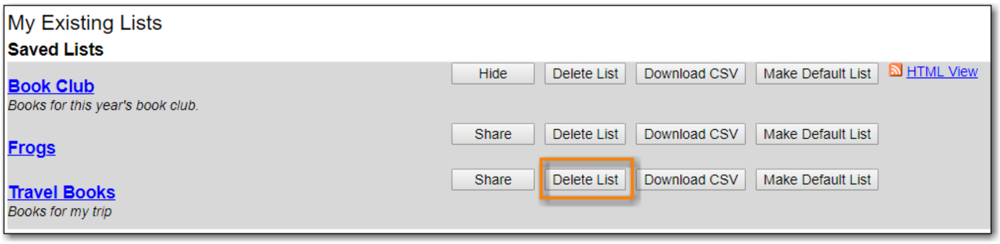
24.6. Downloading Lists

You can export your list to a comma delimited file by selecting **Download CSV** and following your computer's prompts to save the file on your computer.



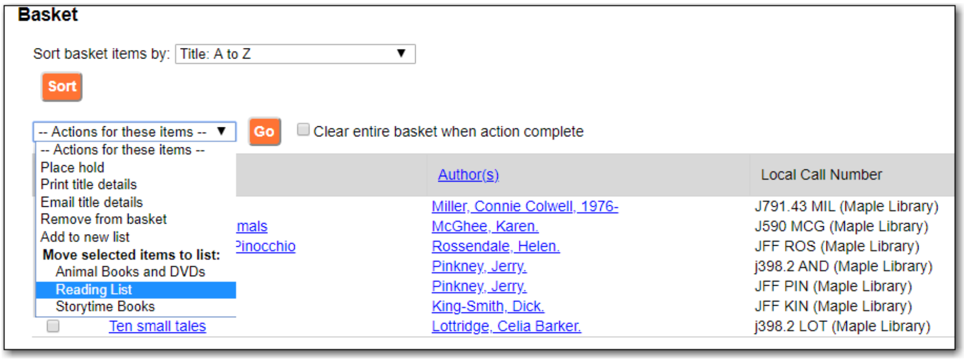
24.7. Deleting Lists

If you no longer need a list you can delete it by clicking **Delete List**.



24.8. Adding Titles to a List

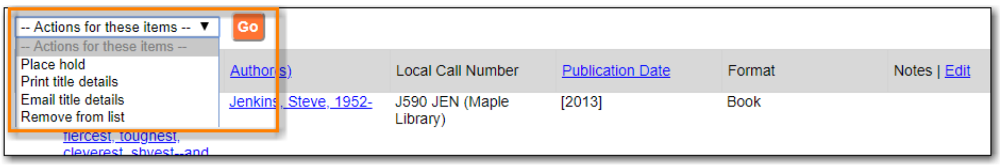
1. Titles are added to a list by first adding them to the basket. Refer to Adding Titles to the Basket.
2. From the basket actions menu select **View Basket** and click **Go** or go to *My Lists*.
3. Check the boxes for the titles in the basket that you wish to add to your list.
4. From the actions menu select the list you would like to add the titles to and click **Go**.



5. The titles are added to your list and removed from the basket.

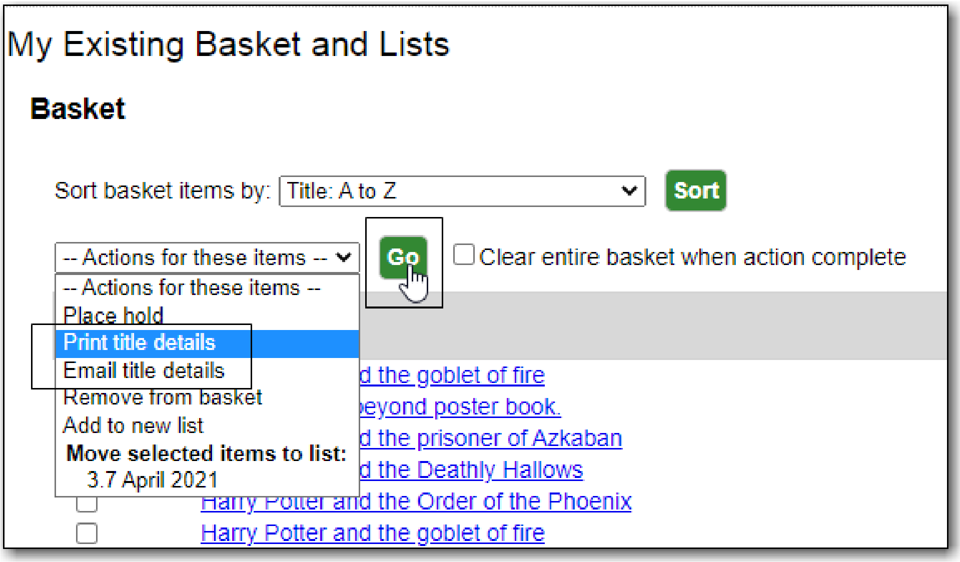
24.9. Managing Titles in a List

You can place holds, email or print the title details, and remove titles from your list using the **Actions for these items** menu.



24.9.1. Email or Print from a List

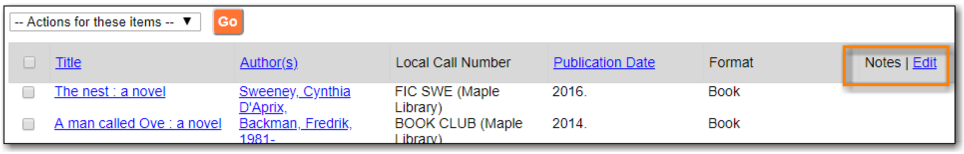
1. Select the titles and click the **Actions** menu.
2. Choose **Email** or **Print** for title details, and click **Go**.



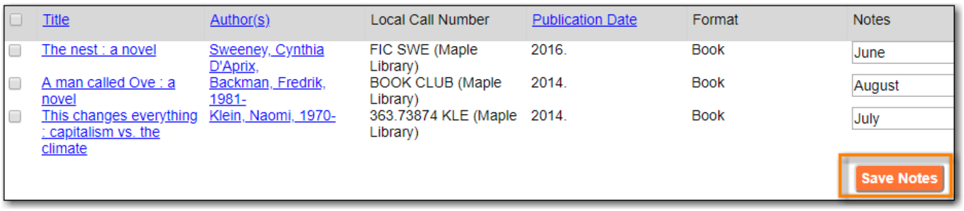
3. The print and email preview and format editor opens.
4. Enter email address and subject if email is chosen.
5. Click into **Format** field, choose **Full** and click **Update**. This ensures the local call number and shelving information will be included.
6. If there are multiple libraries copies in the preview, choose required library in **Holdings Library** field, and click **Update** again.
7. The preview is presented.
8. Click **Print Now** or **Email Now** and follow on screen instructions

24.10. Add a Note or Annotate a List

1. Click on a list to open it and display the contents.
2. A *Notes* column will appear, with an **Edit** hyperlink beside it.



3. Click **Edit**, enter the note and click **Save Notes**.

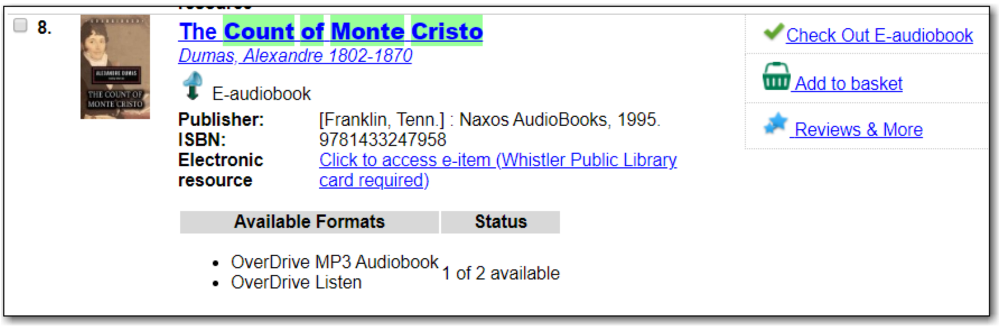


4. The note will display in the patron's view of the list. If the list is shared, the note will also display on the webpage used to access the shared list.

Chapter 25. Integrated eResources

Electronic resources are usually hosted by separate suppliers outside the library. Most of these resources have records in the library catalogue. Links leading to the suppliers' website are provided in these records. Some electronic resources can be integrated into the library catalogue, which allows users not only to view the records, but also to borrow and place holds on the resources on the library catalogue directly. Currently eBooks and eAudiobooks from OverDrive are integrated. Users can borrow or place holds on these eResources, and view their borrowed or on-hold items in their library account.

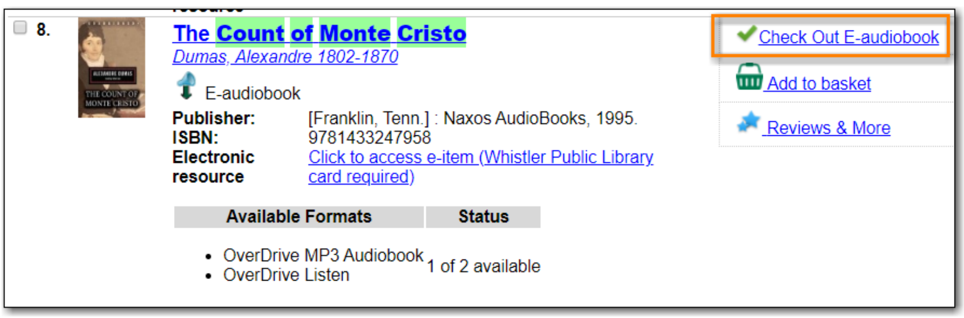
When your search result includes an integrated e-book or e-audiobook from OverDrive, you may see the record is marked as electronic resource with a link going to the supplier's website.You will see two columns for *Available Formats* and *Status*. You may also see **Place Hold on E-book/E-audiobook**, or **Check Out E-book/E-audiobook**, depending on whether there is an available copy, instead of the normal **Place Hold** option on the right hand side of the results list.



TIP	If you're logged into your account you may see **Go to E-items on Hold** for titles you've already placed holds on or **Go to E-items Checked Out** for titles already checked out to you. Clicking those links takes you to your account to view those items.

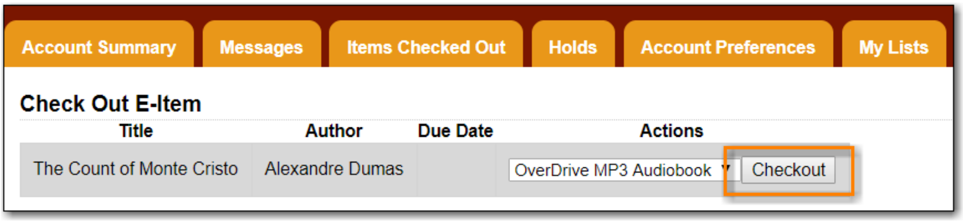
25.1. Checking Out eResources

1. If there is an available copy under a title, click on **Check Out E-book/E-audiobook** on the search result list or record details screen.



NOTE	You will be prompted to log in with your library account, if you have not already done so.

2. Click the **Checkout** button.

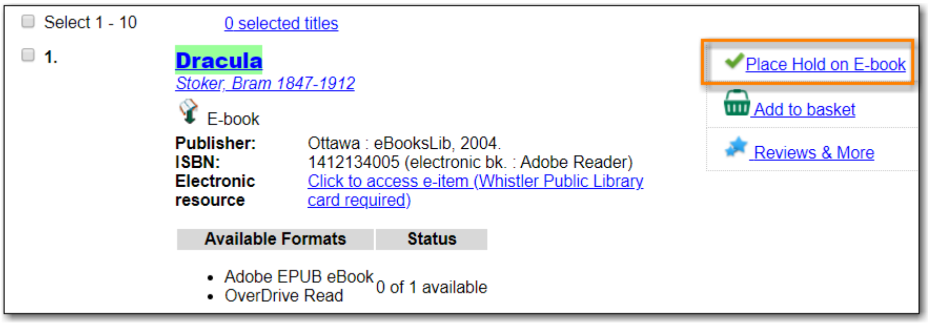


3. Choose a format type from the *Actions* menu and click **Download**. The item will be downloaded in the chosen format.

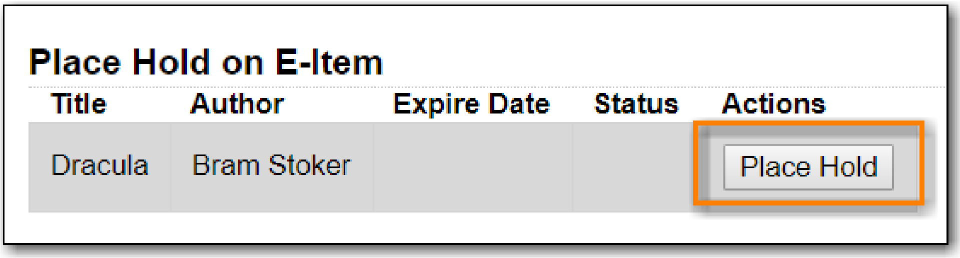
25.2. Placing Holds on eResources

1. If all copies under a title are checked out, click on **Place Hold on E-book/E-audiobook** on the result list or record details screen.

   a. You will be prompted to log in with your library account, if you have not already done so.

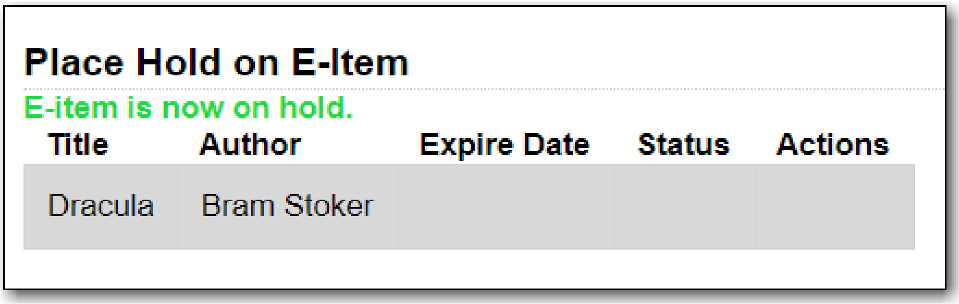


2. Click **Place Hold**.



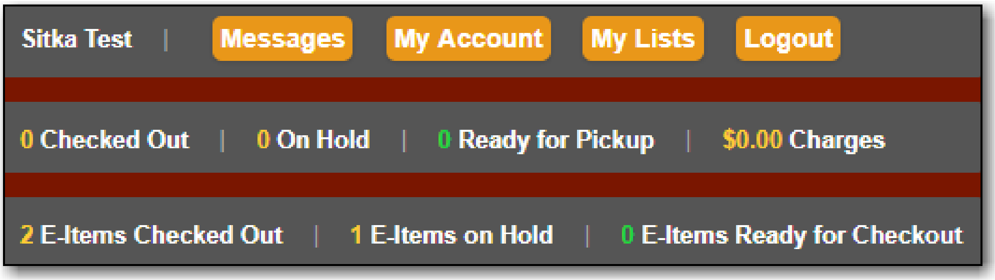
NOTE You must have an email address recorded in your account in order to successfully place a hold.

3. The hold is placed and you will receive an email when it is ready to be checked out.

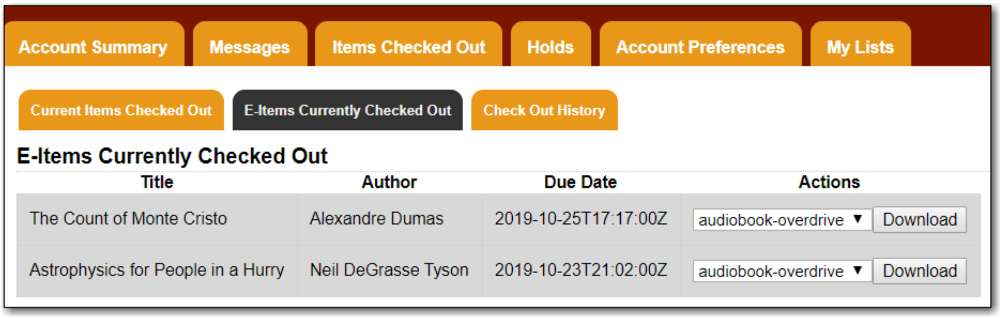


25.3. Checked Out and On Hold eResources in My Account

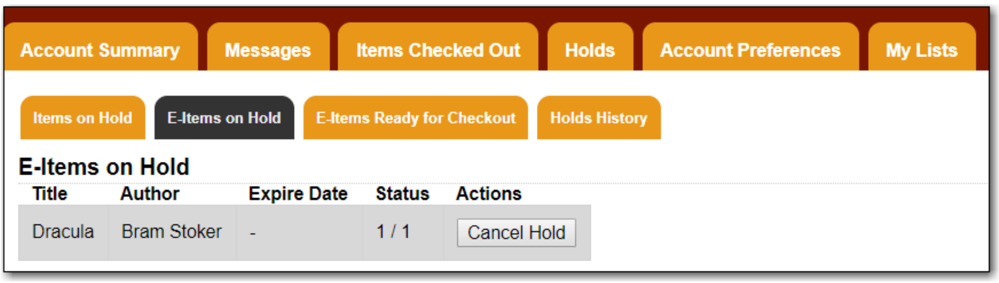
You may view eResources currently checked out to or on hold for you after you log into your account. The summary is displayed at top right of your screen.



Click the **E-items Currently Checked Out** tab to view the titles you have checked out and download a copy from there.



Click the **E-Items on Hold** tab to cancel an unwanted hold or check where you are in the hold queue.



NOTE	OverDrive allows users to keep some preference settings, such as preferred loan period. These preferences can be set up or updated through OverDrive's website or app.

Reports

Chapter 26. Reports Overview

Only users with reporting permissions (granted by Co-op Support on libraries' request) can access the Reports module or view report output. Any staff needing access to the reporter or the ability to view report output must sign and submit a Reporter Privacy Agreement, available at https://bc.libraries.coop/support/sitka/reporter-privacy-waiver/

The Reports interface is accessed from **Administration → Reports**.

Reports are owned by the account used to create them, though the owner can allow other people to view and copy templates by sharing template folders with other staff in the library or other libraries in the federation or lending zone.

Evergreen has very powerful reporting functionalities. It is possible to report on almost every field in every table in the database. Connections between tables are pre-made on the Reports screen. Some views are also provided to group together records meeting certain conditions. For details refer to Commonly Used Tables and Views in Evergreen Database.

The ultimate goal of reporting is finding the records in the database which meet the requirements. Sometimes the result records are processed to some extent before they are included in the output, such as counting and displaying the count of the records found instead of showing the records themselves. The requirements include two parts: the conditions used to extract the records and the information to be displayed in the result file.

Evergreen is designed to achieve this goal by creating a template first. The template specifies the fields to be displayed in the result file (**Displayed Fields**) and the fields, on which conditions can be applied (**Filter Fields**). For example, in an overdue template, Due Date in the circulation record should be a filter field so that a date can be given in order for the reporting program to compare and decide whether a checkout is overdue; while patron's names may be displayed fields so that staff may know who has the overdue item. In short, a template simply contains a list of displayed fields and a list of filter fields. The template can be used for multiple times. For example, the afore-mentioned overdue template can be used to run a report to capture circulation records with Due Date before 2018-01-01. It can also be used to capture circulations with Due Date before 2018-02-15.

Once a template is ready, the next step is assigning values to the filter fields, for example, giving 2018-01-01 to the Due Date field. This process is commonly known as defining a report, or running a report or setting up a report. The process also schedules the report's run-time and frequency (one time only or on regular basis), selects the result file format(s) and designates output file receivers, if preferred. The information provided during this step is saved in a file called "Report" on Evergreen. This file contains the template information and the value for each filter.

When a report starts to run, the program goes through the database and gathers the records that meet the conditions into a file in the selected format(s). This is the Output file that contains the result records.

The three types of files created during the above procedure need to be kept separately in different folders on the Reports interface. Before doing anything, you must create at least one Template, Report, and Output folder as described in Folders.

This chapter focuses on the movements on the Reports interface while demonstrating how to create reports in Evergreen. Once you understand how to navigate around the Reports interface, you can create your own reports from scratch or take advantage of Sitka's pre-packaged report templates. Some background information about the Evergreen database and database terminology is at the end of this chapter.

Chapter 27. Folders

Setting Up Report Folders (2:51)

There are three main components used by the Reports module: Templates, Reports, and Output. Each of these components must be stored in a folder. Folders can be private (accessible to your login only) or shared with other staff at your library or other libraries in your federation or lending zone. It is also possible to selectively share only certain folders and/or subfolders.

CAUTION	A shared subfolder must be created in a shared folder. The sharing scope of the subfolder should be within the sharing scope of the parent folder. For example, a subfolder shared with your federation should only be in a parent folder shared with your federation. It should not be in a folder shared with your library only. Though creating shared subfolders in unshared folders or a subfolder with the sharing scope exceeding its parent's is not blocked by Evergreen, serious consequences will be caused by such folders. You must be cautious when creating shared subfolders.

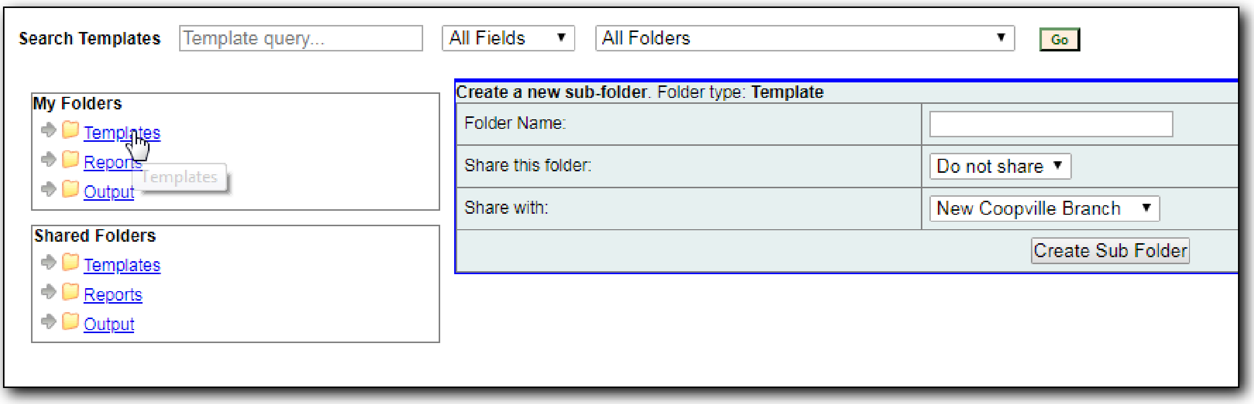
There are two parts in the folders pane. The My Folders section contains folders created with your Evergreen account. Folders that other users have shared with you appear in the Shared Folders section under the username of the sharing account. You can only view the contents or clone the templates in the shared folders, but not make any change in the shared folders. The cloned template can only be saved into your own folder.

27.1. Creating Folders

Whether you are creating a report from scratch or working from a shared template you must first create at least one folder.

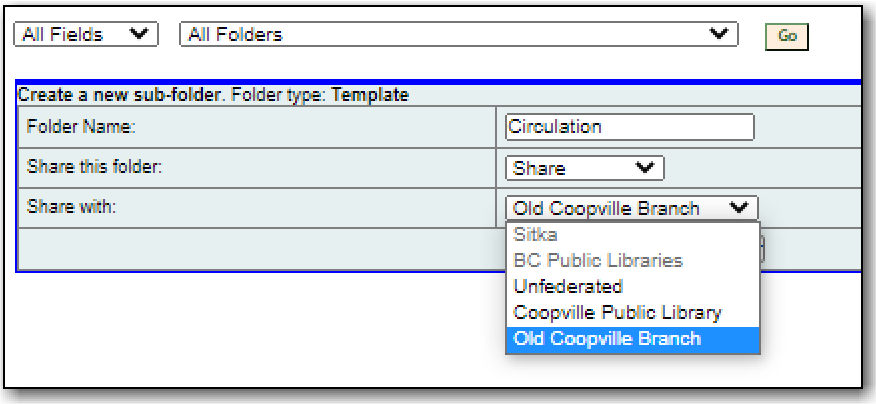
The steps for creating folders are similar for each reporting function. It is easier to create folders for templates, reports, and output all at once at the beginning, though it is possible to do it before each step. This example demonstrates creating a folder for a template.

1. Click on **Templates** in the **My Folders** section.



2. Name the folder. Select **Share** or **Do not share** from the drop down menu.

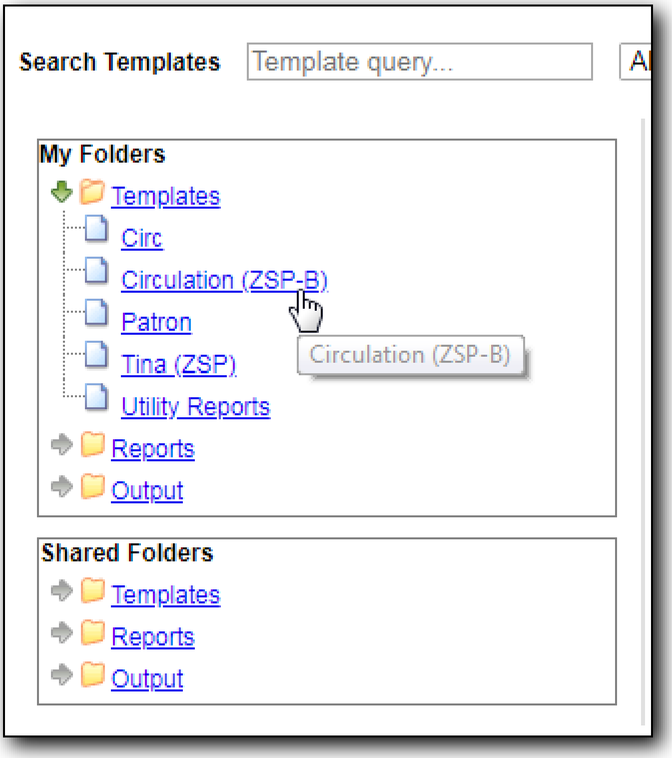
3. If you want to share your folder, select whom you want to share this folder with from the drop down menu.



4. Click **Create Sub Folder**, and then **OK** on the confirmation prompt.
5. Next, create a folder for the report definition to be saved to. Click on **Reports**.
6. Repeat steps 2-4 to create a Reports folder also called Circulation.
7. Finally, you need to create a folder for the report's output to be saved in. Click on **Output**.
8. Repeat steps 2-4 to create an Output folder named Circulation.

TIP Using a parallel naming scheme for folders in Templates, Reports, and Output helps keep your reports organized and easier to find.

The folders you have just created, will now be visible by clicking the arrows in **My Folders**. Bracketed after the folder name, is the name of with whom the folder is shared. For example, Circulation (ZSP-B) is shared with the New Coopville Library. If it is not a shared folder, there will be nothing after the folder name. You may create as many folders and sub-folders as you like.

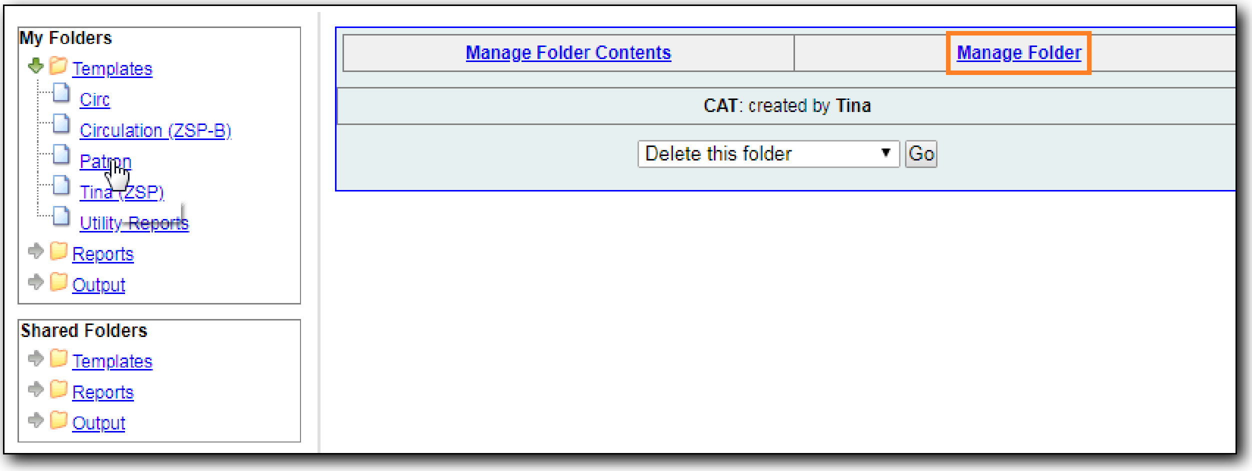


TIP Clicking the blue text of a folder name displays the contents of the folder in the right pane. Clicking the arrow in front of a folder name displays its subfolders.

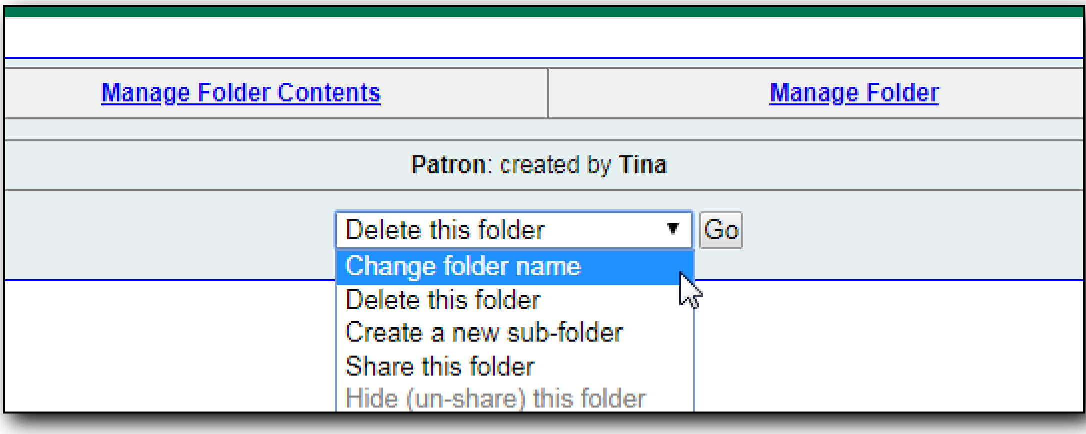
27.2. Managing Folders

Once a folder has been created, you can change the name, delete it, create a new subfolder, or change the sharing settings. This example demonstrates changing a folder name. The other choices follow similar steps.

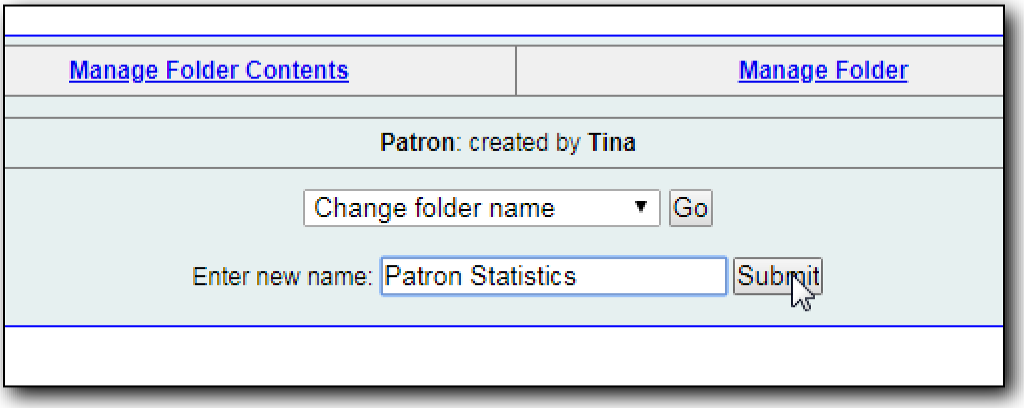
1. Click on the folder name that you wish to rename.
2. Click **Manage Folder**.



3. Select **Change folder name** from the drop down menu and click **Go**.



4. Enter the new name and click **Submit**.



5. You will get a confirmation box that the Action Succeeded. Click **OK**.

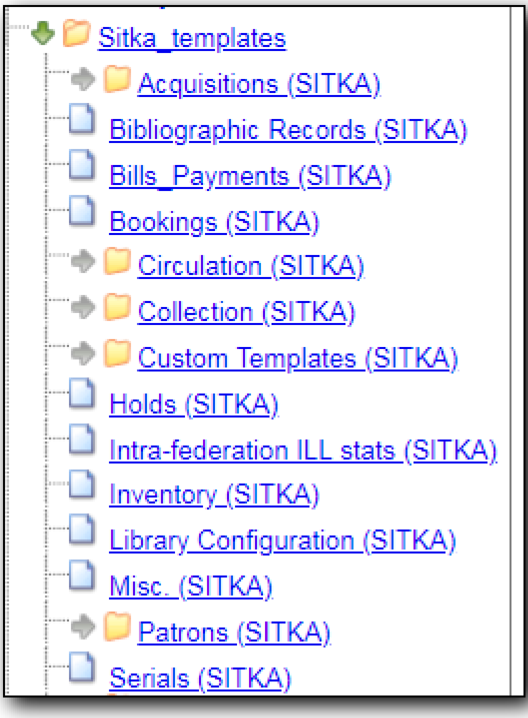
Chapter 28. Shared Sitka Templates

CAUTION Cloning templates created on the old staff client (XUL in ui column) may not work perfectly. You may need to remove, then put back some fields during cloning.

Co-op support has created generic templates for commonly requested reports and shared them under the Sitka_templates folder. This chapter describes how to make local copies of these templates for routine reports or as a starting point for customization. When creating a new template it is a good idea to review the shared templates first: even if the exact template you need does not exist, it is often faster to modify an existing template than to build a brand new one. Reporter permissions are required to clone templates from the Shared Folders section and save them to My Folders.

28.1. What's in Sitka_templates

Co-op support uses a dedicated staff account, Sitka_templates, to share ready-to-use templates. Below is what a user with reporter permissions can see after going to the Reports module, then follow the path to Shared Folders, click the arrow (or + sign) in front of Templates, and then Sitka_templates.



From Acquisitions to Serials are the subfolders containing various templates. Templates using the same source table are usually grouped together under one subfolder. These templates are created based on the anticipation that most libraries may need such reports. Co-op support tends to make these templates generic, which means they contain more information. Individual libraries may have slightly different requirements. You can remove the unwanted information when cloning the templates or choose appropriate values for some filters to disable them. These templates are usually referred to as Sitka standard templates.

The following is a guideline of the templates for various kinds of reports. Please note that Co-op support regularly maintains the templates. The list below may not be the latest.

Overdue reports. Find overdue reports in Circulation > Overdue and Others folder. There are templates capturing checkouts with due date within a selected time frame for all patrons or those without email address (phone list) or the due date is before a selected date. You may use these templates to set up your overdue reports capturing items which are at a certain number of days overdue.

Circulation statistics reports. These templates are in Circulation > Monthly Circulation Stats and Circulation > Circulation within Time Frame folders. Templates in the former folder are designed for monthly recurring reports. The regular circulation statistics can be grouped by various criteria: patron's home library, profile and/or stat cat; items' owning library and/or shelving location.

Other circulation statistics related templates are:

- non-catalogued circulation count
- pre-catalogued circulation count
- pre-catalogued circulation count for items with dummy title prefix of "ILL:" (ILL statistics via pre-catalogued circulation)
- checkin count
- in-house use count for non-catalogued items
- in-house use count for catalogued items
- in-house use count per title

Other circulation related templates are:

- lost and paid item list
- lost with outstanding bills item list
- claimed returned item list

Reports on collection. These templates are in Collection folder. You will find templates counting items or titles of your whole collection or catalogued within the selected time period (new title/items statistics). The numbers are grouped by shelving location and/or circulation modifier. The templates are in Copy and Title Count subfolder.

Another group of templates in Collection folder are item/title lists for items meeting various criteria: having selected shelving location(s) and/or circulation modifier(s), copy stat cat, barcode prefix, call number prefix or within a call number range; or being catalogued (new title/item list), marked missing, lost or deleted within selected time period. These templates are in Copy List by Item Attributes and Title List subfolders.

In this folder, you will also find templates listing pre-catalogued items and items with certain circulation history (items with fewer circulation count for weeding report or more circulation count for popular title/item report). They are in Others folder.

Patron reports. All patron reports are in Patrons folder. You may find templates counting patrons by profile group and/or patron stat cat, registered or expired/expiring within a selected time period, or with circulation history within a selected time period.

Another group of templates list selected information for patrons meeting some conditions such as: email list for all or those patrons having certain stat cat; names and barcode for patrons without circulation history within selected time frame; patrons born before a selected date (seniors list); patrons exceeding maximum fine limit.

Besides, there is a template that counts patron's OPAC logins and another that summarizes the answers to patron survey question(s).

Reports on bibliographic information. It is not easy to generate reports based on bibliographic information due to the bibliographic record structure. But a simple report that lists the values in a selected MARC tag and subfield for the whole collection is possible. And the bibliographic records can be limited by a selected value of a MARC tag and subfield. These templates are in Bibliographic Records folder.

Bills and payments. You can find the templates listing the details of various kinds of payments made in a selected time period, and a template listing bills with negative balance.

Hold reports. Holds related reports are in this folder, including reports for holds that have been long time outstanding (requested some time ago but not filled yet), cancelled, or have no eligible copies to be filled. There are other templates that count the total number of holds placed or fulfilled within a time span, and the hold count per title for popular titles.

Inventory. The two templates in Inventory folder list items based on whether the item showed up (being scanned on shelves or returned) in the library while the inventory was taken. The result of the Inventory - un-scanned items are the potential missing items.

Library setting and policy related reports. Find them in Library Configuration folder.

Other folders. If your library uses the Acquisitions Module, Serials or the Booking Module, you may find related templates in the relevant folders.

Custom Templates folder. If you open this folder, you will see a subfolder for your library federation with sub-subfolders for your library and other libraries within your library federation.

These folders are created when Co-op support creates or customizes templates for individual libraries. The templates go to these folders when there are similar templates in the standard folders already, or Co-op support does not anticipate wide use of the templates. Co-op support tries to limit the number of templates in each standard folder so that staff may find the target template easily.

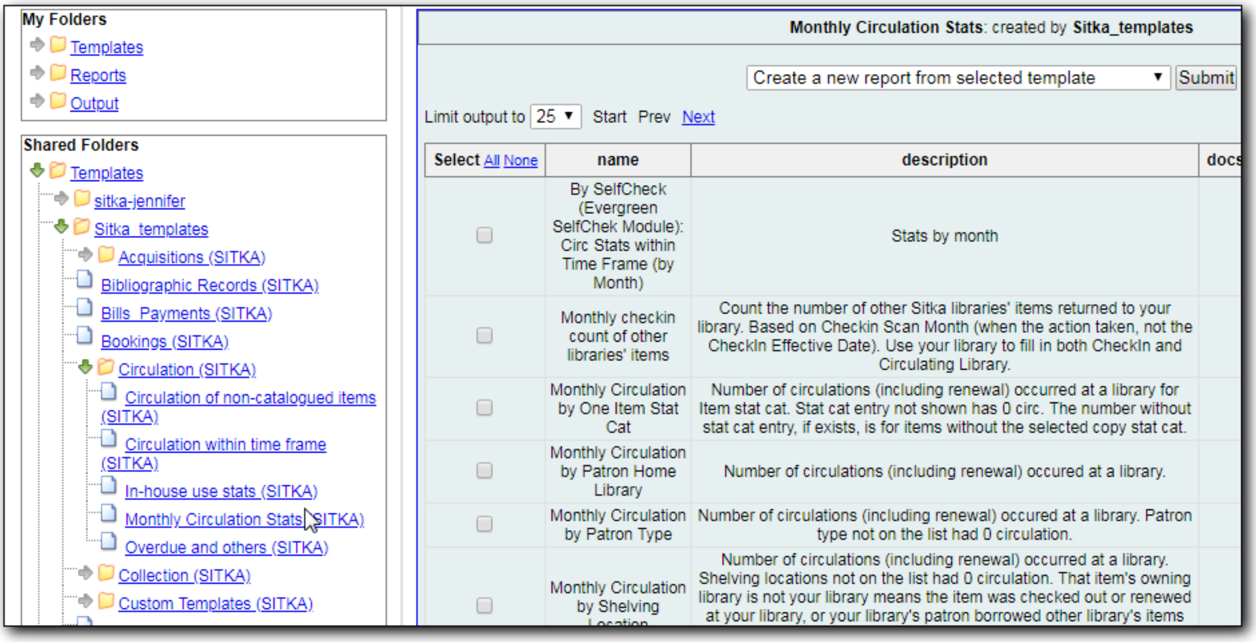
28.2. Clone a template from Sitka_templates

Cloning Reports and Sitka Templates (2:35)

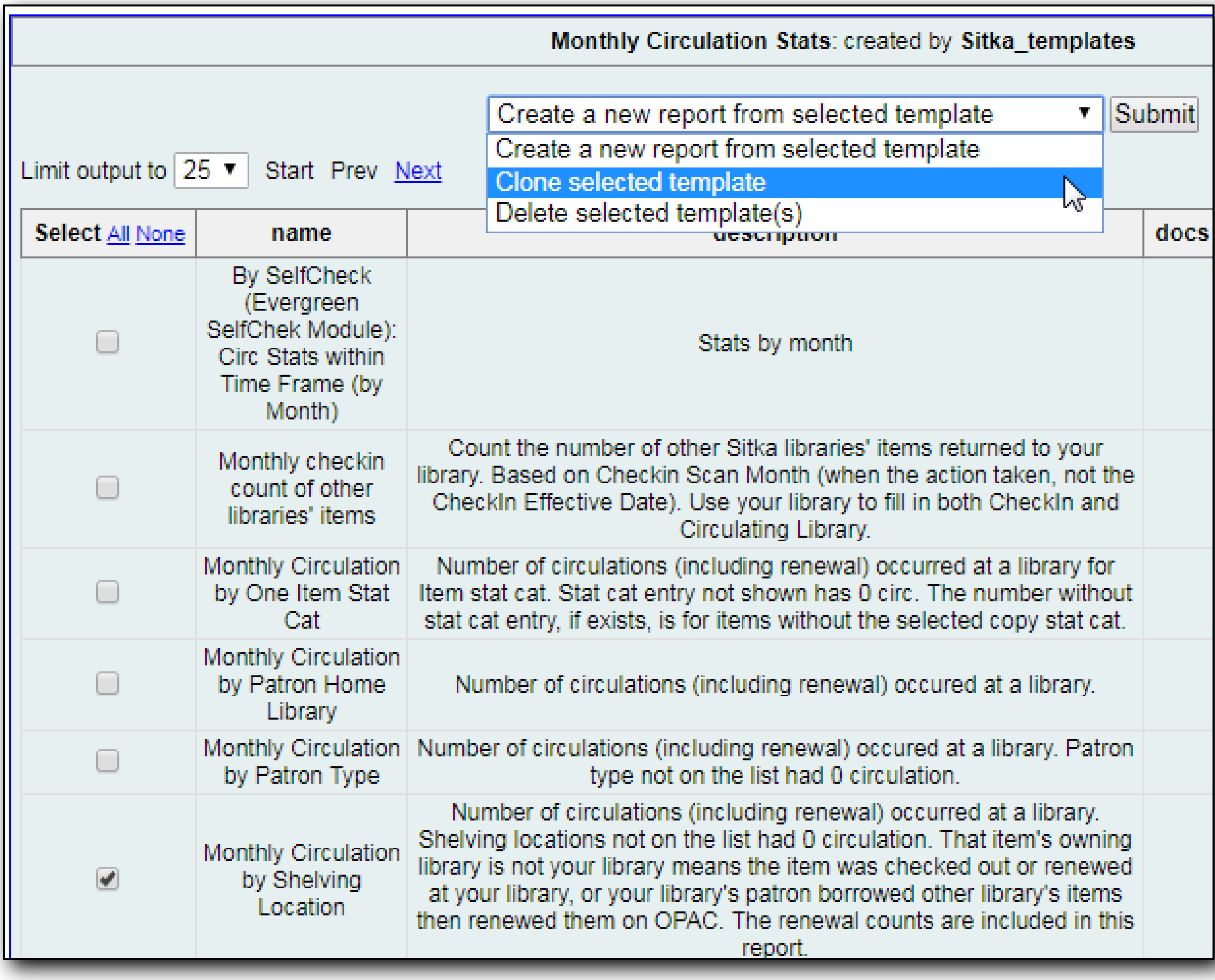
The steps below assume you have already created at least one Templates folder. If you have not done so, please see Folders.

1. Access the Reports interface from **Administration** → **Reports**

2. Under Shared Folders expand the Templates folder and the Sitka_templates subfolder. To expand the folders click on the grey arrow or folder icon. Do not click on the blue underlined hyperlink.
3. Expand the Circulation (SITKA) folder, then click on Monthly Circulation Stats (the blue text) to list templates in it.

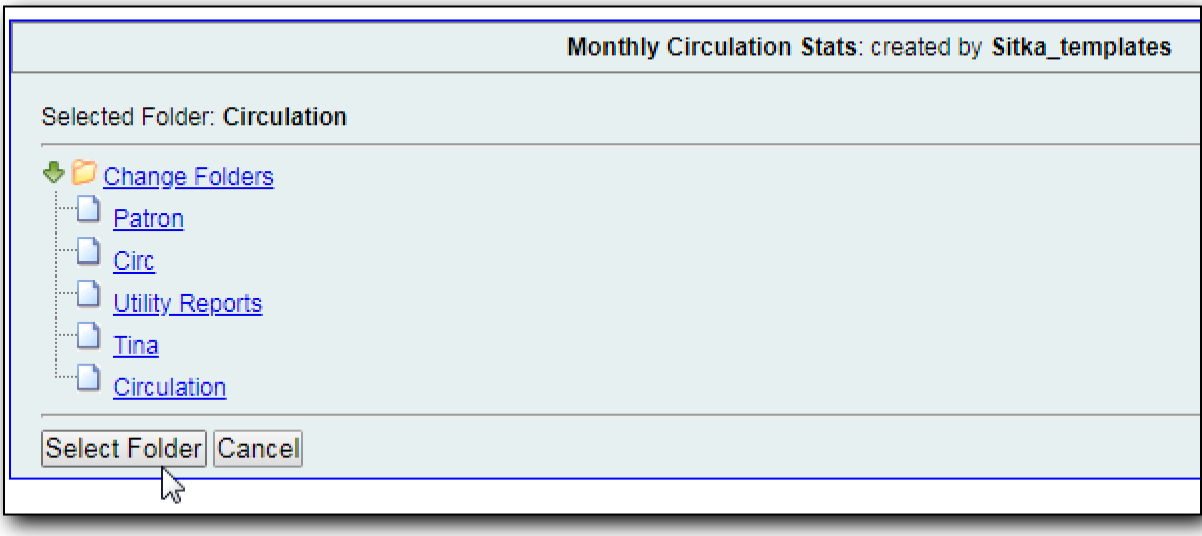


4. Select the template you wish to clone. In this example, we are cloning the Monthly Circulation by Shelving Location template. From the drop down menu choose **Clone selected template**, then click **Submit**.



TIP	By default Evergreen only displays the first 10 items in any folder. To view all content, change the Limit output setting from 10 to All.

5. Choose the folder where you want to save the cloned template, then click **Select Folder**. Only template folders created with your account will be visible.



6. The cloned template opens in the template editor. From here you may modify the template by adding, removing, or editing fields and filters as described in Creating Templates. Template

Name and Description can also be edited. When satisfied with your changes, click **Save Template**.

7. Click **OK/Continue** in the resulting confirmation window.

28.3. Modify a template

Once saved, it is not possible to edit a template. To make changes, clone the template and change the clone.

To modify a template, repeat the steps 1-6 in cloning a template. You will see the template open on Template Creating screen. Here you can add/remove/edit fields as when you create a new template.

To operate on Displayed fields, click Displayed Fields. You will see all the displayed fields. To remove one, highlight it and click **Actions** > **Remove Selected Field**. You may move a field up or down the list, which will affect the sorting of the result records. You may also change the column label or the transform of the field by using respective functions on the Actions list.

TIP

- Removing displayed fields usually does not affect the result set. But sometimes it does, esp. when the report displays the count of records by each group. Sometimes some fields may contain important information. Removing them may cause misunderstanding the results. Usually such fields are explained in the template Description. Be cautious when you delete such fields.
- Be careful with editing filter fields, as usually changing a filter makes a difference in the result set.

You may add fields. See Creating Templates for details on operating on fields.

CAUTION

You can not change the starting source table, but have to follow the links to tables in the Sources pane. Changing the starting table will remove all existing fields, meaning building a new template from scratch.

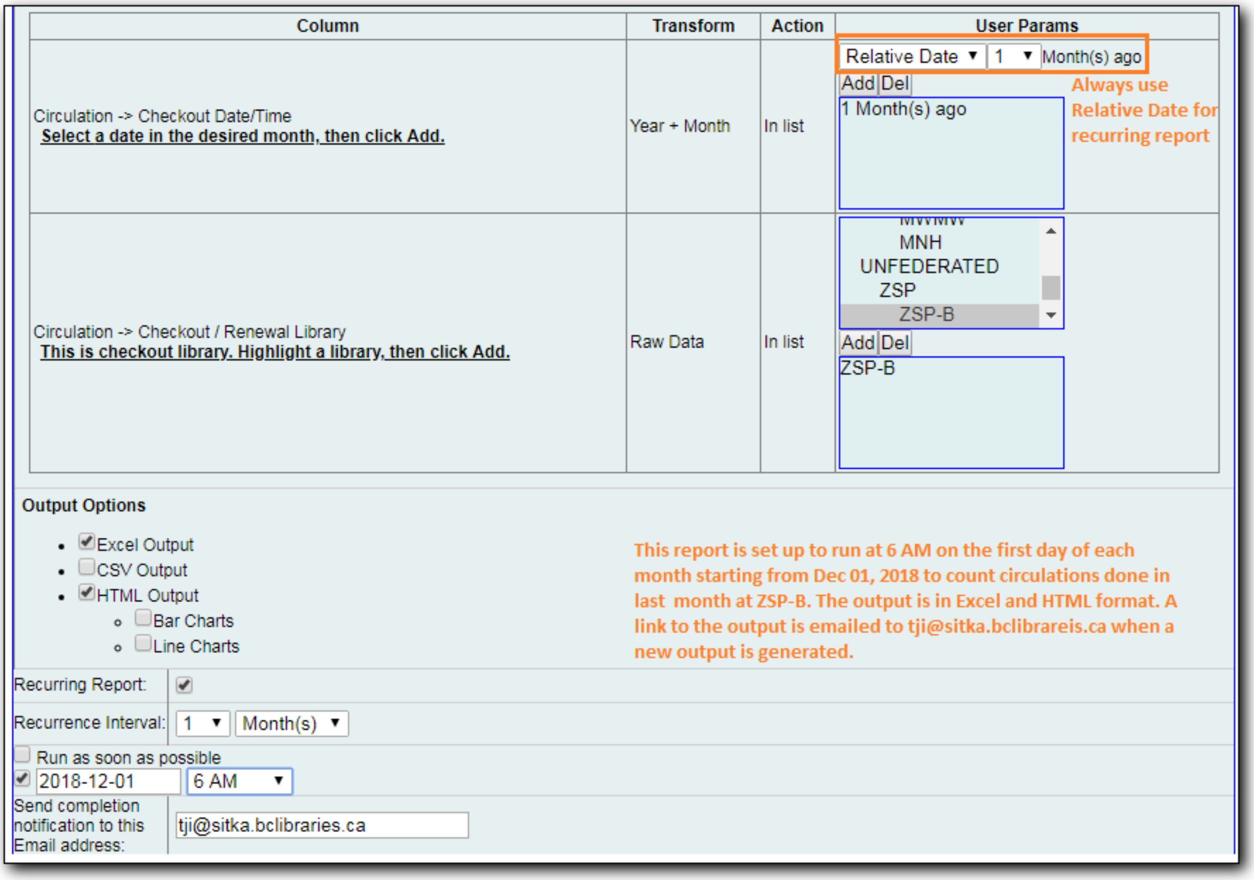
28.4. Examples of using Sitka's templates

CAUTION

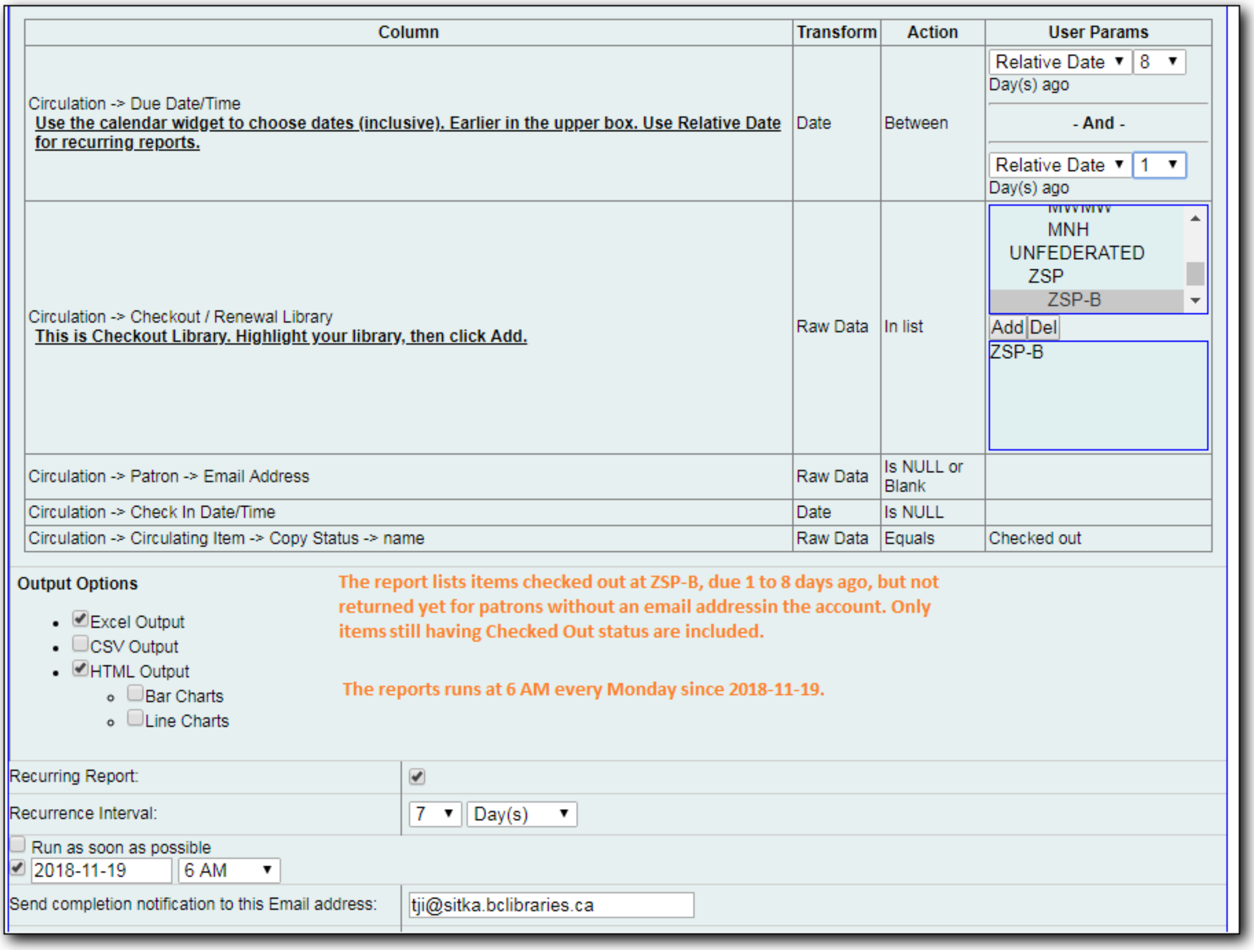
Please clone templates in Sitka_templates and set up your reports from your own copy. This is to avoid any potential impact that may be resulted from changing the orignal templates. Co-op support regularly maintains these templates. Deletion may happen. Deleting a template will delete all linked reports and output files.

Below are a few screenshots showing you how to set up the reports based on some templates in Sitka_templates. Some explanation is added in the orange boxes and text.

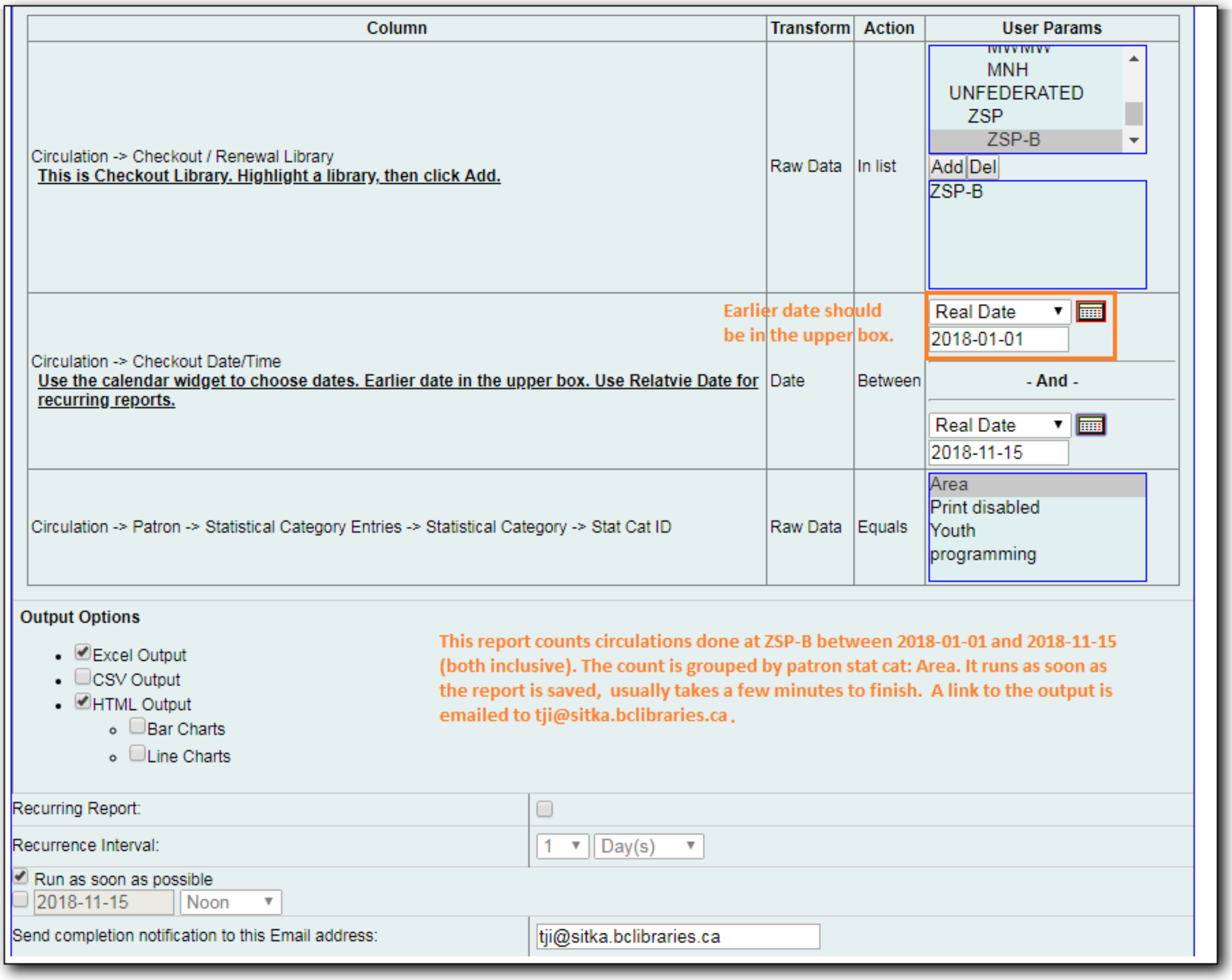
1. Setting up a monthly recurring report by using template: Monthly Circulation by Shelving Location in Circulation > Monthly circulation stats folder:



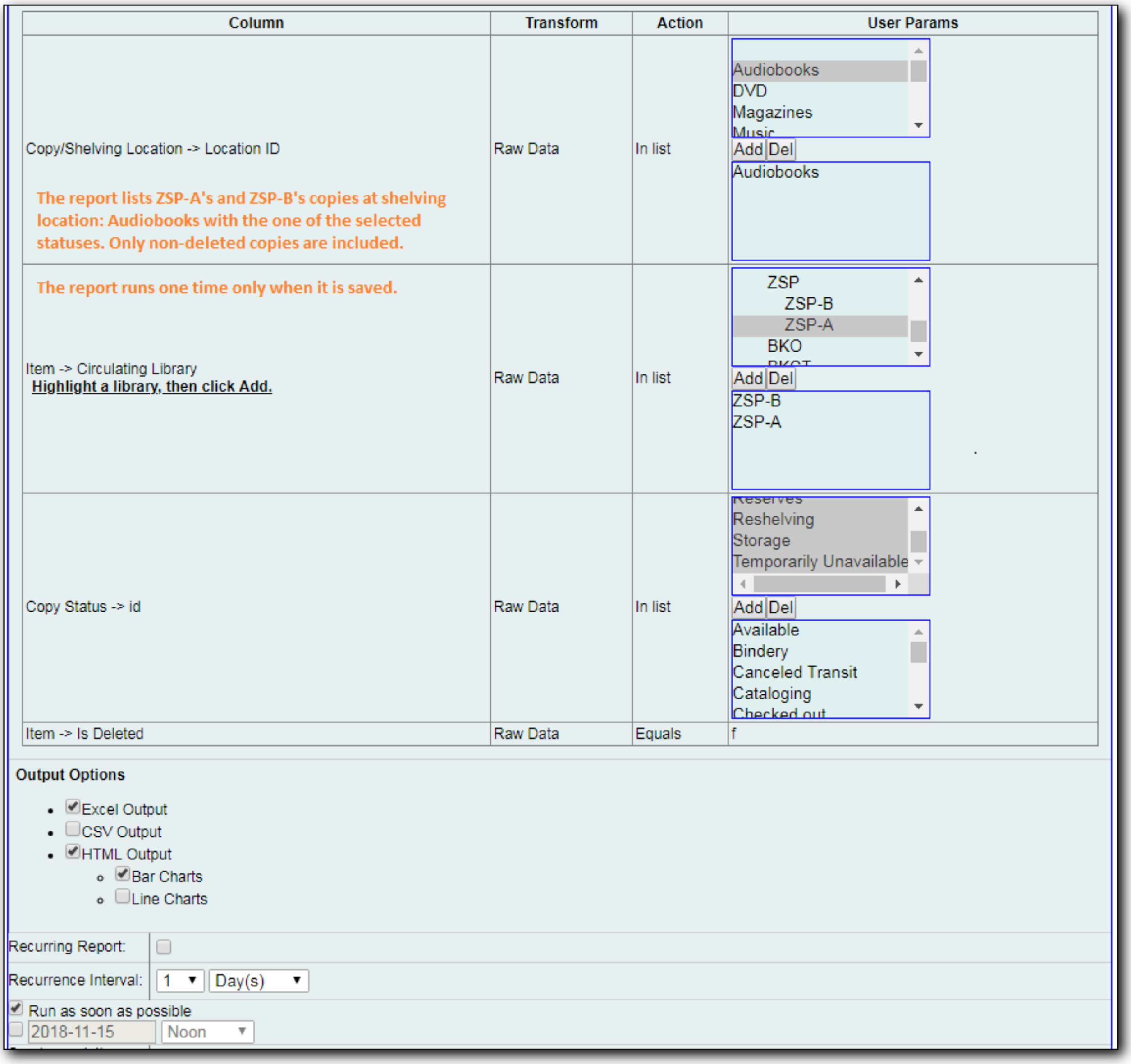
2. Setting up a weekly recurring report by using template: Overdues Within Time Span - for Patrons without Email in Circulation > Overdue and others folder:



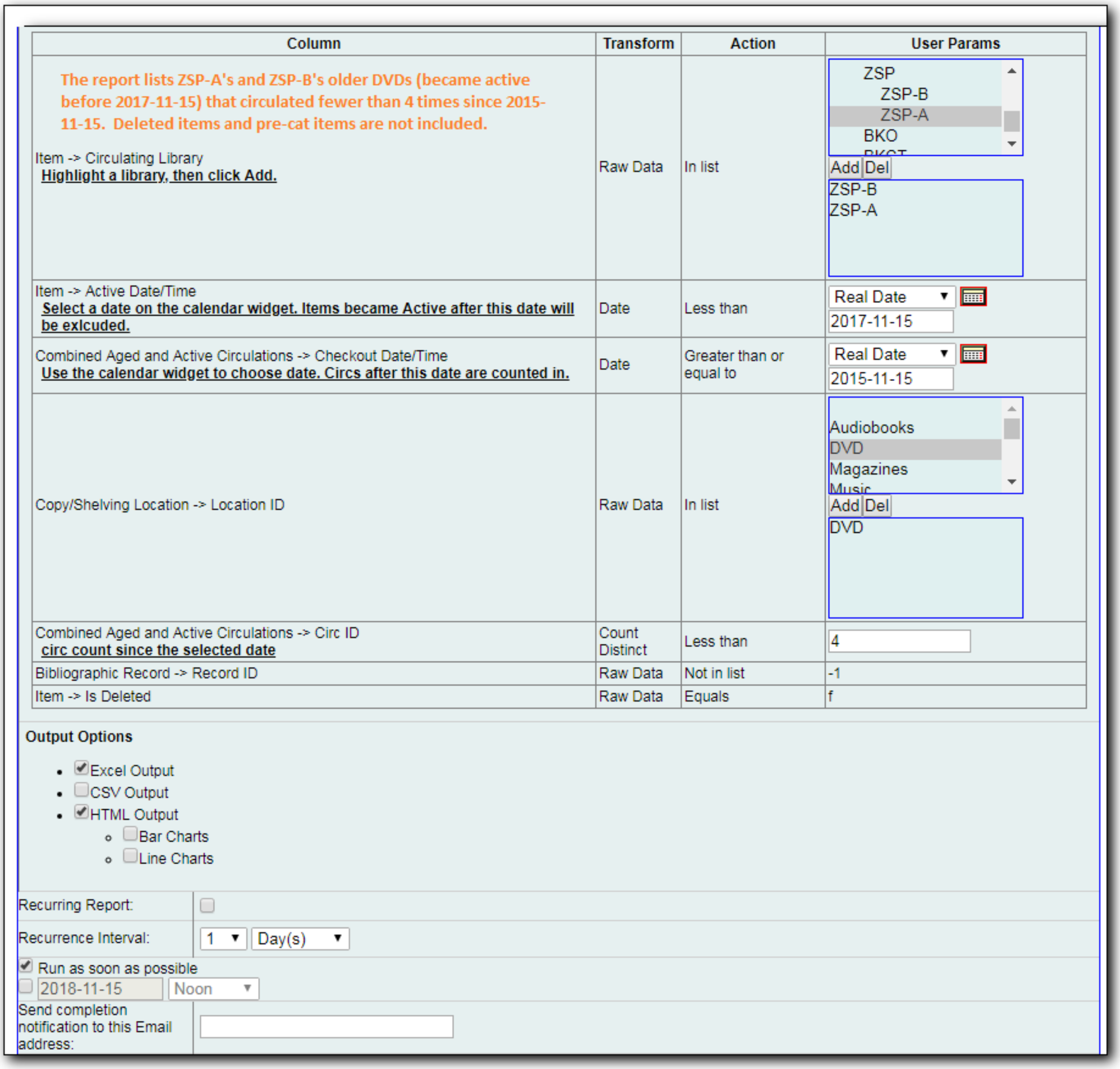
3. Setting up a one-time report by using template: By Patron Stat Cat : Circ Stat within Time Span in Circulation > Circulation within time frame folder:



4. Setting up a one-time report by using template: Shelving Location : Copies with Selected Shelving Location in Collection > Copy List by Item Attributes folder:



5. Setting up a report by using template: Weeding - Copies Circulated Fewer Times since a Selected Date in Collection > Others folder:



Column	Transform	Action	User Params
The report lists ZSP-A's and ZSP-B's older DVDs (became active before 2017-11-15) that circulated fewer than 4 times since 2015-11-15. Deleted items and pre-cat items are not included. Item -> Circulating Library **Highlight a library, then click Add.**	Raw Data	In list	ZSP ZSP-B ZSP-A BKO Add Del ZSP-B ZSP-A
Item -> Active Date/Time **Select a date on the calendar widget. Items became Active after this date will be exlcuded.**	Date	Less than	Real Date 2017-11-15
Combined Aged and Active Circulations -> Checkout Date/Time **Use the calendar widget to choose date. Circs after this date are counted in.**	Date	Greater than or equal to	Real Date 2015-11-15
Copy/Shelving Location -> Location ID	Raw Data	In list	Audiobooks DVD Magazines Add Del DVD
Combined Aged and Active Circulations -> Circ ID **circ count since the selected date**	Count Distinct	Less than	4
Bibliographic Record -> Record ID	Raw Data	Not in list	-1
Item -> Is Deleted	Raw Data	Equals	f

Output Options

- Excel Output
- CSV Output
- HTML Output
  - Bar Charts
  - Line Charts

Recurring Report:

Recurrence Interval: 1 Day(s)

Run as soon as possible

2018-11-15 Noon

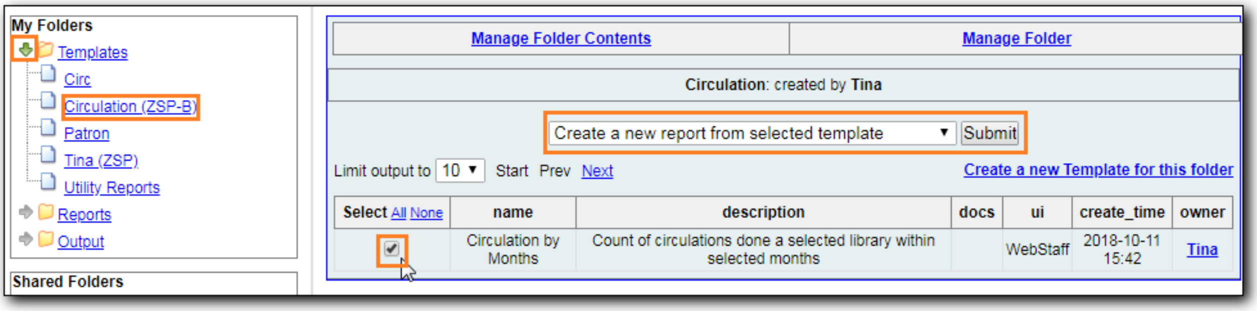
Send completion notification to this Email address:

Chapter 29. Generating Reports from Templates

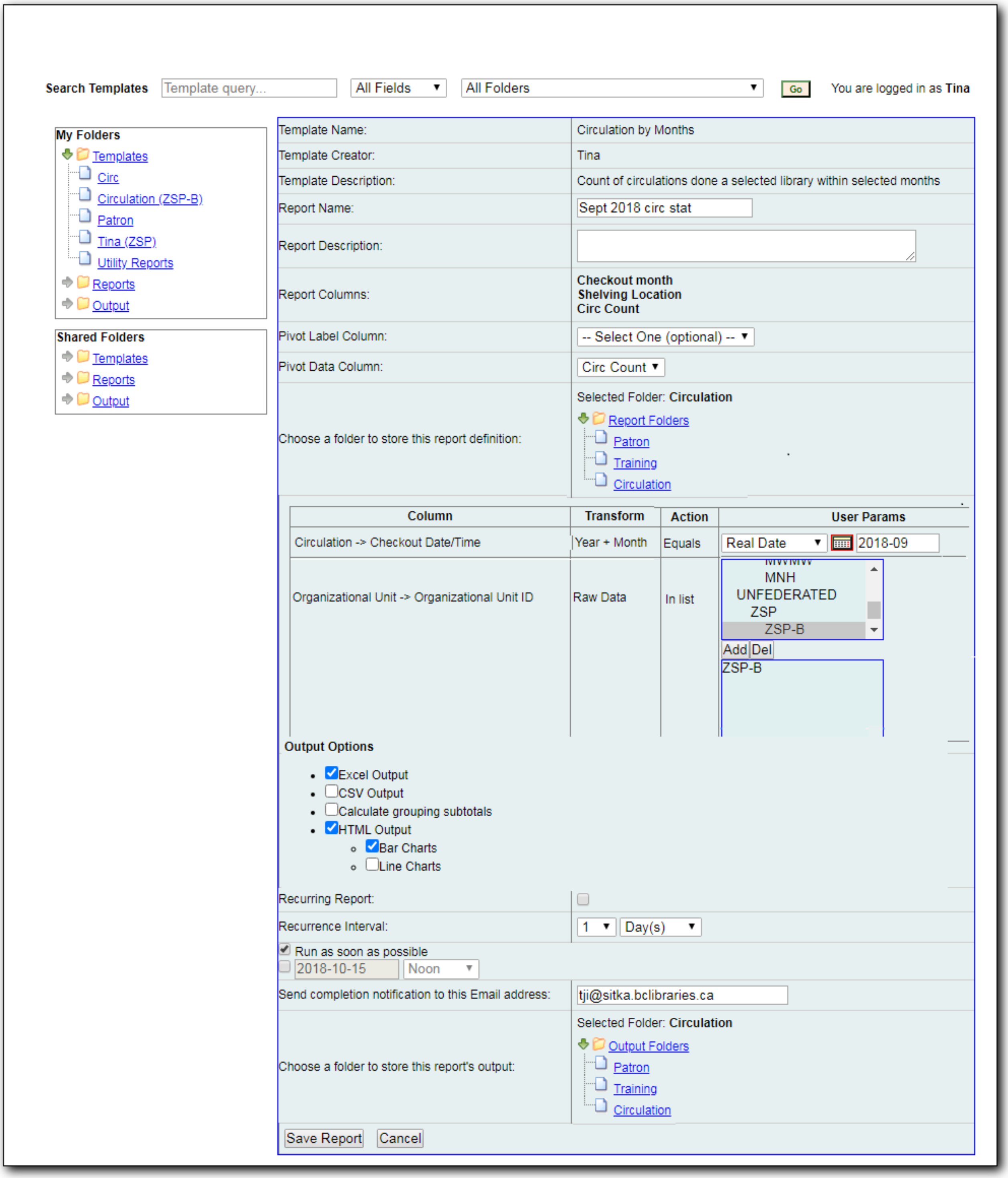
Running a Report (4:25)

Now you are ready to run a report from the template you have created.

1. Find the template you just created in the Template folder. In the My Folders section, click the arrow next to **Templates** to expand this folder and select **Circulation**.
2. Select the check box in front of **Circulations by Months**. Select **Create a new report from selected template** from the drop down menu. Click **Submit**.



3. Complete the first part of report settings.



a. Template Name, Template Creator, and Template Description are for informational purposes only. They are hard coded when the template is created. At the report definition stage it is not possible to change them.

b. Report Name is required. Reports stored in the same folder must have unique names.

c. Report Description is optional, but may help distinguish among similar reports.

d. Report Columns lists the columns that will appear in the output. This is derived from the template and cannot be changed during the report definition.

e. Pivot Label Column and Pivot Data Column are optional. Pivot tables are a different way to view data. If you currently use pivot tables in MS Excel it is better to select an Excel output and continue using pivot tables in Excel. Please note that Pivot tables are suitable to some result data only.

f. You must choose a report folder to store this report definition. Only report folders under My Folders are available. Click on the desired folder to select it.

4. Select values for the Circulation > Check Out Date/Time. Use the calendar widget to choose or manually enter the desired date (always in YYYY-MM or YYYY-MM-DD format).

   The Transform for this field is Year + Month, so even if you choose a specific date (2018-09-20) it will appear as the corresponding month only (2018-09).

5. Select a value for the Checkout/Renewal Library on the Organizational Unit list, then click Add. You may add more than one library. You may use CTRL or SHIFT plus mouse click to select multiple libraries, then click Add, too.
6. Complete the bottom portion of the report definition interface, then click **Save Report**.
   a. Select one or more output formats. In this example the report output will be available as an Excel spreadsheet, an HTML table (for display in the staff client or browser), and as a bar chart. Please note that charts are suitable to some result data only.
   b. Check the “Calculate grouping subtotals” checkbox to add an unlabeled row or column with the subtotals for each grouping and an unlabeled grand total row or column. Please note group subtotals and grand totals are suitable to some result data only.
   c. If you want the report to be recurring, check the Recurring Report box and select the Recurrence Interval as described in Running Recurring Reports. In this example, as this is a report that will only be run once, the Recurring Report box is not checked.
   d. Select **Run as soon as possible** for immediate output. It is also possible to set up reports that run automatically in the future.
   e. It is optional to fill out an email address where a completion notice can be sent. The email will contain a link to a password-protected report output which staff with permission to view report output can access. If you have an email address in your account, it will automatically appear in the email notification box. However, you can enter a different email address or multiple addresses separated by commas.
   f. Select a folder for the report’s output.
7. You will get a confirmation dialogue box that the Action Succeeded. Click OK.

Once saved, reports stay there forever unless you delete them. When a report is deleted all the linked output files will be deleted, too.

Report files are viewable and editable (recurring report only). You may view the contents of a report. You can generate a new report based on the past report file or re-schedule a recurring report. See Viewing/Editing/Rescheduling Reports for details.

TIP

- The required value for filters should be in a format corresponding to the data transform. For example, for a call number field transformed to First Continuous Non-space string, you need to put in the call number prefix; for a field transformed to Count you need to give an integer. See Template Terminology: Data Types, Transforms, and Operators for more on Data Transforms.

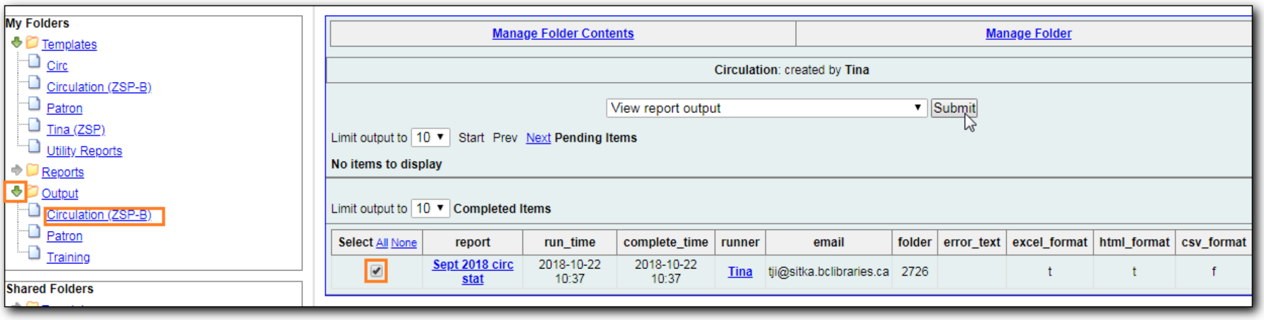
- **Action** corresponds to **Operator** used for filter fields. It specifies how the given value will be compared with the field value. See Template Terminology: Data Types, Transforms, and Operators for more on Operators.
- When creating a report, you may disable an unwanted filter in the template by choosing an appropriate value for it. For example, if a template lists items created within a time frame, specify a time frame between "1900-01-01" and "today" to cover the whole collection; select all copy statuses on the list to bypass the filter on item status.
- If the calendar widget is not provided for a date filter, key in the date in format yyyy-mm-dd.

Chapter 30. Viewing Report Output

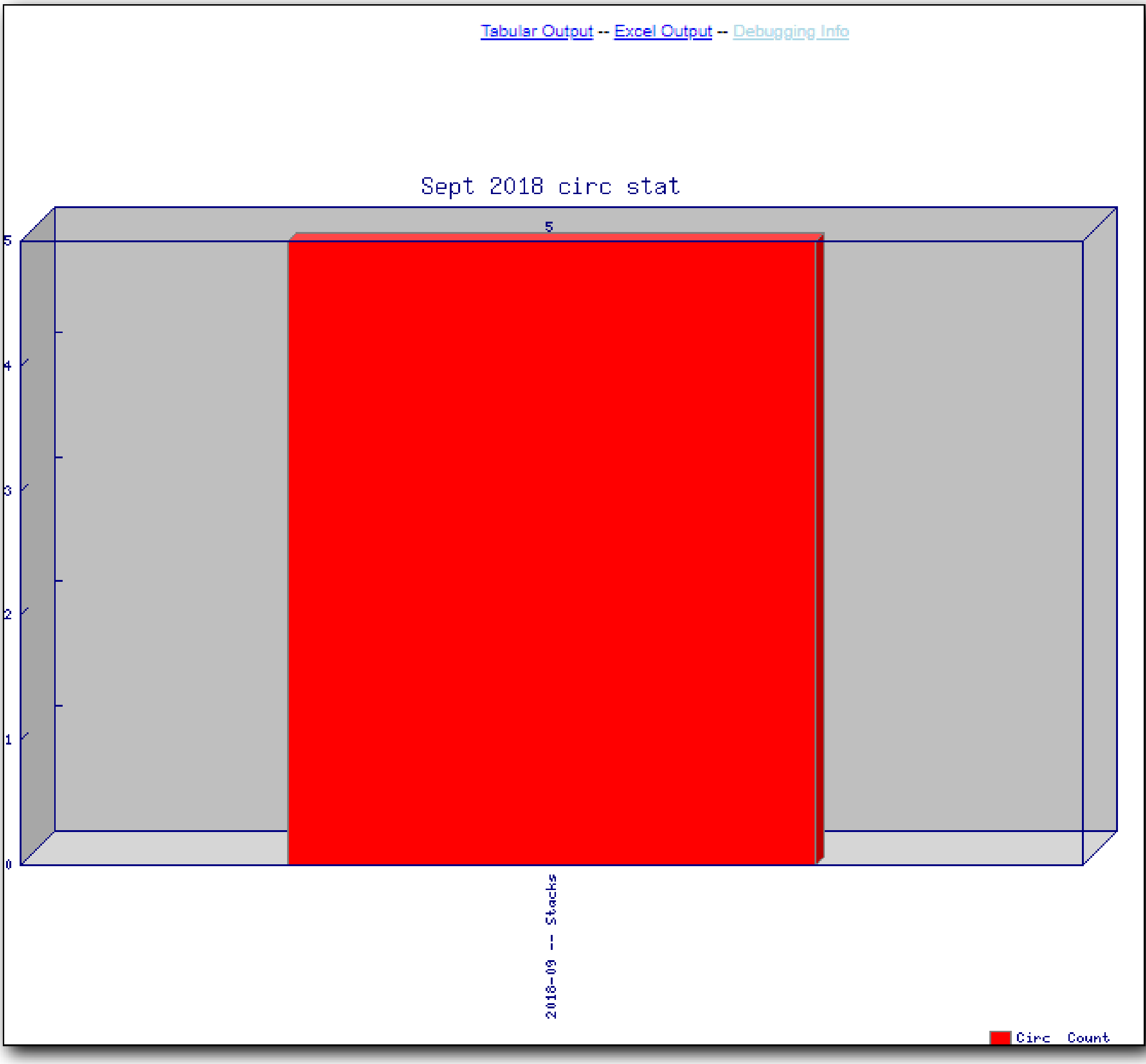
Viewing Report Output (2:08)

Once a report is finished, the output is stored in the specified Output folder and will remain there until manually deleted. Evergreen sends an email with a link to the output if an email address(s) is supplied when the report was set up.

1. To view the report output in the staff client, open the reports module from **Administration** → **Reports**.
2. Click on the arrow in front of **Output** to expand the folder. Click on **Circulation** (where you just saved the circulation report output) to display the output files in the right pane.
3. Select the check box in front of **Sept 2018 circ stat**. **View report output** is the default selection in the drop down menu. Click **Submit**.



4. A new tab will open for the report output. Select either Tabular Output or Excel Output. If Bar Charts was selected during report definition the chart will also appear.



5. Below is what the tabular output looks like. If needed, click **Back to output index** to select another output format.

Back to output index

Sept 2018 circ stat

Checkout month	Shelving Location	Circ Count
2018-09	Stacks	5

6. If you want to manipulate, filter or graph this data, Excel output would be more useful. Click on Excel Output, you will be prompted to open or save the the output file.

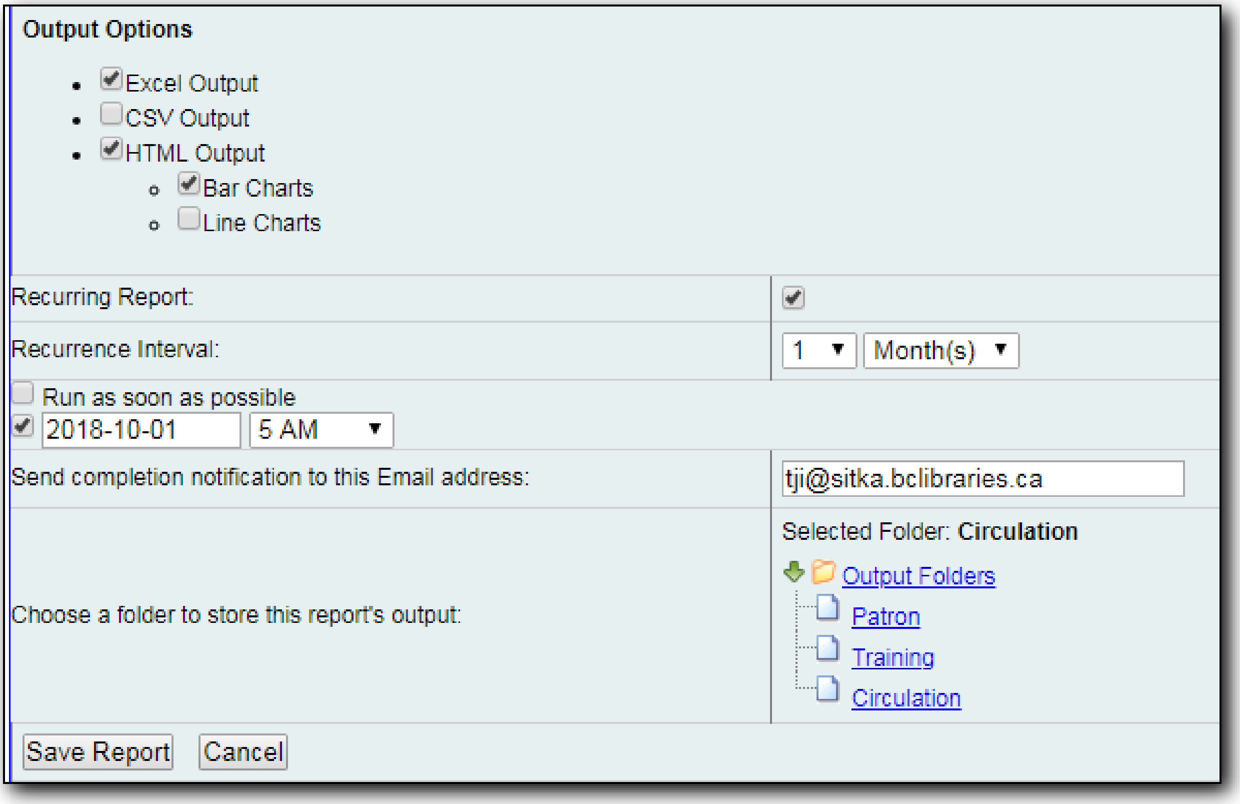
Chapter 31. Running Recurring Reports

Recurring Reports (3:02)

Recurring reports are a useful way to save time by scheduling reports that you run on a regular basis, such as monthly circulation and monthly patron registration statistics. When you have set up a report to run on a monthly basis, you may request an email informing you that the report has successfully run. You can click on the link in the email that will take you directly to the report output. You can also access the output through the Reports interface as described in Viewing Report Output.

To set up a monthly recurring report, follow the procedure in Generating Reports from Templates, but make the changes described below.

1. Select the **Recurring Report** check-box and set the **Recurrence Interval** to 1 month.
2. Do **not** select **Run as soon as possible**. Instead, schedule the report to run early on the first day of next month. Enter the date in YYYY-MM-DD format.



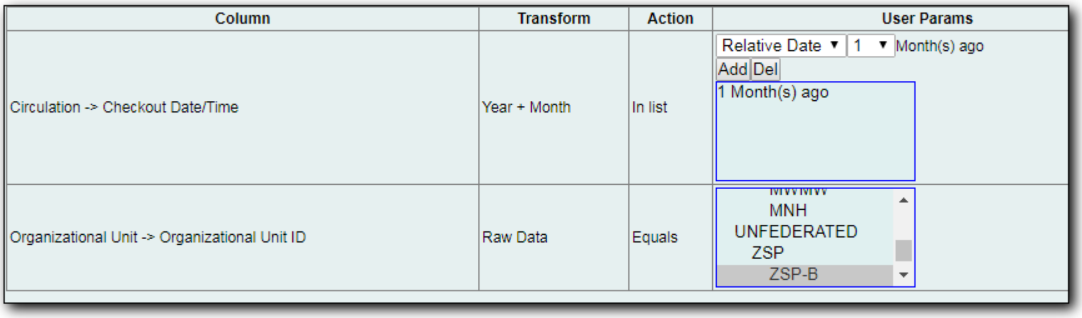
3. Ensure there is an email address to receive completion emails. You will receive an email completion notice each month when the output is ready.
4. Select a folder for the report's output.
5. Click **Save Report**.
6. You will get a confirmation dialogue box that the Action Succeeded. Click OK.

With the above settings, you will get an email on the first day of each month with a link to the report output. By clicking this link it will open the output in a web browser. It is still possible to login to the staff client and access the output in Output folder.

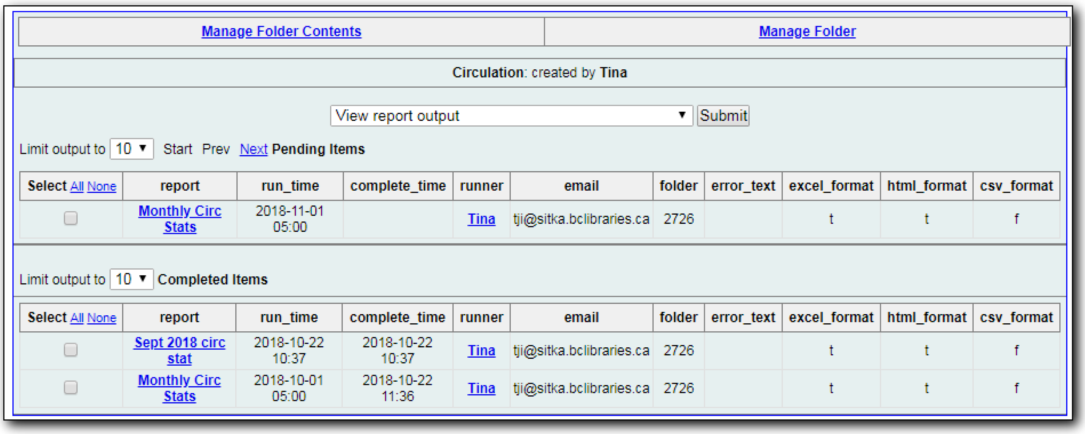
TIP

- Always use relative date for recurring reports. Date is a filter on nearly every template. When setting up a recurring report, always choose **Relative Date**, instead of Real Date for any date filter on the report creating screen. When using relative date the actual date will be calculated when the report runs. Unlike a real date, the actual value of relative date is adjusted according to the run time. For example, if the report runs at 2018-10-10 04:00, a relative date transformed to YYYY-MM of "1 month ago" will be Sept, 2018; while a relative date transformed to YYYY-MM-DD of '1 day ago" will be 2018-10-09. When it runs at 2018-11-10 04:00 "1 month ago", it will be Oct, 2018, while "1 day ago" will be 2018-11-10. The date goes by calendar day or month.

  If you use Real Date, you will have the same result every time, as the report is always generated based on the same condition.



- To stop a recurring report, you may delete the pending output from Pending area in Output folder. You may also delete the report from Report folder. But deleting the report will delete all the output files generated by it, too.



- Sometimes you may wish to make changes to a recurring report, e.g. the recurrence interval, generation date, email address to receive completion email, output format/folder or even filter values (such as the number of days overdue). You may do it by editing the report. See Viewing/Editing/Rescheduling Reports for details.

- Report running interval should correspond to the date filter. For example, if the template filters on a date instead of month, a recurring report running with a monthly interval may miss a day or capture an extra day's data. So it works better if the filter can be transformed to month.

- Schedule your monthly report to run early next month, but not at the end of the current month.
- Once you have been on Evergreen for a year, you can set up your recurring monthly reports to show comparative data from one year ago. To do this select relative dates of 1 month ago and 13 months ago.

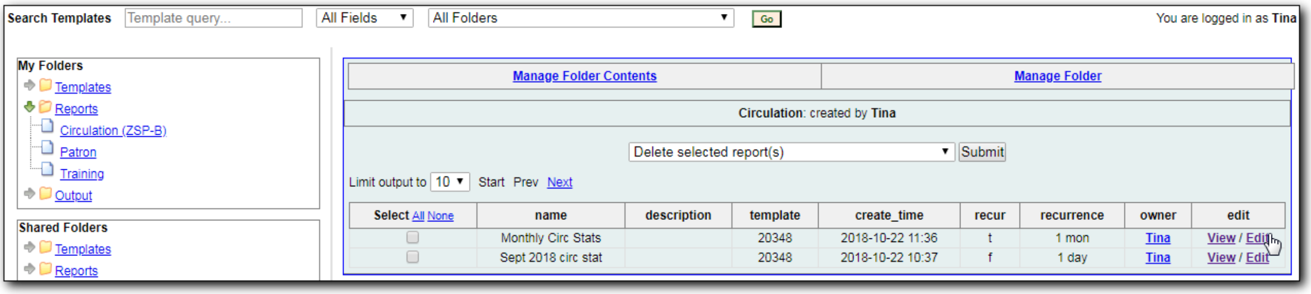
Chapter 32. Viewing/Editing/Rescheduling Reports

Managing Reports (3:02)

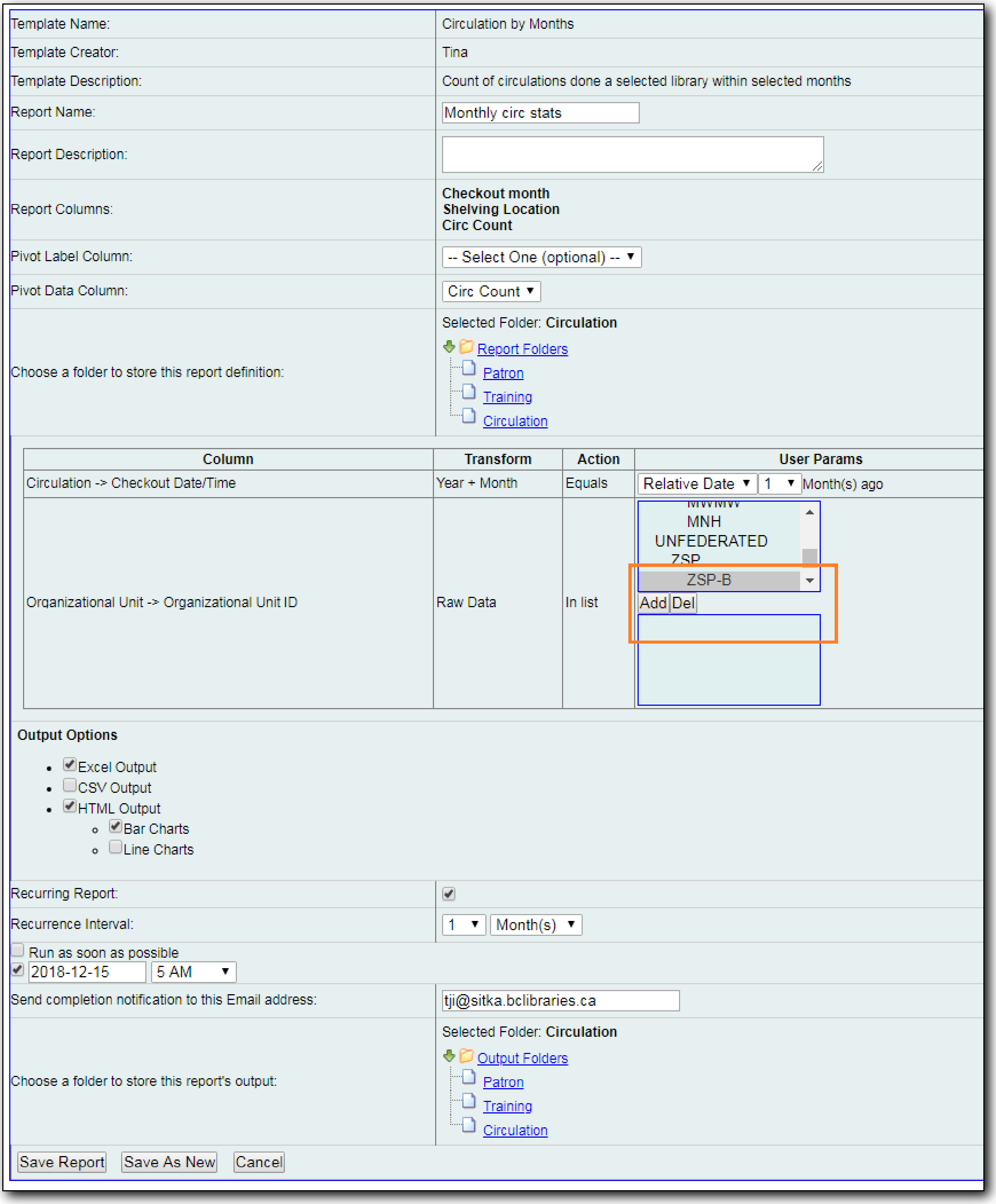
You may view or edit an existing report to change the values for filters, run-time, email reminder recipient, recurring interval, etc. For example, you may reschedule a recurring report to run on Mondays, instead of Thursdays. With this function, you may also generate a new report by editing and saving the report with a new name.

You may edit a report from Reports or Output folder.

To view or edit a report in Reports folder, go to Reports folder to find the report that you wish to view/edit. Click View or Edit in the Edit column. We choose Edit in this example to change the reminder recipient's email address.

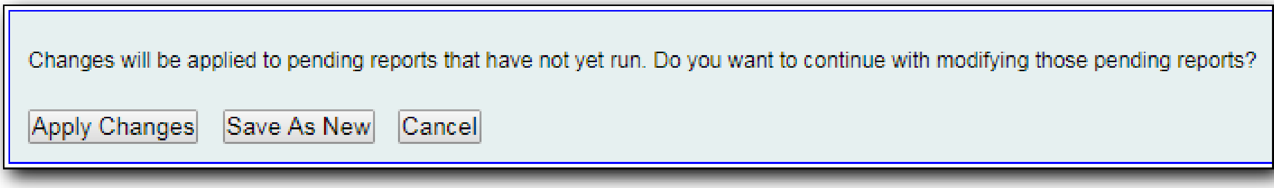


The report is loaded on the report creation screen, where you make the required changes. In this example we edit the receipt's email address.



CAUTION Right now you need to re-select values for filters using In List operator.

Once done, click **Save Report**. Note that Evergreen will update the pending output only. The existing output will remain as is. You will see a prompt to choose **Apply Changes** to the pending output or **Save as New** to create a new report.

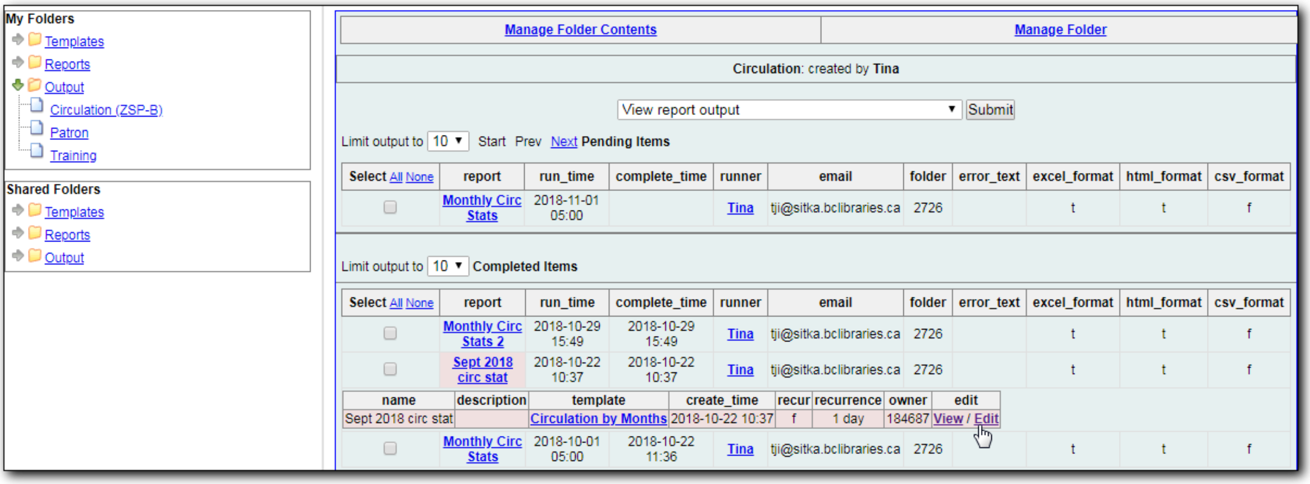


TIP

It is not possible to modify a completed report. In fact, it is useless to attempt to edit a completed report, because the report has run and the output has been generated already. But you may generate a new report based on the conditions in a completed report.

To create a new report, you need to enter a new report name or choose different report/output folders. Click **Save As New** at the bottom after finishing the editing. You can choose to create a one time or a recurring report.

To edit a report in Output folder, go to Output to find the report. Click the report name. The details of the report show up in the line below. Click Edit.



TIP

We suggest you edit recurring reports in the Pending Items in Output folder, as only the pending items are to be updated.

When choosing View a report on the above two screens, the report will be displayed in non-editable mode.

Chapter 33. Creating Templates

Once the folders are ready, you can create or clone a template. Templates allow you to run a report more than once, without building it anew every time by changing definitions (such as values for the filters) to suit current requirements. For example, a template counting patrons with a registration date within a time frame can be used to find out the number of patrons registered within the last month or the last ten days. Another example is a shared template that reports on circulation statistics at a given library. This can be used by other libraries by selecting their own library as the checkout/renewal library when they run the report.

Creating a template is complex. It requires some understanding of the Evergreen database and how Evergreen handles various records when performing tasks on the staff client. You may refer to the last section of this chapter for some background knowledge. Bear in mind that a template includes a list of displayed fields, the information you will see in the result, and a list of filter fields which enables you to set up the conditions for your target records. Generally you do not record your specific conditions in the template. For example, in an overdue template, you do not record 2018-01-01 as the due date. Instead, you just make the Due Date field in the circulation record as a filter field. When setting up the report with this template, you will be given the chance to put in 2018-01-01 as the due date.

It can be useful to plan out your report on paper before getting started with the reporting tool. The first thing to decide is the source table. You can choose only one starting source table for each template. If you need information from other tables, follow the link in the source table to those tables. Grouping together related fields and identifying the key fields will help you select the correct source.

We will take a report on circulation statistics as an example to show you how to create a template. In circulation statistic reports, libraries usually want to know how many items were checked out within a selected time period (in fact how many times items were checked out). When an item is checked out on the staff client, a record is created in the circulation table. You want a count of the number of circulation records created within the time period. So, the Circulation table is the source with which you want to start.

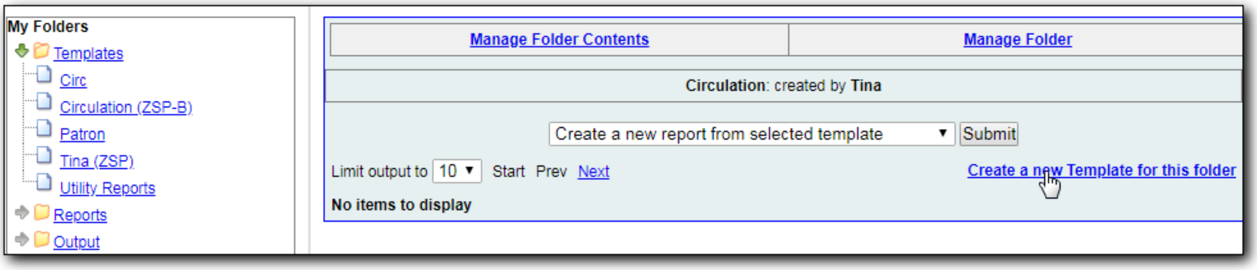
You may wish to break down the number of circulations by items' shelving locations to see the circulations by different types of materials (or the patrons' profile groups). In this case, the count of circulation records and the shelving location (or patron profile) are the potential displayed fields. For the filter fields, you need to limit the circulations done within a time period, so checkout date should be a filter. You want to count the circulations done at your library only as you are part of a consortium, or for all the branches of your library system. (In such a case, you may want to see the checkout library in the result, too.) So, the checkout/renewal library will be another filter.

With the above analysis, we will build the template from scratch in the following section to demonstrate the procedure on the template creating screen.

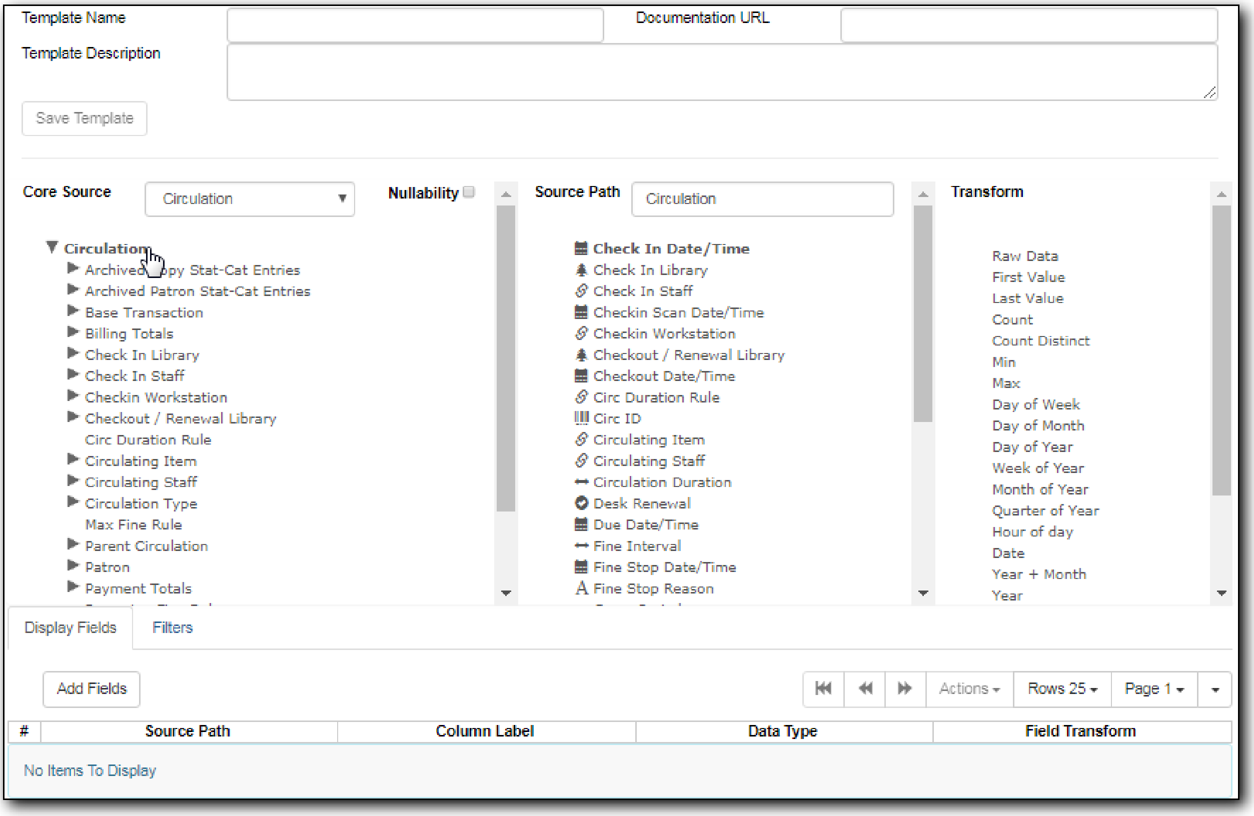
33.1. Choosing Displayed Fields

1. Click on the My Folder template folder where you want the template to be saved.

2. Click on **Create a new Template for this folder**.

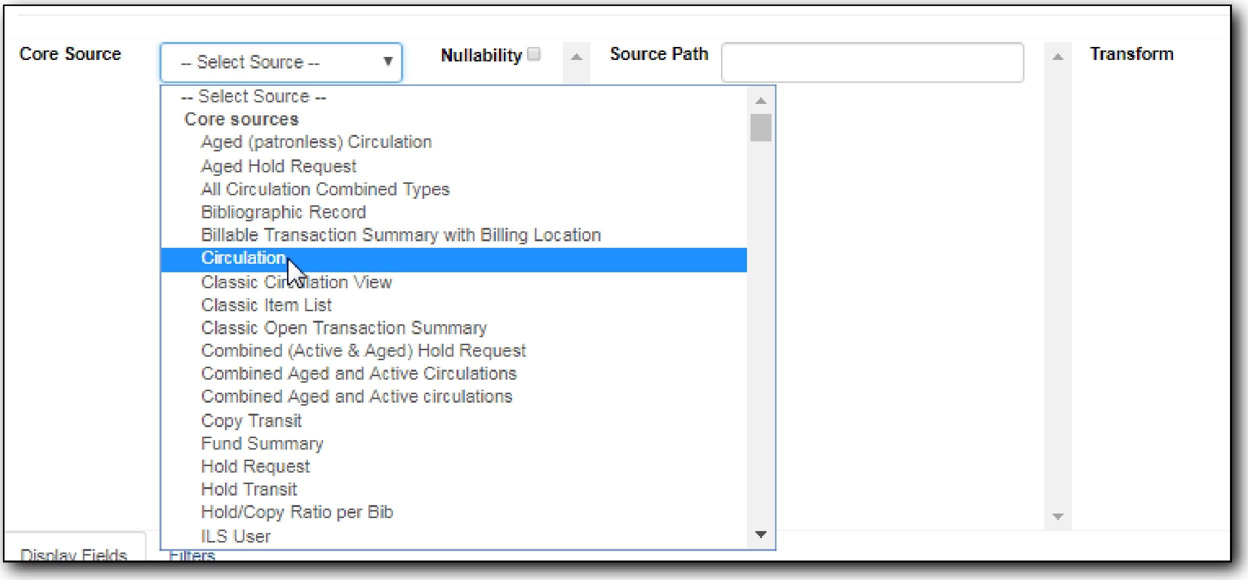


3. You can now see the template creating interface. The three columns below the template name and description are for database source table, fields in the selected table and available transforms for the selected field. You select fields for your template here. The lower portion is the selected displayed fields and fitlers in the template.



We will select the displayed fields for our template first. So make sure Displayed Fields is selected in the lower pane.

The top left hand pane contains the database Core Sources drop-down list. This is the list of tables available as a starting point for your template. Commonly used sources are Circulation (contains circulation records that may be used for circulation statistics and overdue reports), ILS User (contains patron records that may be used for patron reports), and Item (contains copy records that may be used for reports on collection or items with special status).

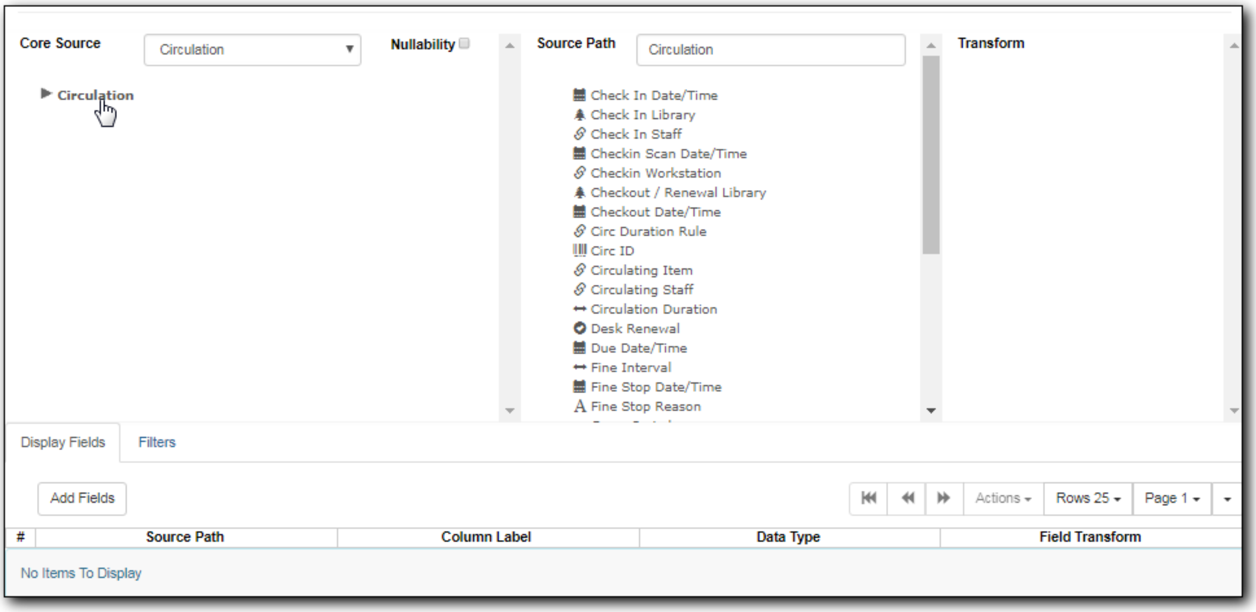


The Nullability check box beside the sources list is for specifying the join type between linked source tables. In most cases, it should be left unchecked by default, which is inner join. However, if you need to include records without a corresponding record in the linked table, you need to use the Nullability check box to specifiy left or right join. For details refer to the tip [nullability_commonly_used_tables] for how to use Nullability check box.

4. Select Circulation in the Sources drop down menu. Note that the Core Sources for reporting are listed first, however it is possible to access all available sources at the bottom of this drop down menu.

CAUTION	One template can have only one starting source table. If you need information from other tables you should follow the links made by the Reports interface to those tables. The reporting program can not put two pieces of isolated information together into one record in the result. When you change a starting table all your existing selected fields will be removed.

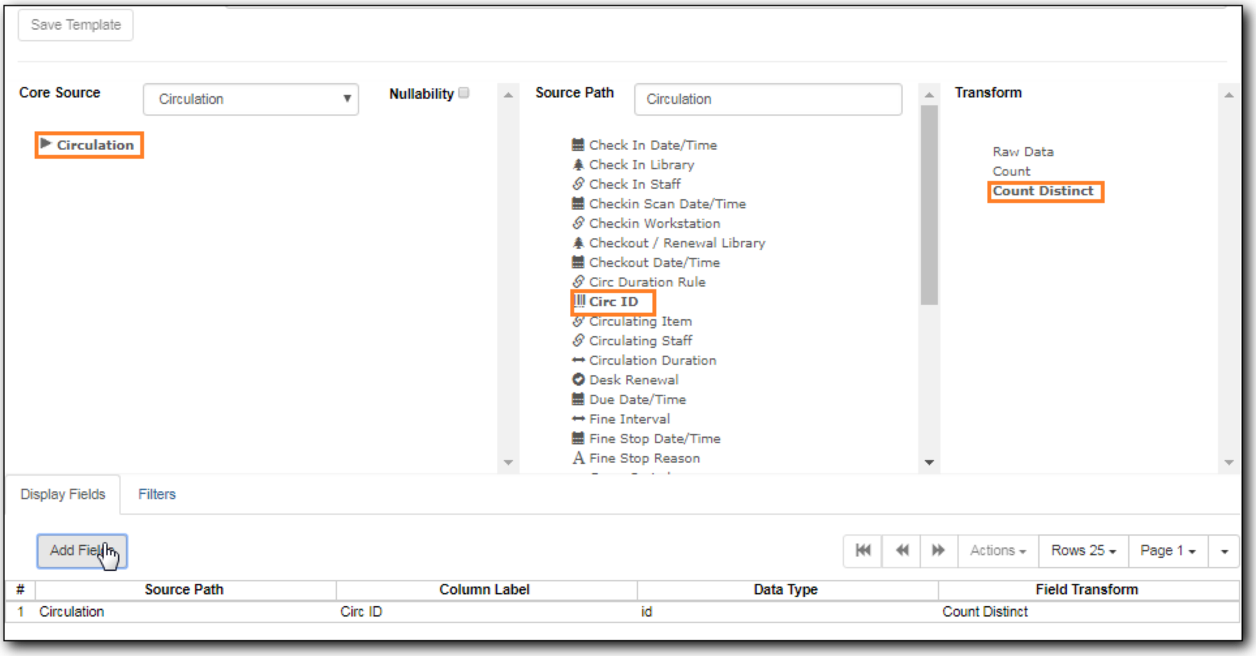
5. Click on Circulation to retrieve all the fields, which will be displayed in the middle column. The icon in front of each entry(field) indicates the data type of the value in the field. Refer to Template Terminology: Data Types, Transforms, and Operators for details.



6. When you select a field in the middle column, the available data transforms of the selected field are displayed in the right column. Transforms specify how data should be processed before they are displayed/compared. Fields may contain different types of data, indicated by the little icon in front of each field. Different data types may be transformed differently. Refer to Template Terminology: Data Types, Transforms, and Operators for details of transforms for each data type.

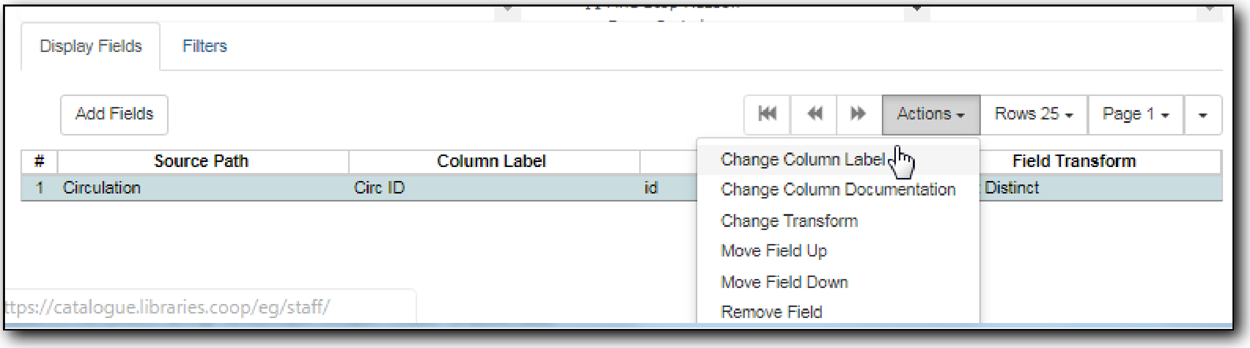
   For our example template, select Circ ID in the middle column, and Count Distinct from the right Transform column. We are counting the number of circulation records.

7. Click **Add Fields** to add this field to your report output. Note that Circ ID now shows up at the bottom under Displayed Fields tab.



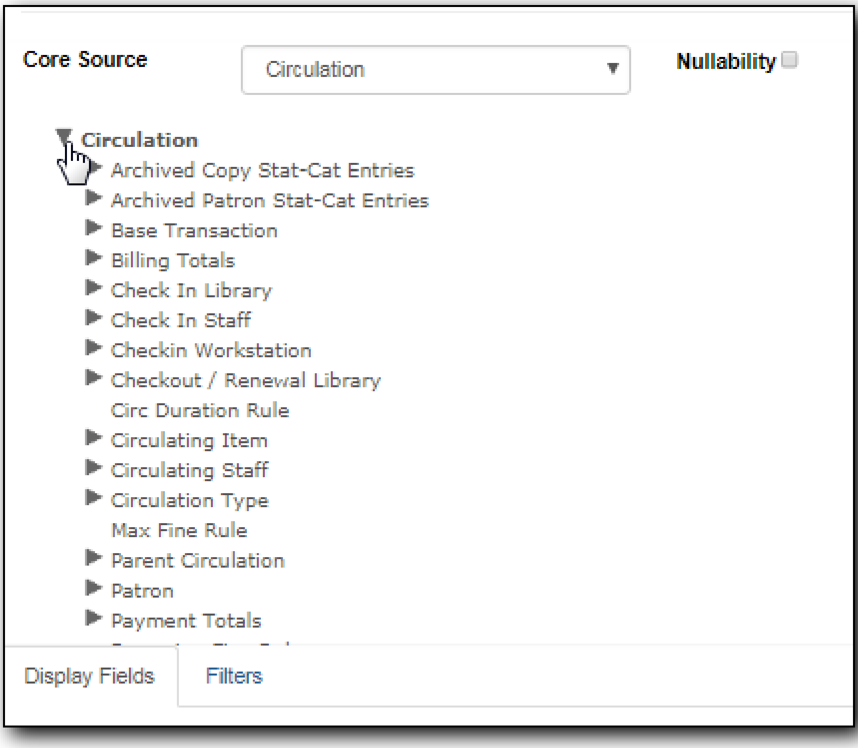
8. Circ ID will be the column header in the report output. You can rename default display names to something more meaningful. To do so in this example, select the Circ ID row and click **Actions** → **Change Column Label**. Type in a new name, "Circ Count", then click **OK/Continue** on the

prompt.



9. Add other data to your report by going back to the Source area and selecting the desired fields. In this example, we are going to add Circulating Item's Shelving Location to further refine the circulation report.

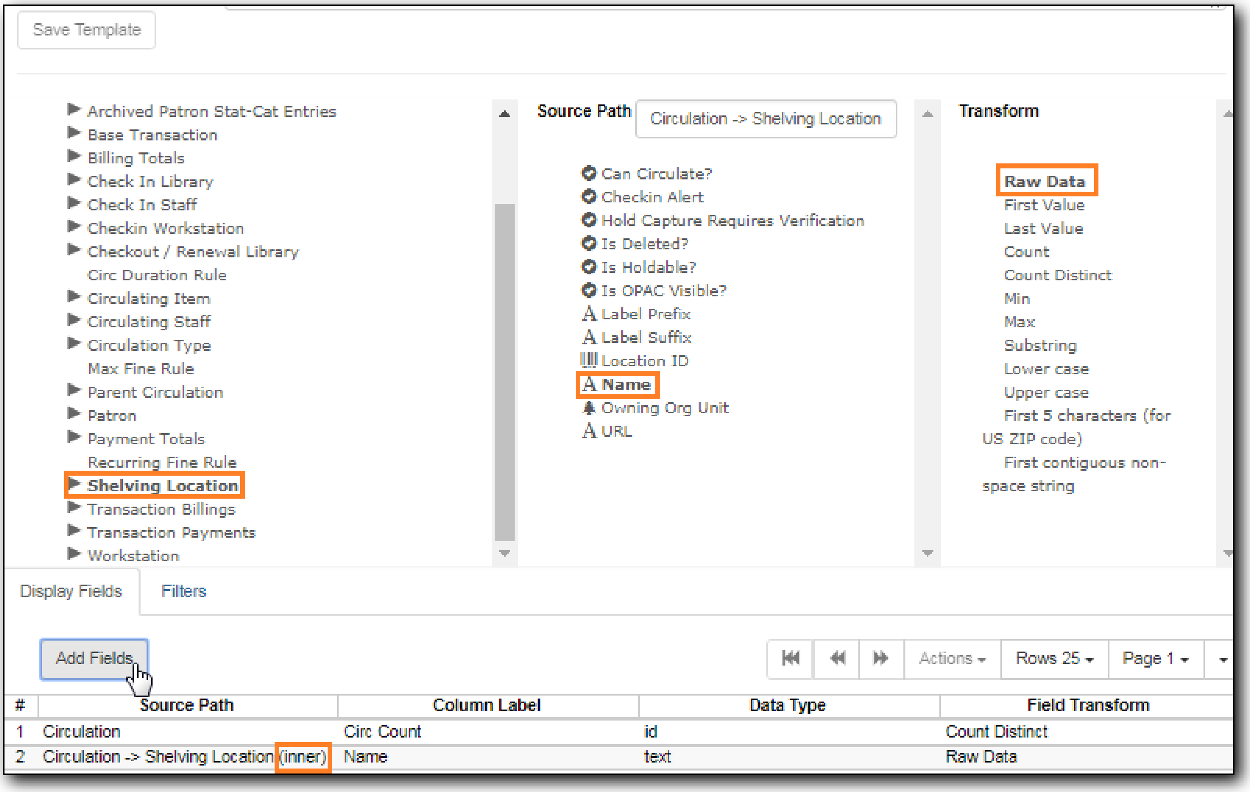
   Shelving Location is listed in the Circulation table. But the icon in front of it indicates it is a , which means it is a record ID from another table. It is meaningless to most users. We need to display shelving location's name. We will follow the link to Shelving Location table to select Name field. Click the arrow in fron of Circulation in the left table column to display the linked tables.



10. Click on Shelving Location in the table list.

11. In the middle Field column, select **Name**.

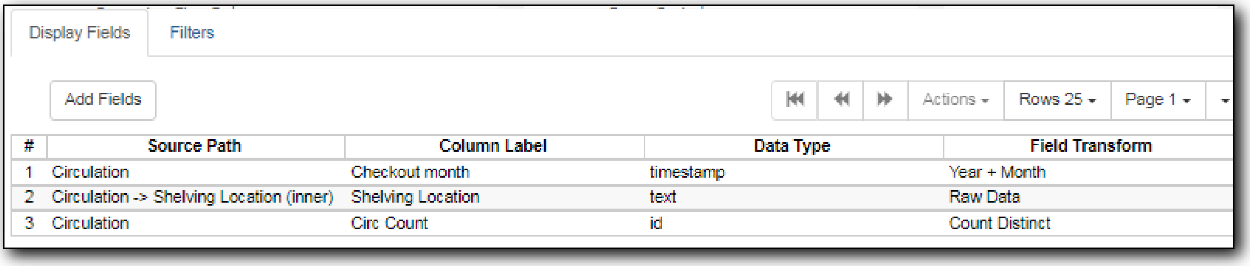
12. In the right Transform column, select Raw Data and click **Add Fields**. Use Raw Data when you do not wish to transform field data in any manner.



13. **Name** will appear in the bottom Displayed Fields tab. Select the Name row and click **Actions** → **Change Column Label** to the field name to Shelving Location.

NOTE	In the left Source Path column, **(inner)** indicates the join type between Circulation and Shelving Location table is inner join.

14. Note that the order of rows (top to bottom) will correspond to the order of columns (left to right) on the final report. The results will be sorted by the columns in this order, too. Select Shelving location and click on **Actions** → **Move Field Up** to move Shelving location before Circ Count. The result will be sorted by Shelving Location first.
15. Return to the Sources area to add more fields to your template. Under Sources click Circulation, then select Check Out Date/Time from the middle Field column.
16. Select Year + Month in the right hand Field Transform column and click Add Fields
17. Check Out Date/Time will appear in the Displayed Fields tab. In the report it will appear as a year and month (YYYY-MM) corresponding to the selected transform.
18. Select the Check Out Date/Time row. Click **Actions** → **Change Column Label** to change the column header to **Checkout month**.
19. Move Checkout month to the top of the list using **Actions** → **Move Field Up**, so that it will be the first column in an MS Excel spreadsheet. Now, the report output will sort by the checkout month first, then by shelving locations.



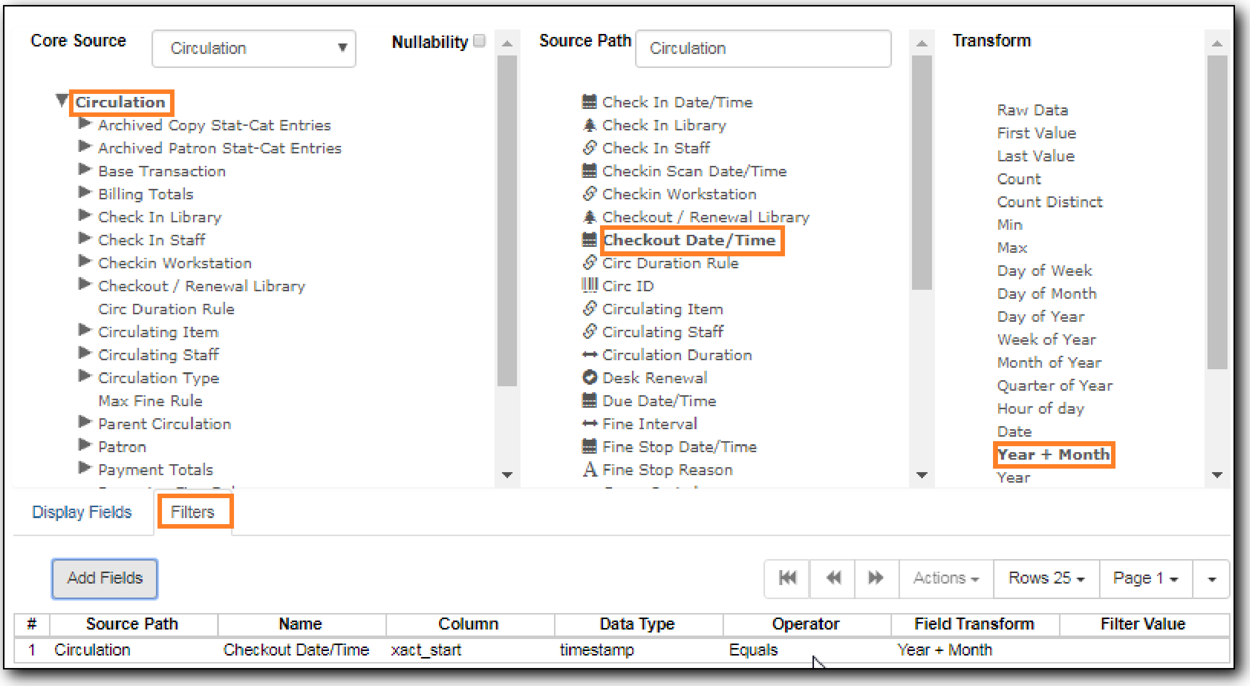
TIP Note that field transform can be changed after fields being added. Use the function on the Actions list.

33.2. Applying Filters

Without filters, all records in the database will be in the result, which is seldom desired, especially in Sitka's context where libraries share the same database. So some filters should be applied to keep out the unwanted records.

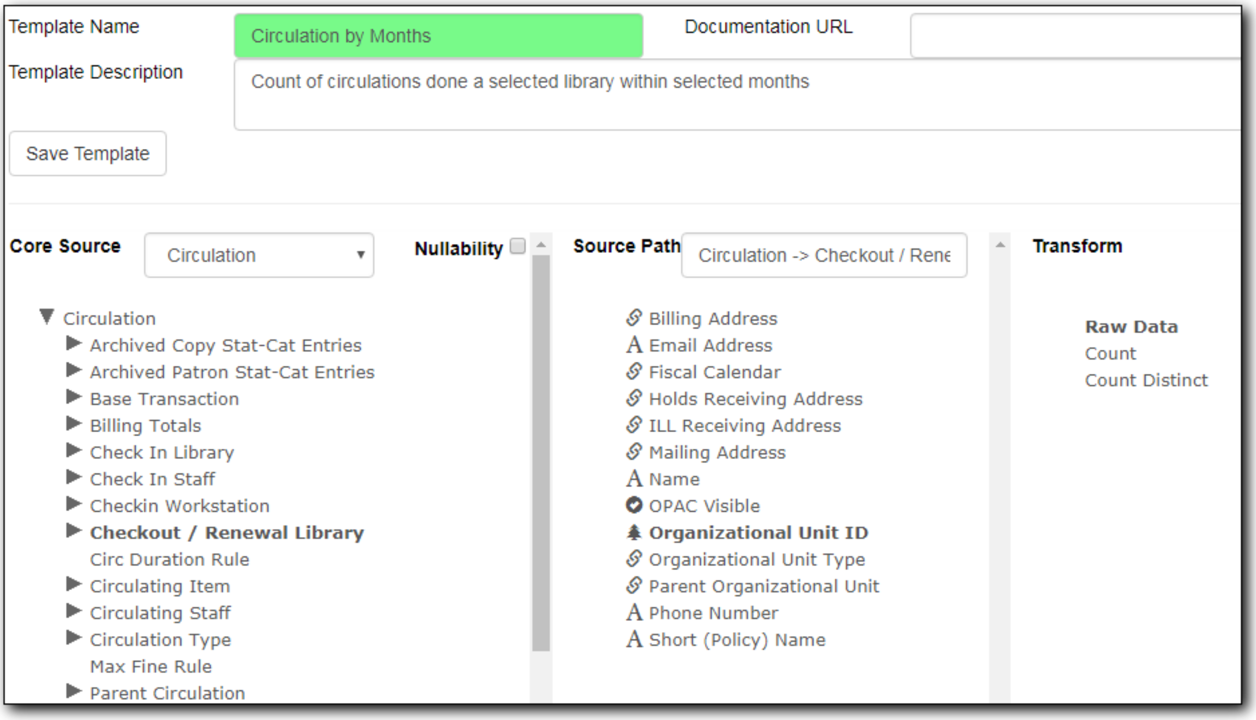
The following procedure shows how to add filters to the example template:

1. Select the Filters tab at the bottom.
2. For this circulation statistics example, select Circulation table, Check Out Date/Time field and Year + Month in transform column,then click on Add Fields. We are going to filter on the checkout month.

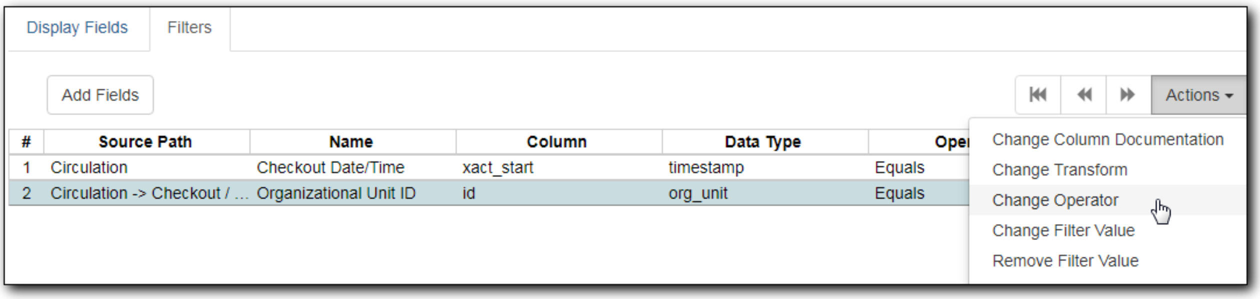


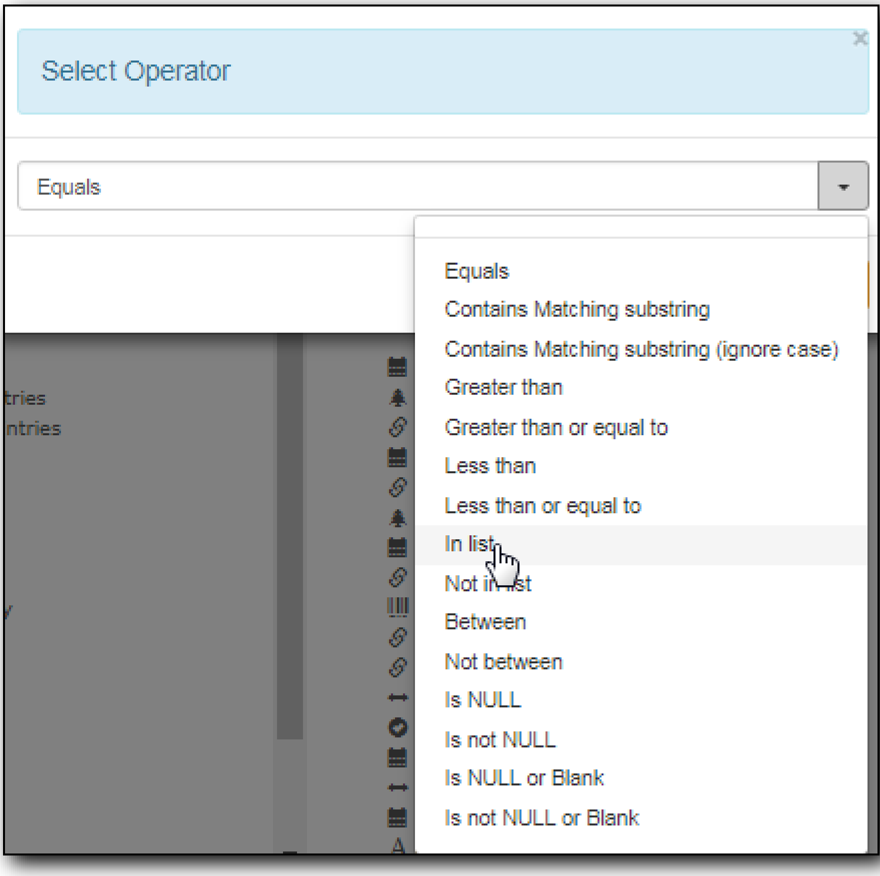
Note that this is a template, so the value for this filter may be filled up when you run the report.

3. To filter on the location of circulation, click the arrow in front of Circulation table to list the linked tables. Click Checkout/Renewal Library table to list its fields. Select Organizational ID and Raw Data transform, then click on Add Fields.



4. Note that the default operator for the filter is Equal, which allows you to specify one checkout library only. For multi-branch libraries, you may want to change the operator to In List so that you could specify multiple branches when you run the report. To do so, you need to change the operator to InList. Select Checkout/Renewal Library row. Click on **Actions** → **Change Operator** and select **In list** from the drop down menu in the popup window.

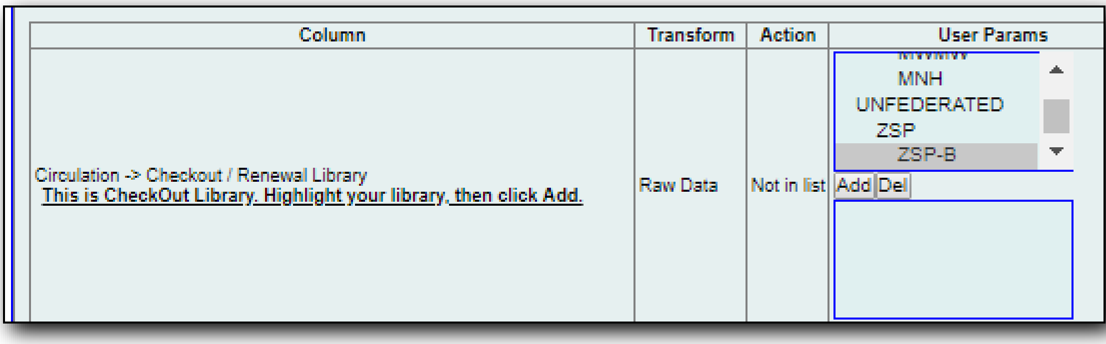




TIP Generally, for filters on ID field, such as the above Checkout/Renewal Library ID, the report interface will generate a selection list for you to choose, instead of a box for you to type in the ID when you run the report.

5. You may add a hint to the filter, e.g. explaining the function of the filter, what value is expected when setting up the report, etc. Select the filter and click **Actions** → **Change Column Documentation** to change field hint.

   In the above example, we added some instruction on how to fill up the filter when setting up the report. The hint will show up on the report creation screen. Below is how it looks like on the report creation screen.



6. Once you have configured your template, you must name and save it. Name this template Circulations by Months. You also need to add a description, otherwise the template can not be saved. Click **Save Template**.

7. You will get a confirmation dialogue box that the template was successfully saved. Click **OK/Continue**.

Once a template is saved, it can not be edited anymore. To make changes you will need to clone it and edit the clone. This will ensure that the work you have done will not be lost. As mentioned before, creating a template is complex. The first try seldom gets the perfect result. Your subsequent changes may not always improve the result. You may need to refer back to your old version. Make changes step-by-step. Check the correctness of the result on each step. This may help you find out the exact cause of the issue. After you have the desired template, you may delete all the interim ones.

The above paragraphs described how to create a template from scratch with a very simple example. You may choose, instead, to use one of the generic templates created by Co-op support to meet common reporting needs. (see Shared Sitka Templates). However, knowing how a template is created will help you understand the report structure and is recommended as an introduction to editing template fields and filters.

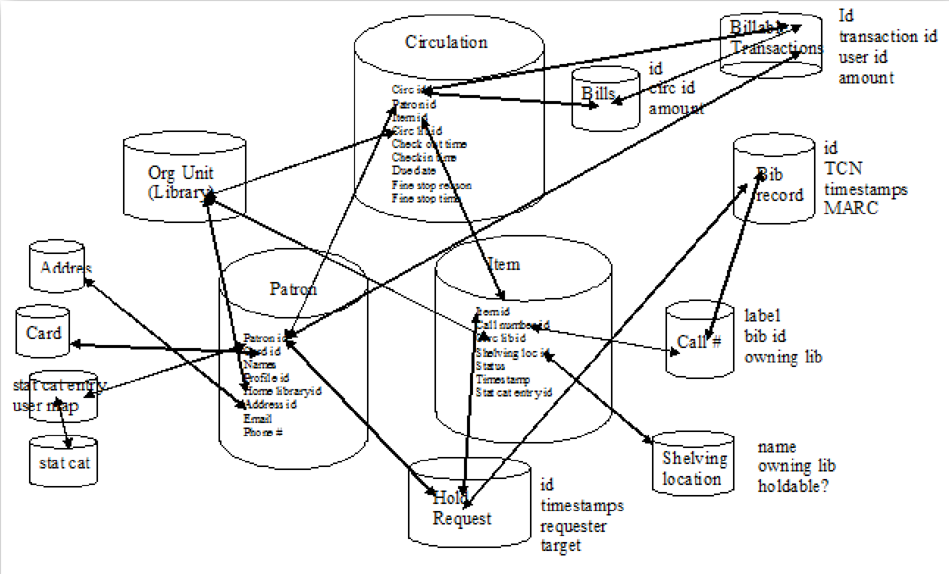
Chapter 34. Commonly Used Tables and Views in Evergreen Database

You are creating/updating records when you work on Evergreen. Reporting means you extract some of these records from the database that meet your requirements. Understanding the Evergreen database and how records are created/updated when tasks are performed on the staff client, will help you when you create templates and set up reports on the Reports interface.

There are various kinds of data used by Evergreen, such as patron's names, address, barcode, item's barcode, shelving location, status, price; checkout date, returned date, fines and bills and so on. This data must be organized in an efficient and effective way to make sure they can be stored and retrieved easily.

Evergreen uses various tables to keep each type of records. You can visualize a table as an MS Excel Worksheet: a specified number of columns with unlimited number of rows. Each column is called a field in the database terminology and each row is a record. There are many tables in Evergreen database. Each contains a certain type of records. The fields in a record you see on the Staff Client may be from more than one tables. For example, in a patron record, you can find patron's names, address, phone number, barcode, profile, etc. all in one record. But in the database, patron's address, barcode, and profile are in separate tables. You do not need to know where these fields are from when editing a patron record on the Staff Client, but you have to know it when creating a template on the Reports interface.

Since various information about one patron is saved in separate tables, there must be a mechanism of matching the information about one patron correctly to make sure all information is about the same patron. This is done via recording the patron id (a unique number in the main patron record) in every related table. So via recording the id of a record in another table, two tables are connected. The connections among many tables are pre-made by the Reports interface. You just need to follow the link to find the data saved in the related table. Below is a simplified diagram showing the connections among some commonly used tables/views on the Reports interface, which can be a guide for you to find various fields in different tables. Some explanation of these tables is after the diagram.



A simplified diagram of the tables and connections among them made by the Reports interface

34.1. Commonly used tables and views

ILS User (aka Patron or User): contains patron records. A patron's name, phone number, email address, and registration date can all be found in this table. Follow the links to the table Current Library Card to find a patron's current barcode, Circulation to find the circulation history, Home Library, Mailing Address, Physical Address, and Main Profile Group, etc. to find more information about the patron.

Item (aka Circulating Item): contains copy records. Item's barcode, creation date, active date, last edited date, last copy status change date and price are in this table. For related information like call number, circulating library, circ modifier, status, shelving location, etc., you need to follow the links to the respective table to find them. For title information you need to follow the Call Number table to the Bibliographic Record table to find it. Follow the link to the Circulation table to find an item's circulation history.

Pre-catalogued item information such as dummy ISBN, title and author are also in this table. When a pre-catalogued item is checked out, an item record is created. If the barcode is already in the table and the item is not marked deleted, the item record will be updated with the new title, author, etc.

Bibliographic Record: Contains title information. To find the basic bibliographic information such as title, author, ISBN, etc., follow the link to Simple Records Extract.

Circulation: Contains circulation records, including pre-catalogued item circulations. When an item is checked out, a circulation record is created. When an item is renewed, the existing circulation record is closed and another record is created. Below are some important timestamps in this table.

Checkout Date/Time: the time when an item is checked out

CheckIn Date/Time: the effective date when the item is treated as checked-in

CheckIn Scan Date/Time: the time when the check in action is taken

Due Date/Time: For all daily loans the due time is 23:59:59 of the day in Pacific Time. Hourly loans have specific time with time zone information.

Fine Stops Date/Time: the date when the Maximum Fine limit has been reached, or the item is returned, marked lost or claimed returned. After this date, the fine generator will not create new overdue fines for this circulation.

Record Creation Date/Time: the date and time when the circulation record is created. For online checkout it is the same as Checkout Date/Time. For offline checkout, this date is the offline transaction processing date.

Transaction Finish Date/Time: the date when the bills linked to this checkout have been resolved. For a regular checkout without bills this field is filled with the checkin time when the item is returned.

Non-catalogued Circulation: When a non-catalogued checkout is recorded, a record is created in this table. Non-catalogued item category can be found in the linked Non-Cat Item Type table.

In-house Use: Contains the catalogued item in-house use records.

Non-catalogued In-house Use: Contains the non-catalogued item in-house use records. Follow the link to Item Type to find the non-catalogued item category.

Copy Transit: When a copy is sent in transit, regardless of whether it is going back to its circulating library or going to fill a hold, a copy transit record is created in this table. Follow the link to Transit Copy to find the item information.

Hold Transit: When a copy is sent in transit to fill a hold, a hold transit record is created in this table and the Copy Transit table. So this table contains a subset of records of the Copy Transit table. You may find hold information following the link to Hold Requiring Transit. Follow the link to Transit Copy to find the item information.

Hold Request: When a hold is placed, a hold record is created in this table. You may find the hold receiver's information in Hold User. Requesting User is the person who takes the placing hold action. It can be the hold receiver or a staff member. Generally if the Hold User is different from the Requesting User, this is a staff-placed hold. Hold Copy Map equals Eligible Copies. Copies that can be used to fill the hold are in this table.

NOTE	Target Object ID is shown as a link. But there is no linked table in the Source pane. The value in this field could be a bibliographic record id, a volume record id or a copy record id depending on the hold type.

Timestamps in this table:

Capture Date/Time: The time when the hold achieves hold shelf or hold-in-transit status.

Fulfillment Date/Time: the time when the on-hold item is checked out.

Hold Cancel Date/Time: the time when the hold is cancelled.

Hold Expire Date/Time: This could be the date calculated based on your library’s default Hold Expire Interval or a selected date when placing the hold.

Last Targeting Date/Time: The last time the hold targeting program checked for a target copy for the hold. It usually has the same time as the Hold Request Time. It is usually not useful for reporting, But it may serve as an indicator of whether the request time has been edited.

Notify Time: when the email notice is sent out.

Request Date/Time: Usually this is when the hold is placed. But it is editable on the staff client. So sometimes this may be the request time chosen by the staff.

Shelf Expire Time: the date is calculated based on the Shelf Time and your library’s Default Hold Shelf Expire Interval.

Shelf Time: when the hold achieves On Hold Shelf status.

Thaw Date: the activation date for a suspended hold.

Bills and Payments tables and views

Billing Line Item. This table contains all the billing line items such as each day’s overdue fines and the grocery bills created manually. The records in this table are viewable on the Full Details screen on Bills in the staff client.

Billable Transaction with Billing Location: this table contains the summary records of billings and payments. Most information in these records is displayed on Bills or Bills History screen. The records are updated when either the related billings or payments are updated. Transaction ID is the bill ID. It is also the circulation record ID for circulation bills. Transaction Start Time is the grocery bill creation time or circulation checkout time. Transaction Finish Time is when the bill is resolved.

Payments: ALL contains all payment records. When a lump sum of payment is made on the staff client, one or more payment records are created depending on the number of bills it resolved or partially resolved. One bill may be resolved by multiple payments.

Payments: Brick-and-mortar contains all payments made at the circulation desk.

Payments: Desk: Cash/Check/Credit Card payment.

Payments: Non-drawer Staff: Forgive/Work/Goods/Patron Credit payments.

TIP

- A view is a virtual table which contains records meeting defined requirements. The fields in a view can be from one or more tables. Before you use a view for your report, you need to make sure the view contains the type of records that you want to report on. For example, Overdue Circulation is a view which contains circulation records without checkin date and the due date past "today". It does not work for a report on last month’s circulation statistics, but it makes an overdue report easier.
- By default, tables are often joined by inner join on the report interface, which means the result records should be in both linked tables. For example,an item may

or may not be circulated, meaning having circulation records or not. An inner join between Circulation table and Item table will not contain those items that do not have circulation history, as there is no record in Circulation table for them. However, sometimes you may want to include all items. You may achieve it by using other join types, which can be defined by the Nullability checkbox beside the Source table list on Template Creation screen. You may see Default, Child Nullable and Parent Nullable in a dropdown list in front of the table names. None means a inner join; Parent is right outer join, meaning all records in the Parent table (the linked from table) are included; Child is left outer join, meaning all records in the child table (the linked to table) are included.

Chapter 35. Template Terminology: Data Types, Transforms, and Operators

35.1. Data Types

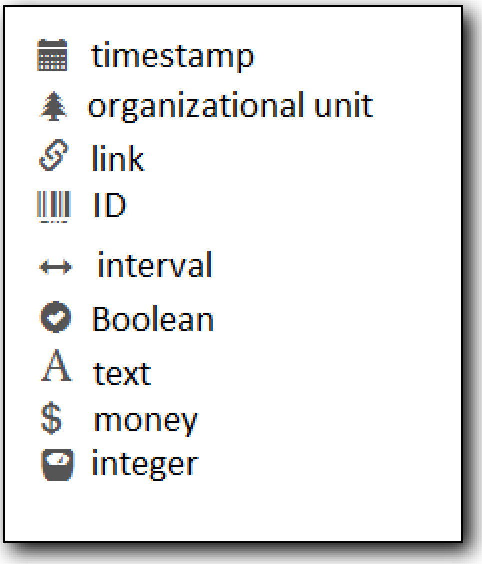
The central column of the Database Source Browser lists Field Name and Data Type for the selected database table.

Data Type is associated with each field. It tells what kind of information is stored in the field. The system handles the information differently based on the data type. Each data type has its own characteristics and uses:

Data Type	Description	Notes
Boolean	Contains either "true" or "false".	Examples in Evergreen: "deleted" in item/patron record, "circulate?" in item record.
ID	Unique number assigned by the database to identify a record	IDs look like numbers, but the id data type is treated specially by the software for determining how tables are linked. Id is a good candidate field for counting records.
Integer	A number like 1, 2, 3.	Examples in Evergreen: "remaining renewal count" in circulation record, "claimed returned count" in patron record.
Interval	Time intervals, such as "2 weeks" and "6 months"	Examples in Evergreen: "loan duration" and "grace period" in circulation record,

Data Type	Description	Notes
Link	It is similar to the id data type. It is the id of a record in another table.	Examples in Evergreen: "user id" and "item id" in a circulation record. Link outputs a number that is a meaningful reference for the database but not of much use to a human user. You will usually want to drill further down the tree in the Sources pane and select fields from the linked table. However, in some instances you might want to use a link field. For example, to count the number of patrons who borrowed items you could do a count on the "user id" in the circulation record.
Money	Monetary amount	Examples in Evergreen: "price" in item record, "billing amount" in billing record.
Org_unit	Organizational unit. It is a number. It acts like link data type.	In Evergreen, libraries are organizational units. In Sitka context they are organized into a tree structure with consortium, library federations, libraries/library systems and branches for library systems. To filter on a library, make sure you choose the field having org_unit data type. To display a library, it is a better option to drill down to the org unit record to display the "name" of it.
Text	Text field. Usually it takes whatever is typed into the field.	Examples: "call number label" in call number record, "patron’s names".
Timestamp	A very detailed time such as 2018-11-25 17:54:26-07	Example: checkout time in circulation record, last status date in item record.

Evergreen uses icons to indicate data type on the report interface.



35.2. Field Transforms

Transforms determine how data is processed when it is retrieved from the database. Different data types can be transformed differently. Not all transforms are available to a certain data type.

Raw Data: To display the data exactly as it is stored in the database. It is available to all data types.

Date: This transform presents a timestamp as a human-readable date in yyyy-mm-dd format. For example, timestamp 2018-11-25 17:54:26-07 will be displayed as 2018-11-25. Date is available to timestamp field.

Year + Month: Presents a timestamp as the year and month in yyyy-mm format. For example, 2018-11-25 17:54:26-07 will be displayed as 2018-11. If filtering on a timestamp transformed to Year + Month, all days in the calendar month are included. It is available to timestamp field.

Upper Case/Lower Case: Transforms text to all upper/lower case. They are only available for the text data type.

Substring: This transform can be applied to filters, not display fields. It matches the given value with a continuous string of characters in the field. For example, if a given value is "123" and the match is with a call number field, call numbers like "123.34", "ANF 123.34", "JNF 233.123", etc. will be in the result list. Substring is only available to text data type.

First Continuous Non-space string: The first word (or string of numbers and/or characters until the first spacing) in a field is returned by this transform. For example, this transform will return "E" from text "E DOR", "E 123", etc. This transform is available to the text data type.

Count: This transform counts the records found. Though you can count by any field, very often id field is used. Count is available to text, integer, id, money, and timestamp.

Count Distinct: This transform counts the number of records with unique value in the field. If two records have the same value in the field, they will be counted once only. A typical example of using Count Distinct is counting the number of active patrons who borrowed items at a library. Each patron can be counted once only but he/she may borrow multiple items. Transforming the patron id in circulation record with Count Distinct will result in the required number. Since each patron has a unique id, she/her will be counted once only. Count Distinct is available to text, integer, id, money, and timestamp.

Max: It compares the values in the field of all result records and then returns the one record with the highest value. Max is available to text, integer, money, and timestamp. For timestamp the highest value means the latest date. For example, if a checkout date is transformed by Max, the returned date is the last checkout date.

Min: It works the same way as Max except that it returns the lowest value. Min is available to text, integer, money, and timestamp.

35.3. Operators

Operators describe how two pieces of data can be compared to each other. They are used when creating filters in a template to determine which records should be included in the result. The record is included when the comparison returns "TRUE". The possible ways of comparing data are related to data type and data transforms. Below are some commonly used operators.

Equals: Compares two operands and returns TRUE if they are exactly the same.

In List: It is similar to Equals, except it allows you specify multiple parameters and returns "TRUE" if the field is equal to any one of the given values.

Not In List: It is the opposite of In List. Multiple parameters can be specified. TRUE will be returned only when none of the parameters is matched with the value in the field.

Greater Than: This operator returns TRUE if a field is greater than your parameter. For text fields, the string is compared character by character in accordance with the general rule that numerical characters are smaller than alphabetical characters and upper case alphabeticals are smaller than lower case alphabeticals; for timestamps "Greater Than" can be thought of as "later than" or "after".

Less Than: This operator returns TRUE if a field is less than, lower than, earlier than or smaller than your parameter.

Between: Two parameters are required by this operator. TRUE is returned when the field value is Greater Than or Equal to the smaller given value and Less Than or Equal to the bigger given value. The smaller parameter should always comes first when filling in a filter with this operator. For example: between 3 and 5 is correct. Between 5 and 3 will return FALSE on the Reports interface. For timestamp earlier date always comes first.

Is NULL or Blank: Returns TRUE for fields that contain no data or blank string. For most intents and purposes this operator should be used when there is no visible value in the field.

Contains Matching Substring: This operator checks if any part of the field matches the given parameter. It is case-sensitive.

Contains Matching Substring (Ignore Case): This operator is identical to Contains Matching Substring, except it is not case-sensitive.

Serials

Chapter 36. Serials Administration

Serials Training Video - Serials Overview (10:41)

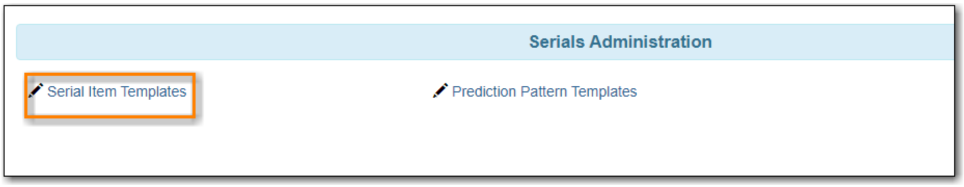
36.1. Serial Item Templates

Serials Training Video - Serial Copy Templates (2:30)

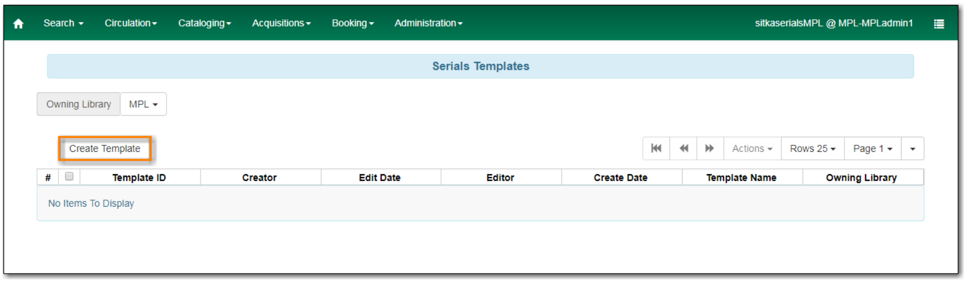
Serial Item Templates specify the item attributes that should be applied when a serial item is received. You must create at least one template to receive serials.

36.1.1. Create a Serial Item Template

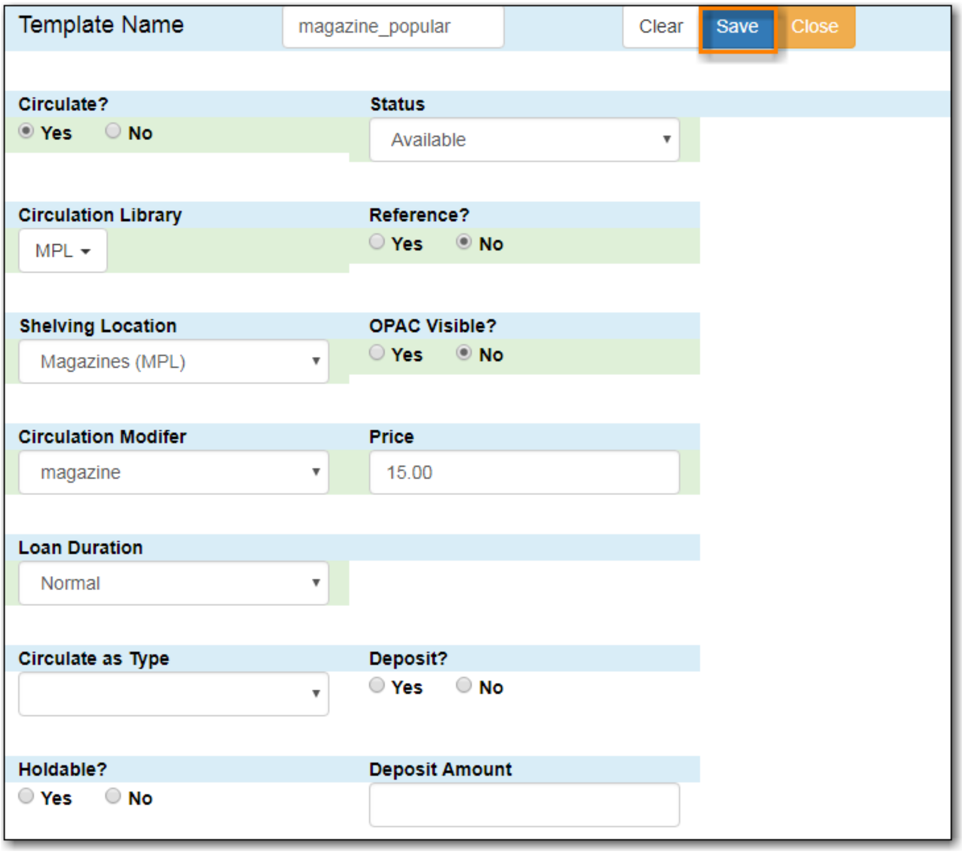
1. Click **Administration** → **Serials Administration** → **Serial Item Templates**.



2. Click **Create Template**.

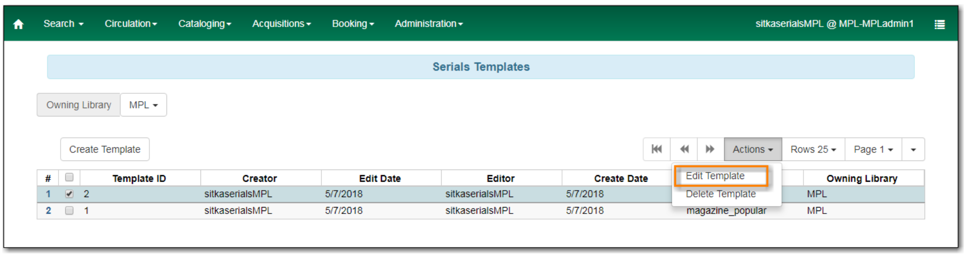


3. Enter a *Template Name*.
4. Choose the item attributes for this template.
5. Click **Save**.



36.1.2. Edit a Serial Item Template

1. Click **Administration** → **Serials Administration** → **Serial Item Templates**.
2. Click the check box beside the template you want to edit.
3. Click **Actions** → Choose *Edit Template*.



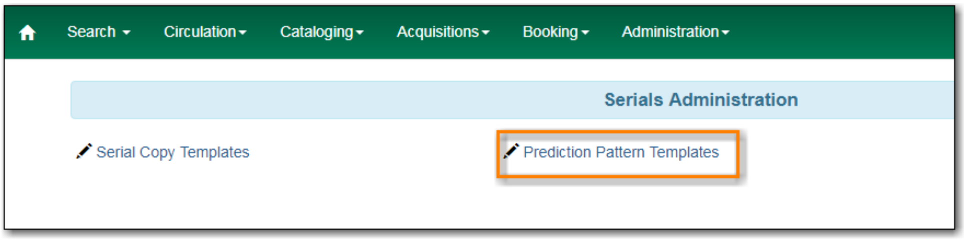
4. Edit the item attributes for this template.
5. Click **Save**.

NOTE	Serial Item Templates cannot be deleted.

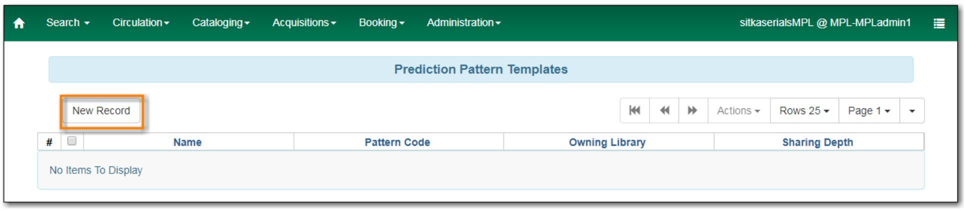
36.2. Prediction Pattern Templates

36.2.1. Create a Prediction Pattern Template

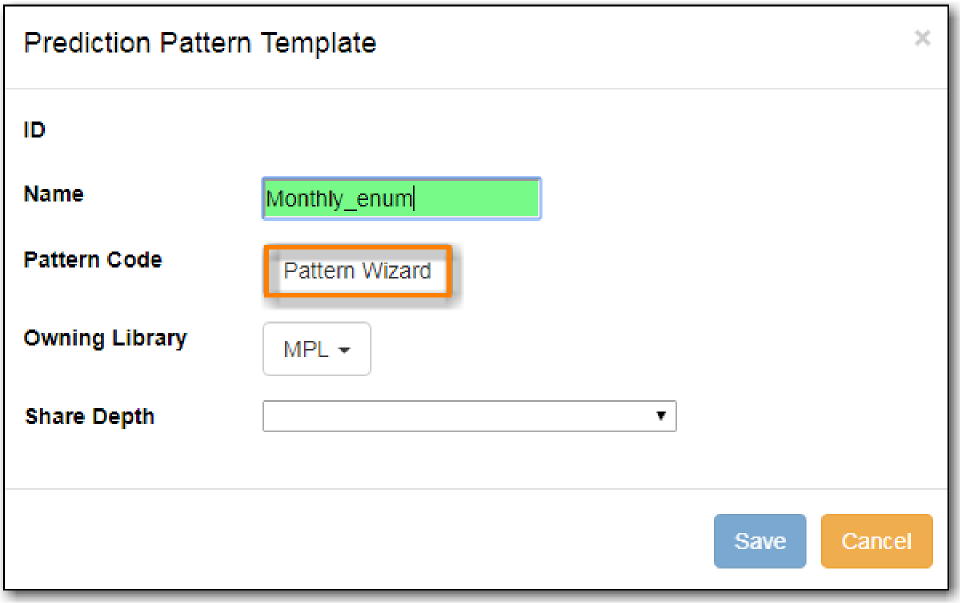
1. Click **Administration** → **Serials Administration** → **Prediction Pattern Templates**.



2. Click **New Record**.

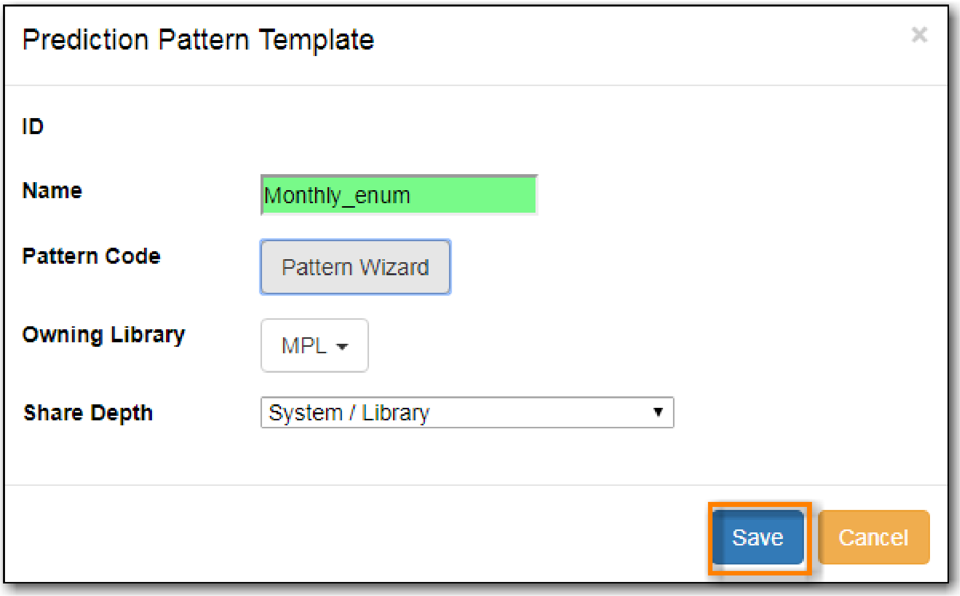


3. Enter a **Name**.
4. Click **Pattern Wizard**. The wizard has five tabs that will take you through the steps to create a prediction pattern for your publication.



    a. See Pattern Wizard for detailed instructions.

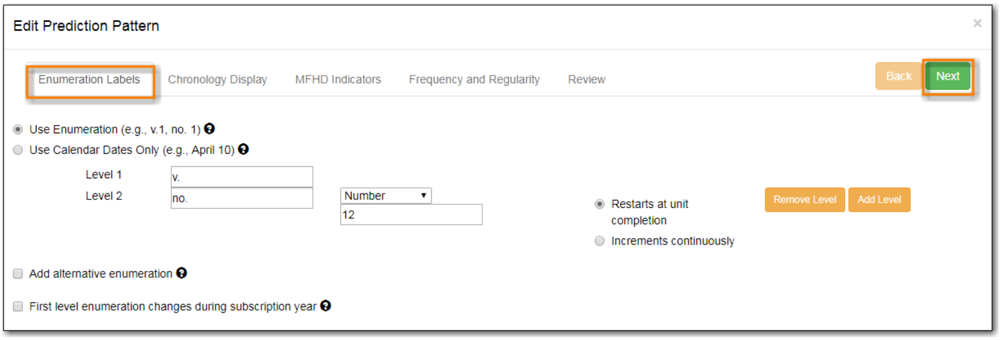
5. Choose the **Owning Library**.
6. Choose the **Share Depth**.
7. Click **Save**.



Pattern Wizard

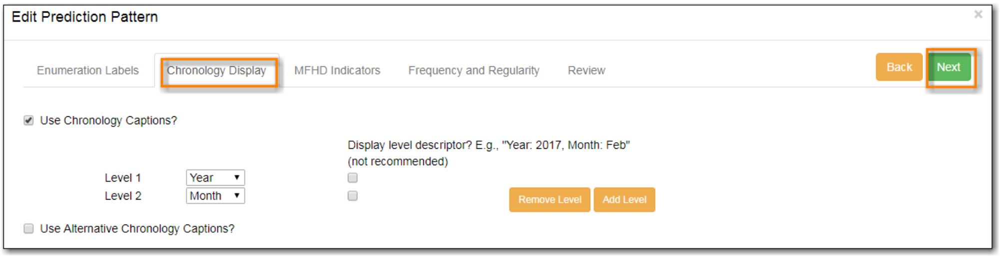
Enumeration Labels

1. Select the radio button adjacent to **Use enumerations**.
   a. The enumerations conform to $a-$h of the 853,854 and 855 MARC tags.
   b. If the publication only uses dates, select the radio button adjacent to **Use Calendar Dates Only** and click **Next** in the upper right-hand corner. *Skip to next step*.
2. Enter the first level of enumeration in the field labeled **Level 1** → Click **Add Level**.
   a. A common first level enumeration is volume, or "v.".
3. Enter the second level of enumeration in the field labeled **Level 2**.
   a. A common second level enumeration is number, or "no.".
4. Select if the second level of enumeration is a set Number, Varies, or is Undetermined.
   a. **Number** - Enter the number of bibliographic units per next higher level (e.g. 12 no. per v.).
      i. This conforms to $u in the 853, 854, and 855 MARC tags.
   b. Select the radio button for the enumeration scheme: **Restarts at unit completion** or **Increments continuously**.
      i. This conforms to $v in the 853, 854, and 855 MARC tags.
5. Check the box adjacent to **Add alternative enumeration** if the publication uses an alternative enumeration.
6. Check the box adjacent to **First level enumeration changes during subscription year** to configure calendar changes if needed.
   a. A common calendar change is for the first level of enumeration to increment every January.
   b. Select when the Change occurs from the drop down menu: Start of the month, Specific date, or Start of season.
   c. Select the specific point in time at which the first level of enumeration should change.
7. Click **Next**



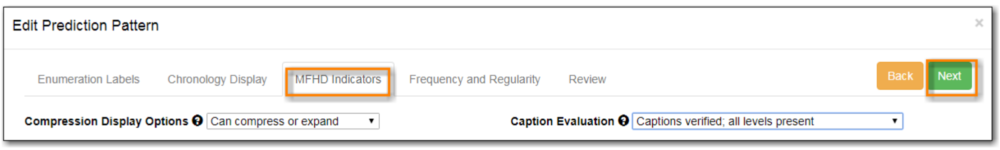
Chronology display

1. Check the box adjacent to **Use Chronology Captions?**
2. Choose a chronological unit for the first level.
3. Do not check **Display level descriptor?**.
    a. If checked the term for the unit selected, such as "Year" and "Month" will display next to the chronology caption in the catalog.
4. To add additional levels of chronology for display, click Add level.
    a. Each level that you add must be a smaller chronological unit than the previous level (e.g. Level 1 = Year, Level 2 = Month).
5. Check the box adjacent to Use Alternative Chronology Captions? If the publication uses alternative chronology.
6. Click **Next**



MFHD Indicators

1. Choose a **Compression Display Option**
    a. Compressibility and expandability correspond to the first indicator in the 853 tag.
    b. Sitka recommends **Can compress or expand**
2. Choose a **Caption Evaluation**
    a. Caption Evaluation corresponds to the second indicator in the 853 tag.
    b. Sitka recommends **Captions verified; all levels present**
3. Click **Next**

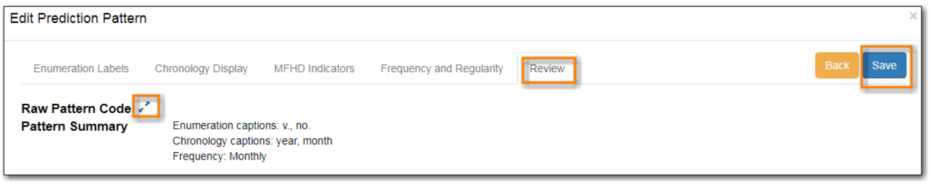


Frequency and Regularity

1. Click the radio button for **Pre-selected** and choose the frequency from the drop down menu.
    a. Alternatively- Use number of issues per year and enter the total number of issues in the field.
2. If the publication has combined, skipped, or special issues, that should be accounted for in the publication pattern, check the box adjacent to Use specific regularity information?.
    a. From the first drop down menu, select the appropriate publication information: Combined, Omitted, or Published issues.
    b. From the subsequent drop down menus, select the appropriate frequency and issue information.
    c. Add additional regularity rows as needed.
    d. For a Combined issue, enter the relevant combined issue code.
        i. E.g., for a monthly combined issue, enter 02/03 to specify that February and March are combined.
3. Click **Next**

Review

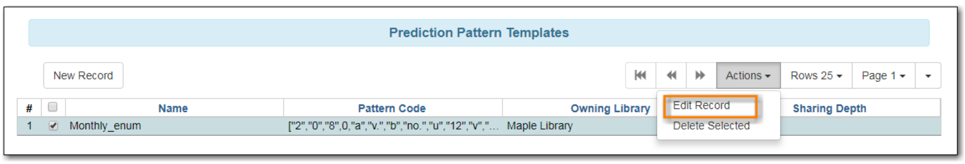
1. Review the **Pattern Summary**
    a. Click the blue arrows to see the **Raw Pattern Code**



2. Click **Save**

36.2.2. Edit a Prediction Pattern Template

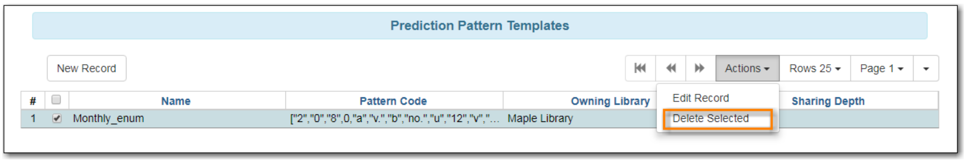
1. Click **Administration** → **Serials Administration** → **Prediction Pattern Templates**.
2. Click the check box beside the template you want to edit.
3. Click **Actions** → Choose **Edit Record**.



NOTE Prediction Patterns can be edited after creation as long as all predicted issues have the status of "Expected". Once an issue is moved into a different status, the Prediction Pattern cannot be changed.

36.2.3. Delete a Prediction Pattern Template

1. Click **Administration** → **Serials Administration** → **Prediction Pattern Templates**.
2. Click the check box beside the template you want to delete.
3. Click **Actions** → Choose **Delete Selected**.



NOTE Prediction Pattern Templates that are being used by subscriptions cannot be deleted.

36.3. Serials Settings

Click **Administration** → **Local Administration** → **Library Settings Editor**.

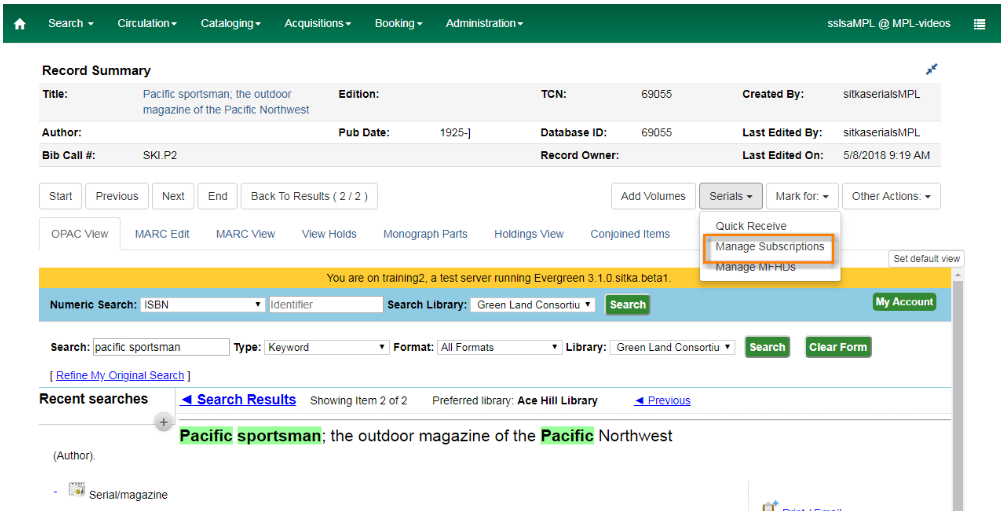
The following settings should be configured in the Library Settings Editor before you start using the Serials module.

Group	Setting	Description	Options	Notes
Serials	Default display grouping for serials distributions presented in the OPAC		"enum" or "chron"	**enum** display in the OPAC by volume and number. **chron** display in the OPAC by month and year .
Serials	Previous Issuance Copy Location	When a serial issuance is received, copies (units) of the previous issuance will be automatically moved into the configured shelving location		use this setting to specify a default copy location for serials
OPAC	Use fully compressed serials holdings		"true" or "false"	**true** is recommended

Chapter 37. Serials Subscriptions

The Serials Module can be used to create subscriptions, distributions, streams, and prediction patterns, as well as to generate predictions and receive issues as they come in to the library.

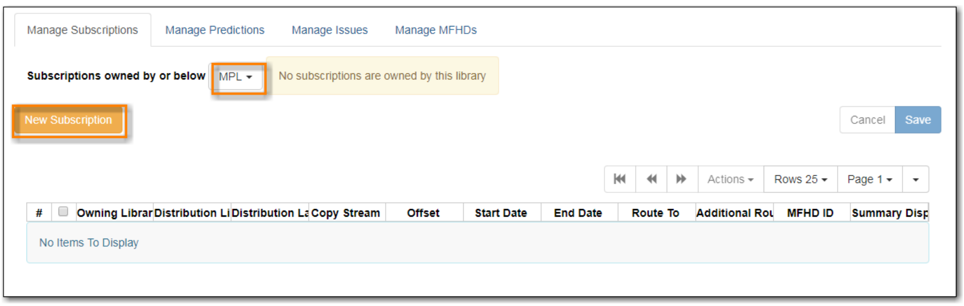
To access the Serials Module, retrieve a bibliographic record and click on **Serials → Manage Subscriptions**. This will open the serials interface for that particular record.



37.1. Create and Manage Subscriptions

A subscription must be added to a bibliographic record. If the record is not already in the catalogue, you can import it via any of your preferred methods (MARC import, Z39.50 search, etc.). A subscription is designed to hold all information related to a single serial title. Therefore, each library is likely to have only one subscription per serial title.

1. Retrieve the bibliographic record you would like to attach your subscription to.
2. Click **Serials** → Choose **Manage Subscriptions**.
3. Existing subscriptions for the workstation location will be displayed.
4. Click **New Subscription**



5. Enter the subscription information.
   a. **Owned By** - Owning Library
   b. **Start Date** - Subscription start date
   c. **End Date** - Subscription end date (Optional)

d. **Expected Offset** - Difference between the nominal publishing date of an issue and the date that you expect to receive your copy. (Optional)

e. **Distributed At** - Circulation Library

   i. Click **Add Distribution** to add a second copy to the subscription

f. **Label** - This field is not publicly visible and only appears when an item is received. There are no limits on the number of characters that can be entered in this field. It may be useful to identify the branch to which you are distributing these issues in this field.

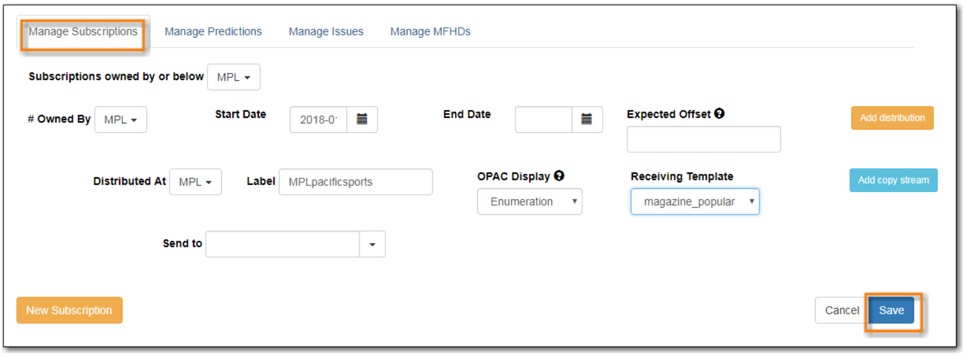
g. **OPAC Display** - Whether the public catalog display of issues should be grouped by chronology (e.g., years) or enumeration (e.g., volume and number).

h. **Receiving Template** - Specifies the item attributes applied on receipt - see [serial-copy-template] for more information.

i. **Send to** - Designate specific users and/or departments that serial items need to be routed to upon receiving.

   i. Click **Add Copy stream** to add additional Routing.

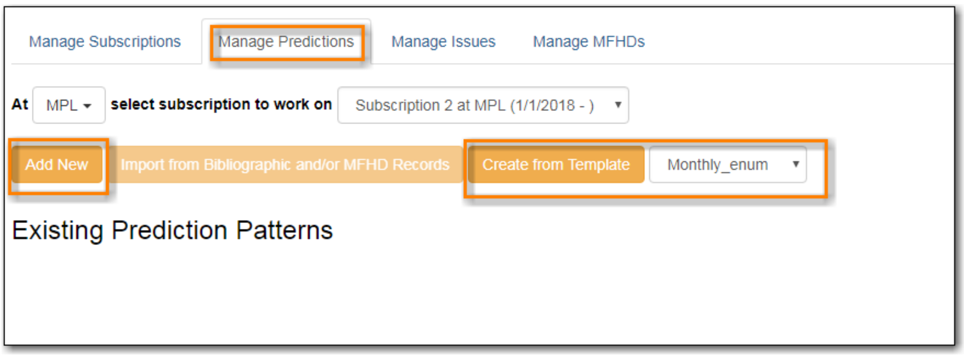
6. Click **Save**



37.2. Create and Manage Predictions

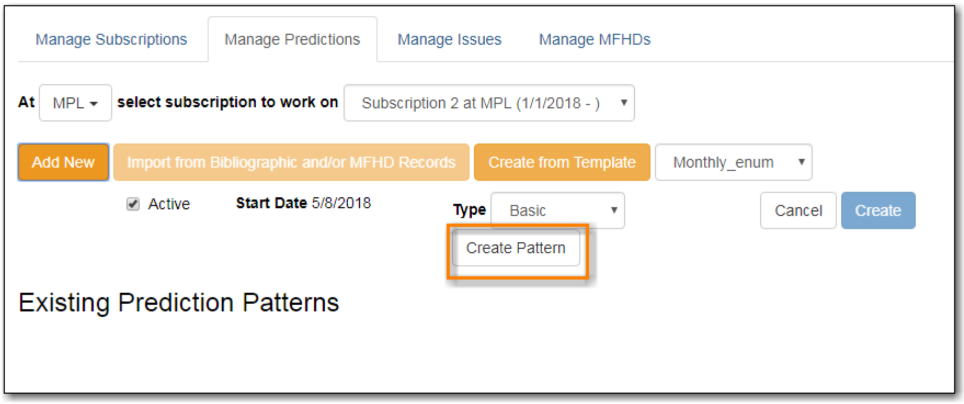
From the Manage Predictions tab you can create a new prediction pattern from scratch, use an existing pattern template, or use an existing pattern template as the basis for a new prediction pattern.

1. Retrieve the bibliographic record your subscription is attached to.
2. Click **Serials** → Choose **Manage Subscriptions** → Click **Manage Predictions**

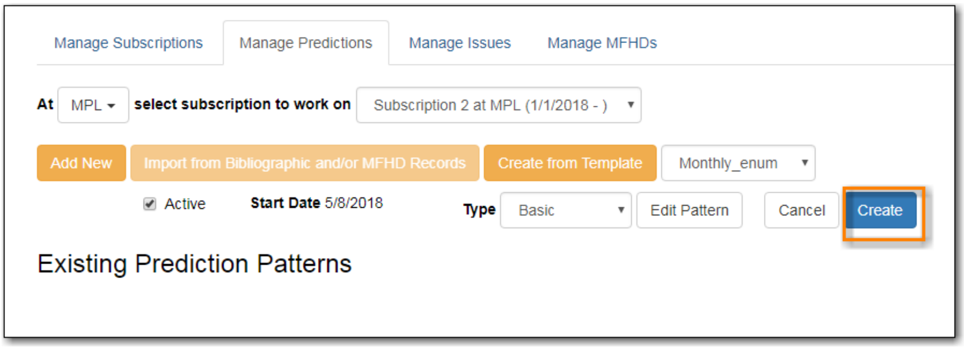


37.2.1. Predict Issues Using a New Prediction Pattern

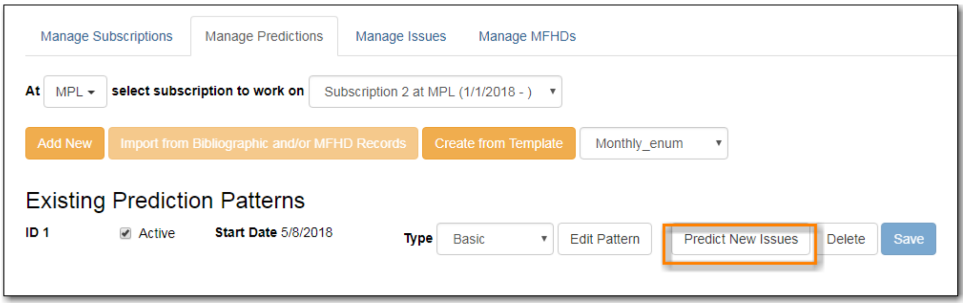
1. Within the *Manage Predictions* tab, **Select Subscription** to work on from the drop down menu.
2. Click **Add New**
3. Click **Create Pattern**



4. Follow the Pattern Wizard steps to modify the template.
5. Click **Create**.



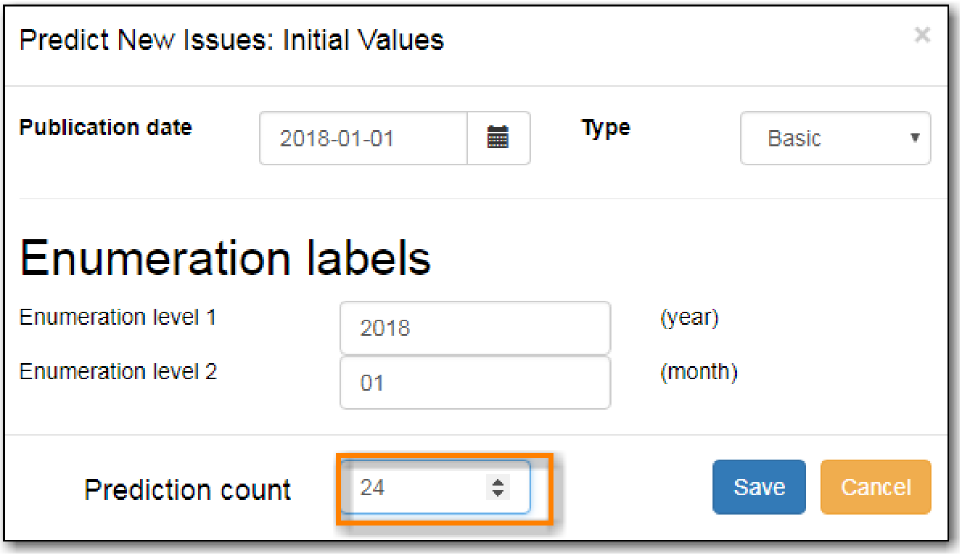
6. To create predictions, click **Predict New Issues**.



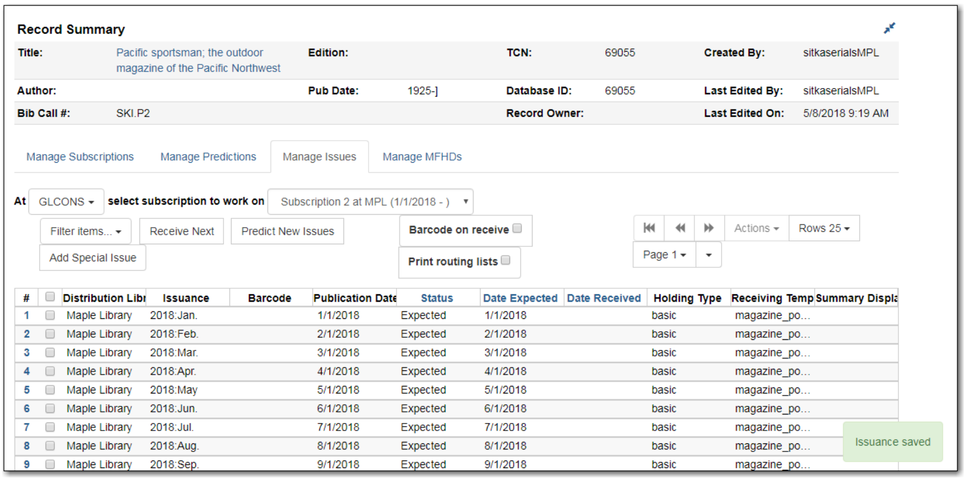
   a. Note: you can also predict new issues from the **Manage Issues** tab.
7. A dialog box called **Predict New Issues: Initial Values** will appear.
   a. Select the **Publication date** for the subscription. This will be publication date of the first issue you expect to receive.
   b. The **Type** will correspond to the type of prediction pattern selected.
   c. Enter any **Enumeration labels** for the first expected issue.
   d. Enter any **Chronology labels** for the first expected issue.

   e. Enter the **Prediction count**. This is the number of issues that you want to predict.

8. Click **Save**.



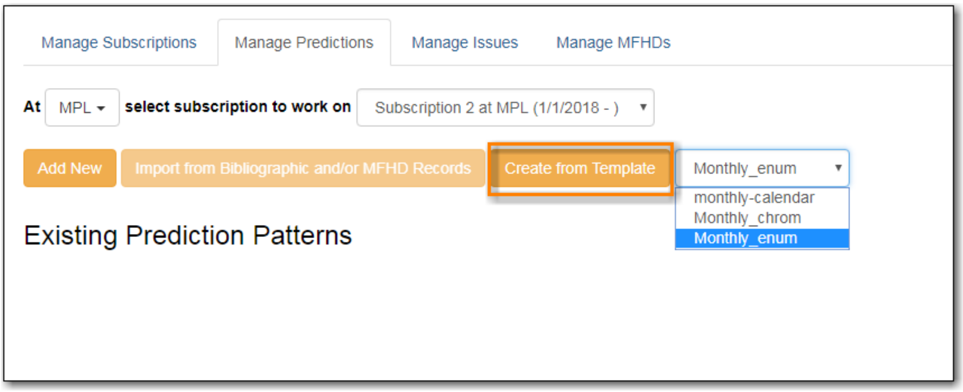
9. Evergreen will generate the predictions and bring you to the *Manage Issues* tab to review the predicted issues.



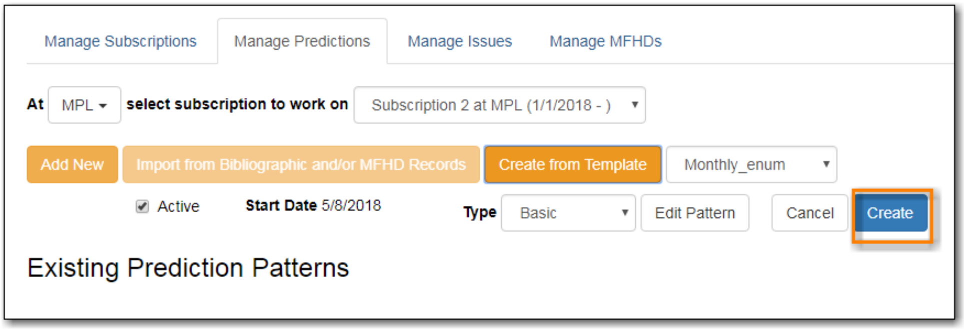
37.2.2. Predict Issues Using a Prediction Pattern Template

1. Within the **Manage Predictions** tab, **Select Subscription** to work on from the drop down menu.

2. Select a template from the drop down menu beside **Create from Template**.



3. Click **Create from Template**.
4. If you want to use the pattern "as is" click **Create**.

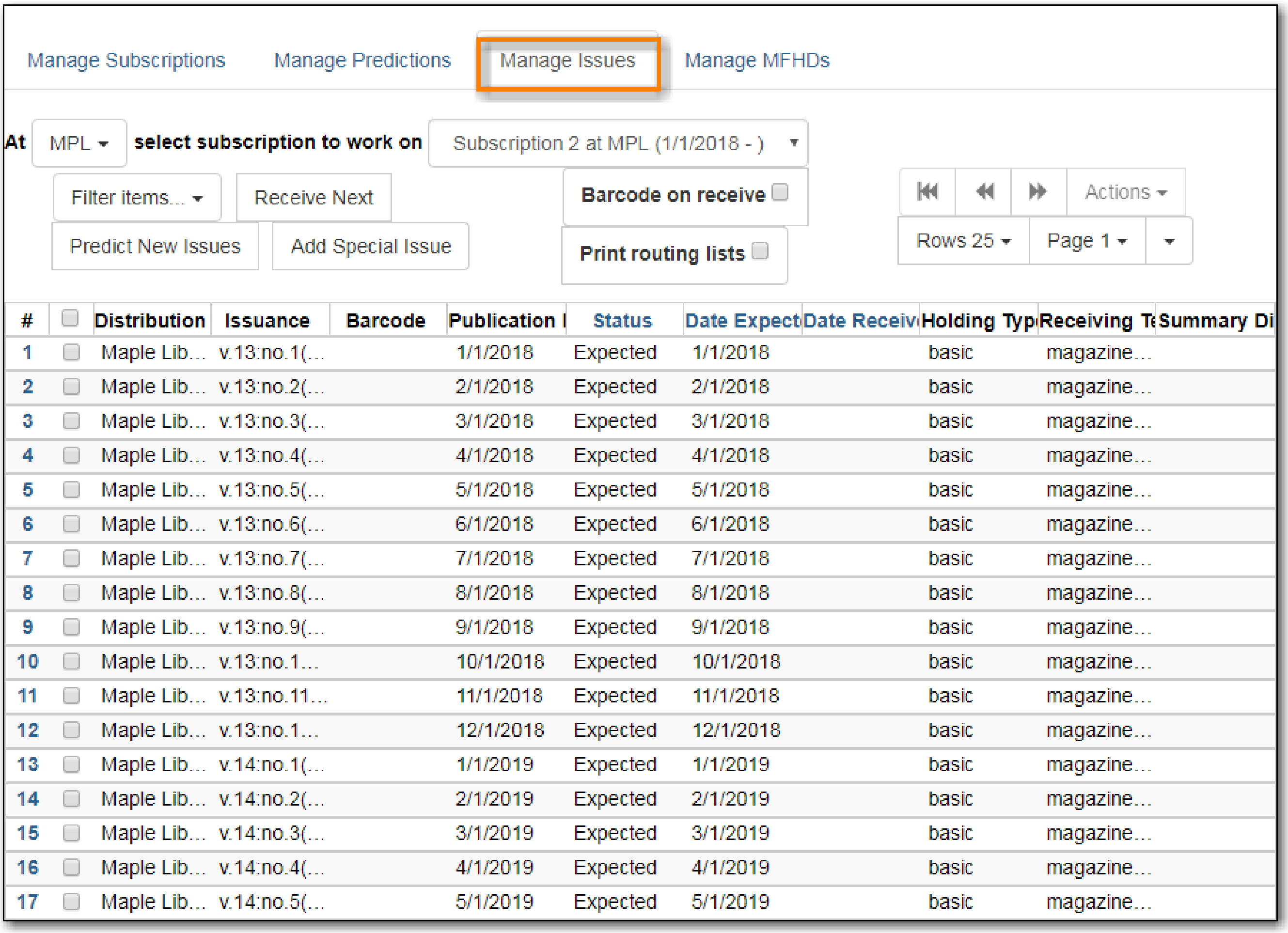


   a. If you want to review or modify the pattern, click **Edit Pattern**. The Pattern Wizard will appear.
   b. The Pattern Wizard will be pre-populated with the pattern template selected.
   c. After modifying or reviewing the pattern in the wizard, click **Create**. The prediction pattern will now appear under Existing Prediction Patterns.
5. To create predictions, click **Predict New Issues**.
   a. Note: you can also predict new issues from the **Manage Issues** tab.
6. A dialog box called **Predict New Issues: Initial Values** will appear.
   a. Select the **Publication date** for the subscription. This will be publication date of the first issue you expect to receive.
   b. The **Type** will correspond to the type of prediction pattern selected.
   c. Enter any **Enumeration labels** for the first expected issue.
   d. Enter any **Chronology labels** for the first expected issue.
   e. Enter the **Prediction count**. This is the number of issues that you want to predict.
7. Click **Save**.
8. Evergreen will generate the predictions and bring you to the *Manage Issues* tab to review the predicted issues.

37.3. Create and Manage Issues

After generating predictions in the **Manage Predictions** tab, you will see a list of the predicted issues in the **Manage Issues** tab. A variety of actions can be taken in this tab:

- Receive issues
  - Click **Receive Next**. Refer to Serials Receiving for details.
- Predict new issues
  - Click **Predict New Issues**. Refer to Create and Manage Predictions for details.
- Add special issues
  - Click **Add Special Issue**. Refer to Special Issues for details.


Manage Subscriptions
Manage Predictions
Manage Issues
Manage MFHDs
At
MPL
select subscription to work on
Subscription 2 at MPL (1/1/2018 -)
Filter items...
Receive Next
Barcode on receive
Actions
Predict New Issues
Add Special Issue
Print routing lists
Rows 25
Page 1
Distribution Issuance Barcode Publication I Status Date Expect Date Receiv Holding Typ Receiving T Summary Di
1 Maple Lib... v.13:no.1(... 1/1/2018 Expected 1/1/2018 basic magazine...
2 Maple Lib... v.13:no.2(... 2/1/2018 Expected 2/1/2018 basic magazine...
3 Maple Lib... v.13:no.3(... 3/1/2018 Expected 3/1/2018 basic magazine...
4 Maple Lib... v.13:no.4(... 4/1/2018 Expected 4/1/2018 basic magazine...
5 Maple Lib... v.13:no.5(... 5/1/2018 Expected 5/1/2018 basic magazine...
6 Maple Lib... v.13:no.6(... 6/1/2018 Expected 6/1/2018 basic magazine...
7 Maple Lib... v.13:no.7(... 7/1/2018 Expected 7/1/2018 basic magazine...
8 Maple Lib... v.13:no.8(... 8/1/2018 Expected 8/1/2018 basic magazine...
9 Maple Lib... v.13:no.9(... 9/1/2018 Expected 9/1/2018 basic magazine...
10 Maple Lib... v.13:no.1... 10/1/2018 Expected 10/1/2018 basic magazine...
11 Maple Lib... v.13:no.11... 11/1/2018 Expected 11/1/2018 basic magazine...
12 Maple Lib... v.13:no.1... 12/1/2018 Expected 12/1/2018 basic magazine...
13 Maple Lib... v.14:no.1(... 1/1/2019 Expected 1/1/2019 basic magazine...
14 Maple Lib... v.14:no.2(... 2/1/2019 Expected 2/1/2019 basic magazine...
15 Maple Lib... v.14:no.3(... 3/1/2019 Expected 3/1/2019 basic magazine...
16 Maple Lib... v.14:no.4(... 4/1/2019 Expected 4/1/2019 basic magazine...
17 Maple Lib... v.14:no.5(... 5/1/2019 Expected 5/1/2019 basic magazine...

Chapter 38. Serials Receiving

Issues can be received through the **Manage Issues** tab.

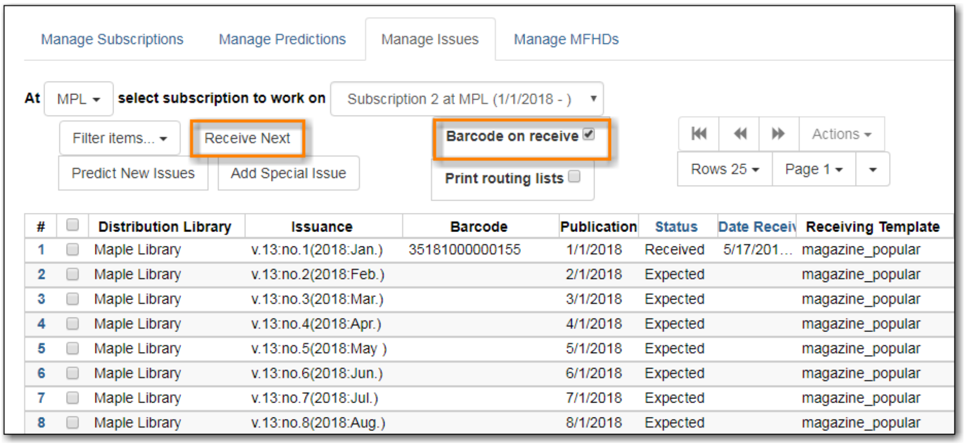
38.1. Receive Issues

The **Manage Issues** tab can be used to receive the next expected issue and to receive multiple expected issues.

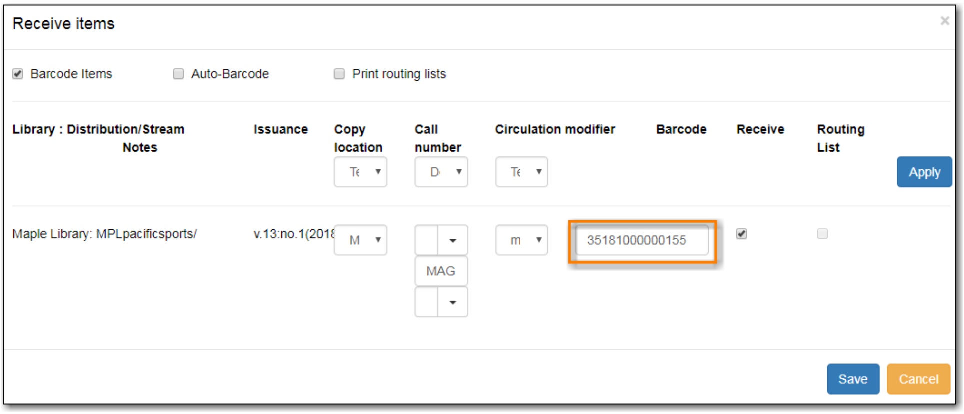
1. Retrieve the serial record
2. Click **Serials** → **Manage Subscriptions** → **Manage Issues** tab.

38.1.1. Receive Next Issue and Barcode

1. Within the Manage Issues tab, **Select Subscription** from the drop down menu. The list of predicted issues for the subscription will appear.
2. Check the box adjacent to **Barcode on receive**.
3. Click **Receive Next**.



4. A Receive items dialog box will appear with the next expected issue and item(s).
5. The Shelving Location and Circulation Modifier will be pre-populated from the Receive Template associated with the Distribution. Changes can be made to the pre-populated information.
6. **Call Number**: Enter a call number. Any item with a barcode must also have a call number.
7. **Barcode**: Scan in the barcode that will be affixed to the item(s).
8. The box to Receive the item(s) will be checked by default.
9. Check the box adjacent to Routing List to print an existing routing list.

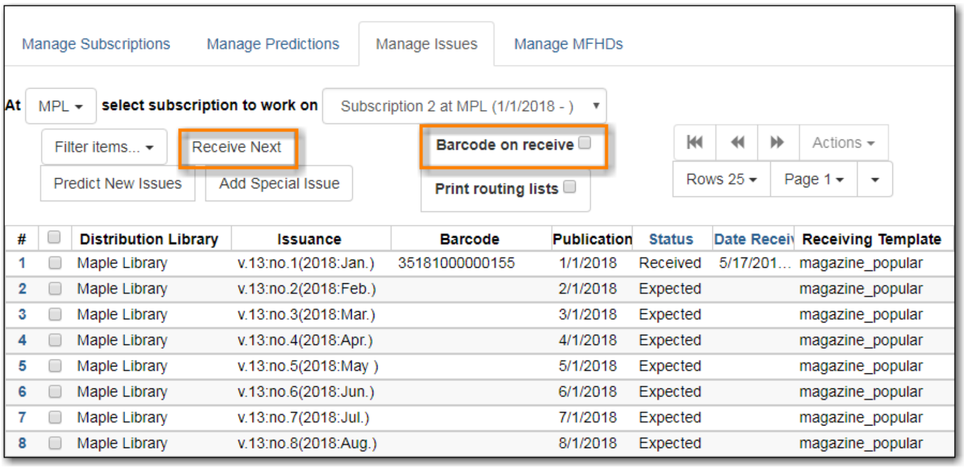


10. Click **Save** to receive the item(s). The Status of the issue will update to "Received" and a Date Received will be recorded.

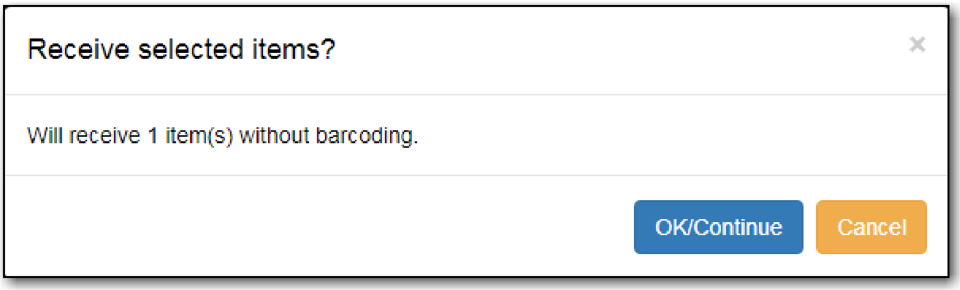
    a. The barcoded item(s) will now appear in the holdings area of the catalogue and the Holdings Summary in the Issues Held tab in the catalogue will reflect the newly received issue.

38.1.2. Receive Next Issue (no barcode)

1. In the **Manage Issues** tab, make sure the box adjacent to Barcode on receive is unchecked and click Receive Next.



2. A Receive items dialog box will appear with the message "Will receive # item(s) without barcoding."



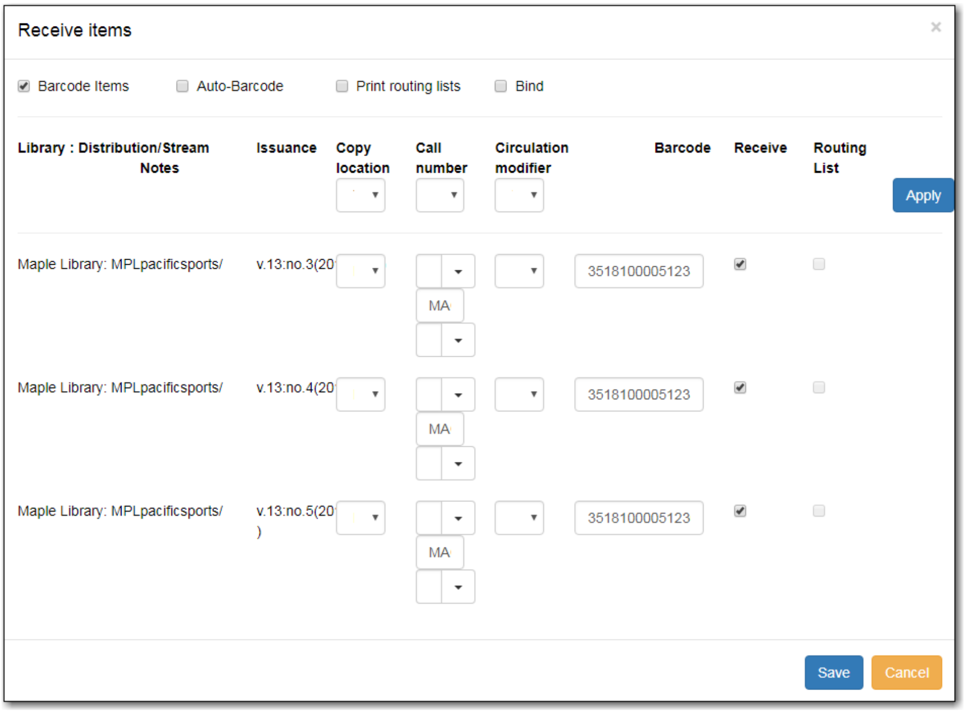
3. Click **OK/Continue** to receive the issue. The Status of the issue will update to "Received" and a Date Received will be recorded. The Holdings Summary in the Issues Held tab in the catalogue will reflect the newly received issue.

38.2. Batch Receive

Multiple issues can be received at the same time using the Manage Issues tab.

38.2.1. Batch Receive and Barcode

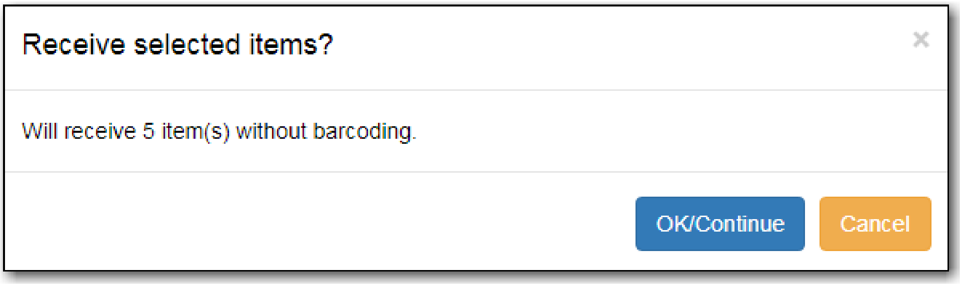
1. Within the Manage Issues tab, **Select Subscription** from the drop down menu. The list of predicted issues for the subscription will appear.
2. Check the box adjacent to **Barcode on receive**.
3. Check the boxes adjacent to the expected issues you want to receive.
4. Go to **Actions** → **Receive selected**.
5. A Receive items dialog box will appear with the selected issues and items.
6. The Shelving Location and Circulation Modifier will be pre-populated from the Receive Template associated with the Distribution. Changes can be made to the pre-populated information.
7. Call Number: Enter a call number. Any item with a barcode must also have a call number.
8. Barcode: Scan in the barcodes that will be affixed to the items.
9. The box to Receive the items will be checked by default.
10. Check the box adjacent to Routing List to print an existing routing list.



11. Click **Save** to receive the items. The Status of the items will update to "Received" and a Date Received will be recorded.
    a. The barcoded items will now appear in the holdings area of the catalogue and the Holdings Summary in the Issues Held tab in the catalogue will reflect the newly received issues.

38.2.2. Receive multiple issues (no barcode)

1. Within the Manage Issues tab, **Select Subscription** to work on from the drop down menu. The list of predicted issues for the subscription will appear.
2. Make sure the box next to Barcode on receive is unchecked and check the boxes adjacent to the expected issues you want to receive.
3. A Receive items dialog box will appear with the message "Will receive # item(s) without barcoding."



4. Click OK/Continue to receive the issues. The Status of the issue will update to "Received" and a Date Received will be recorded. The Holdings Summary in the Issues Held tab in the catalogue will reflect the newly received issues.

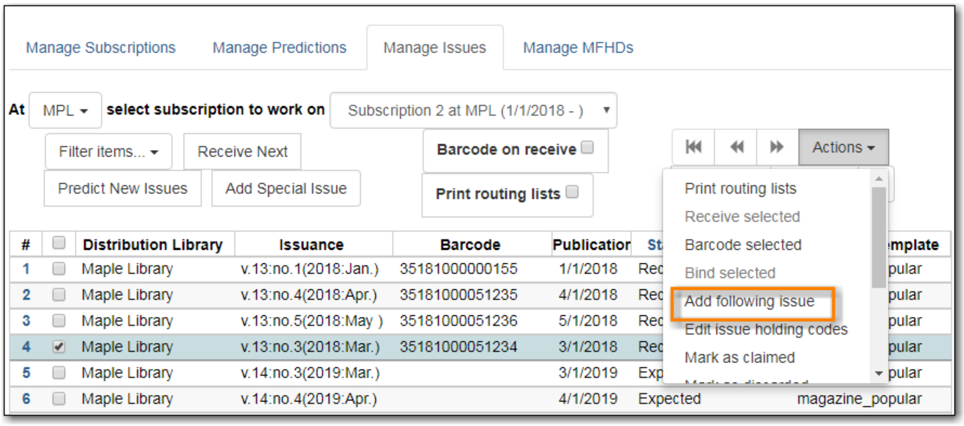
Chapter 39. Special Issues

39.1. Adding Extra Copies

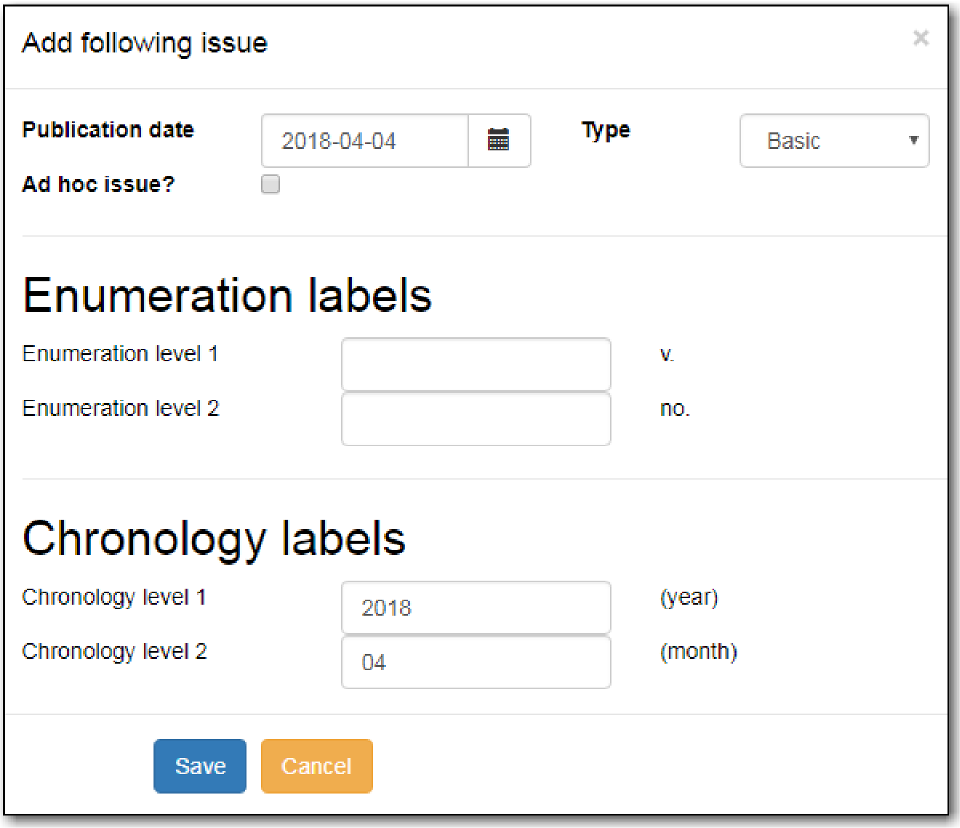
If the library receives an extra copy of an expected issue, the extra copy can be added to the list of predicted issues so it can be received through the serials module.

To add an extra copy of an expected issue:

1. In the **Manage Issues** tab, select the issuance that precedes the issuance that you received an extra copy of and go to **Actions** → **Add following issue**.



2. Verify the Publication date, Type, and Chronology labels are correct.
3. The Enumeration labels will be filled in automatically when the issue is created.



4. Click **Save** to create the extra copy of the following issue.

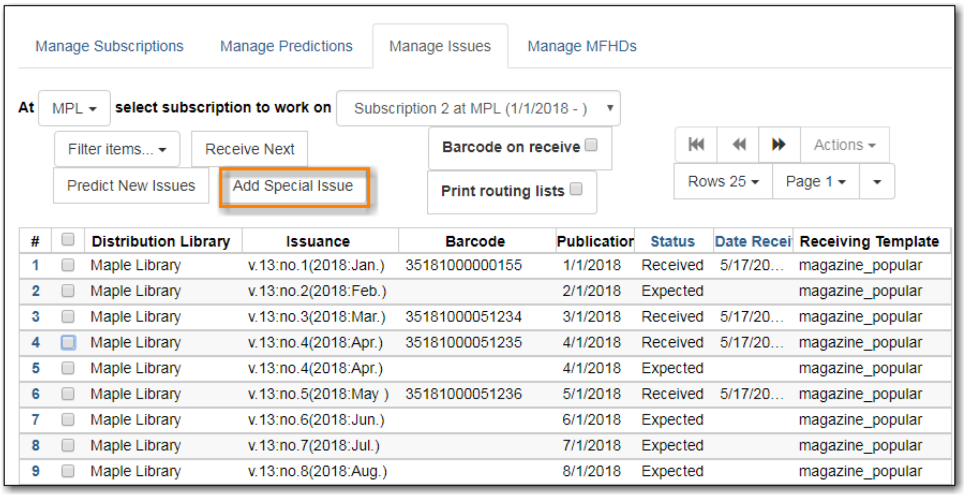
5. The extra copy will appear in the list of issues and can be received using your typical workflow.

39.2. Adding Special Issues

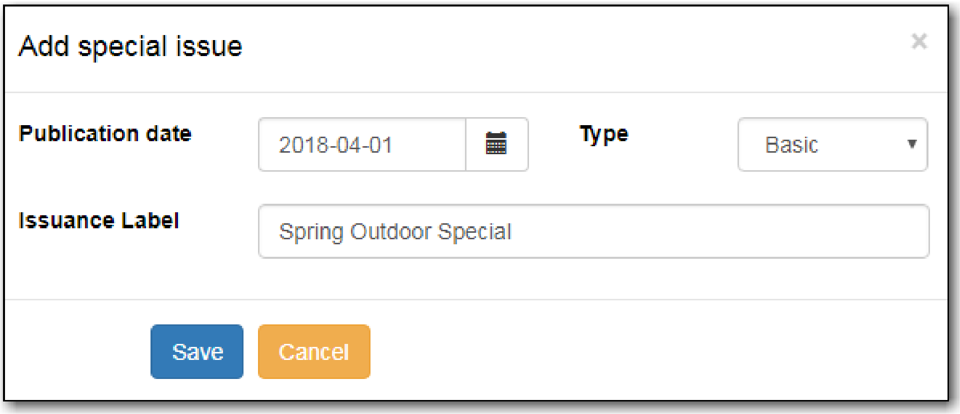
If the library receives an unexpected issue of a subscription, such as Summer Issue or Holiday Issue, it can be added to the list of predicted issues as a Special Issue so it can be received through the serials module.

To add a special issue:

1. In the **Manage Issues** tab, click **Add Special Issue**.



2. Enter the Publication date of the special issue.
3. Select the Type (typically Basic).
4. Add an Issuance Label to identify the special issue, such as "Holiday Issue".



5. Click **Save**.
6. The special issue will appear in the list of issues and can be received using your typical workflow.

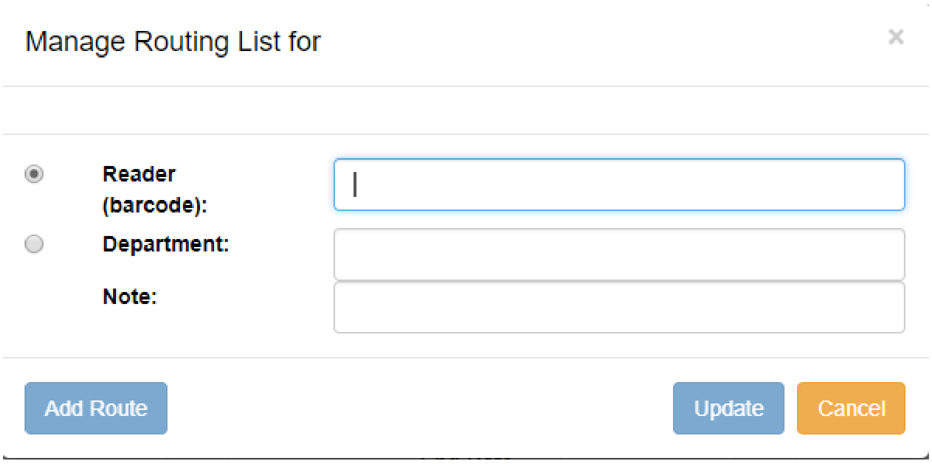
NOTE	A special issue may also be added as an ad hoc issue by following the instructions for Adding Extra Copies. Enter the Publication date and Type and check the box adjacent to Ad hoc issue? The form will update to allow you to enter an Issuance Label.

Chapter 40. Routing List

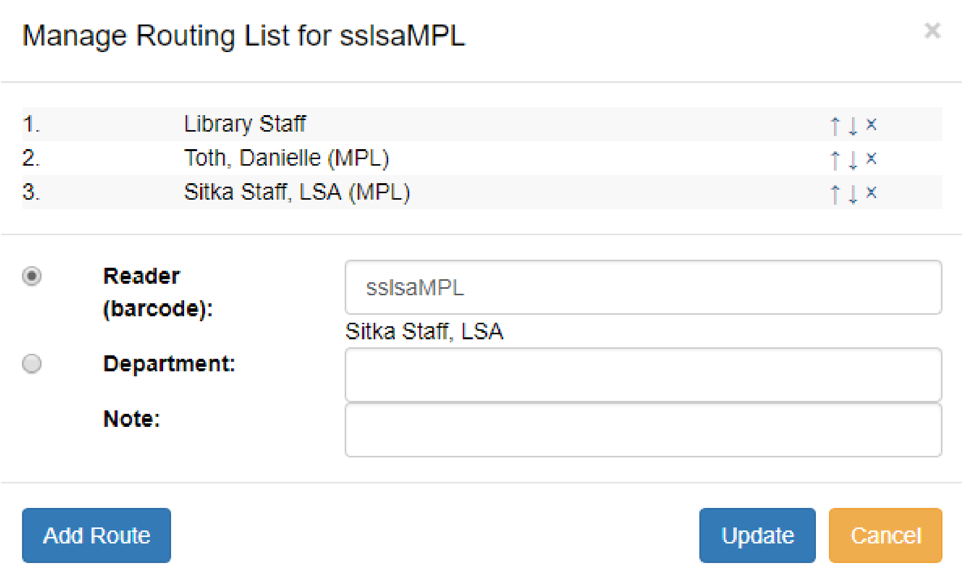
Routing lists enable you to designate specific users and/or departments that serial items need to be routed to upon receiving.

Create a Routing List

1. Retrieve bibliographic record → Click **Serials** → **Manage Subscriptions**
2. Select the subscription from the list
3. Click **Actions** → **Additional Routing**.
   a. A dialog box will appear where you can create the routing list.



4. Scan or type in the barcode of the user the items should be routed to in the Reader (barcode) field and click **Add Route**.
   a. A Note may be added along with each addition to the list.
   b. Continue adding barcodes until the list is complete.
5. To route items to a location, click the radio button next to Department, type in the routing location, and click **Add Route**.
6. The names and departments on the list will appear at the top of the dialog box and can be reordered by clicking the arrows or removed by clicking the x next to each name or department.



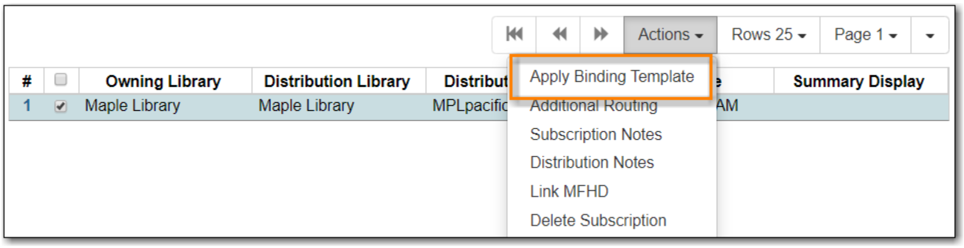
7. When the list is complete, click **Update**.

Chapter 41. Serials Binding

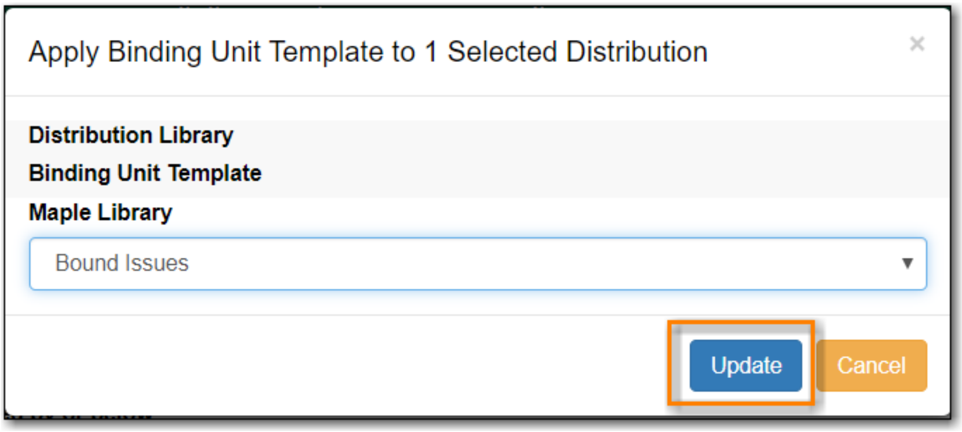
41.1. Apply a Binding Template

To bind issues, first a binding template needs to be applied to the associated distribution.

1. Go to the **Manage Subscriptions** tab and from the grid, select the distribution(s) with issues you'd like to bind.
2. Right-click on the distribution(s) or go to **Actions** and select **Apply Binding Template**.

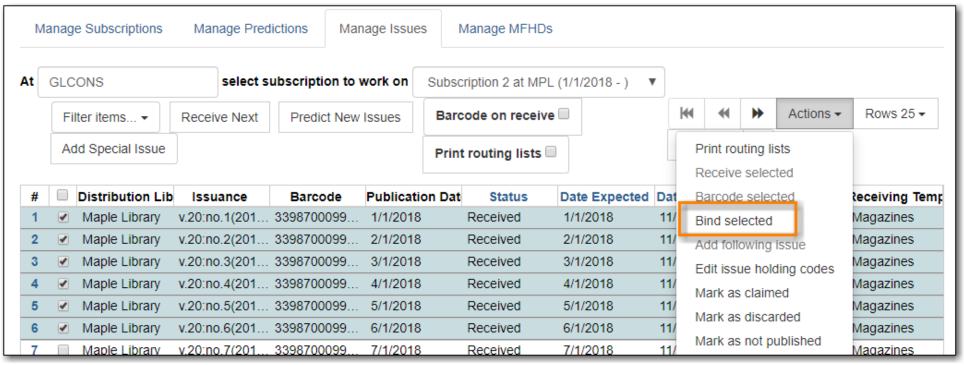


3. In the dialog box that appears, select the Serial Copy Template you'd like to use from the dropdown and click **Update**.



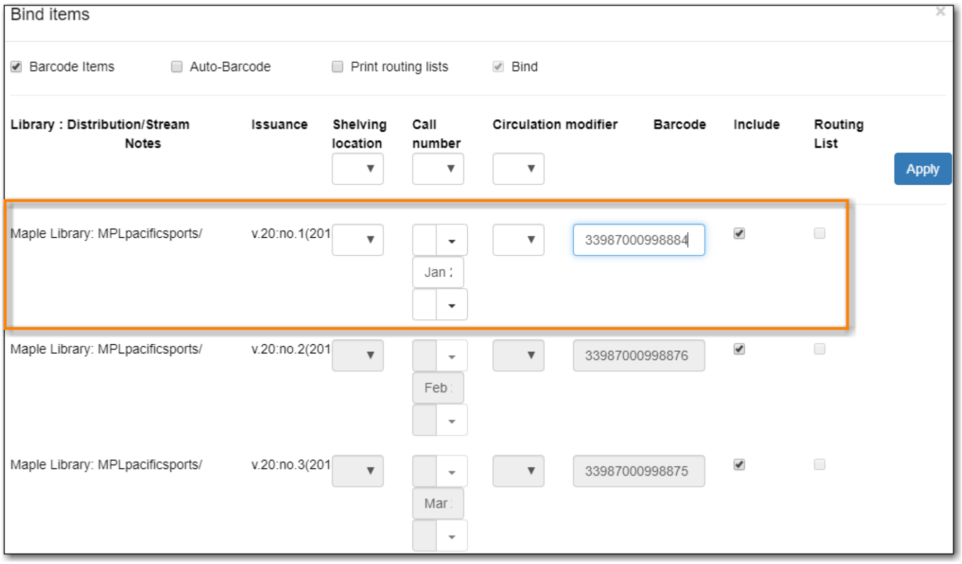
41.2. Bind Received Issues Together

1. Go to the **Manage Issues** tab and select the issues you want to bind together.



2. Right-click on the issues or go to **Actions** and select **Bind Selected**.
3. The Bind Items screen will appear and all items will be represented on the screen. The first

item's fields will be editable.



4. Modify the call number if needed.
5. Replace the barcode and click **Save**.

NOTE	The barcode must be replaced with a new barcode. The binding will fail if you attempt to reuse an existing barcode from one of the items being bound. Evergreen views it as a duplicate barcode.

Inventory

Chapter 42. Running Inventory

The following procedure was developed by Co-op Support based on the current functionality available in Sitka's Evergreen, and the experience of inventory projects done by libraries in the Sitka consortium and the Evergreen community.

Inventory in Evergreen involves staff checking in all items in a specific area, using the Checkin Modifier Update Inventory, or, scanning or uploading barcodes to the Item Status screen, and batch editing the Update Inventory date. Staff can then run a report to list all the items that were not scanned, and look for them.

When items are inventoried, the date, time, and workstation is recorded in the Update Inventory field of the item record. This field is used by the inventory reports to determine which items have been inventoried and which have not.

42.1. Preparing for Inventory

The first step to running inventory is to choose the section of your library you will inventory. We recommend that you inventory a shelving location or particular call number range. There are several report templates you can use to aid you in preparing for your inventory.

- Sitka_templates → Collection → Copy and Title Count → Title and Copy Count by Shelving Location and Circulation Modifier
- Sitka_templates → Collection → Copy List by Item Attributes → Call Number : Copies with Call Numbers within a Range
- Sitka_templates → Collection → Copy List by Item Attributes → Shelving Location : Copies with Selected Shelving Locations

TIP Once inventory starts, any item found in an incorrect location should be checked in before it is shelved in the correct location.

42.2. Running Inventory with the Staff Client

1. In Evergreen go to **Circulation** → **Check In** or **Circulation** → **Item Status**.
2. If using **Check in**, enable Checkin Modifier **Update Inventory**.
3. Scan the items in.
4. If using **Item Status**, select all items on screen and click **Actions** → **Update Inventory**.

TIP Staff can check for cataloguing issues while checking in items for inventory. To do so set up your Check In screen with the following columns:

- Title
- Location
- Circulation Modifier

- Call Number

Staff can fix items right away or put them aside to be dealt with later.

42.3. Running Inventory with the Offline Module

If you are planning to take a laptop into your shelves and do not have Wi-Fi available you can use Evergreen's Offline module to check items in for inventory.

1. In Evergreen go to **Circulation** → **Offline Circulation**.
2. Go to **Checkin** and check in the items in the area you are inventorying.
3. Connect the computer to the internet and open the Evergreen Staff Client.
4. Upload your check ins. See Upload and Process Offline Transactions.
5. Make sure you follow up on any exceptions that appear when the transactions are uploaded. See Handle Exceptions. These items will need to be pulled from the shelf and checked in on the live staff client to resolve the exceptions.

42.4. Running Inventory with a Portable Barcode Scanner

Some libraries have portable barcode scanners designed to be used for inventory. These scanners collect and store barcode information which can then be exported as a file and saved on a computer.

1. Scan every item barcode on shelf in the chosen area.
2. Export the barcodes to a text file (we recommend using Notepad) and save the file. The barcodes should be in one single spaced single column without extra spaces anywhere.
3. Use Cut and Paste functions to break the big list of barcodes into smaller lists and save each list as an individual text file (we recommend each list contains about 50 to 100 barcodes). Name your files in sequence, e.g. inventory001, inventory002…, so that it will be easy to follow when you upload the files.
4. On the Item Status screen in Evergreen, click **Choose File**.
5. You will be prompted to browse your local computer to find the barcode files. Navigate to and select your first file and click **Open**.
6. Every item on the list is retrieved and displayed. It may take a while if the list is long. Select all items using the checkbox at the top of the Row Selector Column.
7. Click **Actions** → **Update Inventory**.
8. Repeat steps 4-7 to inventory the items in all of your files.

Chapter 43. Reporting on Inventory

There are two report templates in the Sitka_templates → Inventory folder on the *Reports* screen.

Inventory - Scanned Items Count by Shelving Location

This report counts the items that have been checked in/out or otherwise had their status changed (including being checked out, marked missing or lost) during the inventory period. The date when you started taking inventory should be entered as the *Copy Status Changed Time* when running the report. The numbers are broken down by shelving locations.

Inventory - Un-scanned Items

This report generates a list of items that should be on the shelf but were not checked in/out or otherwise had their status changed during the inventory period. When running the report use the date when you started taking inventory for the *Copy Status Changed Time*, the shelving location(s) in which you took inventory and the "on shelf" statuses *Reshelving* and *Available*.

You can use this report to search for the listed items. You can also upload the barcodes from this report into the Item Status screen and set the items to *Missing*.

Course Reserves

Chapter 44. Course Reserves Administration

The Course Reserves module is available to academic libraries for displaying and managing course reserve lists.

The module uses the *My Lists* functionality in the public catalogue to create lists of reserves materials that can be viewed by users.

44.1. Implementing Course Reserves

To request the course reserves module for your library contact Co-op Support. This module is only available for academic libraries.

Before implementing course reserves you will need to consider the following:

How will your reserve items will be identified in Evergreen?

Support recommends setting up a Course Reserves shelving location and using reserve specific circulation modifiers.

How will your reserve items circulate?

If your reserve materials will have special loan periods or fines you will need to consider which circulation modifiers you use and contact Co-op Support to set up new circulation policies. If reserve materials are not holdable your shelving location needs to be set accordingly or hold policies adjusted by Support.

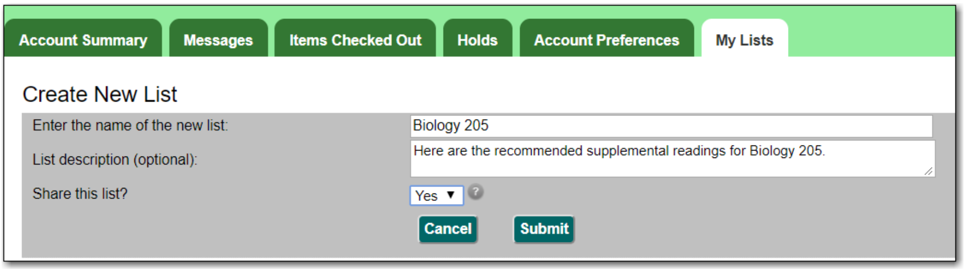
Who will create the course reserve lists?

Because the course reserves module uses the *My Lists* functionality the lists can be created by instructors or library staff or both. Decide who will create the lists and how admin staff will be informed of new lists to be added or old lists needing to be removed.

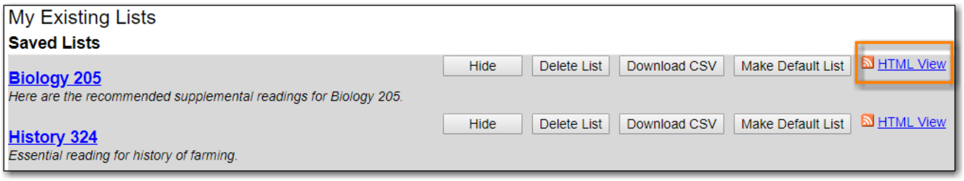
44.2. Creating Course Reserve Lists

Course Reserve lists are created using the My List functionality. Further details can be found in Baskets and Lists.

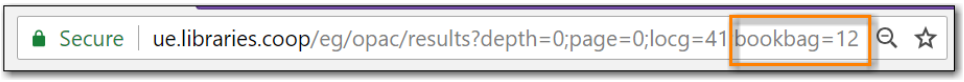
1. Log into your account in the public catalogue.
2. Select the *My Lists* tab at the top of the *My Account* area.
3. In the *My Account* area, click on **My Lists**.
4. In the *Create New List* section, enter a name for your list into the text box.
5. Optional - enter a list description.
6. Set Share this list? to **Yes**.
7. Click **Submit**.



8. Find the course and click **HTML View**.



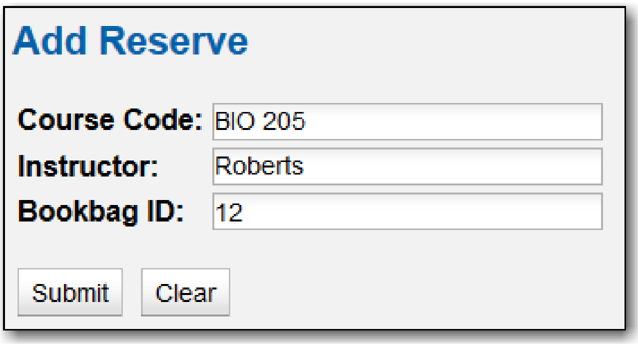
9. Check the URL to find “bookbag=”. This number is required to add the list to Course Reserves.



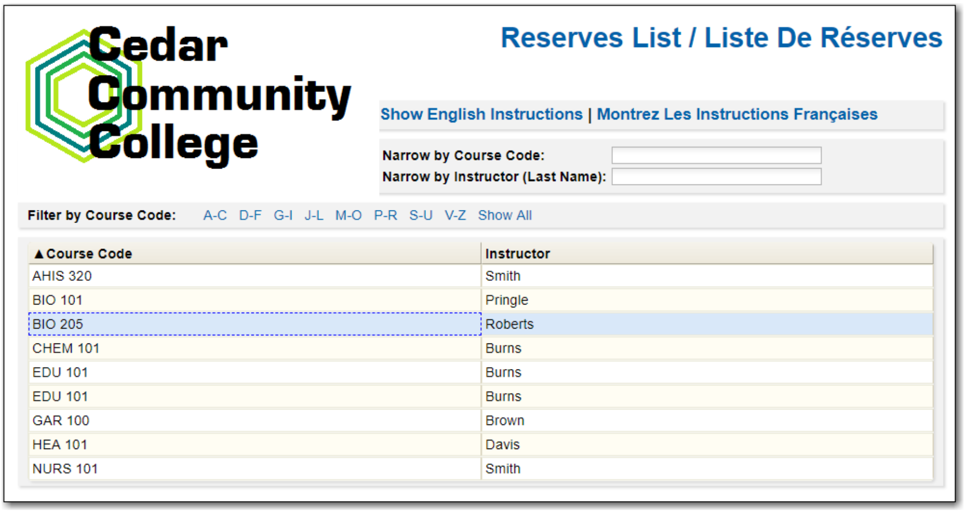
NOTE The owner of the list can add and remove items from the list as needed and users will always see the current list.

44.3. Adding Course Reserves

1. Login to the Course Reserves Admin module provided to you by Co-op Support
2. Enter the course information
   a. Course code
   b. Instructor
   c. Bookbag ID
3. Click Submit

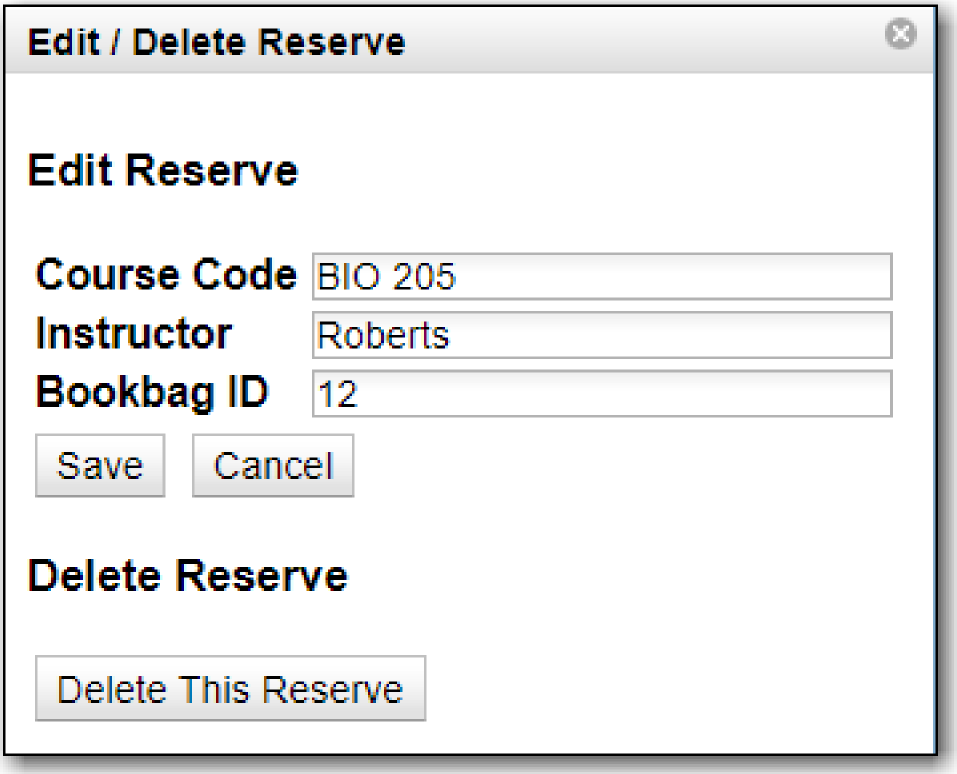


4. Go to the public Course Reserves page and click on the course to make sure the list opens as expected in the public catalogue.



44.4. Editing/Removing Course Reserves

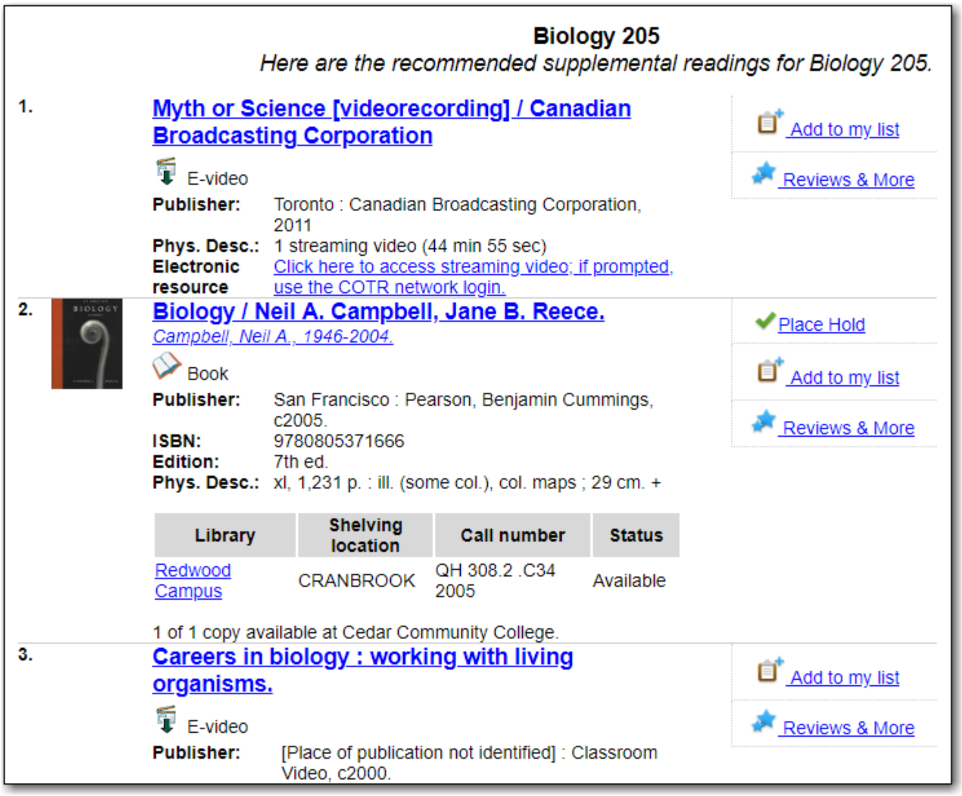
1. Login to the Course Reserves Admin module provided to you by Co-op Support
2. Click on reserve you wish to modify or delete.
3. In the pop-up that appears make the needed edits and click **Save** or click **Delete This Reserve** to remove the reserve.



Chapter 45. Using Course Reserves

1. From your library website, or elsewhere as appropriate, link to the your public course reserves module so that students and faculty can access the course reserve lists.
2. Users can search for particular courses by code or instructor name

3. Clicking on the course list will display the items on the list in your public catalogue. If the list has a description it will display.



Booking

Chapter 46. Booking Module

Sitka Training Video - Booking Module (10:36)

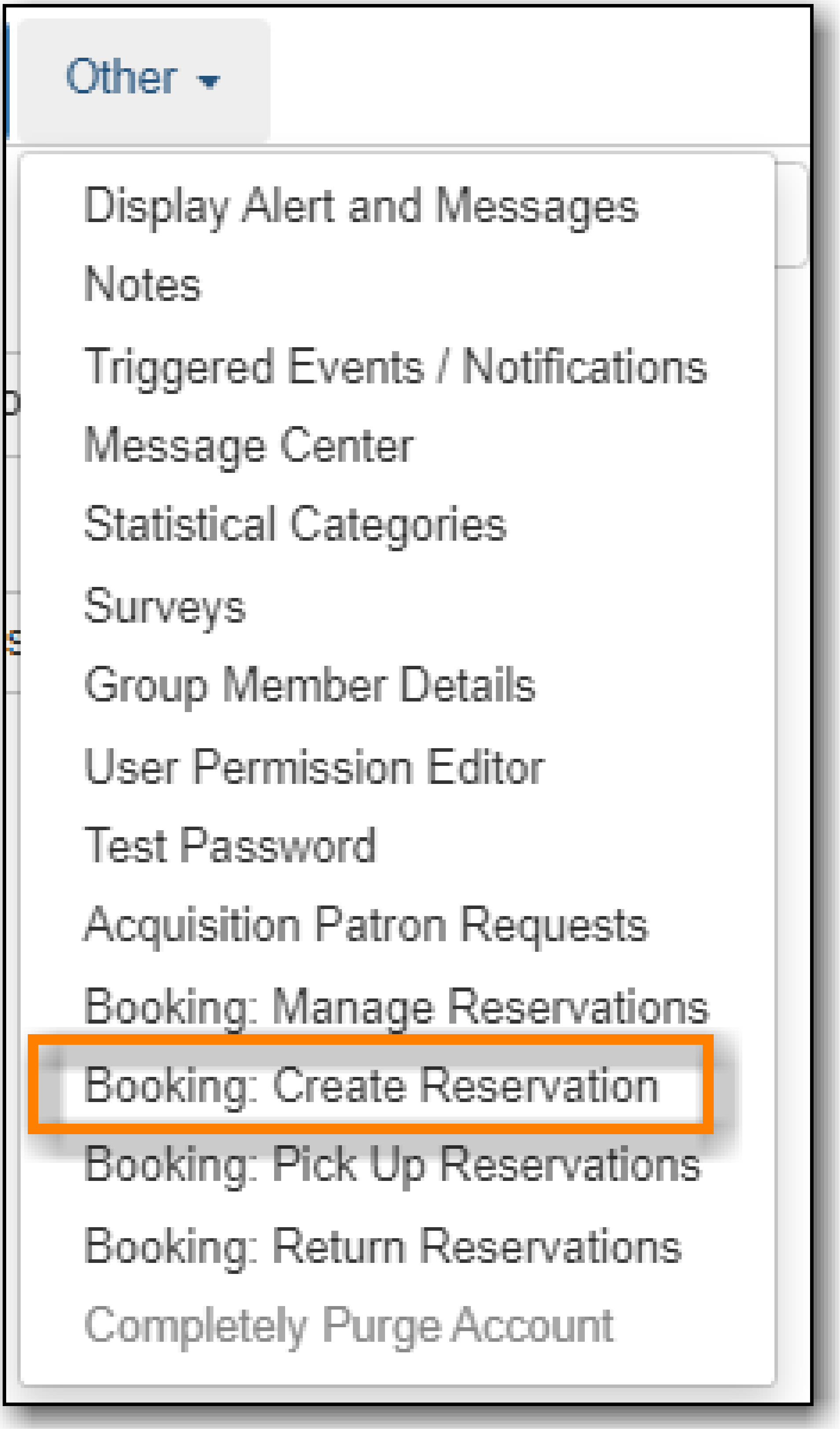
46.1. Create Booking reservations

Sitka Snippet Video - Create Reservations (1:59)

Only staff members may create reservations. A reservation can be started from a patron record, or from the booking module. To reserve catalogued items, you may start from searching the catalogue.

46.1.1. Create reservations from the patron record

1. Retrieve the patron record.
2. Click **Other** → **Booking: Create Reservation**.



3. This will open the Create Reservations screen.

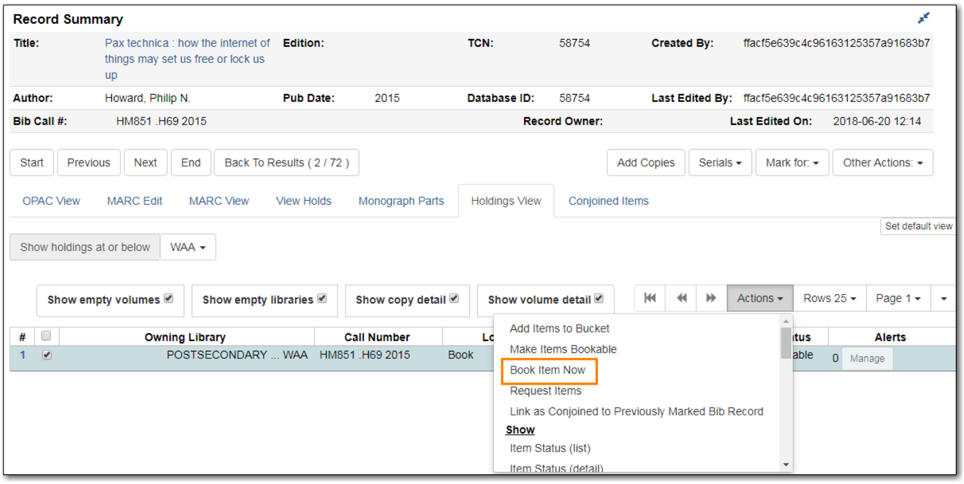
46.1.2. Create reservations from the catalogue

If you would like to reserve a catalogued item but do not know the item barcode, you may start with a catalogue search.

1. In the staff client, click **Cataloguing** → **Search the Catalogue**. You may search by any

bibliographic information.

2. Click the title to display the record summary. Click **Holdings View** → select Copy → click **Actions** → **Book Item Now**.

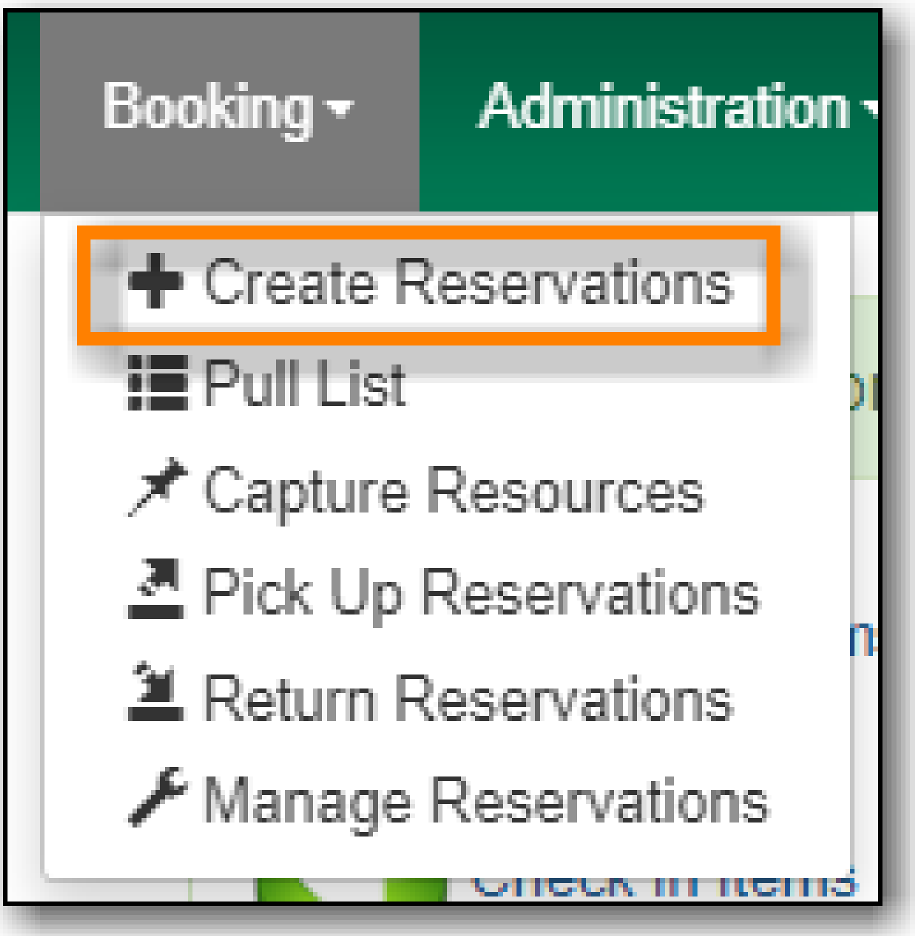


3. This will open the Create Reservations screen.

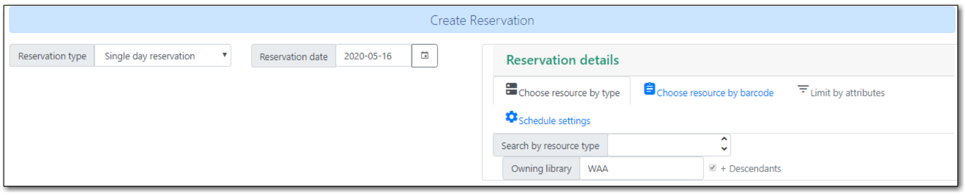
NOTE If you know the catalogued item's barcode a reservation can be created from Item Status (Scan the barcode → **Actions** → **Book Item Now**).

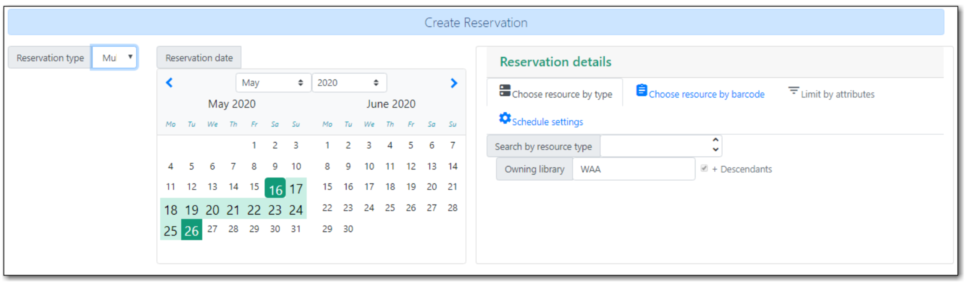
46.1.3. Create reservations

1. Click **Booking** → **Create Reservations**.
   a. from the patron record, click **Other** → **Booking: Create Reservation**.
   b. from the catalogue record, click **Holdings View** → select Copy → click **Actions** → **Book Item Now**.

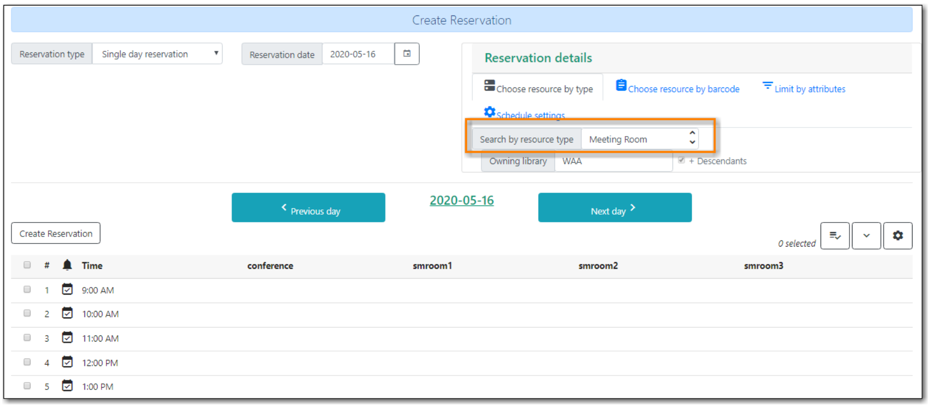


2. **Reservation type** - Choose Single day reservation or Multiple day reservation

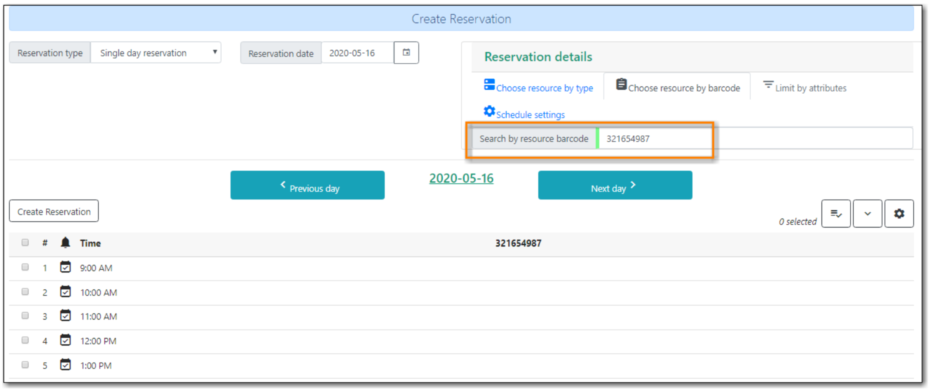




3. **Reservation date** - Enter the reservation date(s)
4. **Reservation details** - use the filters to find a bookable resource
   a. **Choose resource by type** - use this to see all resources of a specific type



b. **Choose resource by barcode** - use this if you know the barcode of the resource you want to reserve



5. Click **Create Reservation**

6. Confirm Reservation Details

   a. **Patron barcode** - enter or search for the patron barcode.

   b. **Start time** - choose or confirm the start time for the reservation.

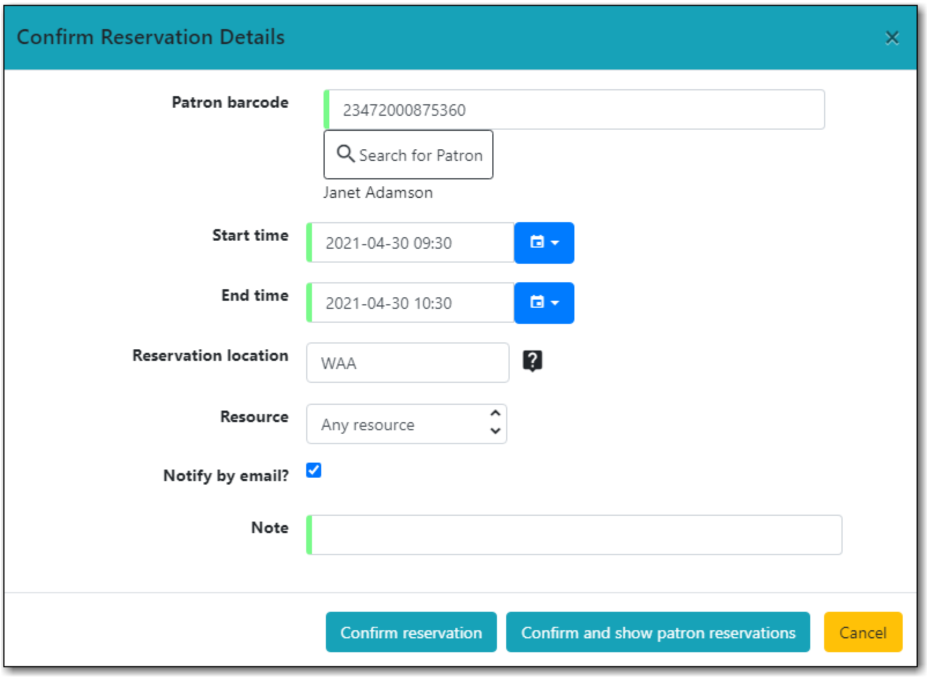
   c. **End time** - choose or confirm the end time for the reservation.

   d. **Reservation location** - the library where the resource is picked up or used.

   e. **Resource** - choose **Any resource** to reserve any available resource of the chosen resource type or choose a specific resource barcode from the drop down menu.

   f. **Notify by email?** - check the box to notify the patron by email when the resource is ready for pick up

   g. **Note** - enter a note (optional)

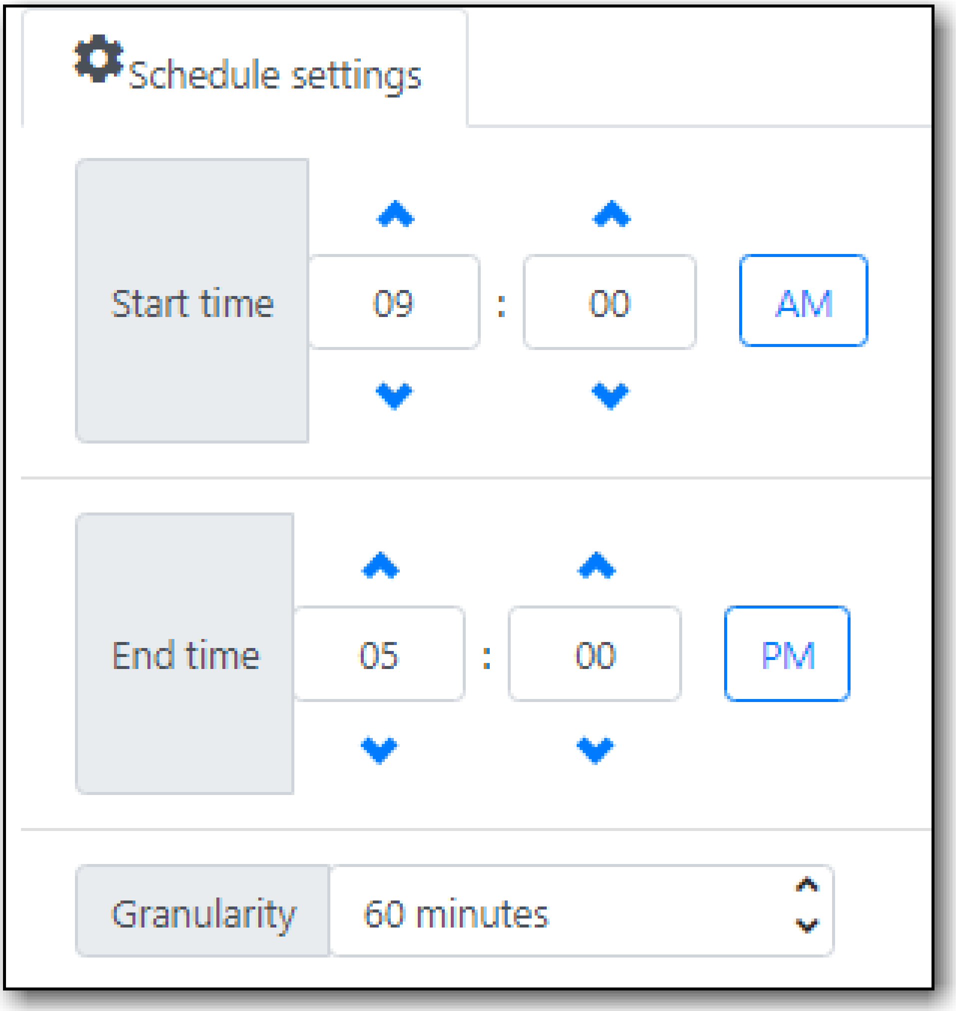


7. Click **Confirm reservation** or **Confirm and show patron reservations** to save the reservation.

Schedule settings

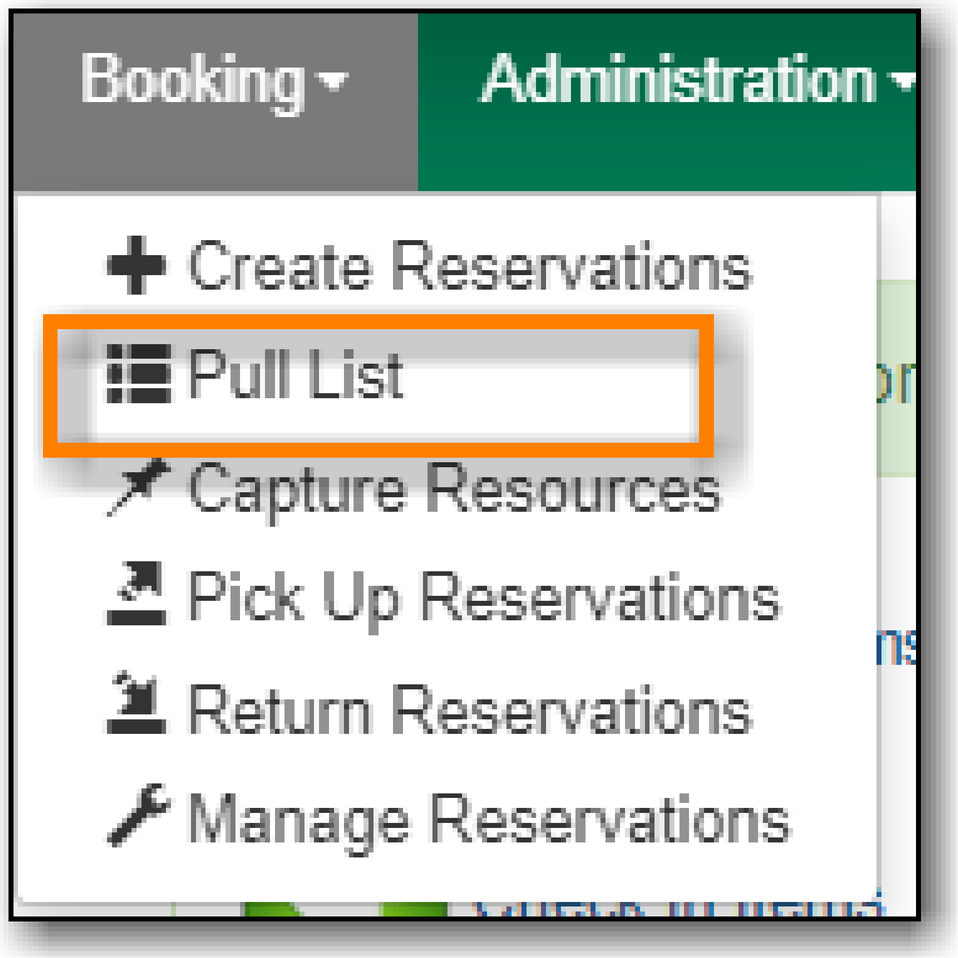
The schedule start time and end time will match your Hours of Operation.

1. Start Time - adjust the schedule start time.
2. End time - adjust the schedule end time.
3. Granularity - adjust the schedule granularity. Options are 15 min, 30 min or 60 min.

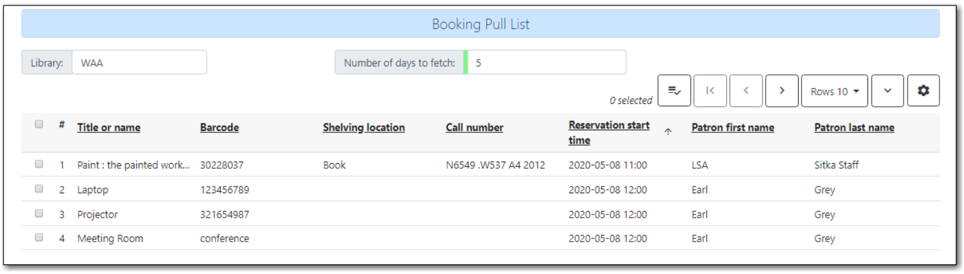


46.2. Reservation Pull List

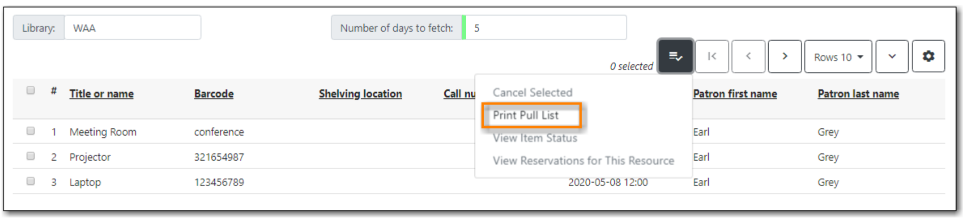
1. Click **Booking** → **Pull List**.



2. The pull list of reserved resources will appear

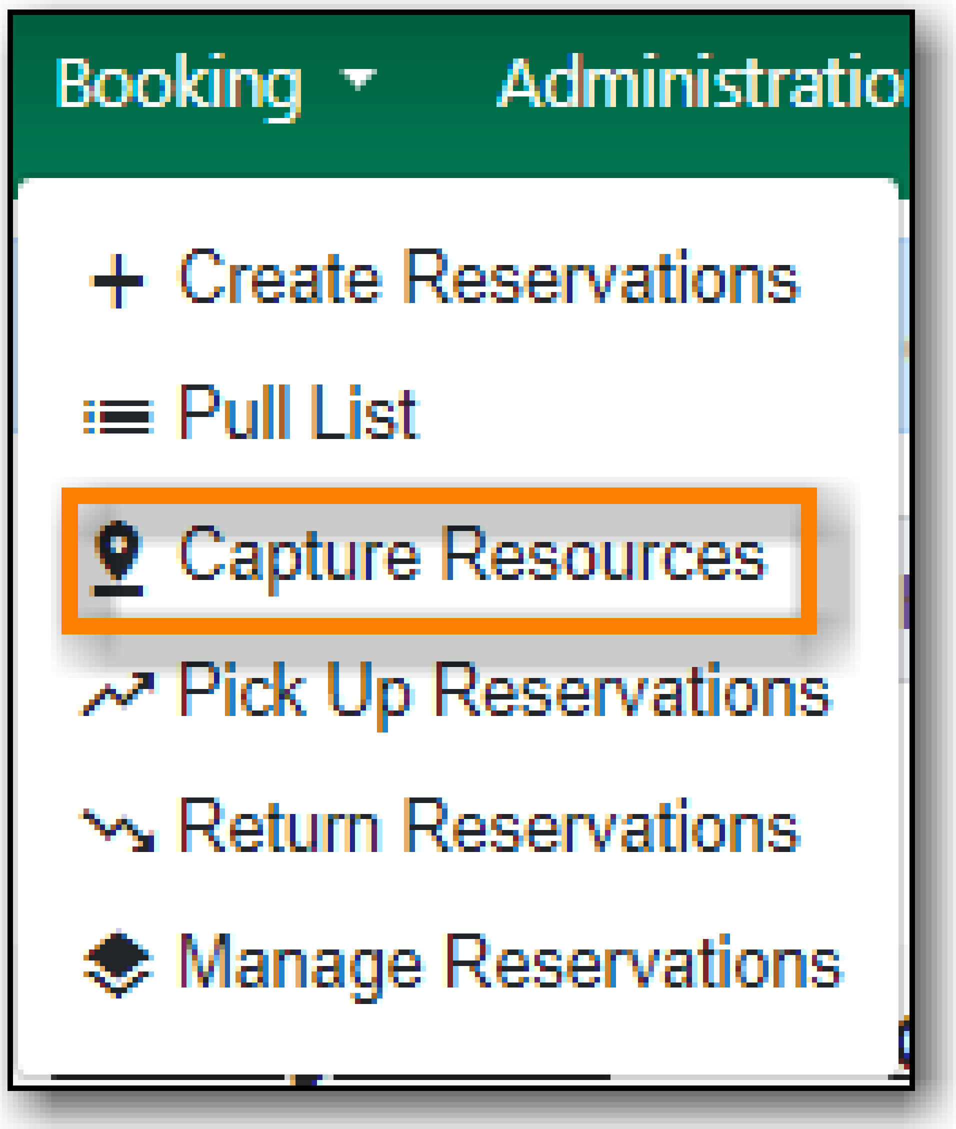


3. Edit the **Number of days to fetch**. For example, if you would like to see only resources that are needed today, enter 1 in the box to retrieve a list of resources with reservations that start today.
4. Click **Actions** → **Print Pull List** to print the pull list.

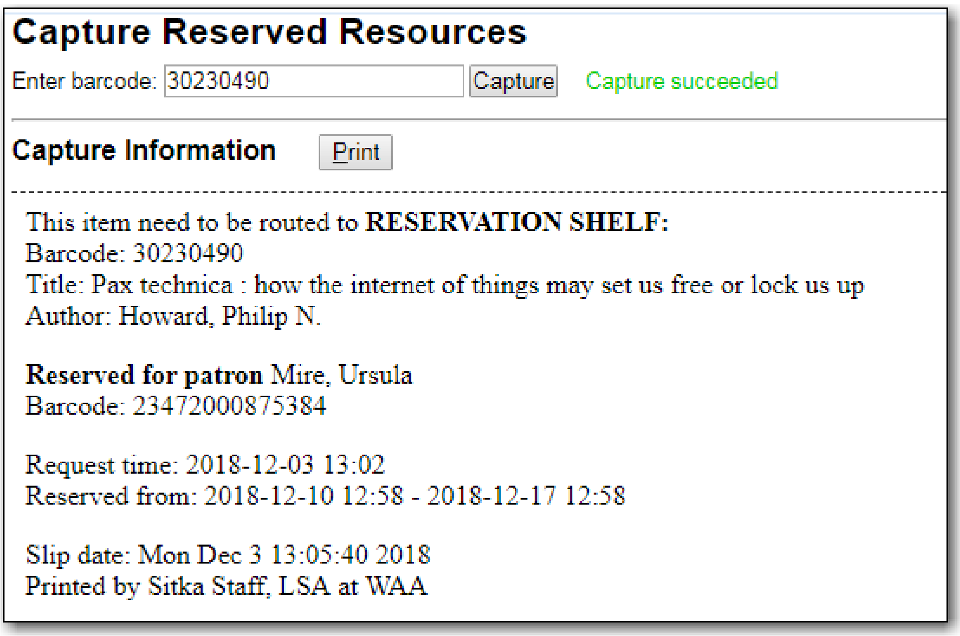


46.3. Capture Resources for Reservations

1. Click **Booking** → **Capture Resources**.



2. Enter the resource barcode then click **Capture**.



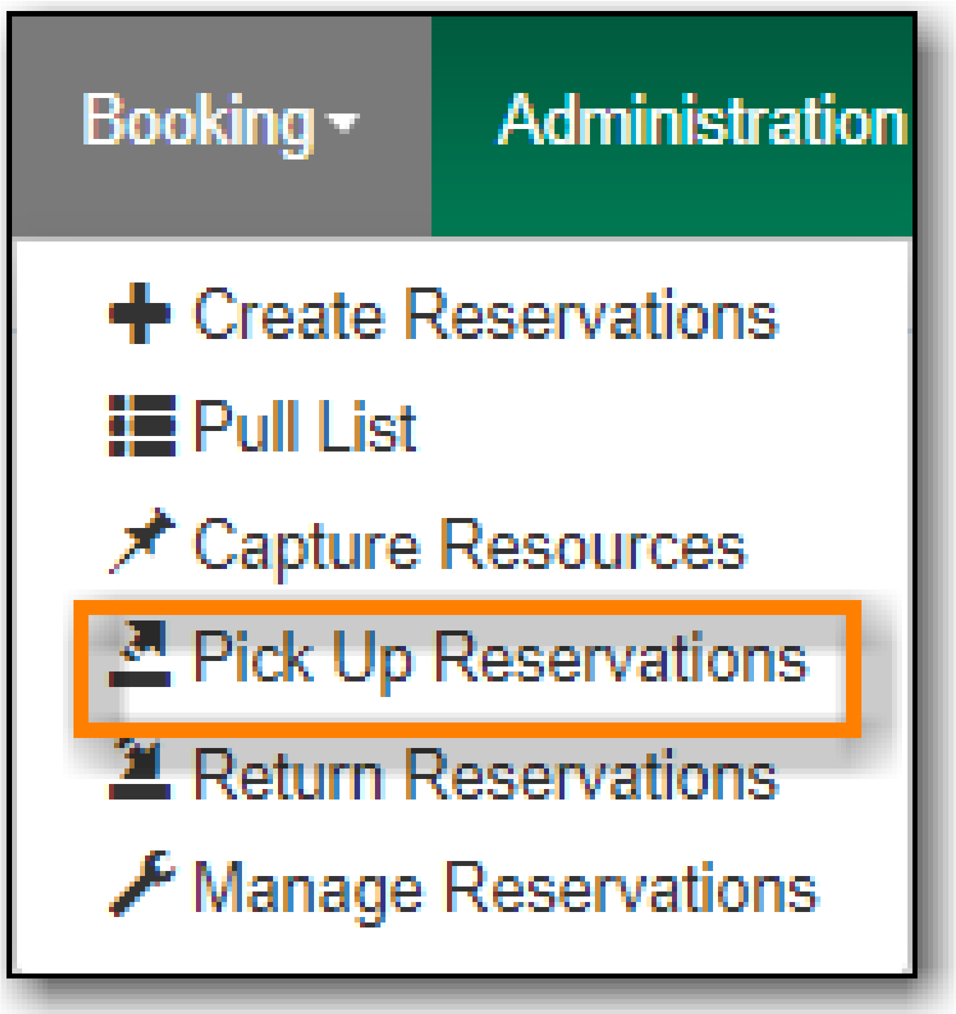
3. The message Capture succeeded will appear to the right. Information about the resource will appear below the message.

4. Click **Print** to print a slip for the reservation.

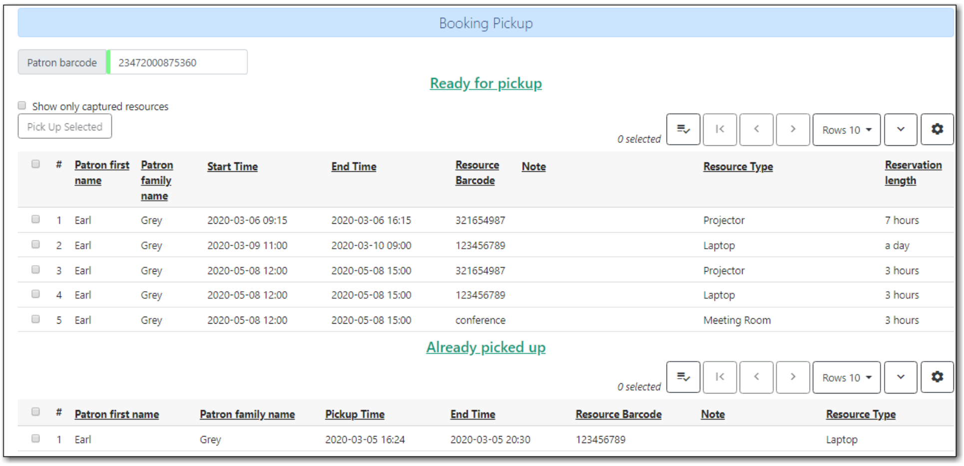
CAUTION	Always capture reservations in Booking Module. Check In function in Circulation does not function the same as Capture Resources.

46.4. Pick Up Reservations

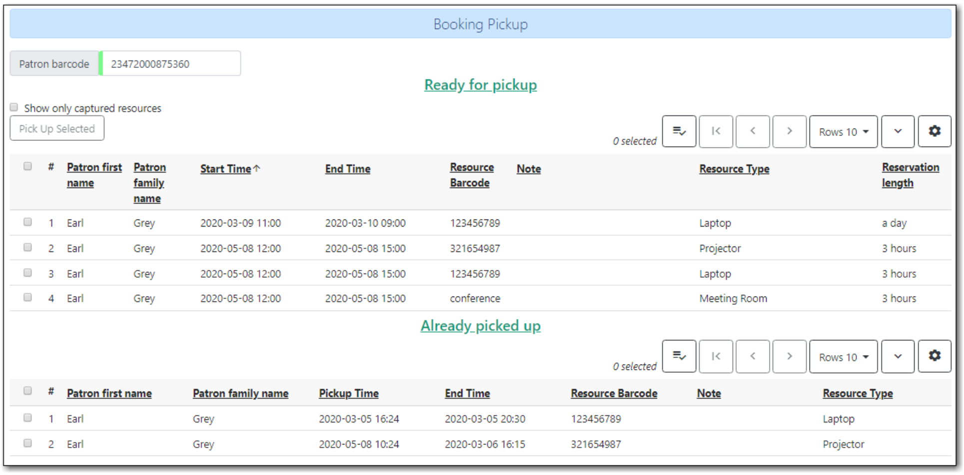
1. Click **Booking** → **Pick Up Reservations**.



2. Enter the patron barcode
3. The reservation(s) available for pickup will display.



4. **Show only captured resources**
    a. if checked, only captured resources will display
    b. if unchecked, all the resources the patron has upcoming reservations for will display
5. Select the resources you want to pick up and click **Pick Up Selected**.
6. The screen will refresh to show that the patron has picked up the reservation(s).



NOTE

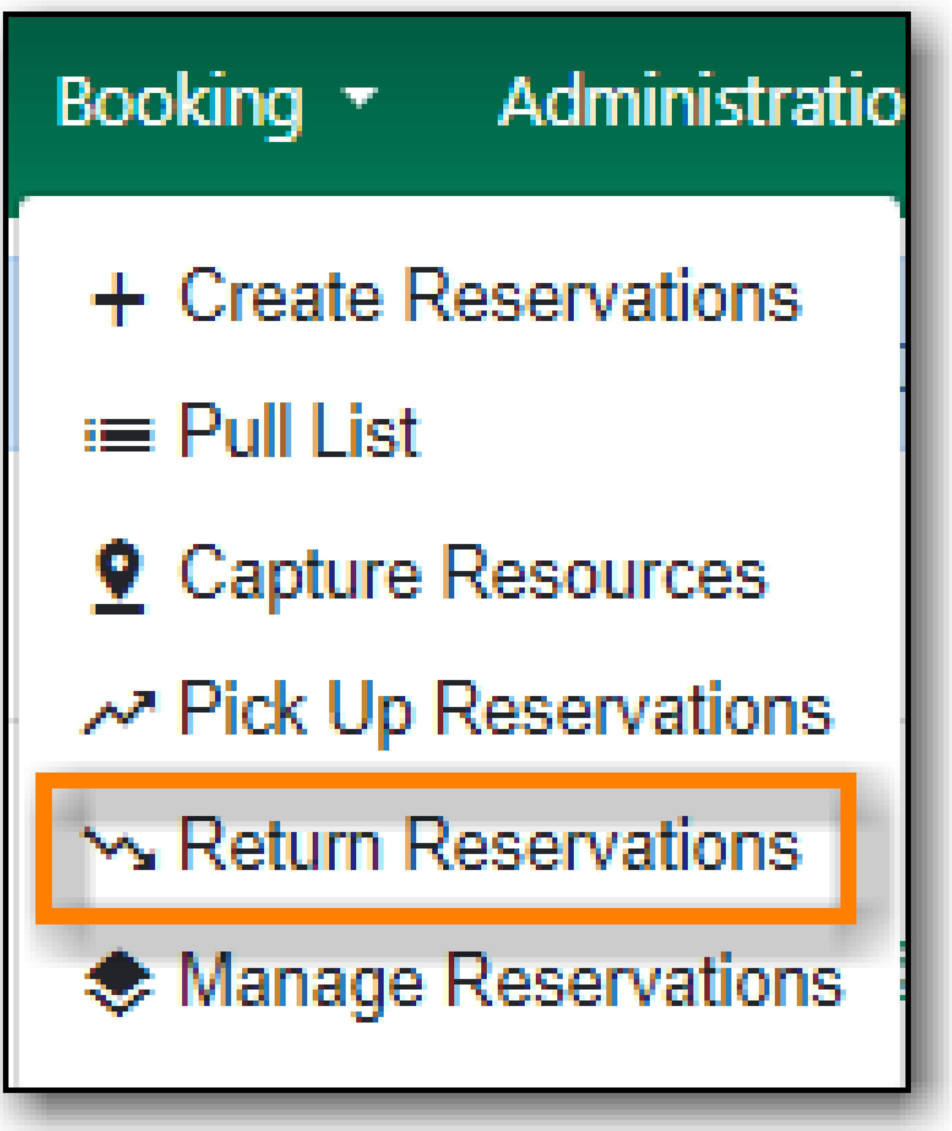
Reservations can also be picked up from the patron record. Retrieve the patron record → click **Other** → **Booking: Pick Up Reservations**.

CAUTION

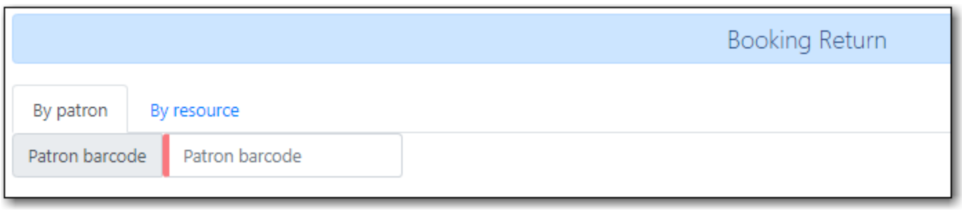
Always use the dedicated Booking Module interfaces for tasks related to reservations. Resources that have been captured for a reservation cannot be checked out using the Check Out interface, even if the patron is the reservation recipient.

46.5. Return Reservations

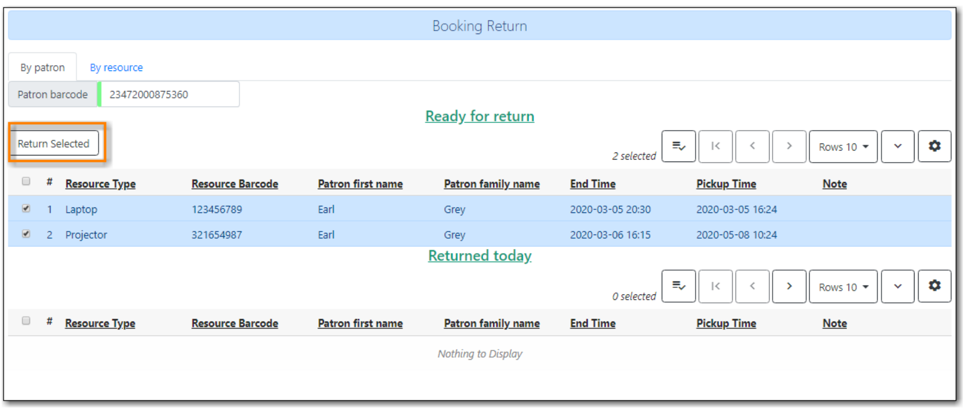
1. Click **Booking** → **Return Reservations**.



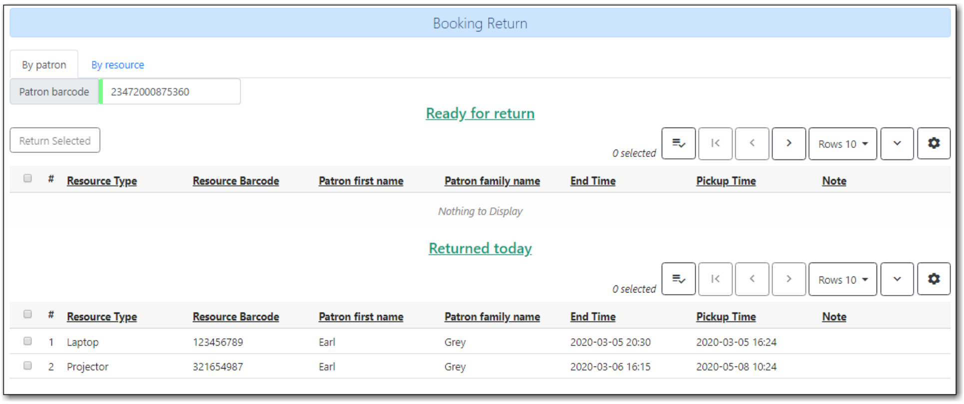
2. You can return the reservation by patron or resource barcode. Scan or enter the barcode.



3. Select the resources you want to return and click **Return Selected**.



4. The screen will refresh to show that the patron has returned the resource(s).



NOTE	Reservations can be returned from the patron record. Retrieve patron → click **Other** → **Booking: Return Reservations**.

CAUTION	When a reserved resource is brought back, staff must use the Booking Module to return the reservation.

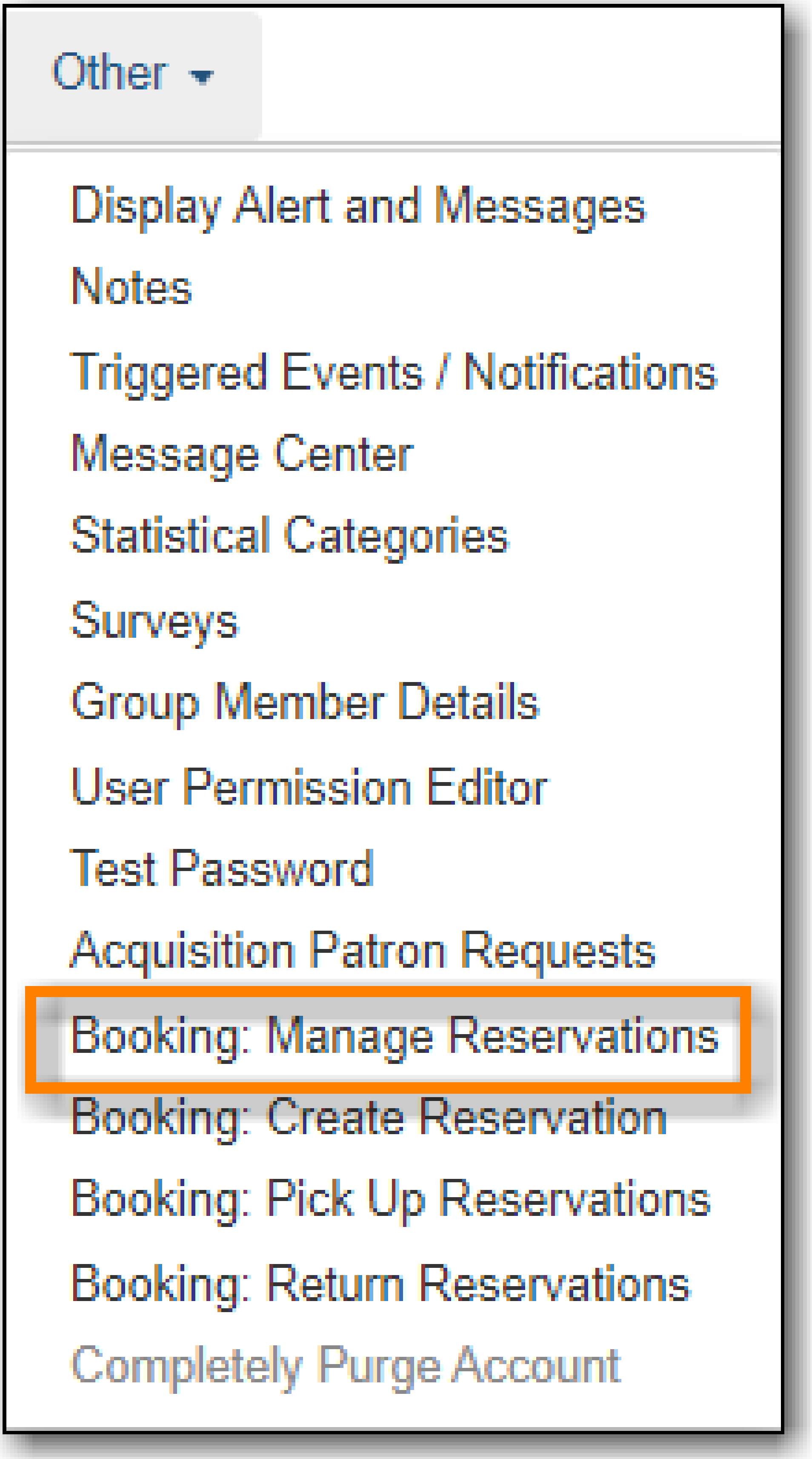
46.6. Manage Reservations

Sitka Snippet Video - Manage Reservations (2:17)

A reservation can be cancelled or edited from the patron's record or from Manage Reservations.

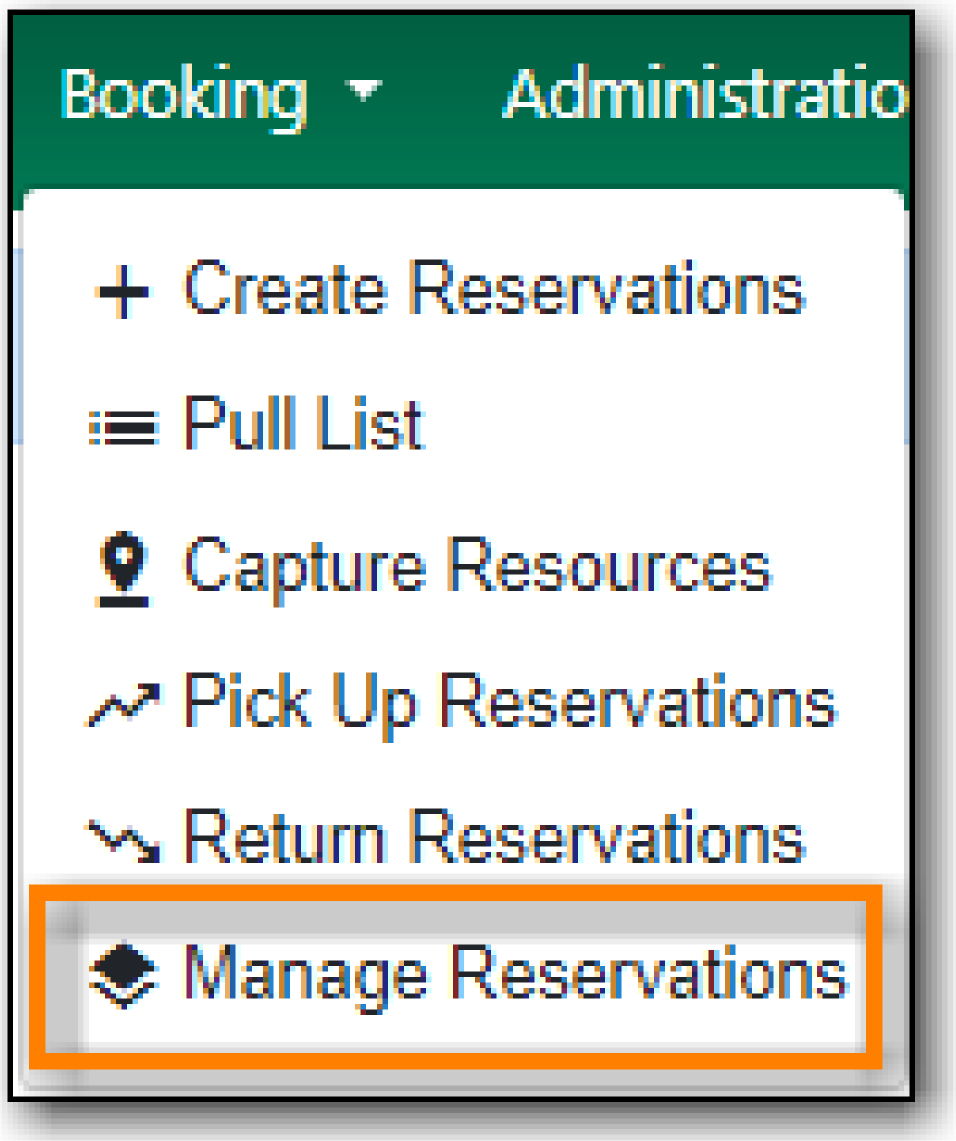
46.6.1. Manage reservations from the patron record

1. Retrieve the patron's record.
2. Click **Other** → **Booking: Manage Reservation**.



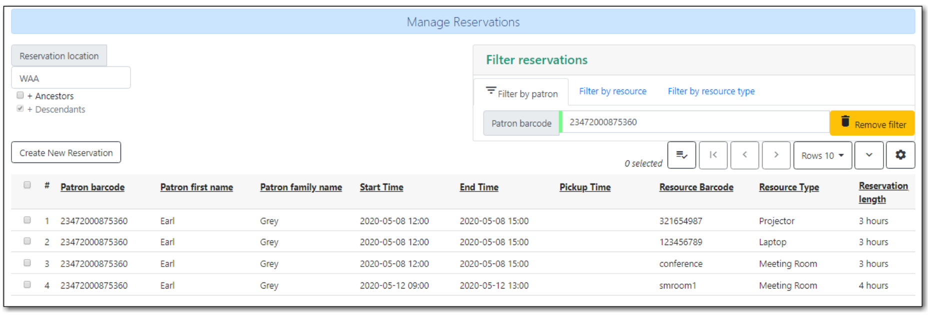
46.6.2. Manage reservations from the Manage Reservations screen

1. Click **Booking** → **Manage Reservations**.

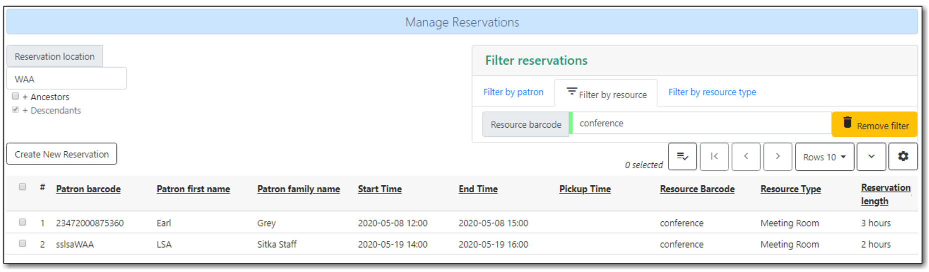


2. Use the filters to find specific reservations

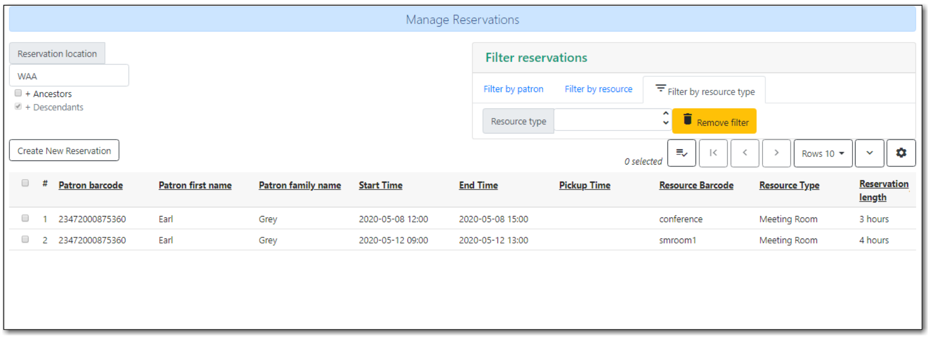
   a. Filter by patron



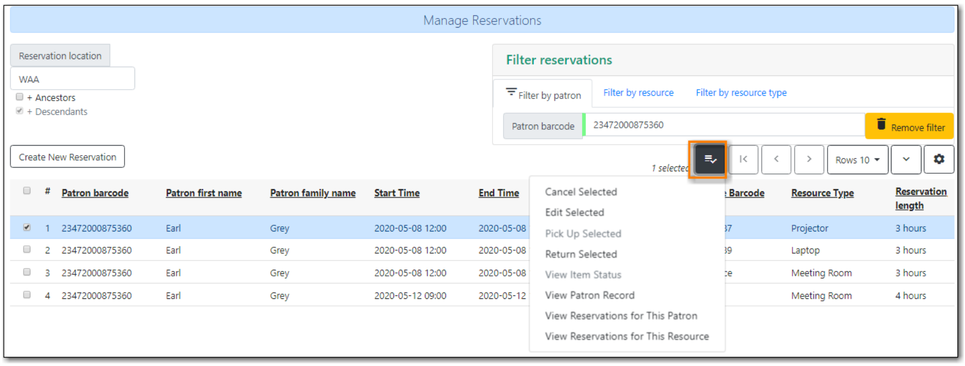
   b. Filter by resource



c. Filter by resource type



3. Select the reservation → Click **Actions** to see a list of available Actions.



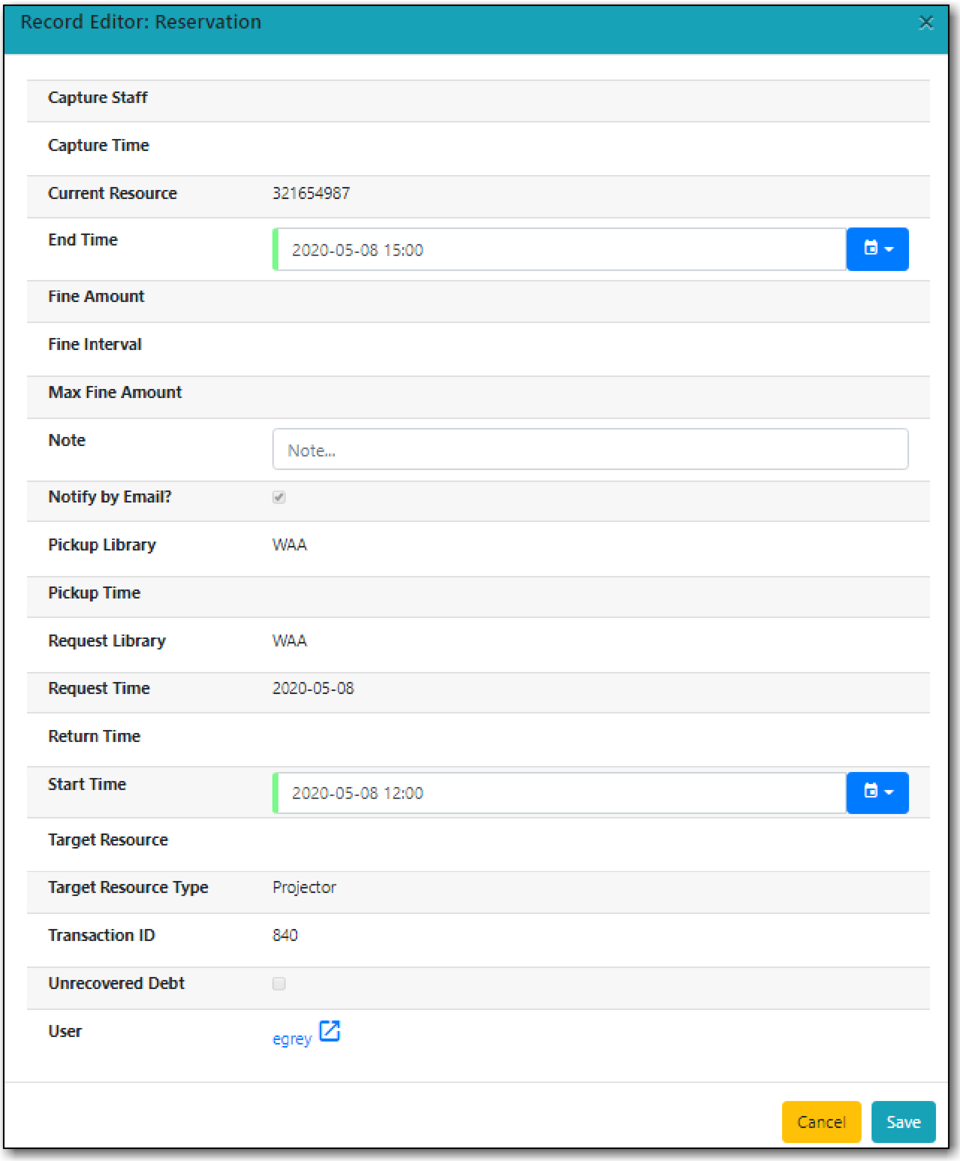
Cancel Reservation

1. Select the reservation(s) → Click **Actions** → Cancel Selected
2. A pop-up will ask you to confirm the cancellation → Click **Confirm**
3. A confirmation message will appear - Reservation successfully canceled.

Edit Reservation

You can change the start time and/or the end time of a reservation. You can also add a Note.

1. Select the reservation → Click **Actions** → Edit Selected
2. The reservation record editor will open



3. Edit the reservation
4. Click **Save**

Chapter 47. Booking Module Administration

47.1. Creating Bookable Non-Bibliographic Resources

Staff with the required permissions can create bookable non-bibliographic resources such as laptops, projectors, and meeting rooms.

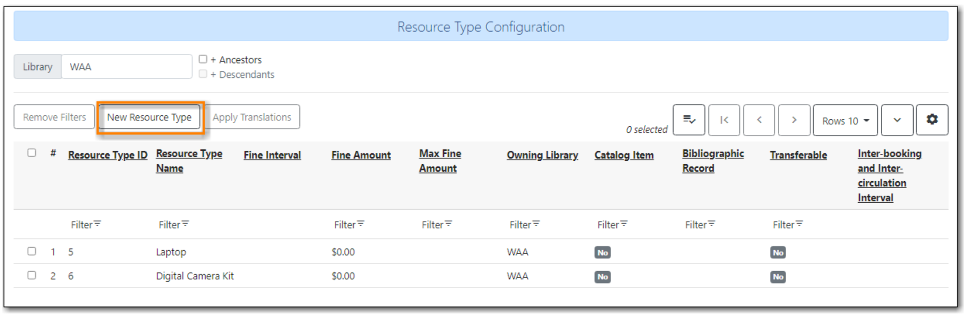
The following pieces make up a non-bibliographic resource:

- Resource Type
- Resource
- Resource Attribute
- Resource Attribute Values
- Resource Attribute Map

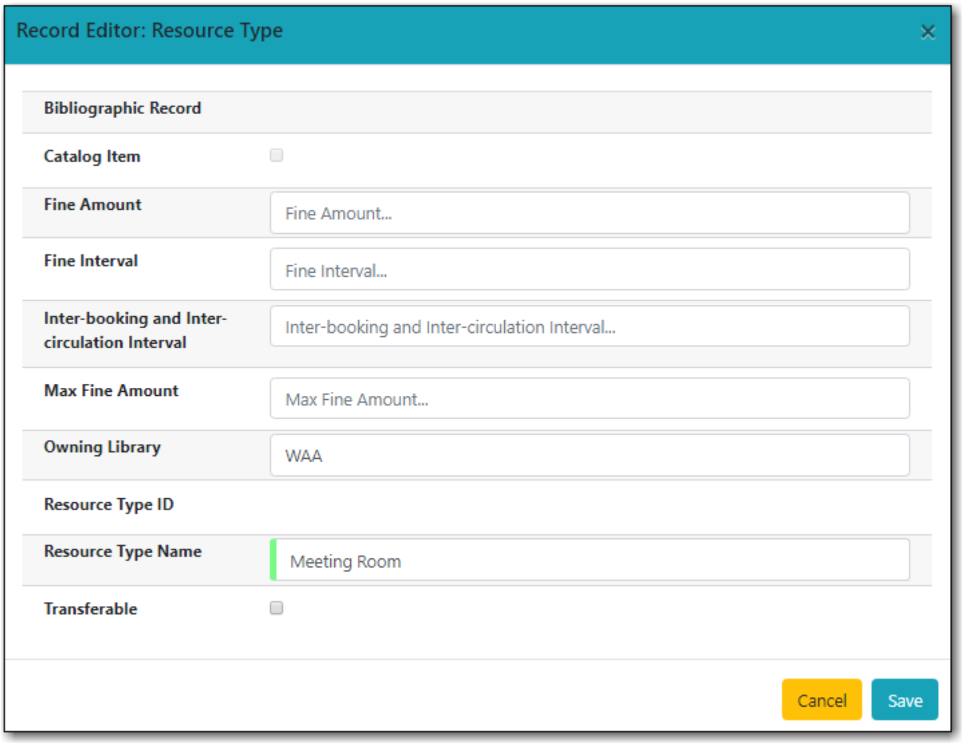
NOTE	You must create **Resource Types** and add **Resources** (booking items) to individual resource types. **Resource Attributes** are optional. Resource attribute may have multiple values. You need to link the applicable features (resource attributes and values) to individual items (resource) through the **Resource Attribute Map**. Before you create resources (booking items) you need to have a resource type and associated resource attributes and values, if any, for them.

47.1.1. Create New Resource Type

1. Select **Administration** → **Booking Administration** → **Resource Types**.
2. A list of current resource types will appear.
   a. You may also see catalogued items in the list. Those items have been marked bookable or booked before.
3. To create a new resource type, click **New Resource Type** in the top right corner.



4. A box will appear in which you create your new type of resource.

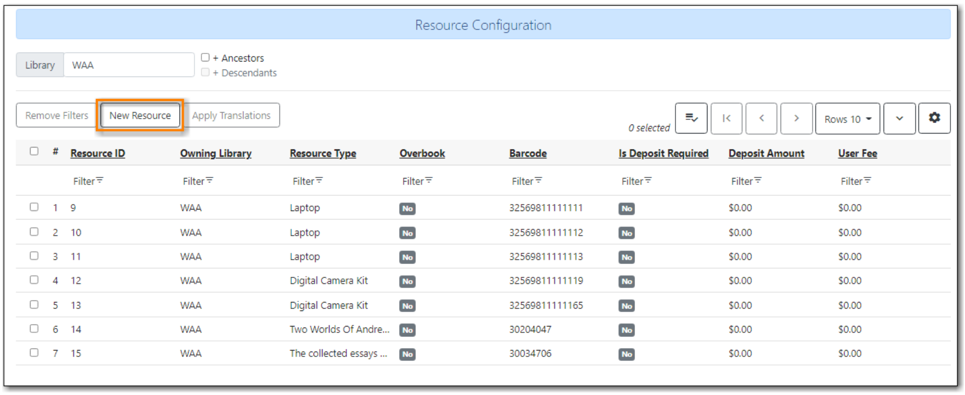


- Catalog Item - (Function not currently available.)
- Fine Amount - The amount that will be charged at each Fine Interval.
- Fine Interval - How often will fines be charged?
  - second(s), minute(s), hour(s), day(s), week(s)
  - 00:00:30, 00:01:00, 01:00:00
- Inter-booking and Inter-circulation Interval - The amount of time required by your library between the return of a resource and a new reservation for the resource.
- Max Fine Amount - The amount at which fines will stop generating.
- Owning Library - The home library of the resource.
- Resource Type Name - Give your resource a name.
- Transferable - This allows the item to be transferred between libraries.

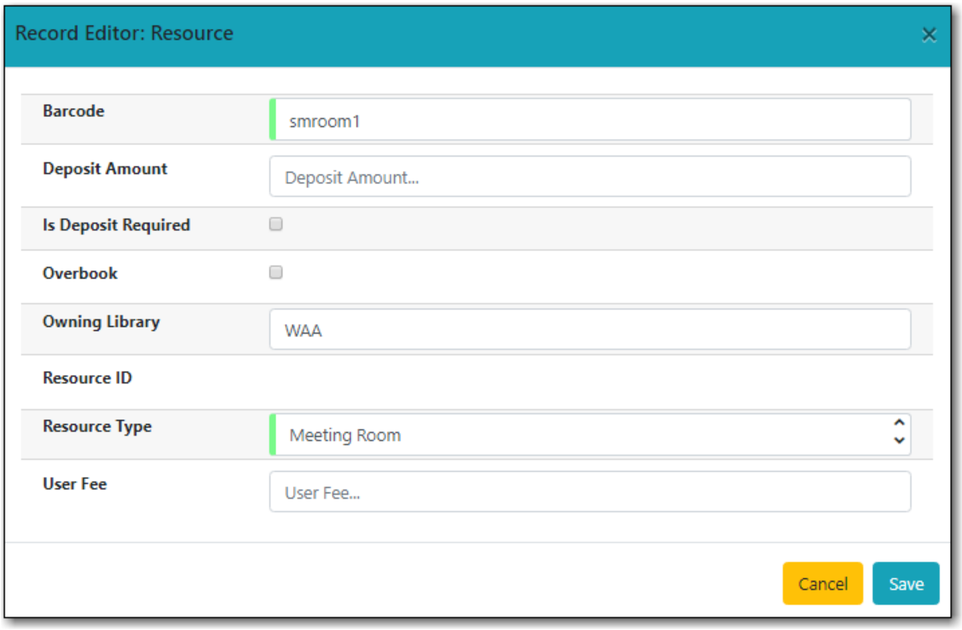
5. Click **Save**.

47.1.2. Create New Resource

1. Click **Administration** → **Booking Administration** → **Resources**.
2. Click **New Resource** in the top right corner.



3. A box will appear. Add information for the resource.

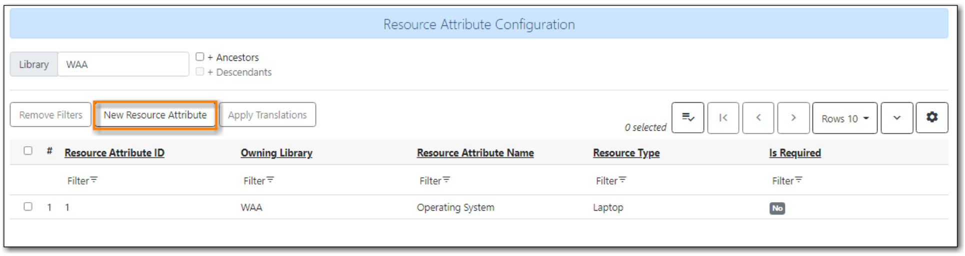


- Owning Library - The home library of the resource.
- Resource Type - Type in the first letter of the resource type's name to list then select the resource type for your item.
- Barcode - Barcode for the resource.
- Overbook - This allows a single item to be reserved, picked up, and returned by multiple patrons during overlapping or identical time periods.
- Is Deposit Required
- Deposit Amount
- User Fee

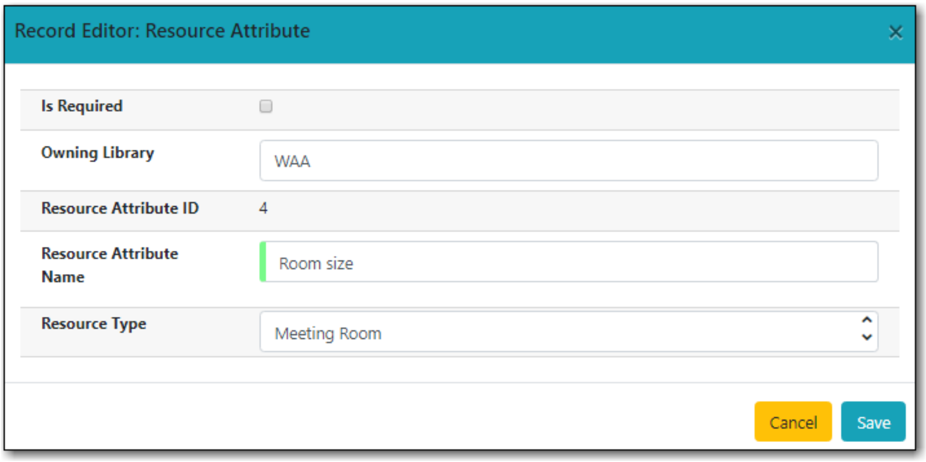
4. Click **Save**.

47.1.3. Create New Resource Attribute

1. Select **Administration** → **Booking Administration** → **Resource Attributes**.
2. Click **New Resource Attribute** in the top right corner.



3. A box will appear in which you can add the attributes of the resource.
    a. Attributes are categories of descriptive information. For example, an attribute of a projector may be the type of projector. Other attributes might be the number of seats available in a room, or the computing platform of a laptop.



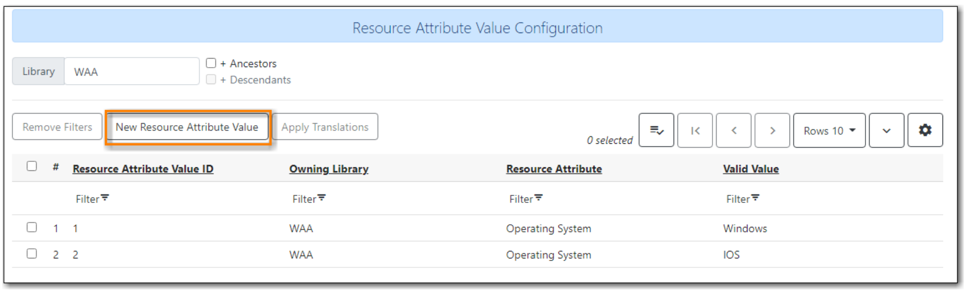
- Resource Attribute Name - Give your attribute a name.
- Owning Library - The home library of the resource.
- Resource Type - Type in the first letter to list then choose the Resource Type to which the Attribute is applicable.
- Is Required - (Function not currently available.)

4. Click **Save**.

NOTE One resource type may have multiple attributes. You may repeat the above procedure to add more.

47.1.4. Create New Resource Attribute Value

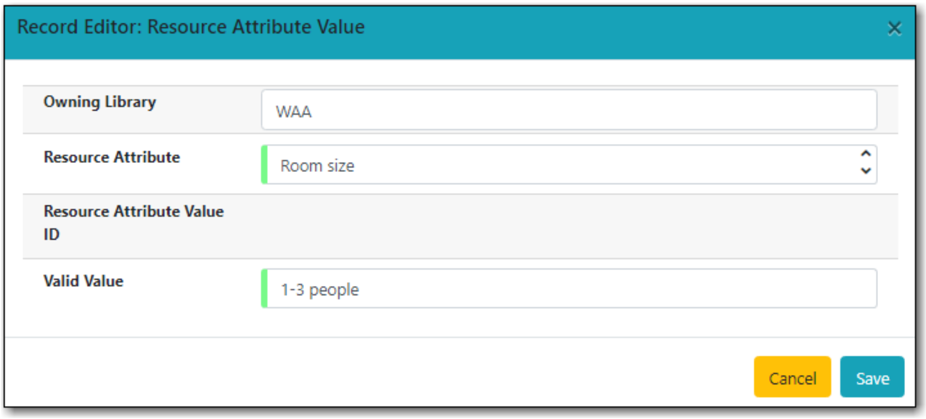
1. Select **Administration** → **Booking Administration** → **Resource Attribute Values**.
2. Click **New Resource Attribute Value** in the top right corner.



3. A box will appear in which you assign a value to a particular attribute.

   a. Values can be numbers, words, or a combination of them, that describe the particular aspects of the resource that have been defined as Attributes.

   b. As all values appear on the same list for selection, values should be as unique as possible. For example, a laptop may have a computing platform that is either PC or Mac.



      - Owning Library - The home library of the resource.
      - Resource Attribute - The attribute you wish to assign the value to.
      - Valid Value - Enter the value for your attribute.

4. Click **Save**..

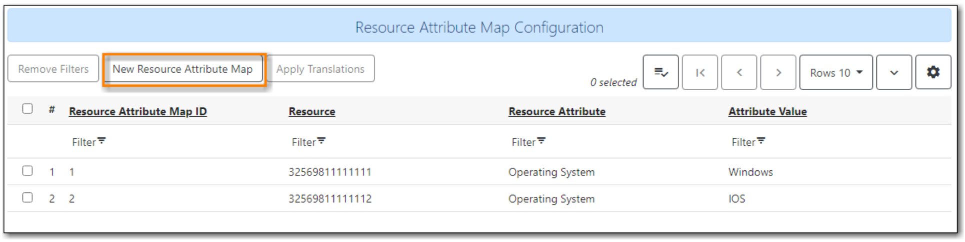
   a. Each attribute should have at least two values attached to it; repeat this process for all applicable attribute values.

47.1.5. Map Resource Attributes and Values to Resources

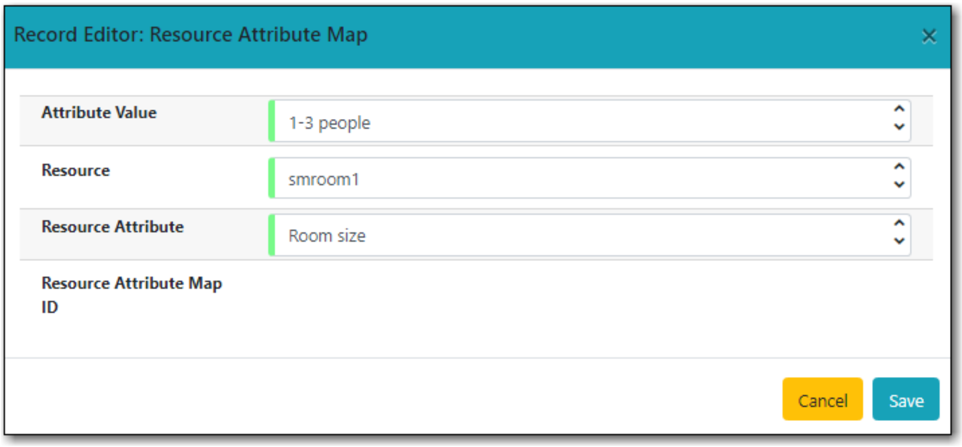
Use Resource Attribute Maps to bring together the resources and their attributes and values.

1. Select **Administration** → **Booking Administration** → **Resource Attribute Maps**.

2. Click **New Resource Attribute Map** in the right top corner.



3. A box will appear in which you will map your attributes and values to your resources.



- Resource - Enter the barcode of your resource.
- Resource Attribute - Select an attribute that belongs to the Resource Type.
- Attribute Value - Select a value that belongs to your chosen attribute and describes your resource. If your attribute and value do not belong together you will be unable to save.

4. Click **Save**.

NOTE A resource may have multiple attributes and values. Repeat the above steps to map all.

47.2. Editing Non-Bibliographic Resources

Staff with the required permissions can edit aspects of existing non-bibliographic resources. For example, resource type can be edited in the event that the fine amount for a laptop changes from $2.00 to $5.00.

47.2.1. Editing Resource Types

1. Bring up your list of resource types. Select **Administration** → **Booking Administration** → **Resource Types**.
2. A list of current resource types will appear.
3. Select the check box of the resource type you want to edit.
4. Click **Actions** → ***Edit Selected**.
5. The resource type box will appear. Make your changes and click **Save**.
6. Following the same procedure you may edit Resource Attributes, Attribute Values, Resources and Attribute Map by selecting them on **Administration** → **Booking Administration**.

47.3. Deleting Non-bibliographic Resources

1. To delete a booking resource, go to **Administration** → **Booking Administration** → **Resources**.
2. Select the check box of the resource you want to delete.
3. Click **Actions** → ***Delete Selected**. The resource will disappear from the list.

NOTE Following the same procedure you may delete Resource Attributes Maps.

You may also delete Resource Attribute Values, Resource Attributes and Resource Types. But you have to delete them in the reverse order as when you created them to make sure the entry is not in use when you try to delete it.

This is the deletion order: Resources → Resource Attribute Values → Resource Attributes → Resource Types.

Administration

Chapter 48. Administration Overview

Administration functions are available on the **Administration** dropdown menu. Functions on this menu are grouped into either the target module that the configuration applies to or the effect scope, e.g. individual workstations, libraries or the whole consortium. These function are visible to anyone logged into the staff client but most of them require special permissions to edit.

Workstation Administration: Here you may register your computer with extra libraries, configure printer settings, print templates, workstation's settings and their storage location.

Local Administration: Most settings applied to individual libraries are configured here.

Server Administration: Settings here are mainly applied to the whole consortium. But individual libraries can configure a few items, such as, call number prefix/suffix, library's operation hours and addresses under Organizational Units.

User Permission Editor: Local system administrators may add extra permissions to individual staff accounts.

NOTE	You may access most of the administration functions but attempting to edit may fail silently if you do not have the required permission. Your editing will not be saved.

Chapter 49. Workstation Administration

49.1. Search Preferences

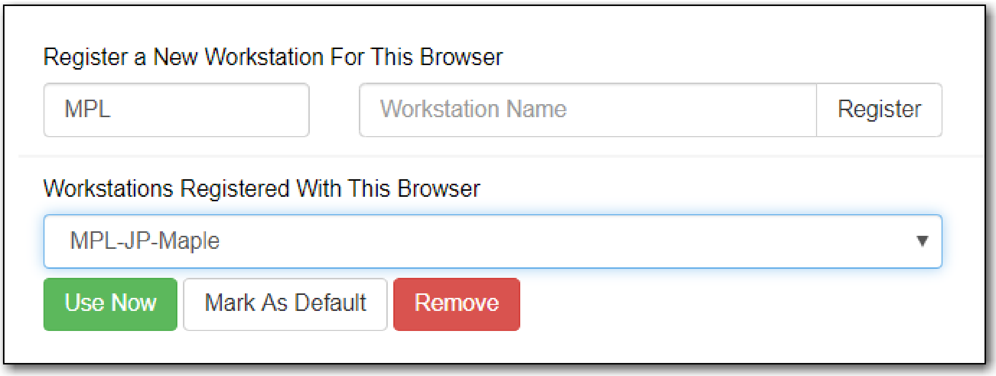
Refer to Set Search Preferences for detailed instructions

49.2. Registered Workstations

49.2.1. Register a New Workstation For This Browser

Register more than one workstation on a computer.

1. Click **Administration** → **Workstation** → **Registered Workstations**
2. Choose your library short code from the drop down menu.
3. Enter a unique workstation name → Click **Register**.
    a. If you are re-registering a workstation you can use the workstation's previous name to keep your workstation settings.
4. The new workstation is listed in the **Workstations Registered With This Browser** menu → click **Use Now** to return to the login page.



TIP Multi-branch library adminstrators and federation coordinators may require multiple workstations.

49.2.2. Workstations Registered With This Browser

A drop down menu shows the Workstations registered with this browser. Use the drop down to choose a registered workstation

1. Click **Use Now** to go to the staff client log in page
2. Click **Mark as Default** to make the selected workstation your default.
3. Click **Remove** to deleted the selected workstation.

49.3. Printer Settings

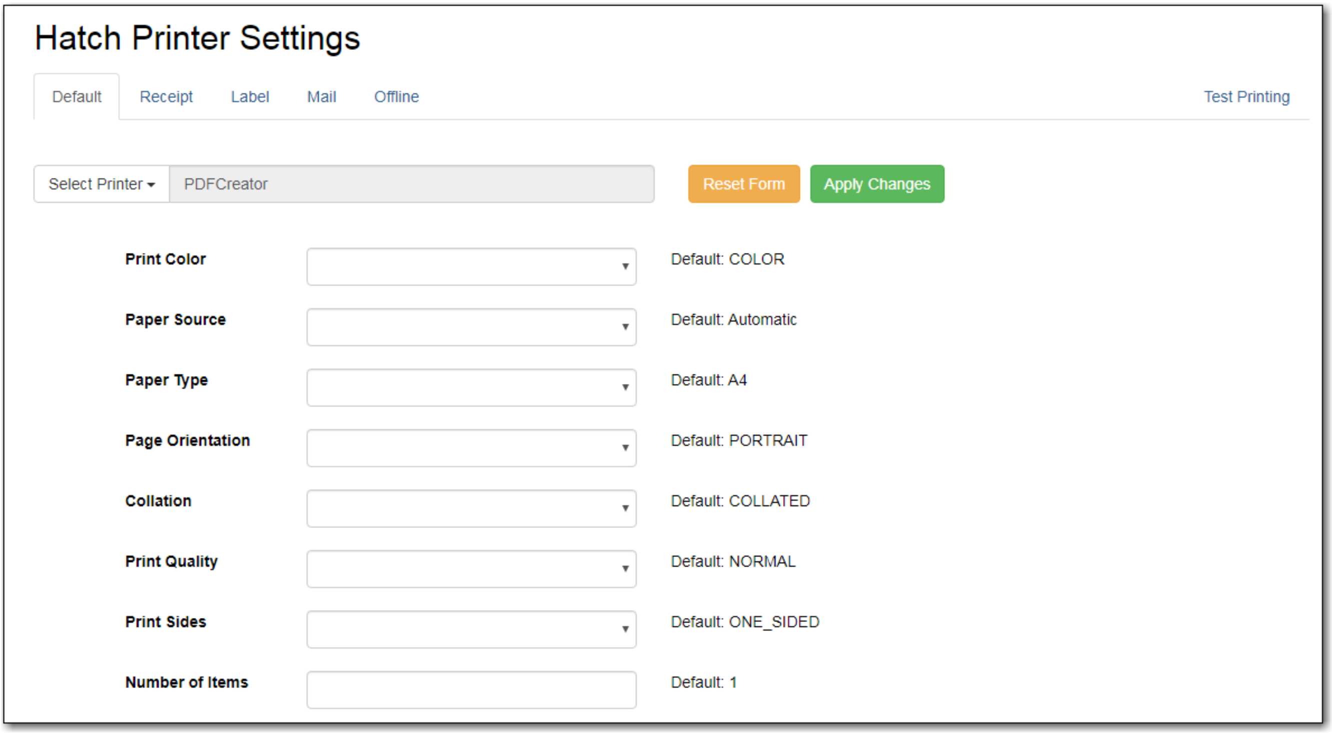
Click **Administration** → **Workstation** → **Printer Settings**

49.3.1. Printing without Hatch

If you do not have Hatch installed on your computer you will see this message "Hatch is not installed in this browser. Printing must be configured via the native browser print configuration."

49.3.2. Printing with Hatch

If Hatch is installed on your computer you will use this screen to setup your printer defaults.



49.4. Print Templates

Most of the receipts that print from the Evergreen staff client software are managed via the Print Template Editor (**Administration** → **Workstation** → **Print Templates**) and can be customized on an individual workstation basis. Typically, library systems will set up the receipts the way they want them to print out on one workstation at a branch, then export the settings as a file and import that file to each of the other workstations at that branch.

If Hatch is installed receipts can be forced to use specific printer settings. Printer Settings can be set at **Administration** → **Workstation** → **Printer Settings**.

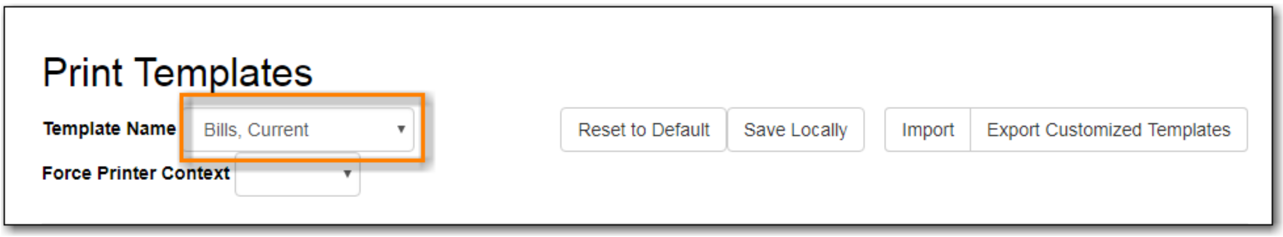
This is a complete list of the receipts currently in use in Evergreen.

List of Receipts

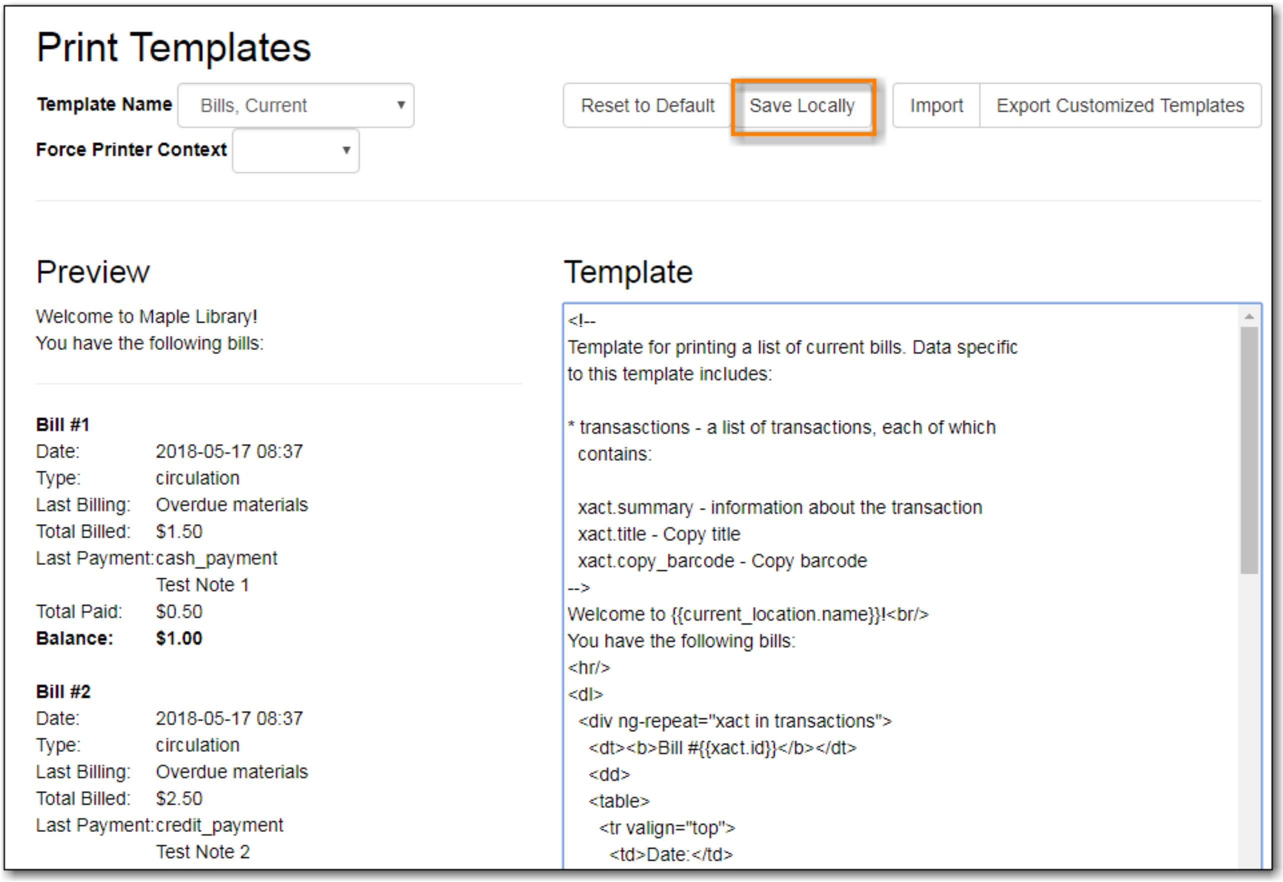
- **Bills, Current:** Listing of current bills on an account.
- **Bills, Historic:** Listing of bills that have had payments made on them. This used on the Bill History Transaction screen.
- **Bills, Payment:** Patron payment receipt.
- **Checkin:** List of items that have been entered in to the check-in screen.
- **Checkout:** List of items currently checked out by a patron during the transaction.
- **Hold Transit Slip:** This is printed when a hold goes in-transit to another library.
- **Hold Shelf Slip:** This prints when a hold is fulfilled.
- **Holds for Bib Record:** Prints a list of holds on a Title record.
- **Holds for Patron:** Prints a list of holds on a patron record.
- **Hold Pull List:** Prints the Holds Pull List.
- **Hold Shelf List:** Prints a list of hold that are waiting to be picked up.
- **In-House Use List:** Prints a list of items imputed into In-house use.
- **Item Status:** Prints a list of items imputed into Item Status.
- **Items Out:** Prints the list of items a patron has checked out.
- **Patron Address:** Prints the current patrons address.
- **Patron Note:** Prints a note on a patron's record.
- **Renew:** List of items that have been renewed using the Renew Item Screen.
- **Transit List:** Prints the list of items in-transit from the Transit List.
- **Transit Slip:** This is printed when an items goes in-transit to another location.

49.4.1. Customize Receipt Templates

1. In Evergreen, go to **Administration** → **Workstation** → **Print Templates**.
2. Select the Template Name of the receipt you wish to customize.



3. If Hatch is enabled, you can choose different printers for different receipts with the Force Printer Context field. Otherwise, disregard this field.
4. Make changes to the code in the Template editor field on right. Examples of code and formatting are below.
5. Click **Save Locally**.



Formatting

The print templates follow W3C HTML standards http://w3schools.com/html/default.asp.

Print templates use variables for various pieces of information coming from the Evergreen database. These variables deal with everything from the library name to the due date of an item. Information from the database is entered in the templates with curly brackets. Different types of print templates have access to different pieces of information. Example: `{{checkout.title}}`

Some print templates have sections that are repeated for each item in a list. For example, the portion of the Checkout print template below repeats every item that is checked out in HTML list format by means of the *ng-repeat* in the li tag.

```
<ol>
<li ng-repeat="checkout in circulations">
<b>{{checkout.title}}</b><br/>
Barcode: {{checkout.copy.barcode}}<br/>
Due: {{checkout.circ.due_date | date:"short"}}<br/>
</li>
</ol>
```

Table 2. Text Formatting

Goal	Original	Code	Result
Bold (HTML)	hello	`<b>hello</b>`	**hello**

<table>
<tr><th>Goal</th><th>Original</th><th>Code</th><th>Result</th></tr>
<tr><td>Bold (CSS)</td><td>hello</td><td>hello</td><td>hello</td></tr>
<tr><td>Capitalize</td><td>circulation</td><td>circulation</td><td>Circulation</td></tr>
<tr><td>Currency</td><td>1</td><td>{{1 | currency}}</td><td>$1.00</td></tr>
</table>

Table 3. Date Formatting

<table>
<tr><th>Code</th><th>Result</th></tr>
<tr><td>{{today}}</td><td>2017-08-01T14:18:51.445Z</td></tr>
<tr><td>{{today | date:'short'}}</td><td>8/1/17 10:18 AM</td></tr>
<tr><td>{{today | date:'M/d/yyyy'}}</td><td>8/1/2017</td></tr>
</table>

Table 4. Currency Formatting

<table>
<tr><th>Code</th><th>Result</th></tr>
<tr><td>{{xact.summary.balance_owed | currency}}</td><td>$2.50</td></tr>
</table>

Conditional Formatting

You can use Angular JS to only print a line if the data matches. For example:

```
`$$<div ng-if="hold.email_notify == 't'">Notify by email: {{patron.email}}</div>$$`
```

This will only print the “Notify by email:” line if email notification is enabled for that hold.

See also: https://docs.angularjs.org/api/ng/directive/ngIf

Substrings

To print just a substring of a variable, you can use a **limitTo** function: `{{variable | limitTo:limit}}` where limit is the number of characters you want.

<table>
<tr><td>Original</td><td>Code</td><td>Result</td></tr>
<tr><td>The Sisterhood of the Traveling Pants</td><td>{{checkout.title | limitTo:10}}</td><td>The Sisterhood of th</td></tr>
<tr><td>123456789</td><td>{{patron.card.barcode | limitTo:-5}}</td><td>56789</td></tr>
</table>

Images

You can use HTML and CSS to add an image to your print template if you have the image uploaded onto a publicly available web server. The logo image from your Evergreen public catalogue can be used for this.

```
<img
src="https://LIBRARYCODE.PROVINCE.catalogue.libraries.coop/eg/opac/images/small_logo.p
ng" style="width:150px;padding:5px;">
```

Sort Order

You can sort the items in an ng-repeat block using orderBy. For example, the following will sort a list of holds by the shelving location first, then by the call number:

```
`$$<tr ng-repeat="hold_data in holds | orderBy :
['copy.location.name','volume.label']">$$`
```

Reset Print Templates to Default

Click **Reset to Default**.

Export / Import Customized Templates

To quickly set up all workstations in a branch in the same way, set up one workstation's receipt templates completely, then use the "Export Customized Templates" function to save an external file of templates that you can import into other workstations. Just remember to *'Save Locally'* once you import the receipts on the new machine.

Export Customized Templates

1. Click **Export Customized Templates**.
2. The file will open in your default text editor, select the location to save the file to, name the file, and click **Save.**
3. Click **OK.**

Import Customized Templates

1. Click **Import**.
2. Navigate to and select the file that you want to import. Click **Open.**
3. A message displays advising file imported.
4. Click **Save Locally.**

49.4.2. Receipt Content Reference

Receipt templates use variables for various pieces of information coming from the Evergreen database. These variables deal with everything from the library name to the due date of an item. Information from the database is entered in the templates with {{term}}.

Table 5. Any Type of Print Template

Tag	Notes
{{current_location.name}}	Current library’s full name
{{current_location.shortname}}	Current library’s short name
{{current_location.email}}	Current library’s email address
{{current_location.phone}}	Current library’s phone number
{{today}}	Today’s time and date - raw data
{{today|date:'short'}}	Readable time and date: 8/1/17 10:18 AM
{{today|date:'M/d/yyyy'}}	Date only: 8/1/2017
{{staff.first_given_name}}	Staff first name

Table 6. Bills, Current

Tag	Notes
{{xact.summary.balance_owed}}	Balance remaining
{{xact.copy_barcode}}	Barcode
{{xact.id}}	Bill ID
{{xact.xact_start}}	Bill start date
{{xact.summary.xact_type}}	Bill type (circulation vs. grocery)
{{xact.summary.last_billing_note}}	Last billing note
{{xact.summary.last_billing_type}}	Last billing type
{{xact.summary.last_payment_note}}	Last payment note
{{xact.summary.last_payment_type}}	Last payment type
{{xact.title}}	Title
{{xact.summary.total_owed}}	Total billed
{{xact.summary.total_paid}}	Total paid

Table 7. Bills, Historical

Tag	Notes
{{xact.summary.balance_owed}}	Balance remaining
{{xact.copy_barcode}}	Barcode
{{xact.id}}	Bill ID
{{xact.xact_start}}	Bill start date
{{xact.summary.xact_type}}	Bill type (circulation vs. grocery)
{{xact.summary.last_billing_type}}	Last billing type
{{xact.summary.total_owed}}	Total billed
{{xact.summary.total_paid|currency}}	Total paid

Tag	Notes
{{xact.summary.last_billing_note}}	Last billing note
{{xact.summary.last_billing_type}}	Last billing type
{{xact.summary.last_payment_note}}	Last payment note
{{xact.summary.last_payment_type}}	Last payment type
{{xact.title}}	Title
{{xact.summary.total_owed}}	Total billed
{{xact.summary.total_paid}}	Total paid

Table 8. Bills, Payment

Tag	Notes
{{payment_applied}}	Amount paid
{{amount_voided}}	Amount voided
{{change_given}}	Change given
{{payment_note}}	Payment note
{{payment_type}}	Payment type
{{previous_balance}}	Previous balance
{{new_balance}}	Remaining balance
{{payment.xact.copy_barcode}}	Barcode
{{payment.xact.summary.last_billing_type}}	Last billing type
{{payment.xact.id}}	Payment ID
{{payment.amount}}	Payment received
{{payment.xact.title}}	Title

Table 9. Checkin

Tag	Notes
{{checkin.copy_barcode}}	Barcode
{{checkin.call_number.label||"Not Cataloged"}}	Call Number (if no call number, displays “Not Cataloged”)
{{checkin.title}}	Title

Table 10. Checkout

Tag	Notes
{{patron_money.balance_owed}}	Amount Owed
{{checkout.author}}	Author
{{checkout.copy_barcode}}	Barcode

Tag	Notes
{{checkout.call_number.label}}	Call Number
{{checkout.circ.due_date}}	Due Date
{{checkout.copy.price}}	Price
{{checkout.title}}	Title

Table 11. Hold Pull List

Tag	Notes
{{hold_data.author}}	Author
{{hold_data.copy.barcode}}	Barcode
{{hold_data.volume.label}}	Call number
{{hold_data.hold.hold_type}}	Hold type
{{hold_data.part.label}}	Part
{{hold_data.copy.location.name}}	Shelving location
{{hold.title}}	Title

Table 12. Hold Shelf Slip

Tag	Notes
{{call_number.label}}	Call Number
{{today}}	Hold available date
div ng-switch on="hold.behind_desk">div ng-switch-when="t">strong>Private - Hold Behind Desk/strong>/div>div ng-switch-when="f">strong>Public Holds Shelf/strong>/div>/div>	Hold location (Hold behind desk or public holds shelf)
ol>li ng-repeat="note in hold_notes|filter: {slip : 't'}">strong>{{note.title}}/strong>br/>{{note.body }}/li>/ol>	Hold Notes
{{hold.request_time | date:'M/d/yyyy'}}	Hold request date
{{hold.shelf_expire_time | date:'M/d/yyyy'}}	Hold shelf expire date
{{author}}	Item author
{{copy.barcode}}	Item barcode
{{title}}	Item title
{{hold.email_notify}}	Returns true or false flag
{{hold.phone_notify}}	Notification phone number
{{hold.sms_notify}}	Notification SMS text number
{{patron.card.barcode}}	Patron barcode

Tag	Notes
{{patron.email}}	Patron email address
{{patron.first_given_name}}	Patron first name
{{patron.family_name}}	Patron last Name
{{patron.second_given_name}}	Patron middle name

Table 13. Hold Transit Slip

Tag	Notes
{{dest_address.city}}	Destination city
{{dest_courier_code}}	Destination courier code
{{dest_location.name}}	Destination full name
{{dest_location.shortname}}	Destination short name
{{dest_address.state}}	Destination state
{{dest_address.street1}}	Destination street address 1
{{dest_address.street2}}	Destination street address 2
{{dest_address.post_code}}	Destination zip code
{{hold.behind_desk}}	Hold behind desk
{{hold.request_time}}	Hold request date
{{author}}	Item author
{{copy.barcode}}	Item barcode
{{title}}	Item title
{{hold.email_notify}}	Notification email address
{{hold.phone_notify}}	Notification phone number
{{hold.sms_notify}}	Notification SMS text number
{{patron.card.barcode}}	Patron barcode
{{patron.first_given_name}}	Patron first name
{{patron.family_name}}	Patron last Name
{{patron.second_given_name}}	Patron middle name

Table 14. Holds for Bib Record

Tag	Notes
{{holds.title}}	Title
{{hold_data.author}}	Author
{{hold.copy.barcode}}	Hold target copy barcode
{{hold.hold.request_time}}	Hold request date

Tag	Notes
{{hold.patron_barcode}}	Patron barcode
{{hold.patron_alias}}	Patron hold alias
{{hold.patron_last}}	Patron last name

Table 15. Holds for Patron

Tag	Notes
{{hold.author}}	Author
div ng-if="hold.hold.email_notify == 't'"> {{hold.hold.requestor.email}} /div>	Notify by email (shows email only if selected)
{{hold.hold.phone_notify}}	Notify by phone (shows number)
{{hold.hold.sms_notify}}	Notify by SMS text (shows number)
{{hold.hold.pickup_lib.name}}	Pickup library
{{hold.hold.request_time}}	Request date
{{hold.title}}	Title

Table 16. In-House Use List

Tag	Notes
{{ihu.copy.barcode}}	Barcode
{{ihu.num_uses}}	Number of uses

Table 17. Item Status

Tag	Notes
{{copy.barcode}}	Barcode
{{copy['call_number.record.simple_record.title']} }	Title

Table 18. Items Out

Tag	Notes
{{checkout.copy.barcode}}	Barcode
{{checkout.circ.due_date}}	Due date
{{checkout.title}}	Title

Table 19. Patron Address

Tag	Notes
{{patron.first_given_name}}	Patron first name
{{patron.second_given_name}}	Patron middle name
{{patron.family_name}}	Patron last name

Tag	Notes
{{address.street1}}	Street address 1
{{address.street2}}	Street address 2
{{address.city}}	City
{{address.state}}	State
{{address.post_code}}	Zip code

Table 20. Patron Note

Tag	Notes
{{note.value}}	Note contents
{{note.create_date}}	Note creation date
{{note.title}}	Note title
{{note.usr.card.barcode}}	Patron barcode
{{note.usr.first_name}}	Patron first name
{{note.usr.family_name}}	Patron last name
{{note.usr.second_given_name}}	Patron middle name

Table 21. Renew

Tag	Notes
{{renewal.copy.barcode}}	Barcode
{{renewal.circ.due_date}}	Due date
{{renewal.title}}	Title

Table 22. Transit List

Tag	Notes
{{transit.target_copy.barcode}}	Barcode
{{transit.source_send_time}}	Date sent
{{transit.dest.shortname}}	Short name of destination library
{{transit.source.shortname}}	Short name of sending library
{{transit.target_copy.call_number.record.simple_record.title}}	Title

Table 23. Transit Slip

Tag	Notes
{{dest_address.city}}	Destination city
{{dest_courier_code}}	Destination courier code
{{dest_location.name}}	Destination full name

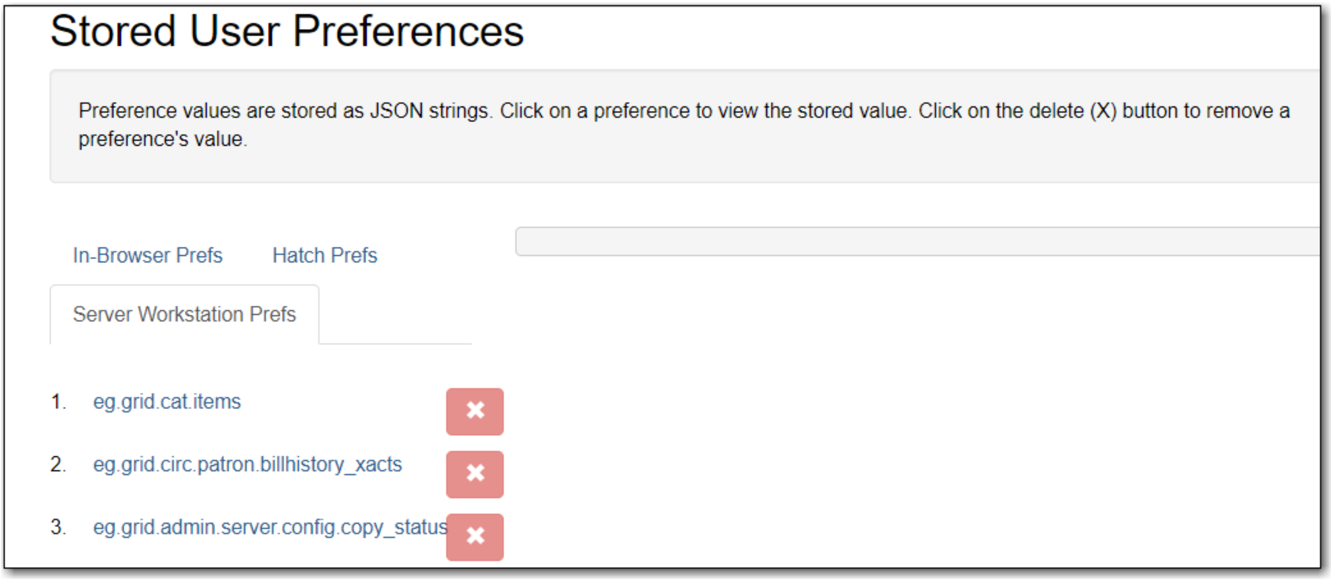
Tag	Notes
{{dest_location.shortname}}	Destination short name
{{dest_address.state}}	Destination state
{{dest_address.street1}}	Destination street address 1
{{dest_address.street2}}	Destination street address 2
{{dest_address.post_code}}	Destination zip code
{{author}}	Item author
{{copy.barcode}}	Item barcode
{{title}}	Item title

49.5. Stored Preferences

Click **Administration** → **Workstation** → **Stored Preferences**

Here you can view stored user preferences. User settings are added to the list whenever you choose to **Save Columns**, **Set default view** or pick a value from a sticky drop down menu.

- Click on a preference to view the stored value.
- Click on the delete (X) button to remove a preference's value



49.5.1. In-Browser Prefs

- Saved settings for this workstation only

49.5.2. Hatch Prefs

- Saved settings via Hatch

49.5.3. Server Workstation Prefs

- Saved settings for any workstation registered to your library

49.6. Hatch

Hatch is an optional installable program that works with your browser to manage complex printing needs (such as printing to different printers under different circumstances).

Refer to Downloading and Installing Hatch for installation instructions.

49.6.1. Troubleshooting Hatch

Operating System

Hatch will only work with Windows 7, 8, and 10 at this time. If you are going to submit a ticket, include the version in your ticket, as well as whether it is 32 or 64-bit. You can find this by:

1. Click on the Windows Start button.
2. Right-click on Computer.
3. Click on Properties.

Java

Verify that the Java Runtime Environment (JRE) is up to date (version 8 update 161 or higher). If you are unsure which version you have, view your computer's list of programs or simply download and install the latest version from:

https://www.java.com/en/download/help/windows_manual_download.xml

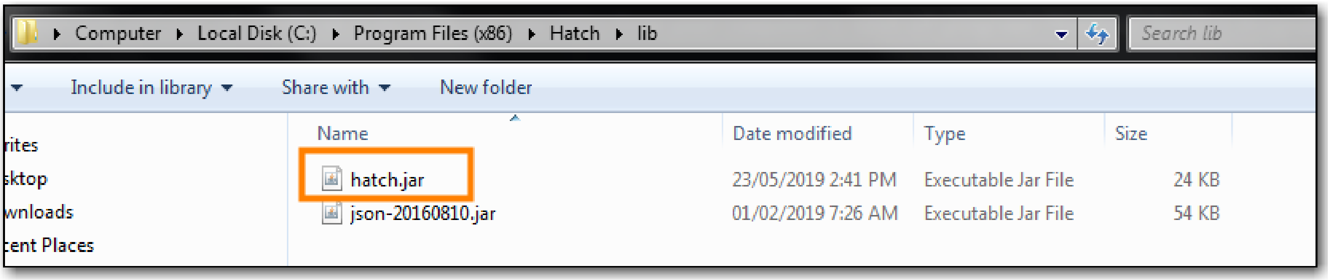
You can also check to be sure that your operating system is able to find the path to Java:

1. Open up a command window (Start Menu, type in cmd).
2. Type in: java -version
3. You should see the Java version number listed. If there is a problem, you will see an error message.

Hatch Program

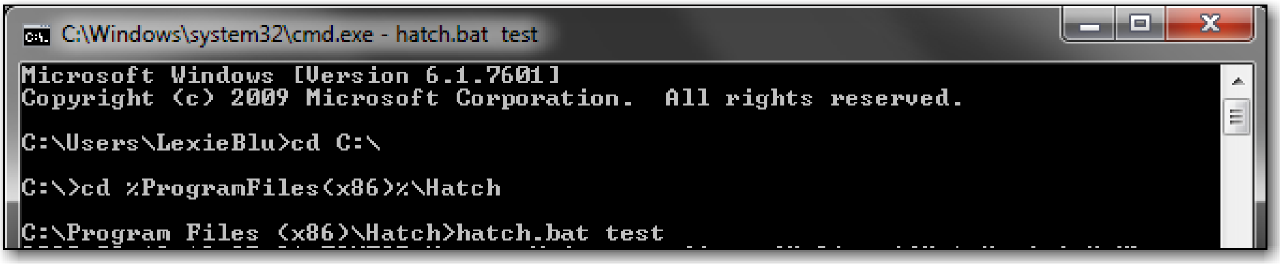
Verify that you are running the correct version of Hatch (0.3.2). You can see this from your computer's list of programs **Control Panel** > **Programs and Features**.

Confirm a "lib" directory exists in the Hatch install directory and that it includes a hatch.jar file



Test Hatch

1. Open up a command window (Start Menu, type in cmd).
2. Enter command C:\>cd %ProgramFiles(x86)%\
3. Enter command C:\Program Files (x86)\Hatch>hatch.bat test

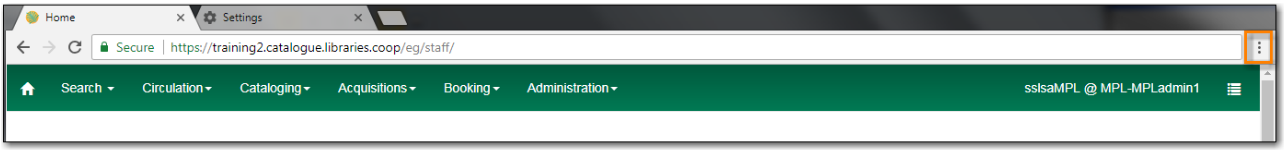


4. Either take a screenshot or copy and paste the text that appears in the command window.

Hatch Extension

Verify that you are running the correct version of the Hatch Chrome Extension (0.2.2).

1. Click Menu.



2. Click **More Tools**.
3. Click **Extensions**.
4. Scroll down to Hatch Native Messenger.
5. Verify that it is version 0.2.2 and Enabled.
6. When the Hatch Extension is installed and enabled, a small yellow icon should appear in the top-right corner of the browser:

Hatch Extension Console Messages:

1. In Chrome, click **Menu**.
2. Select **More Tools**.
3. Select **Extensions**.
4. Enable Developer Mode.
5. Choose Hatch Native Messenger.

6. Click on the link that says "background" page. (This will open a new window.)
7. Select the Console tab.
8. Change the "Default" drop down to be sure that Verbose is checked.
9. Either take a screen shot or copy and paste the text that appears in the console when you see the errors occurring. Be sure to include any of the errors that display in red.

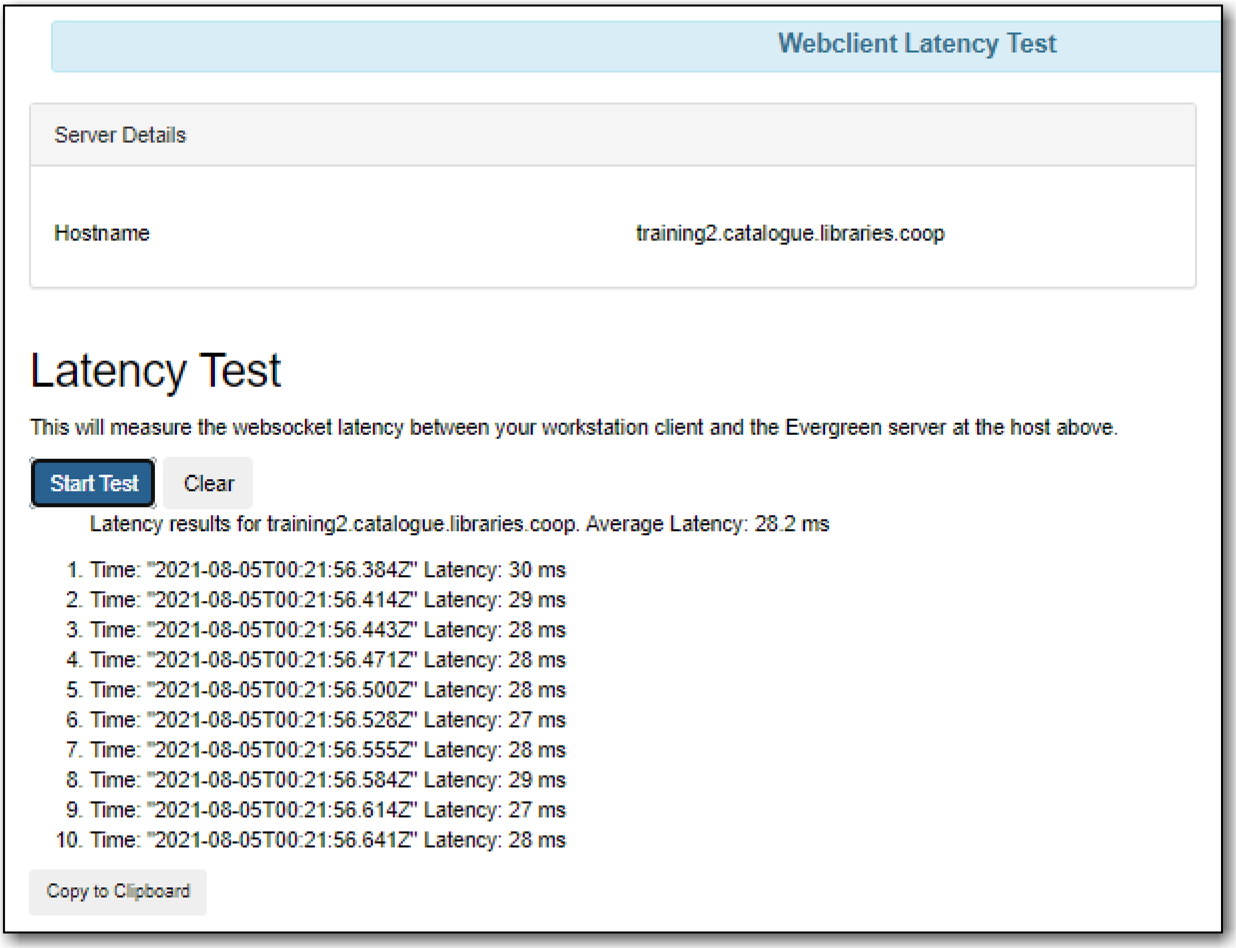
49.7. Tests

Click **Administration** → **Workstation** → **Tests**

49.7.1. Latency Test

This will measure the websocket latency between your workstation client and the Evergreen server.

1. Click **Start Test** to run the test
2. Click **Copy to Clipboard** to copy the results
3. Click **Clear** to clear the results



Average Latency - Indicates how long it takes for your workstation to communicate with Sitka's Evergreen servers.

49.8. Disable Sounds

Click **Administration** → **Workstation**

Disable Sounds

1. Check the box for **Disable Sounds** to turn off the staff client Sounds.

Test Sounds

1. Click the buttons to test the staff client sounds.
2. Distinct sounds will be played for each event.
   a. **Success**
   b. **Info**
   c. **Warning**
   d. **Error**

Chapter 50. Local Administration

50.1. Overview

The following table describes each of the menu options in use and their required permission levels. Contact Co-op support team if you have questions about settings that cannot be edited with a Local System Administrator (LSA) account.

Menu option	Description	Permission
Age Overdue Circs to Lost	To create a queue of ALL overdue items by selected patron profiles at selected libraries to be marked lost. It does not support date parameter. This feature is mainly for school libraries' end of term process. To automatically mark items lost when they are overdue for x days, contact Co-op support	LSA
Auto-Print Settings	To block automatic receipt printing in selected staff client transactions	LSA
Cash Reports	View summary report of cash transactions for selected date range	All staff
Circulation Policy	View circulation policies	Viewable to LSA. Contact Co-op support for editing
Closed Dates Editor	Set library ad hoc closure dates (affects due dates and fines)	LSA
Group Penalty Thresholds	Set library-specific thresholds for maximum items out, maximum overdues, and maximum fines	LSA
Holdings Template	Interface to create holdings templates	LSA/Cataloguers
Item Alert Suppression	not to display copy alert on selected actions	LSA
Item Tags	Searchable copy information	LSA
Library Settings Editor	Detailed library configuration settings	LSA/Co-op suppport

Menu option	Description	Permission
Non-catalogued Type Editor	Create and edit optional non-catalogued item types	LSA
Patrons with Negative Balances	Display a list of patron accounts with negative bill balances, to whom the library may owe refunds	All staff
Shelving Location Editor	Create and edit copy locations, also known as shelving locations	LSA
Shelving Location Group	Allows one or more shelving locations to be grouped together as a search location.	LSA
Shelving Location Order	Change display order of copy locations on Holds Pull list, also known as shelving locations	LSA
Statistical Category Editor	Create and manage optional categories for detailed patron/item information	LSA
Survey	Create patron surveys to be completed at patron registration	LSA
Transit List	View items in transit to or from your library during selected date range	All staff
[work-log]	List the most recent transactions processed on the workstation	All staff

50.2. Age Overdue Circs to Lost

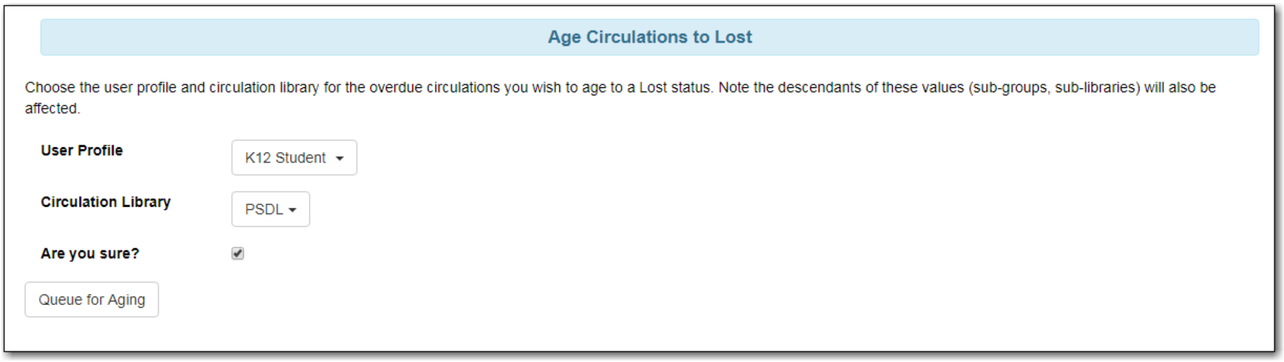
The *Age Overdue Circs to Lost* feature allows you to create a queue of items to be marked lost. **ALL** overdue items by selected patron profiles at selected libraries will be marked Lost.

NOTE This feature does not support a date parameter. **ALL** overdue items by selected patron profiles at selected libraries will be marked Lost. It is mainly for school libraries' end of term process. To automatically mark items lost when they are overdue for x days, contact Co-op support.

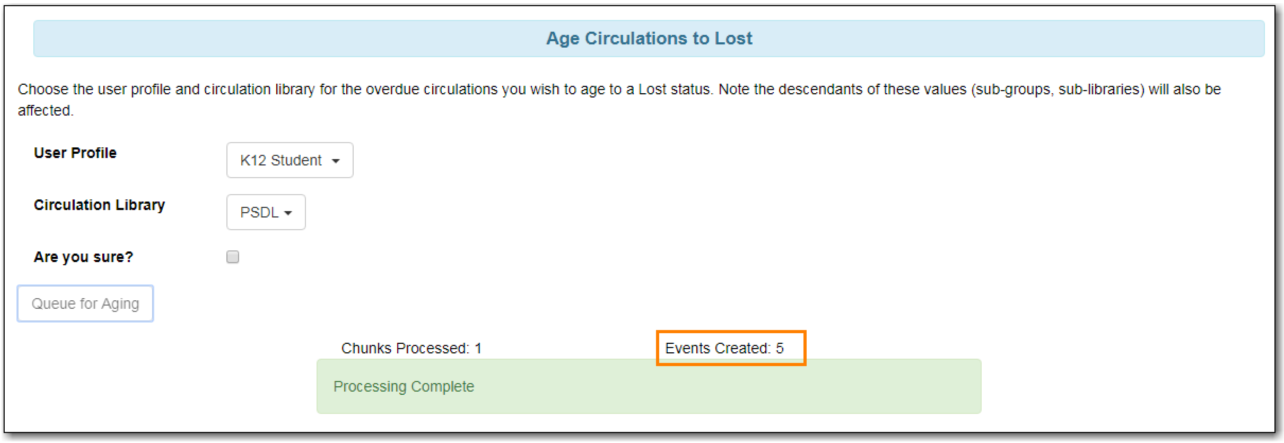
Age Overdue Items to Lost

1. Click **Administration** → **Local Administration** → **Age Overdue Circs to Lost**

2. Choose the **User Profile** and **Circulation Library** for the overdue circulations you wish to age to a Lost status.
    a. Note the descendants of these values (sub-groups, sub-libraries) will also be affected.
3. Check the **Are you Sure?** check box.
4. Click **Queue for Aging**



5. Evergreen will process the request and create action trigger events for all overdue items for the selected patron profiles at the selected libraries.
6. You will see a *Processing Complete* message with a count of Events created.



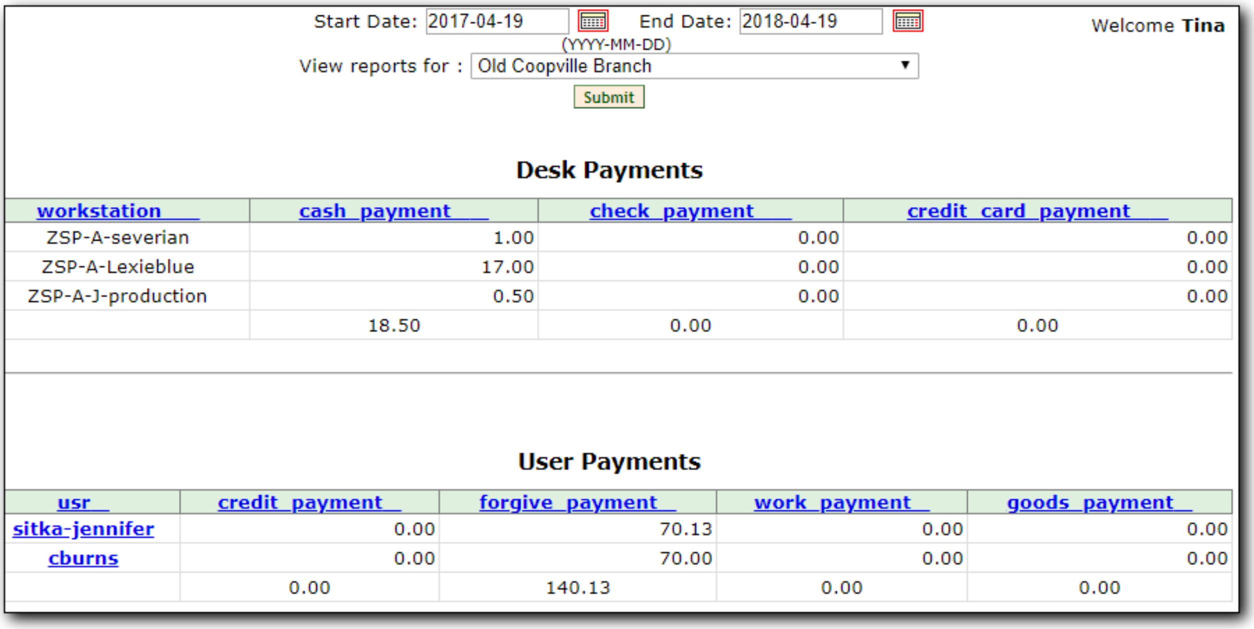
7. The number of events created indicates the number of items which will be marked Lost.

NOTE	Please email Support if you would like this feature turned on for your library. Please indicate if you would like to send an automatic email when the items are marked lost.

50.3. Cash Reports

1. Go to **Administration** → **Cash Reports**.
2. Select the start date and the end date that you wish to run a cash report for. You can either enter the date in the YYYY-MM-DD format, or click on the calendar icon to use the calendar widget.
3. Select your library from the drop down menu. Click **Submit**.
4. The output will show cash, check, and credit card payments. It will also show amounts for

credits, forgiven payments, work payments and goods payments (e.g. food for fines initiatives, replacement copy for lost item, etc.). The output will look something like this:


Start Date: 2017-04-19 End Date: 2018-04-19 (YYYY-MM-DD)

Welcome **Tina**

View reports for : Old Coopville Branch

Submit

Desk Payments

workstation	cash_payment	check_payment	credit_card_payment
ZSP-A-severian	1.00	0.00	0.00
ZSP-A-Lexieblue	17.00	0.00	0.00
ZSP-A-J-production	0.50	0.00	0.00
	18.50	0.00	0.00

User Payments

usr	credit_payment	forgive_payment	work_payment	goods_payment
sitka-jennifer	0.00	70.13	0.00	0.00
cburns	0.00	70.00	0.00	0.00
	0.00	140.13	0.00	0.00

TIP By clicking on the hyperlinked column headers (i.e. workstation, cash_payment, check_payment, etc.) it is possible to sort the columns to order the payments from smallest to largest, or largest to smallest, or to group the workstation names.

NOTE Customized payment reports can be created from the reports interface. Several shared templates are available under Sitka_templates → Bills_Payments folder. For instructions on using shared templates see Shared Sitka Templates.

50.4. Circulation Policies

Circulation policies define the loan rules when an item is checked out. The policies are applied based on factors including the item's circulation modifier, shelving location, and the patron's permission profile.

When an item is scanned for check out Evergreen checks the following to determine if the item can be checked out to the patron and if so with what parameters:

- Group Penalty Thresholds for the check out library
- Item's Status
- Circulate flag for the item's Shelving Location
- Circulate flag for the item
- Circulation Policies for the check out library
- Library Operating Hours for the check out library
- Closed Dates Editor for the check out library

50.4.1. Viewing Your Circulation Policies

Sitka Training Video - Viewing Your Circulation Policies (2:15)

To easiest way to view your current circulation policies is to run a report (reporter permissions required).

1. In the reporter go to **Shared Folders** → **Templates** → **Sitka_templates** → **Library Configuration**
2. Clone the template *Circulation Policies by Checkout Library* into your folders and run the report for your library.

Local system administrators can also view their policies within Evergreen.

- Go to **Administration** → **Local Administration** → **Circulation Policies**.
  - By default, your library is selected in the box after **Context Org Unit** (i.e. Checkout Library). The initial display will show circulation policies at both your library and the federation level.

NOTE	Only 15 policies display per page in Evergreen so if you want to see all your policies at once running a report is the better option.

50.4.2. Understanding Your Circulation Policies

Circulation policies can be divided into two parts - the pieces that determine which patrons and items a policy applies to and the pieces that determine how the policy is applied.

Who/What Does A Policy Apply To

(Circulation Policy Filters)

- Patron Profile (Main Profile Permission Group)
- Org Unit (Check Out Library)
- Copy Circ Lib (Circulating Library)
- Patron Home Library
- Circulation Modifier
- Shelving Location
- Reference
- Item Age

The filters are weighted differently in the system. For most libraries the system looks at the patron group, then at the libraries involved, then the circulation modifier, then the shelving location, then whether or not the item is reference, and then the age of the item.

Checkout Library	Copy Circ Lib	Patron Profile	Patron Home Library	Circulation Modifier	Shelving Location	Reference?	Item Age <	Circulate?	Duration	Hard Due Date	Renewals Override	Recurring fine	Max fine	Grace Period Override
Maple Library	Public Library Federation	PL Extended Loans	Green Land Consortium			0		1	42_3			zero	zero	
Maple Library	Public Library Federation	PL ILL	Green Land Consortium			0		1	42_0			zero	zero	
Maple Library	Public Library Federation	PL No-fines	Green Land Consortium	dvd		0		1	3_7_21_1			zero	zero	
Maple Library	Public Library Federation	PL No-fines	Green Land Consortium	ill-no-renewal		0		1	21_0			zero	zero	
Maple Library	Public Library Federation	PL No-fines	Green Land Consortium	video-games		0		1	3_7_21_1			zero	zero	

All libraries have at least one default circulation policy. The default policy has no circulation modifier or shelving location specified and so applies to all check outs unless there is a more specific policy that applies to a check out. More specific policies will look at the item's circulation modifier, shelving location, reference flag, and item age individually or in combination to determine if policy should be used for the check out. In Sitka, most circulation policies are based off the item's circulation modifier. While circulation policies can be based off shelving location additional set up is required to enable this for a library.

Some libraries apply different policies to different patron profile. Libraries that do this will see separate default policies for the different patron groups. Generally policies are set for the patron group at the top of the permission tree and then additional policies are added for more specific patron groups as needed. For example, most public libraries have policies set for *Public Library Users* which apply to all patron groups unless there's a policy for a more specific group such as *PL Extended Loans*.

Libraries that participate in reciprocal borrowing will see policies with different organizational units specified for the circulating library and patron's home library. These policies tell Evergreen how to handle items and patrons from other libraries who are checking out at your library. For example, libraries participating in Interlibrary Connect may have different loan durations or renewals for items that come from another library compared to the items the library owns. As well, libraries participating in BC One Card may have items that can only be checked out by patrons who live in the library's service area so need policies to block check outs by patrons visiting from other areas.

The image below shows two policies. The first policy blocks patrons with a home library that falls within the Green Land Consortium from borrowing items that use the circulation modifier *game* at Maple Public Library. The second policy allows patrons of Maple Public Library to borrow those items.

Checkout Library	Copy Circ Lib	Patron Profile	Patron Home Library	Circulation Modifier	Reference?	Item Age <	Circulate?	Duration	Hard Due Date	Renewals Override	Recurring fine	Max fine	Grace Period Override	Copy Location
Maple Library	Maple Library	Public Library Users	Green Land Consortium	game			0	7_14_21_0			zero	zero		
Maple Library	Maple Library	Public Library Users	Maple Library	game			1	7_14_21_0		100	zero	zero		

How Is the Policy Applied

- Circulate? - true/false
- Duration Rule - includes renewals
- Renewals Override
- Recurring Fine Rule
- Maximum Fine Rule

- Grace Period Override
- Hard Due Date
- Item Specific Limit

Checkout Library	Copy Circ Lib	Patron Profile	Patron Home Library	Circulation Modifier	Shelving Location	Reference?	Item Age <	Circulate?	Duration	Hard Due Date	Renewals Override	Recurring fine	Max fine	Grace Period Override
Maple Library	Public Library Federation	PL Extended Loans	Green Land Consortium			0		1	42_3			zero	zero	
Maple Library	Public Library Federation	PL ILL	Green Land Consortium			0		1	42_0			zero	zero	
Maple Library	Public Library Federation	PL No-fines	Green Land Consortium	dvd		0		1	3_7_21_1			zero	zero	
Maple Library	Public Library Federation	PL No-fines	Green Land Consortium	ill-no-renewal		0		1	21_0			zero	zero	
Maple Library	Public Library Federation	PL No-fines	Green Land Consortium	video-games		0		1	3_7_21_1			zero	zero	

The **circulate flag**, on a circulation policy, when set to false will block a check out from going through. (In the circulation policy report a 1 indicates true while a 0 indicates false.) Staff with the appropriate permission level can force the check out through. If the check out is forced it will follow the other parameters, such as duration, that are specified in the policy.

Duration rules will display in one of two ways in circulation policies:

- SHORT_NORMAL_LONG_RENEWAL (ie. 3_7_14_100)
- NORMAL_RENEWAL (ie. 21_0) - this is an older naming convention which is being phased out

When applying the duration rule Evergreen looks at the value in *Loan Duration* for the item, set via the Holdings Editor, to tell it what duration to assign the check out. The default value is Normal.

Renewals override it will override the number of renewals specified in the duration rule.

Recurring fine rule specifies the amount a patron is charged on an hourly or daily basis until the item is returned; set to lost, claimed returned, or claimed never checked out; or reaches the amount specified in the maximum fine rule. Hourly recurring fines indicate per hour in the fine rule name. The fine level can be set as Low, Normal, or High for an item via the Holdings Editor. This is rarely used in Sitka's Evergreen.

The **grace period override** enables libraries to specify a different grace period per circulation policy. Sitka's Evergreen has a default grace period for all check outs of one day.

The **hard due date** is set up separately and linked to the relevant circulation policies so that Evergreen can use the current hard due date and applicable settings to determine what due date to give the item.

Item specific limits can be applied to specific circulation policies to restrict how many items using a particular circulation modifier or shelving location can be out to a patron at a time. For example, a item specific limit can restrict a user to having 5 items with the circulation modifier *dvd* out at a time. The limits can also have combinations specified, so you can have a limit of up to 5 items using the circulation modifier *dvd*, *dvd-feature*, or *video*. Item specific limits can't be included in the circulation policy report so contact Co-op Support if you have questions about your existing limits.

As you can see from the options, Evergreen can handle complex circulation policy needs but keep in mind the more policies you have and the more complex they are the more complicated it is to troubleshoot when items aren't circulating as expected.

50.4.3. Troubleshooting Your Circulation Policies

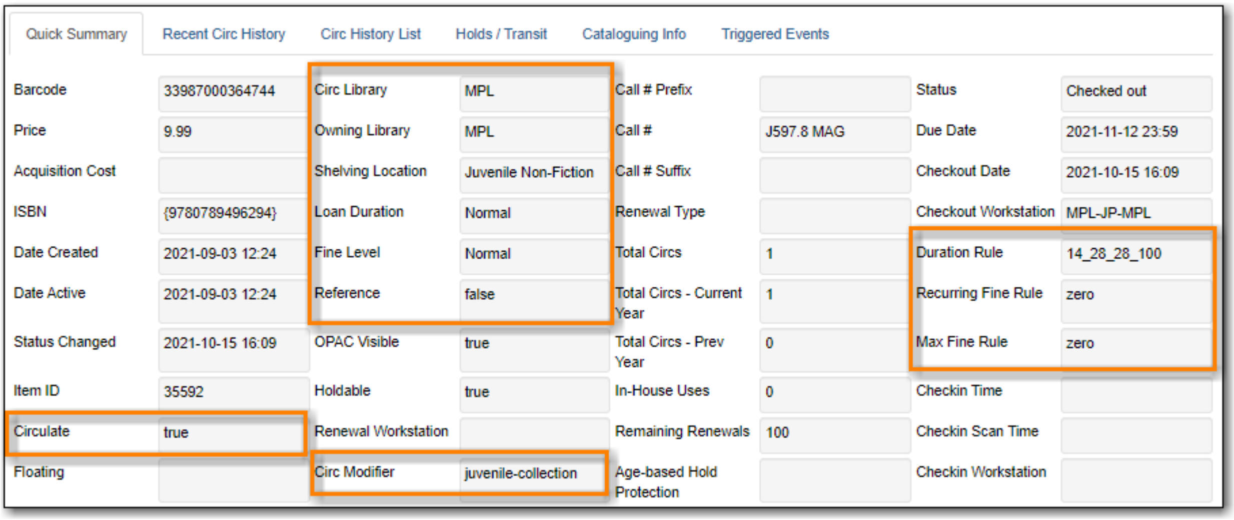
Sitka Training Video - Troubleshooting Your Circulation Policies (3:12)

There are three common reasons why items do not circulate as expected:

1. Policy has changed and the circulation policy needs to be updated in Evergreen to match your actual library policy.
2. The expected policy does not currently exist in Evergreen. To prevent these issues it is a good idea to regularly review your circulation policies using the report and request changes as needed.
3. The item attributes for the item are incorrect. Most commonly the circulation modifier is incorrect or missing.

To check the item attribues:

1. Enter the item barcode into *Item Status* and click on **Detail View**.
   a. Here you can see the item attributes as well as the circulation policy applied to the current check out.



2. Check the values for Circulate, Circ Library, Owning Library, Shelving Location, Loan Duration, Fine Level, Reference, and Circ Modifier.
3. If any values are incorrect edit the item to have the correct values.
4. Once the item is updated, to apply the correct policy you need to check the item in and then back out to the patron.
5. If the item still doesn't follow the expected policy double check that the patron's permission profile matches what is specified in the policy you expect to be followed.
6. If the item still doesn't follow the expected policy contact Co-op Support for assistance.
   a. In your ticket make sure to include the item barcode, the patron barcode, and a description of what is currently happening and what should be happening.

If you're unsure about what values are used for different policies you can run the circulation policy report to view your current circulation policies.

50.4.4. Changing Your Circulation Policies

Only Co-op Support can edit circulation policies.

Local system administrators can view circulation policies within Evergreen, but making changes and clicking save will have no effect.

Submit a ticket to Co-op Support to request changes to your circulation policies. We recommend submitting your request at least one week before you'd like the change to go into effect.

In your request please include the specific changes you need made.

When requesting a new circulation policy you must include:

- Circulation modifier, shelving location, or item age
- What patron group(s) the policy applies to
- Loan duration
- Number of renewals
- Recurring fine - if you don't charge fines please specify zero
- Maximum fine amount - if you don't charge fines please specify zero

If additional paramters are needed such as item specific limits, grace period overrides, or hard due dates please include that information.

If the policy should have different parameters for different patron groups or based on the patron's home library please specify that as well.

When selecting a circulation modifier to use for a new circulation policy please pick one that is not already used at your library from the list of recommended circulation modifiers.

If you are making extensive changes to your circulation policies please make sure to contact Co-op Support well in advance of when you would like the new policies to go into effect. In those circumstances we recommend running the circulation policies report, making all your desired changes on the report in a spreadsheet program, and then sending the updated spreadsheet to Support.

NOTE	Changes made to circulation policies only apply to new circulations. Items already checked out will continue to follow the policy that was in place at the time of check out until the item is checked in.

Going Fine Free

If your library decides to go fine free your circulation policies need to be updated.

To make the change we need to know the following:

- What date does this go into effect?
- Are there any items (based on circulation modifier) that should still generate fines?

- Are there any patron groups who should still get fined?
- Are borrowers from other libraries exempt from fines? (ie. BC One Card users)
- Do you want existing overdue fines voided or will staff manually resolve them as patrons come in?
    - We do not void partially paid fines. We can generate a list of those for library staff to resolve manually.

50.5. Closed Dates Editor

Sitka Snippet Video - Setting Closed Dates (2:18)

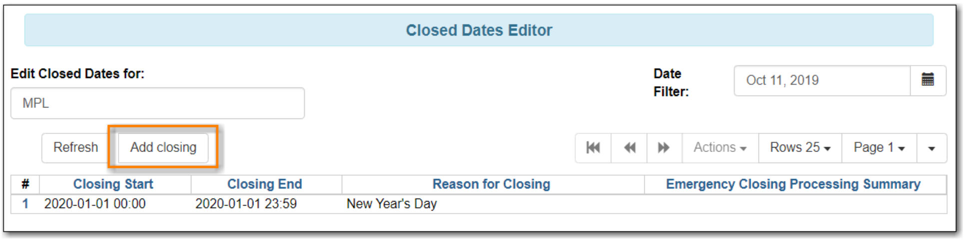
These dates are in addition to your regular weekly closed days (see Library Hours of Operation). Both regular closed days and those entered in the Closed Dates Editor affect due dates, fines, and targeting for holds.

NOTE The due date for daily loans will fall on a day marked partially closed.

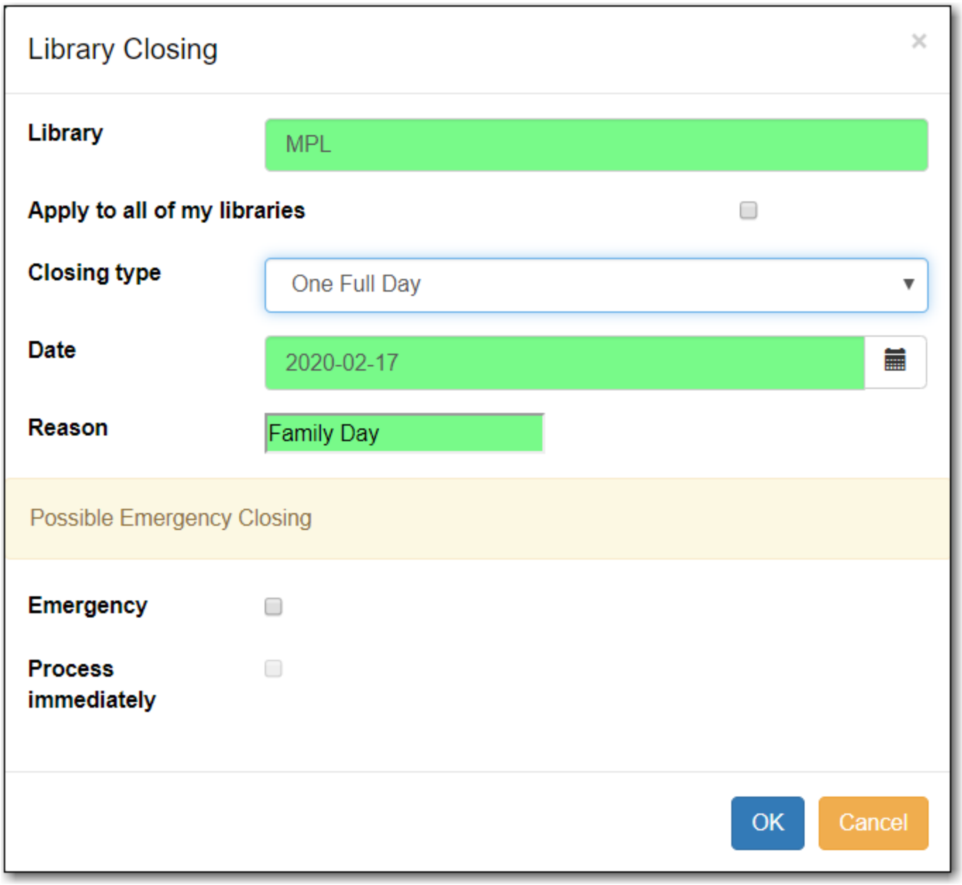
50.5.1. Entering Closed Dates

To enter closed dates:

1. Go to **Administration** → **Local Administration** → **Closed Date Editor**.
2. Click **Add Closing**



3. By default the Library field is populated with the workstation's location.
    a. Multi-branch libraries must set closed dates at the branch level. This can be done individually by branch or by setting **Library** to the system level organizational unit and then checking the box for *Apply to all of my libraries* to apply the closing to all branches.
4. Select the type of closing from the drop down menu.
    a. One Full Day - use for single day closure.
    b. Multiple Days - use for closures spanning more than one day.
    c. Detailed - use for closures involving a partial day closure.
5. Depending on the closing type enter the required dates and time.
6. Enter the reason for the closing.
7. Click **OK**.



NOTE The closed period is your local time.

50.5.2. Emergency Closing

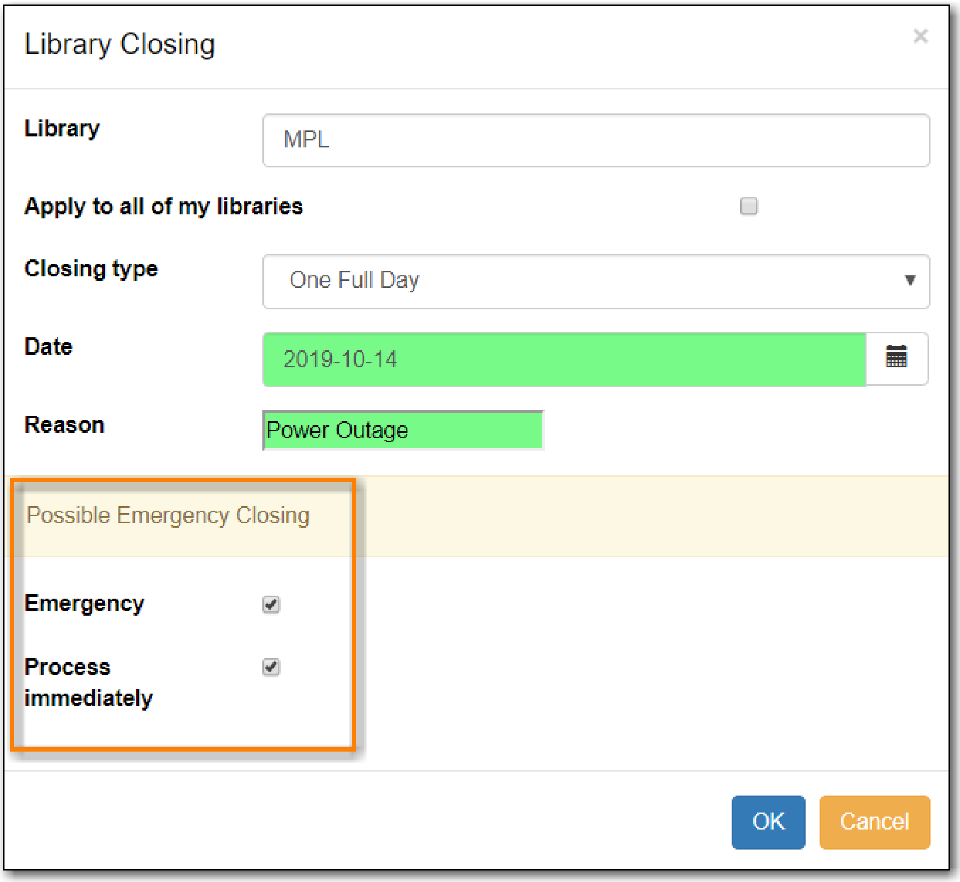
Sitka Snippet Video - Emergency Closures (1:37)

When an emergency closing is processed due dates are adjusted to fall on the day they would have had the closing been in place at the time of check out; hourly loans have their due date adjusted to the end of the day following the closing. Depending on a library's settings any fines acrrued doing the closing may be voided. Notification emails will be sent to patrons to alert them to the change in due date.

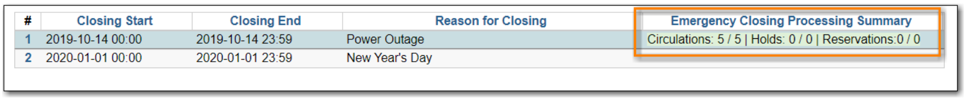
NOTE The notification email is a global email and cannot be customized for individual libraries.

To enter an emergency closing:

1. Go to **Administration** → **Local Administration** → **Closed Date Editor**.
2. Click **Add Closing**
3. Fill out the top section of the form as you would for a regular closed date.
4. Check the box for *Emergency*.
5. Check the box for *Process immediately* if you are ready to have the system process the closing



6. Click **OK**.
7. A summary of what has been processed during the emergency closing will display.



#	Closing Start	Closing End	Reason for Closing	Emergency Closing Processing Summary
1	2019-10-14 00:00	2019-10-14 23:59	Power Outage	Circulations: 5 / 5 | Holds: 0 / 0 | Reservations:0 / 0
2	2020-01-01 00:00	2020-01-01 23:59	New Year's Day	

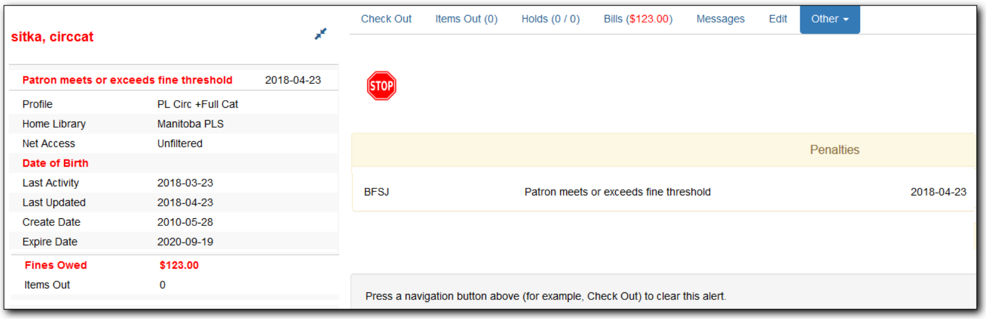
50.6. Group Penalty Thresholds

Group Penalty Thresholds block circulation transactions for users who exceed maximum check out limits, number of overdue items, or fines. Settings for your library are visible under **Administration** → **Local Administration** → **Group Penalty Thresholds**. There are four penalties in use now.

- PATRON_EXCEEDS_FINES: Blocks new circulations and renewals if patron exceeds X in fines
- PATRON_EXCEEDS_OVERDUE_COUNT: Blocks new circulations if patron exceeds X overdue items
- PATRON_EXCEEDS_CHECKOUT_COUNT: Blocks new circulations if patron exceeds X items out
- PATRON_EXCEEDS_LOST_COUNT: Blocks new circulations and placing holds if patron exceeds X lost items

NOTE Other penalties are not used by Sitka.

Accounts that meet or exceed penalty thresholds display an alert message when opened and require staff overrides for blocked transactions.



Group Penalty Thresholds may be set up on different levels in terms of patron profiles and libraries. Penalties on more specific levels of profile and/or library take precedence. This allows you to set up penalties on a higher level of profile, e.g. Public Library Patrons, and/or library, e.g. system instead of branch, for most profiles and/or branches to share. If there are rules applied to lower level profiles, e.g. PL Juvenile or a branch, you just need to set them up for these specific profile/branch.

There are a set of penalties on Sitka level for all patrons. These rules will be applied if your library does not have your own rules.

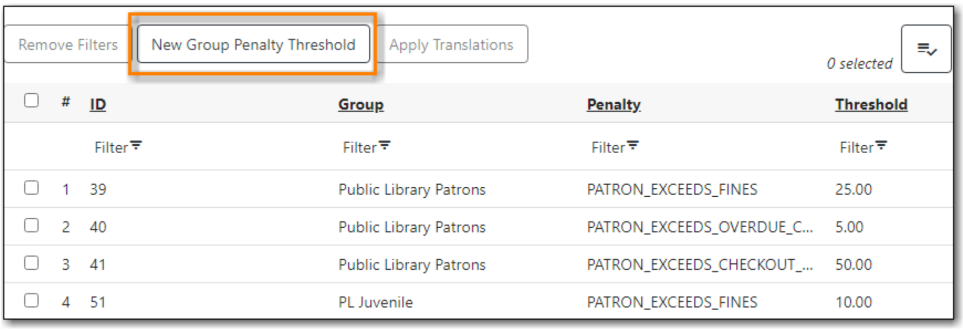
50.6.1. Creating Local Penalty Thresholds

Local System Administrators can created local penalty thresholds.

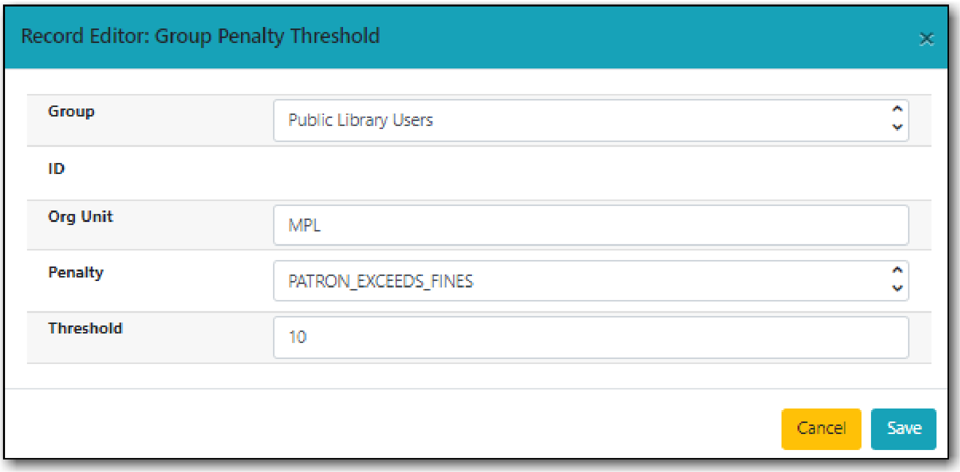
1. Go to **Administration** → **Local Administration** → **Group Penalty Threshold**.

To view the group penalty thresholds for your library enter your library code into the Library filter. Multi-branch libraries can enter the system and then check the box to display the descendants.

1. Click **New Penalty Threshold**.



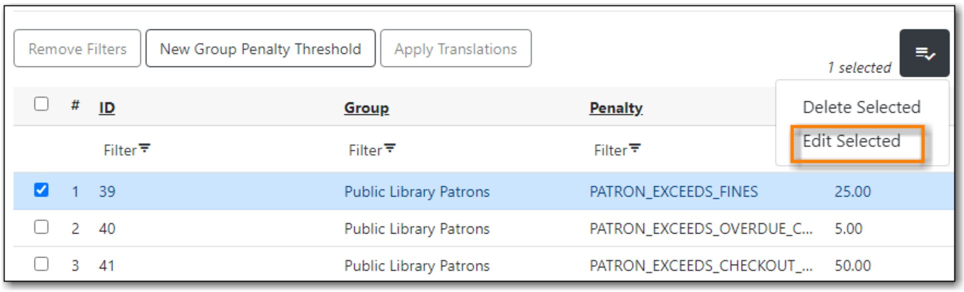
2. Choose or enter the appropriate value for each field.
3. Click **Save**.



TIP You may set up penalties with a too high to reach limit to achieve the no limit effect.

50.6.2. Editing Local Penalty Thresholds

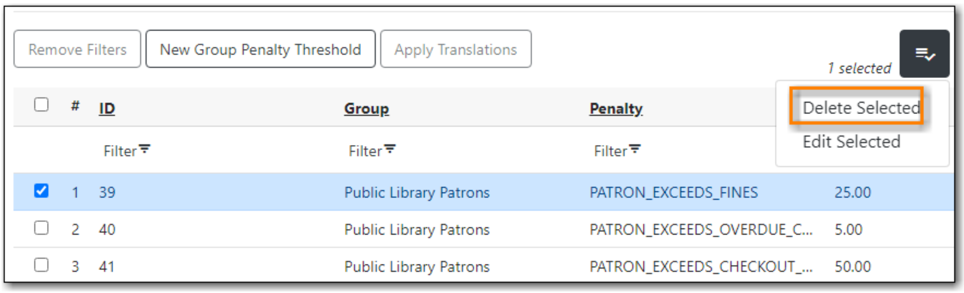
1. Select the penalty you'd like to edit.
2. Click the actions button and select **Edit Selected**.
3. Make your changes and click **Save**.



Double clicking a penalty on the list will open it in editing mode. Edit, then save.

50.6.3. Deleting Local Penalty Thresholds

1. Select the penalty you'd like to delete.
2. Click the actions button and select **Delete Selected**.
3. The penalty will be deleted.



50.7. Hold Policies

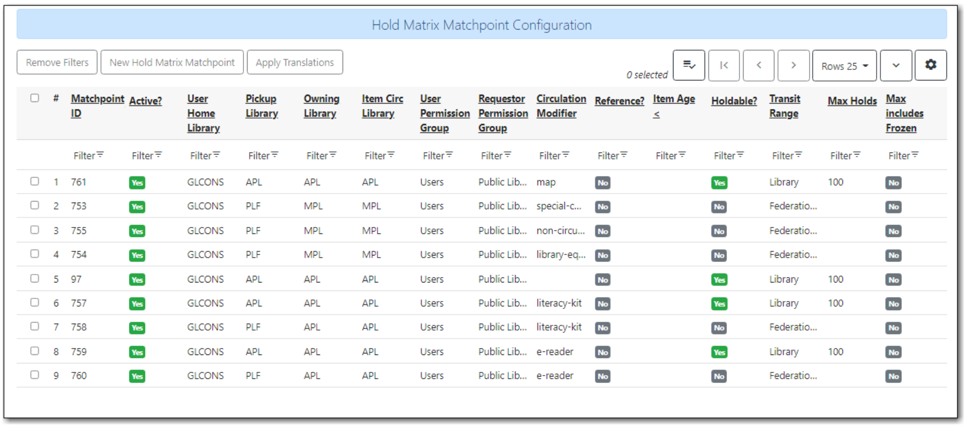
The hold policy for each library or library system defines who can place how many holds on what types of materials. It also defines whether the library’s materials can be used to fill holds picked up at other libraries.

Hold policies are usually defined by a combination of the Requestor Permission Group (eg. Public Library Users, Public Library Staff etc.), item attributes like circulation modifier (eg. book, juvenile-collection etc.), and library (user home, item’s owning and circulating library) with additional parameters of maximum holds and whether a hold can be placed at all. Transit Range defines where the library’s materials can go to fill holds.

> **NOTE**
>
> All changes to your hold policies are made by Co-op Support Staff.
>
> To request changes to your hold policies submit a ticket to Support. We recommend submitting your request at least one week before you’d like the change go into effect.

To view your current hold policies run a report (reporter permissions required) or view your policies in Evergreen (Local System Administrator permissions required).

- In the reporter go to **Shared Folders** → **Templates** → **Sitka_templates** → **Library Configuration**
  - Multiple report templates for hold policies are available here.
- In Evergreen select **Administration** → **Local Administration** → **Hold Policies**.



Hold Matrix Matchpoint Configuration

Remove Filters | New Hold Matrix Matchpoint | Apply Translations | 0 selected | Rows 25

#	Matchpoint ID	Active?	User Home Library	Pickup Library	Owning Library	Item Circ Library	User Permission Group	Requestor Permission Group	Circulation Modifier	Reference?	Item Age ≤	Holdable?	Transit Range	Max Holds	Max includes Frozen
1	761	Yes	GLCONS	APL	APL	APL	Users	Public Lib…	map	No		Yes	Library	100	No
2	753	Yes	GLCONS	PLF	MPL	MPL	Users	Public Lib…	special-c…	No		No	Federatio…		No
3	755	Yes	GLCONS	PLF	MPL	MPL	Users	Public Lib…	non-circu…	No		No	Federatio…		No
4	754	Yes	GLCONS	PLF	MPL	MPL	Users	Public Lib…	library-eq…	No		No	Federatio…		No
5	97	Yes	GLCONS	APL	APL	APL	Users	Public Lib…		No		Yes	Library	100	No
6	757	Yes	GLCONS	APL	APL	APL	Users	Public Lib…	literacy-kit	No		Yes	Library	100	No
7	758	Yes	GLCONS	PLF	APL	APL	Users	Public Lib…	literacy-kit	No		No	Federatio…		No
8	759	Yes	GLCONS	APL	APL	APL	Users	Public Lib…	e-reader	No		Yes	Library	100	No
9	760	Yes	GLCONS	PLF	APL	APL	Users	Public Lib…	e-reader	No		No	Federatio…		No

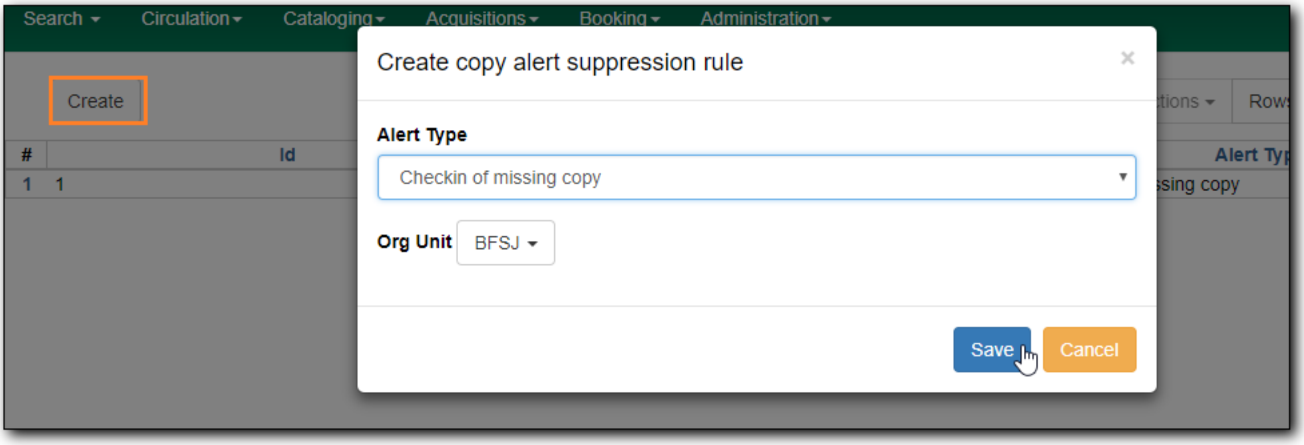
> **NOTE**
>
> For libraries participating in reciprocal borrowing like Interlibrary Connect not all hold policies will display in Evergreen by default. To ensure you see all your policies you need to filter the display twice: once by Owning Library, and then a second time by Pickup Library.
>
> Click **Filter** under **Pickup Library**. In the popped up window, select **Is (or includes)**, check the box for + **Ancestors**, and choose your library. Click **Apply filter** to display policies based on the pickup library.

Click **Filter** under **Owning Library**. In the popped up window, select **Is (or includes)**, check the box for + **Ancestors**, and choose your library. Click **Apply filter** to display policies based on the owning library.

50.8. Item Alert Suppression

You may suppress some item alerts from showing up on the corresponding staff action. For example, you may choose to suppress the alert when checking out a missing item.

1. Go to **Administration** → **Local Administration** → **Item Alert Suppression**.
2. Click **Create**.
3. In the pop-up window, select the Alert Type from the dropdown list.
4. Make sure your library is in the Org Unit box.
5. Click **Save**.



50.9. Item Tags

Item tags are not currently used.

50.10. Library Settings Editor

With the *Library Settings Editor* staff with local system administrator permissions can customize Evergreen's behavior for a particular library or library system. For descriptions of available settings see the Settings Overview table below.

50.10.1. Editing Library Settings

1. To open the *Library Settings Editor* select **Administration** → **Local Administration** → **Library Settings Editor**.
2. Settings affecting the same function or module are grouped together. You may browse the list or search for the entry you want to edit. Type in your search term in the filter box. You may clear or re-apply the filter by clicking **Clear Filter** or **Filter**.
3. To edit an entry click **Edit** in the line.
4. Read the instruction in the pop-up window. Make the change. Click **Update Setting** to save the change. Click **Delete Setting** if you wish to delete it.
5. Click **History** to view the previous values, if any, of a setting. You can revert back to an old value by clicking **revert**.

NOTE	Please note that different settings may require different data formats, which are listed in the Settings Overview table. Refer to the Data Types table at the bottom of this page for more information.

50.10.2. Exporting/Importing Library Settings

1. To export library settings, click the **Export** button on the above **Library Setting Editor** screen. Click **Copy** in the pop-up window. Those settings displayed on the screen are copied to the clipboard. Paste the contents to a text editor, such as Notepad. Save the file on your computer.
2. To import library settings, click the **Import** button on the **Library Settings Editor** screen. Open your previously saved file and copy the contents. Click **Paste** in the pop-up window. Click **Submit**.

50.10.3. Settings Overview

The settings are grouped together in separate tables based on functions and modules, which are affected by the setting. They are in the same sequence as you see in the staff client. Each table describes the available settings in the group and shows which can be changed on a per-library basis. At the bottom is the table with a list of data types with details about acceptable settings values.

Data Types

Acceptable formats for each setting type are listed below. Quotation marks are never required when updating settings in the staff client.

Table 24. Data Types in the Library Settings Editor

Data type	**Formatting**
True/False	Boolean True/False drop down

Data type	Formatting
Number	Enter a numerical value (decimals allowed in price settings)
Duration	Enter a number followed by a space and any of the following units: minutes, hours, days, months (30 minutes, 2 days, etc)
Selection list	Choose from a drop-down list of options (e.g. copy status, copy location)
Text	Free text

Table 25. Booking and Cataloging

Setting	Description	Data type	Notes	Edited by
Booking Allow Email Notify	Permit email notification when a reservation is ready for pick-up.	True/false		LSA
Elbow room	Elbow room specifies how far in the future you must make a reservation on an item if that item will have to transit to reach its pick-up location. It secondarily defines how soon a reservation on a given item must start before the check-in process will opportunistically capture it for the reservation shelf.	Duration		LSA
Default Classification Scheme	Defines the default classification scheme for new call numbers: 1 = Generic; 2 = Dewey; 3 = LC	Number	Effect on call number sorting.	LSA

Setting	Description	Data type	Notes	Edited by
Default copy status (fast add)	Default status when a copy is created using the "Fast Item Add" interface.	Selection list	Default: In process	LSA
Default copy status (normal)	Default status when a copy is created using the normal volume/copy creator interface.	Selection list		LSA
Default Merge Profile (Z39.50 and Record Buckets)	Default merge profile to use during Z39.50 imports and record bucket merges	Selection list		Sitka
Defines the control number identifier used in 003 and 035 fields		Text		Sitka
Delete bib if all copies are deleted via Acquisitions line item cancellation.		True/False	Default: TRUE	Sitka
Delete volume with last copy	Automatically delete a volume when the last linked copy is deleted.	True/False	Default: TRUE	Sitka
ItemPrint Label - Call Number Wrap Filter Height	Set the default height (in number of lines) to use for call number wrapping in the left print label.	Text		LSA

Setting	Description	Data type	Notes	Edited by
ItemPrint Label - Call Number Wrap Filter Width	set the default width (in number of characters) to use for call number wrapping in the left print label.	Text		LSA
ItemPrint Label - Height for Left Label	Set the default height for the leftmost item print label. Please include a unit of measurement that is valid CSS. For example, "1in" or "2.5cm"	Text		LSA
ItemPrint Label - Height for Right Label	Set the default height for the rightmost item print label. Please include a unit of measurement that is valid CSS. For example, "1in" or "2.5cm"	Text		LSA
ItemPrint Label - Inline CSS	inject arbitrary CSS into the item print label template. For example, ".printlabel { text-transform: uppercase; }"	Text		LSA
ItemPrint Label - Left Margin for Left Label	Set the default left margin for the leftmost item print Label. Please include a unit of measurement that is valid CSS. For example, "1in" or "2.5cm"	Text		LSA

Setting	Description	Data type	Notes	Edited by
ItemPrint Label - Left Margin for Right Label	Set the default left margin for the rightmost item print label (or in other words, the desired space between the two labels). Please include a unit of measurement that is valid CSS. For example, "1in" or "2.5cm"	Text		LSA
ItemPrint Label - Width for Left Label	Set the default width for the leftmost item print label. Please include a unit of measurement that is valid CSS. For example, "1in" or "2.5cm"	Text		LSA
ItemPrint Label - Width for Right Label	Set the default width for the rightmost item print label. Please include a unit of measurement that is valid CSS. For example, "1in" or "2.5cm"	Text		LSA
ItemPrint Label Font Family	Set the preferred font family for item print labels. You can specify a list of CSS fonts, separated by commas, in order of preference; the system will use the first font it finds with a matching name. For example, "Arial, Helvetica, serif"	Text		LSA

Setting	Description	Data type	Notes	Edited by
ItemPrint Label Font Size	Set the default font size for item print labels. Please include a unit of measurement that is valid CSS. For example, "12pt" or "16px" or "1em"	Text		LSA
ItemPrint Label Font Weight	Set the default font weight for item print labels. Please use the CSS specification for values for font-weight. For example, "normal", "bold", "bolder", or "lighter"	Text		LSA
Maximum Parallel Z39.50 Batch Searches	The maximum number of Z39.50 searches that can be in-flight at any given time when performing batch Z39.50 searches	Number		Sitka
Maximum Z39.50 Batch Search Results	The maximum number of search results to retrieve and queue for each record + Z39 source during batch Z39.50 searches	Number		Sitka

Setting	Description	Data type	Notes	Edited by
Spine and pocket label font family	Set the preferred font family for spine and pocket labels. You can specify a list of fonts, separated by commas, in order of preference; the system will use the first font it finds with a matching name. For example, "Arial, Helvetica, serif".	Text		LSA
Spine and pocket label font size	Set the default font size for spine and pocket labels	Number		LSA
Spine and pocket label font weight	Set the preferred font weight for spine and pocket labels. You can specify "normal", "bold", "bolder", or "lighter".	Text		LSA
Spine label left margin	Set the left margin for spine labels in number of characters.	Number		LSA
Spine label line width	Set the default line width for spine labels in number of characters. This specifies the boundary at which lines must be wrapped.	Number		LSA
Spine label maximum lines	Set the default maximum number of lines for spine labels.	Number		LSA

Table 26. Circulation

Setting	Description	Data type	Notes	Edited by
Allow others to use patron account (privacy waiver)	Add a note to a user account indicating that specified people are allowed to place holds, pick up holds, check out items, or view borrowing history for that user account	True/False	Default: True	LSA
Auto-extend grace periods	When enabled grace periods will auto-extend. By default this will be only when they are a full day or more and end on a closed date, though other options can alter this.	True/False		LSA
Auto-extending grace periods extend for all closed dates	It works when the above setting "Auto-Extend Grace Periods" is set to TRUE. If enabled, when the grace period falls on a closed date(s), it will be extended past all closed dates that intersect, but within the hard-coded limits (your library’s grace period).	True/False		LSA

Setting	Description	Data type	Notes	Edited by
Auto-extending grace periods include trailing closed dates	It works when the above setting "Auto-Extend Grace Periods" is set to TRUE. If enabled, grace periods will include closed dates that directly follow the last day of the grace period. A backdated check-in with effective date on the closed dates will assume the item is returned after hours on the last day of the grace period.	True/False	Useful when libraries' book drop equipped with AMH.	LSA
Block hold request if hold recipient privileges have expired		True/False		LSA
Cap max fine at item price	This prevents the system from charging more than the item price in overdue fines	True/False		LSA
Charge fines on overdue circulations when closed	When set to True, fines will be charged during scheduled closings and normal weekly closed days.	True/False		LSA

Setting	Description	Data type	Notes	Edited by
Checkout fills related hold	When a patron checks out an item and they have no holds that directly target the item, the system will attempt to find a hold for the patron that could be fulfilled by the checked out item and fulfills it. On the Staff Client you may notice that when a patron checks out an item under a title on which he/she has a hold, the hold will be treated as filled though the item has not been assigned to the patron’s hold.	True/false		LSA
Checkout fills related hold on valid copy only	When filling related holds on checkout only match on items that are valid for opportunistic capture for the hold. Without this set a Title or Volume hold could match when the item is not holdable. With this set only holdable items will match.	True/False		LSA

Setting	Description	Data type	Notes	Edited by
Checkout auto renew age	When an item has been checked out for at least this amount of time, an attempt to check out the item to the patron that it is already checked out to will simply renew the circulation. If the checkout attempt is done within this time frame, Evergreen will prompt for choosing Renewing or Check-in then Checkout the item.	Duration		LSA
Clear hold when other patron checks out item	Default to cancel the hold when patron A checks out item on hold for patron B	True/False		LSA
Display copy alert for in-house-use	Setting to true for an organization will cause an alert to appear with the copy's alert message, if it has one, when recording in-house-use for the copy.	True/False		LSA

Setting	Description	Data type	Notes	Edited by
Display copy location check in alert for in-house-use	Setting to true for an organization will cause an alert to display a message indicating that the item needs to be routed to its location if the location has check in alert set to true.	True/False		LSA
Do not change fines/fees on zero-balance LOST transaction	When an item has been marked lost and all fines/fees have been completely paid on the transaction, do not void or reinstate any fines/fees EVEN IF "Void lost item billing when returned" and/or "Void processing fee on lost item return" are enabled	True/False		LSA
Do not include outstanding Claims Returned circulations in lump sum tallies in Patron Display.	In the Patron Display interface, the number of total active circulations for a given patron is presented in the Summary sidebar and underneath the Items Out navigation button. This setting will prevent Claims Returned circulations from counting toward these tallies.	True/False		LSA

Setting	Description	Data type	Notes	Edited by
Exclude Courtesy Notices from Patrons Itemsout Notices Count		True/False		LSA
Forgive fines when checking out a long-overdue item and copy alert is suppressed?			Not in use	
Forgive fines when checking out a lost item and copy alert is suppressed?	Controls whether fines are automatically forgiven when checking out an item that has been marked as lost, and the corresponding copy alert has been suppressed.	True/False		LSA
Hold shelf status delay	The purpose is to provide an interval of time after an item goes into the on-holds-shelf status before it appears to patrons that it is actually on the holds shelf. This gives staff time to process the item before it shows as ready-for-pick-up.	Duration		LSA

Setting	Description	Data type	Notes	Edited by
Include Lost circulations in lump sum tallies in Patron Display.	In the Patron Display interface, the number of total active circulations for a given patron is presented in the Summary sidebar and underneath the Items Out navigation button. This setting will include Lost circulations as counting toward these tallies.	True/False		LSA
Invalid patron address penalty	When set, if a patron address is set to invalid, a penalty is applied.	True/False		LSA
Item status for missing pieces	This is the Item Status to use for items that have been marked or scanned as having Missing Pieces. In the absence of this setting, the Damaged status is used.	Selection list		LSA
Load patron from Checkout	When scanning barcodes into Checkout auto-detect if a new patron barcode is scanned and auto-load the new patron.	True/False	Not in use	

Setting	Description	Data type	Notes	Edited by
Long-Overdue Check-In Interval Uses Last Activity Date	Use the long-overdue last-activity date instead of the due_date to determine whether the item has been checked out too long to perform long-overdue check-in processing. If set, the system will first check the last payment time, followed by the last billing time, followed by the due date. See also "Long-Overdue Max Return Interval"	True/False	Not in use	
Long-Overdue Items Usable on Checkin	Long-overdue items are usable on checkin instead of going "home" first	True/False	Not in use	
Long-Overdue Max Return Interval	Long-overdue check-in processing (voiding fees, re-instating overdues, etc.) will not take place for items that have been overdue for (or have last activity older than) this amount of time	Duration	Not in use	

Setting	Description	Data type	Notes	Edited by
Lost check-in generates new overdues	Enabling this setting causes retroactive creation of not-yet-existing overdue fines on lost item check-in, up to the point of check-in time (or max fines is reached). This is different than "restore overdue on lost", because it only creates new overdue fines. Use both settings together to get the full complement of overdue fines for a lost item	True/False		LSA
Lost items usable on checkin	Lost items are usable on checkin instead of going *home* first	True/false		LSA
Max patron claims returned count	When this count is exceeded, a staff override is required to mark the item as claims returned.	Number		LSA
Maximum visible age of User Trigger Events in Staff Interfaces	If this is unset, staff can view User Trigger Events regardless of age. When this is set to an interval, it represents the age of the oldest possible User Trigger Event that can be viewed.	Duration	Not working	LSA

Setting	Description	Data type	Notes	Edited by
Minimum transit checkin interval	In-Transit items checked in this close to the transit start time will be prevented from checking in	Duration		LSA
Number of Retrievable Recent Patrons	Number of most recently accessed patrons that can be re-retrieved in the staff client. A value of 0 or less disables the feature. Defaults to 1.	Number		LSA
Patron merge address delete	Delete address(es) of subordinate user(s) in a patron merge.	True/False		LSA
Patron merge barcode delete	Delete barcode(s) of subordinate user(s) in a patron merge	True/False		LSA
Patron merge deactivate card	Mark barcode(s) of subordinate user(s) in a patron merge as inactive.	True/False		LSA
Patron Registration: Cloned patrons get address copy	If True, in the Patron editor, addresses are copied from the cloned user. If False, addresses are linked from the cloned user which can only be edited from the cloned user record.	True/False		LSA

Setting	Description	Data type	Notes	Edited by
Patron search diacritic insensitive	Match patron last, first, and middle names irrespective of usage of diacritical marks or spaces.	True/False	Default: True	Sitka
Printing: custom JavaScript file	Full URL path to a JavaScript File to be loaded when printing. Should implement a print_custom function for DOM manipulation. Can change the value of the do_print variable to false to cancel printing.	Text	Not in use	
Require matching email address for password reset requests		True/False		LSA
Restore Overdues on Long-Overdue Item Return		True/False		LSA
Restore overdues on lost item return	If true when a lost item is checked in overdue fines are charged (up to the maximum fines amount)	True/False		LSA
Specify search depth for the duplicate patron check in the patron editor	When using the patron registration page, the duplicate patron check will use the configured depth to scope the search for duplicate patrons.	Number		Sitka

Setting	Description	Data type	Notes	Edited by
Suppress hold transits group	To create a group of libraries to suppress Hold Transits among them. All libraries in the group should use the same unique value. Leave it empty if transits should not be suppressed.	Text	Not in use	Sitka
Suppress non-hold transits group	To create a group of libraries to suppress Non-Hold Transits among them. All libraries in the group should use the same unique value. Leave it empty if Non-Hold Transits should not be suppressed.	Text	Not in use	Sitka
Suppress popup-dialogs during check-in.	When set to True, no pop-up window for exceptions on check-in. But the accompanying sound will be played.	True/False		LSA
Target copies for a hold even if copy's circ lib is closed	If this setting is true at a given org unit or one of its ancestors, the hold targeter will target copies from this org unit even if the org unit is closed (according to the Org Unit's closed dates.).	True/False	Set the value to True if you want to target copies for holds at closed circulating libraries. Set the value to False, or leave it unset, if you do not want to enable this feature.	LSA

Setting	Description	Data type	Notes	Edited by
Target copies for a hold even if copy's circ lib is closed IF the circ lib is the hold's pickup lib	If this setting is true at a given org unit or one of its ancestors, the hold targeter will target copies from this org unit even if the org unit is closed (according to the Org Unit's closed dates) IF AND ONLY IF the copy's circ lib is the same as the hold's pickup lib.	True/False	Set the value to True if you want to target copies for holds at closed circulating libraries when the circulating library of the item and the pickup library of the hold are the same. Set the value to False, or leave it unset, if you do not want to enable this feature.	LSA
Truncate fines to max fine amount		True/False	Default: True	Sitka
Use Lost and Paid copy status	Use Lost and Paid copy status when lost or long overdue billing is paid	True/False	Default: True	Sitka
Void Long-Overdue Item Billing When Returned		True/False	Not in use	LSA
Void Processing Fee on Long-Overdue Item Return		True/False	Not in use	LSA
Void longoverdue item billing when claims returned		True/False		LSA
Void longoverdue item processing fee when claims returned		True/False		LSA
Void lost item billing when claims returned		True/False		LSA

Setting	Description	Data type	Notes	Edited by
Void lost item billing when returned	If true,when a lost item is checked in the item replacement bill (item price) is voided.	True/False		LSA
Void lost item processing fee when claims returned	When an item is marked claims returned that was marked Lost, the item processing fee will be voided.	True/False		LSA
Void lost max interval	Items that have been overdue this long will not result in lost charges being voided when returned, and the overdue fines will not be restored, either. Only applies if **Circ: Void lost item billing** or **Circ: Void processing fee on lost item** are true.	Duration		LSA
Void processing fee on lost item return	Void processing fee when lost item returned	True/False		LSA
Warn when patron account is about to expire	If set, the staff client displays a warning this number of days before the expiry of a patron account. Value is in number of days.	Duration		LSA

Setting	Description	Data type	Notes	Edited by
Workstation OU fallback for staff-placed holds	For staff-placed holds, in the absence of a patron preferred pickup location, fall back to using the staff workstation OU (rather than patron home OU)	True/False		LSA

NOTE	Long Overdue status is not in use on Sitka Evergreen. All settings related to Long Overdue may be ignored.

Table 27. Credit Card Processing

Credit card payment is not currently supported.
All settings can be ignored.

Table 28. Ebook API Integration

Ebook API Integration
All settings are set by Sitka.

Table 29. Finances

Setting	Description	Data type	Notes	Edited by
Allow credit card payments	If enabled, patrons will be able to pay fines accrued at this location via credit card.	True/False	Not in use	
Charge item price when marked damaged	If true Evergreen bills item price to the last patron who checked out the damaged item. Staff receive an alert with patron information and must confirm the billing.	True/False		LSA

Setting	Description	Data type	Notes	Edited by
Charge lost on zero	If set to True, default item price will be charged when an item is marked lost even though the price in item record is 0.00 (same as no price). If False, only processing fee, if used, will be charged.	True/False		LSA
Charge processing fee for damaged items	Optional processing fee billed to last patron who checked out the damaged item. Staff receive an alert with patron information and must confirm the billing.	Number(Currency)	Disabled when set to 0	LSA
Default item price	Replacement charge for lost items if price is unset in the Copy Editor. Does not apply if item price is set to $0	Number(Currency)		LSA
Disable Patron Credit	Do not allow patrons to accrue credit or pay fines/fees with accrued credit	True/False		LSA
Leave transaction open when long overdue balance equals zero	Leave transaction open when long-overdue balance equals zero. This leaves the lost copy on the patron record when it is paid	True/False	Not in use	

Setting	Description	Data type	Notes	Edited by
Leave transaction open when lost balance equals zero	Leave transaction open when lost balance equals zero. This leaves the lost copy on the patron record when it is paid	True/False	Default: False	Sitka
Long-Overdue Materials Processing Fee	The amount charged in addition to item price when an item is marked Long-Overdue	Number (Currency)	Not in use	
Lost materials processing fee	The amount charged in addition to item price when an item is marked lost.	Number(Currency)		LSA
Maximum Item Price	When charging for lost items, limit the charge to this as a maximum.	Number(Currency)		LSA
Minimum Item Price	When charging for lost items, charge this amount as a minimum.	Number(Currency)		LSA
Negative Balance Interval (DEFAULT)	Amount of time after which no negative balances (refunds) are allowed on circulation bills. The "Prohibit negative balance on bills" setting must also be set to "true".	Duration	If the settings for Lost and Overdues are the same, you may use this setting and the "Prohibit Negative Balance on Bills (DEFAULT)" setting, and igore the separate settings for Lost and Overdues.	LSA

Setting	Description	Data type	Notes	Edited by
Negative Balance Interval for Lost	Amount of time after which no negative balances (refunds) are allowed on bills for lost/long overdue materials. The "Prohibit negative balance on bills for lost materials" setting must also be set to "true".	Duration		LSA
Negative Balance Interval for Overdues	Amount of time after which no negative balances (refunds) are allowed on bills for overdue materials. The "Prohibit negative balance on bills for overdue materials" setting must also be set to "true".	Duration		LSA
Prohibit negative balance on bills (Default)	Default setting to prevent negative balances (refunds) on circulation related bills. Set to "true" to prohibit negative balances at all times or, when used in conjunction with an interval setting, to prohibit negative balances after a set period of time.	True/False		LSA

Setting	Description	Data type	Notes	Edited by
Prohibit negative balance on bills for lost materials	Prevent negative balances (refunds) on bills for lost/long overdue materials. Set to "true" to prohibit negative balances at all times or, when used in conjunction with an interval setting, to prohibit negative balances after an interval of time.	True/False		LSA
Prohibit negative balance on bills for overdue materials	Prevent negative balances (refunds) on bills for lost/long overdue materials. Set to "true" to prohibit negative balances at all times or, when used in conjunction with an interval setting, to prohibit negative balances after an interval of time.	True/False		LSA
Void Overdue Fines When Items are Marked Long-Overdue	If true overdue fines are voided when an item is marked Long-Overdue	True/False	Not in use	
Void overdue fines when items are marked lost	If true overdue fines are voided when an item is marked lost	True/False		LSA

Table 30. GUI: Graphic User Interface

Setting	Description	Data type	Notes	Edited by
Alert on empty bib records	Alert staff when the last copy for a record is being deleted.	True/False		LSA
Button bar	If TRUE, the staff client button bar appears by default on all workstations registered to your library; staff can override this setting at each login.	True/False	Not in use anymore	
Cap results in Patron Search at this number.	The maximum number of results returned per search. If 100 is set up here, any search will return 100 records at most.	Number		LSA
Default Country for New Addresses in Patron Editor	This is the default Country for new addresses in the patron editor.	Text		LSA
Default hotkeyset	Default Hotkeyset for clients (filename without the .keyset). Examples: Default, Minimal, and None	Text	Not in use anymore	LSA
Default ident type for patron registration	This is the default Ident Type for new users in the patron editor.	Selection list	Default: Other	LSA
Default showing suggested patron registration fields	Instead of All fields, show just suggested fields in patron registration by default.	True/False		LSA

Setting	Description	Data type	Notes	Edited by
Disable the ability to save list column configurations locally.	GUI: Disable the ability to save list column configurations locally. If set, columns may still be manipulated, however, the changes do not persist. Also, existing local configurations are ignored if this setting is true.	True/False		LSA
Example dob field on patron registration	The example for validation on the dob field in patron registration.	Text		LSA
Example for Day_phone field on patron registration	The example on validation on the Day_phone field in patron registration.	Text		LSA
Example for Email field on patron registration	The example on validation on the Email field in patron registration.	Text		LSA
Example for Evening-phone on patron registration	The example on validation on the Evening-phone field in patron registration.	Text		LSA
Example for Other-phone on patron registration	The example on validation on the Other-phone field in patron registration.	Text		LSA

Setting	Description	Data type	Notes	Edited by
Example for phone fields on patron registration	The example on validation on phone fields in patron registration. Applies to all phone fields without their own setting.	Text		LSA
Example for Postal Code field on patron registration	The example on validation on the Postal Code field in patron registration.	Text		LSA
Format Date+Time with this pattern		Text	Default: yyyy-MM-dd HH:mm	Sitka
Format Dates with this pattern		Text	Default: yyyy-MM-dd	Sitka
GUI: Hide these fields within the Item Attribute Editor.	Sets which fields in the Item Attribute Editor to hide in the staff client.	Text	This is useful to hide attributes that are not used.	LSA
Horizontal layout for Volume/Copy Creator/Editor.	The main entry point for this interface is in Holdings Maintenance, Actions for Selected Rows, Edit Item Attributes / Call Numbers / Replace Barcodes. This setting changes the top and bottom panes (if FALSE) for that interface into left and right panes (if TRUE).	True/False	Not in use anymore	LSA

Setting	Description	Data type	Notes	Edited by
Idle timeout	If you want staff client windows to be minimized after a certain amount of system idle time, set this to the number of seconds of idle time that you want to allow before minimizing (requires staff client restart).	Number		LSA
Items Out Claims Returned display setting	Value is a numeric code, describing which list the circulation should appear while checked out and whether the circulation should continue to appear in the special list, when checked in with outstanding fines. 1 = regular list, special list. 2 = special list, special list. 5 = regular list, do not display. 6 = special list, do not display.	Number		LSA
Items Out Long-Overdue display setting		Number	Not in use	LSA

Setting	Description	Data type	Notes	Edited by
Items Out Lost display setting	Value is a numeric code, describing which list the circulation should appear while checked out and whether the circulation should continue to appear in the special list, when checked in with outstanding fines. 1 = regular list, special list. 2 = special list, special list. 5 = regular list, do not display. 6 = special list, do not display.	Number		LSA
Max user activity entries to retrieve (staff client)	Sets the maximum number of recent user activity entries to retrieve for display in the staff client.	Number		LSA
Maximum payment amount allow	The payment amount in the Patron Bills interface may not exceed the value of this setting.	Number	Default: 1000	LSA
Maximum previous checkouts displayed	The maximum number of previous circulations the staff client will display when investigating item details	Number		LSA
Patron circulation summary is horizontal		True/False	Not in use anymore	LSA

Setting	Description	Data type	Notes	Edited by
Payment amount threshold for Are You Sure? dialog	In the Patron Bills interface, a payment attempt will warn if the amount exceeds the value of this setting.	Number	Default: 1000	LSA
Record in-house use: # of uses threshold for Are You Sure? dialog.	In the Record In-House Use interface, a submission attempt will warn if the # of uses field exceeds the value of this setting.	Number		LSA
Record In-House Use: Maximum # of uses allowed per entry.	The # of uses entry in the Record In-House Use interface may not exceed the value of this setting.	Number		LSA
Regex for barcodes on patron registration	The Regular Expression for validation on barcodes in patron registration.	Regular Expression		LSA

Setting	Description	Data type	Notes	Edited by
Regex for Day_phone field on patron registration	The Regular Expression for validation on the Day_phone field in patron registration. Note: The first capture group will be used for the "last 4 digits of phone number" as patron password feature, if enabled. Ex: "[2-9]\d{2}-\d{3}-(\d{4})(x\d+)?" will ignore the extension on a NANP number.	Regular expression		LSA
Regex for Email field on patron registration	The Regular Expression on validation on the Email field in patron registration.	Regular expression		LSA
Regex for Evening-phone on patron registration	The Regular Expression on validation on the Evening-phone field in patron registration.	Regular expression		LSA
Regex for Other-phone on patron registration	The Regular Expression on validation on the Other-phone field in patron registration.	Regular expression		LSA

Setting	Description	Data type	Notes	Edited by
Regex for phone fields on patron registration	The Regular Expression on validation on phone fields in patron registration. Applies to all phone fields without their own setting.	Regular expression		LSA
Regex for Postal Code field on patron registration	The Regular Expression on validation on the Postal Code field in patron registration.	Regular expression		LSA
Require at least one address for Patron Registration	Enforces a requirement for having at least one address for a patron during registration. If set to False, you need to delete the empty address before saving the record. If set to True, deletion is not allowed.	True/False		LSA
Require XXXXX field on patron registration	The XXXXX field will be required on the patron registration screen.	True/False	XXXXX can be Country, State, Day-phone, Evening-phone, Other-phone, DOB, Email, or Prefix.	LSA
Require staff initials for entry/edit of patron standing penalties and messages.	Appends staff initials and edit date into patron standing penalties and messages.	True/False		LSA

Setting	Description	Data type	Notes	Edited by
Require staff initials for entry/edit of patron notes.	Appends staff initials and edit date into patron note content.	True/False		LSA
Require staff initials for entry/edit of copy notes.	Appends staff initials and edit date into copy note content.	True/False		LSA
Show billing tab first when bills are present	If true accounts for patrons with bills will open to the billing tab instead of check out	True/false	Not in use anymore	LSA
Show XXXXX field on patron registration	The XXXXX field will be shown on the patron registration screen. Showing a field makes it appear with required fields even when not required. If the field is required this setting is ignored.	True/False		LSA
Suggest XXXXX field on patron registration	The XXXXX field will be suggested on the patron registration screen. Suggesting a field makes it appear when suggested fields are shown. If the field is shown or required this setting is ignored.	True/False		LSA

Setting	Description	Data type	Notes	Edited by
Toggle off the patron summary sidebar after first view.	When true, the patron summary sidebar will collapse after a new patron sub-interface is selected.	True/False	Not in use anymore	
URL for remote directory containing list column settings.		Text	Not in use	
Uncheck bills by default in the patron billing interface	Uncheck bills by default in the patron billing interface, and focus on the Uncheck All button instead of the Payment Received field.	True/False		LSA
Unified Volume/Item Creator/Editor	If True, combines the Volume/Copy Creator and Item Attribute Editor in some instances.	True/False	Not in use anymore	
Work Log: maximum actions logged	Maximum entries for "Most Recent Staff Actions" section of the Work Log interface.	Number		LSA
Work Log: maximum patrons logged	Maximum entries for "Most Recently Affected Patrons…" section of the Work Log interface.	Number		LSA

Table 31. Global

Setting	Description	Data type	Notes	Edited by
Allow multiple username changes	If enabled (and Lock Usernames is not set) patrons will be allowed to change their username when it does not look like a barcode. Otherwise username changing in the OPAC will only be allowed when the patron's username looks like a barcode.	True/False	Default True	Sitka
Global default locale		Number	Default: Canada	Sitka
Lock Usernames	If enabled username changing via the OPAC will be disabled.	True/False	Default: False	Sitka
Password format	Defines acceptable format for OPAC account passwords	Regular expression	Default requires that passwords "be at least 7 characters in length,contain at least one letter (a-z/A-Z), and contain at least one number.	Sitka
Patron barcode format	Defines acceptable format for patron barcodes	Regular expression		Sitka

Setting	Description	Data type	Notes	Edited by
Patron username format	Regular expression defining the patron username format, used for patron registration and self-service username changing only	Regular expression		Sitka

Table 32. Holds

Setting	Description	Data type	Notes	Edited by
Behind desk pickup supported	If a branch supports both a public holds shelf and behind-the-desk pickups, set this value to true. This gives the patron the option to enable behind-the-desk pickups for their holds by selecting Hold is behind Circ Desk flag in patron record.	True/False		LSA
Best-hold selection sort order	Defines the sort order of holds when selecting a hold to fill using a given copy at capture time	Selection list		Sitka
Block renewal of items needed for holds	When an item could fulfill a hold, do not allow the current patron to renew	True/False		Sitka
Cancelled holds display age	Show all cancelled holds that were cancelled within this amount of time	Duration		LSA

Setting	Description	Data type	Notes	Edited by
Cancelled holds display count	How many cancelled holds to show in patron holds interfaces	Number		LSA
Clear shelf copy status	Any copies that have not been put into reshelving, in-transit, or on-holds-shelf (for a new hold) during the clear shelf process will be put into this status. This is basically a purgatory status for copies waiting to be pulled from the shelf and processed by hand	Selection list		Sitka
Default estimated wait	When predicting the amount of time a patron will be waiting for a hold to be fulfilled, this is the default estimated length of time to assume an item will be checked out.	Duration	Not in use	Sitka
Default hold shelf expire interval	Hold Shelf Expiry Time is calculated and inserted into hold record based on this interval when capturing a hold.	Duration		LSA
Expire alert interval	Time before a hold expires at which to send an email notifying the patron	Duration	Not in use	Sitka

Setting	Description	Data type	Notes	Edited by
Expire interval	Amount of time until an unfulfilled hold expires	Duration		LSA
FIFO	Force holds to a more strict First-In, First-Out capture. Default is SAVE-GAS, which gives priority to holds with pickup location the same as checkin library.	True/False	Default: False	Sitka
Hard boundary		Number		Sitka
Hard stalling interval		Duration		Sitka
Has local copy alert	If there is an available copy at the requesting library that could fulfill a hold during hold placement time, alert the patron.	True/False		LSA
Has local copy block	If there is an available copy at the requesting library that could fulfill a hold during hold placement time, do not allow the hold to be placed.	True/False		LSA
Max foreign-circulation time	Time a copy can spend circulating away from its circ lib before returning there to fill a hold	Duration		Sitka

Setting	Description	Data type	Notes	Edited by
Maximum number of duplicate holds allowed	Maximum number of duplicate title or metarecord holds allowed per patron	Number		LSA
Maximum library target attempts	When this value is set and greater than 0, the system will only attempt to find a copy at each possible branch the configured number of times	Number		Sitka
Minimum estimated wait	When predicting the amount of time a patron will be waiting for a hold to be fulfilled, this is the minimum estimated length of time to assume an item will be checked out.	Duration	Not in use	Sitka
Org unit target weight	Org Units can be organized into hold target groups based on a weight. Potential copies from org units with the same weight are chosen at random.	Number		Sitka
Randomize group hold order	When placing a batch group hold, randomize the order of the patrons receiving the holds so they are not always in the same order.	True/False	Default: True	LSA

Setting	Description	Data type	Notes	Edited by
Reset request time on un-cancel	When a hold is uncancelled, reset the request time to push it to the end of the queue	True/False		LSA
Skip for hold targeting	When true, don't target any copies at this org unit for holds	True/False		Sitka
Soft boundary	Holds will not be filled by copies outside this boundary if there are holdable copies within it.	Number		Sitka
Soft stalling interval	For this amount of time, holds will not be opportunistically captured at non-pickup branches.	Duration		Sitka
Use Active Date for age protection	When calculating age protection rules use the Active date instead of the Creation Date.	True/False	Default: True	Sitka
Use weight-based hold targeting	Use library weight based hold targeting	True/False		Sitka

Table 33. Library

Setting	Description	Data type	Notes	Edited by
Change reshelving status interval	Amount of time to wait before changing an item from "Reshelving" status to "Available"	Duration	The default is at midnight each night for items with "Reshelving" status for over 24 hours.	LSA

Setting	Description	Data type	Notes	Edited by
Claim never checked out: mark copy as missing	When a circ is marked as claims-never-checked-out, mark the copy as missing	True/False		LSA
Claim return copy status	Claims returned copies are put into this status. Default is to leave the copy in the Checked Out status	Selection list		Sitka
Courier code	Courier Code for the library. Available in transit slip templates as the %courier_code% macro.	Text	Not in use	
Juvenile age threshold	Upper cut-off age for patrons to be considered juvenile, calculated from date of birth in patron accounts	Duration (years)		LSA
Library information URL (such as "http://example.com/about.html")	URL for information on this library, such as contact information, hours of operation, and directions. Use a complete URL, such as "http://example.com/hours.html".	Text		LSA
Library time zone		Text		Sitka

Setting	Description	Data type	Notes	Edited by
Mark item damaged voids overdues	When an item is marked damaged, overdue fines on the most recent circulation are voided.	True/False		LSA
Pre-cat item circ lib	Override the default circ lib of "here" with a pre-configured circ lib for pre-cat items. The value should be the "shortname" (aka policy name) of the org unit	Text		LSA
Telephony: Arbitrary line(s) to include in each notice callfile	This overrides lines from opensrf.xml. Line(s) must be valid for your target server and platform (e.g. Asterisk 1.4).	Text	Not in use	Sitka
Use external "library information URL" in copy table, if available	If set to true, the library name in the copy details section will link to the URL associated with the "Library information URL" library setting rather than the library information page generated by Evergreen.	True/False		LSA

Table 34. OPAC

Setting	Description	Data type	Notes	Edited by
Allow Patron Self-Registration	Allow patrons to self-register, creating pending user accounts	True/False		Sitka

Setting	Description	Data type	Notes	Edited by
Allow pending addresses	If true patrons can edit their addresses in the OPAC. Changes must be approved by staff	True/False		LSA
Allow record emailing without login	Instead of forcing a patron to log in in order to email the details of a record, just challenge them with a simple catpcha.	True/False		LSA
Auto-Override Permitted Hold Blocks (Patrons)	This will allow patrons with the permission "HOLD_ITEM_CHECKED_OUT.override" to automatically override permitted holds.	True/False	When a patron places a hold in the OPAC that fails, and the patron has the permission to override the failed hold, this automatically overrides the failed hold rather than requiring the patron to manually override the hold. Default: False	Sitka
Custom CSS for the OPAC	This can be populated with CSS that will load in the OPAC after the stylesheets and allow for custom CSS without editing server side templates.	Text		Sitka

Setting	Description	Data type	Notes	Edited by
Enable Digital Bookplate Search	If enabled, adds a "Digital Bookplate" option to the query type selectors in the public catalog for search on copy tags.	True/False		Sitka
Ignore the Global luri_as_copy flag for this OU	Admin setting on e-records scoping	True/False		Sitka
Jump to details on 1 hit (OPAC)	When a search yields only 1 result, jump directly to the record details page. This setting only affects the public OPAC	True/False		LSA
Jump to details on 1 hit (staff client)	When a search yields only 1 result, jump directly to the record details page. This setting only affects the PAC within the staff client	True/False		LSA
Limit the depth of xxxxxx	Admin setting on e-record link display	Number		Sitka
Limit the number of URIs on the results page	Admin setting on e-record link display	Number		Sitka
OPAC login message	HTML blob to be rendered in an interstitial page upon OPAC login	Text		LSA

Setting	Description	Data type	Notes	Edited by
OPAC: Number of staff client saved searches to display on left side of results and record details pages	If unset, the OPAC (only when wrapped in the staff client!) will default to showing you your ten most recent searches on the left side of the results and record details pages. If you actually don’t want to see this feature at all, set this value to zero at the top of your organizational tree.	Number		LSA
OPAC: Org Unit is not a hold pickup library	If set, this org unit will not be offered to the patron as an option for a hold pickup location. This setting has no affect on searching or hold targeting.	True/False		Sitka
Open Reviews & More in a new tab	Allows the Reviews & More links in the search results to be opened in a new tab	True/False		Sitka

Setting	Description	Data type	Notes	Edited by
Org unit hiding depth	This will hide certain org units in the public OPAC if the Original Location (url param "ol") for the OPAC inherits this setting. This setting specifies an org unit depth, that together with the OPAC Original Location determines which section of the Org Hierarchy should be visible in the OPAC. For example, a stock Evergreen installation will have a 3-tier hierarchy (Consortium/System/Branch), where System has a depth of 1 and Branch has a depth of 2. If this setting contains a depth of 1 in such an installation, then every library in the System in which the Original Location belongs will be visible, and everything else will be hidden. A depth of 0 will effectively make every org visible. The embedded OPAC in the staff client ignores this setting.	Number		Sitka

Setting	Description	Data type	Notes	Edited by
Paging shortcut links for OPAC Browse	The characters in this string, in order, will be used as shortcut links for quick paging in the OPAC browse interface. Any sequence surrounded by asterisks will be taken as a whole label, not split into individual labels at the character level, but only the first character will serve as the basis of the search.	Regular expression		Sitka
Patron Self-Reg. Display Timeout	Number of seconds to wait before reloading the patron self-registration interface to clear sensitive data	Duration		Sitka
Patron Self-Reg. Expire Interval	If set, this is the amount of time a pending user account will be allowed to sit in the database. After this time, the pending user information will be purged	Duration		Sitka
Payment history age limit	The OPAC should not display payments by patrons that are older than any interval defined here.	Duration	Not in use	

Setting	Description	Data type	Notes	Edited by
Permit renewals when patron exceeds max fine threshold	Permit renewals even when the patron exceeds the maximum fine threshold	True/False		LSA
Specify how items are ordered	This value specifies how items are ordered in search results and record views within the org unit. To sort from newest to oldest by active date use *desc*. To sort from oldest to newest by active date use *asc*. To sort by call number use *call*.	Text		LSA
Tag Circulated Items in Results	When a user is both logged in and has opted in to circulation history tracking, turning on this setting will cause previous (or currently) circulated items to be highlighted in search results	True/False	Default: True	LSA
Use fully compressed serial holdings	Show fully compressed serial holdings for all libraries at and below the current context unit	True/False		Sitka

Setting	Description	Data type	Notes	Edited by
Uses phone as default pin		True/False	When set to True the password hint is "If this is your first time logging in use the last 4 digits of your phone number or contact your library for assistance."	LSA
Warn patrons when adding to a temporary book list	Present a warning dialogue when a patron adds a book to the temporary book list.	True/False		Sitka

Table 35. Offline and Program

Setting	Description	Data type	Notes	Edite by
Skip offline checkin if newer item Status Changed Time.	Skip offline checkin transaction (raise exception when processing) if item Status Changed Time is newer than the recorded transaction time. WARNING: The Reshelving to Available status rollover will trigger this.	True/False		LSA

Setting	Description	Data type	Notes	Edite by
Skip offline checkout if newer item Status Changed Time.	Skip offline checkout transaction (raise exception when processing) if item Status Changed Time is newer than the recorded transaction time. WARNING: The Reshelving to Available status rollover will trigger this.	True/False		LSA
Skip offline renewal if newer item Status Changed Time.	Skip offline renewal transaction (raise exception when processing) if item Status Changed Time is newer than the recorded transaction time. WARNING: The Reshelving to Available status rollover will trigger this.	True/False		LSA

Setting	Description	Data type	Notes	Edite by
Disable automatic print attempt type list	Disable automatic print attempts from staff client interfaces for the receipt types in this list. Possible values: "Checkout", "Bill Pay", "Hold Slip", "Transit Slip", and "Hold/Transit Slip". This is different from the Auto-Print checkbox in the pertinent interfaces in that it disables automatic print attempts altogether, rather than encouraging silent printing by suppressing the print dialogue. The Auto-Print checkbox in these interfaces have no effect on the behavior for this setting. In the case of the Hold, Transit, and Hold/Transit slips, this also suppresses the alert dialogues that precede the print dialogue (the ones that offer Print and Do Not Print as options).	Text		LSA

Setting	Description	Data type	Notes	Edite by
Retain empty bib records	Retain a bib record even when all attached copies are deleted	True/False	Default: False	Sitka
Sending email address for patron notices	This email address is for automatically generated patron notices (e.g. email overdues, email holds notification). It is good practice to set up a generic account, like info@nameofyourlibrary.org, so that one person's individual email inbox doesn't get cluttered with emails that were not delivered. Multi-branch libraries must set the email at the branch level rather than the system level, though the same email can be used for each branch.	Text		LSA

Table 36. Receipt Templates and SMS Text Message

Setting	Description	Data type	Notes	Edited by
Content of alert_text include	Text/HTML/Macros to be inserted into receipt templates in place of %INCLUDE(alert_text)%	Text	Not in use anymore	

Setting	Description	Data type	Notes	Edited by
Content of event_text include	Text/HTML/Macros to be inserted into receipt templates in place of %INCLUDE(event_text)%	Text	Not in use anymore	
Content of footer_text include	Text/HTML/Macros to be inserted into receipt templates in place of %INCLUDE(footer_text)%	Text	Not in use anymore	
Content of header_text include	Text/HTML/Macros to be inserted into receipt templates in place of %INCLUDE(header_text)%	Text	Not in use anymore	
Content of notice_text include	Text/HTML/Macros to be inserted into receipt templates in place of %INCLUDE(notice_text)%	Text	Not in use anymore	
Disable auth requirement for texting call numbers.	Disable authentication requirement for sending call number information via SMS from the OPAC.	True/False		LSA

Setting	Description	Data type	Notes	Edited by
Enable features that send SMS text messages.	Current features that use SMS include hold-ready-for-pickup notifications and a "Send Text" action for call numbers in the OPAC. If this setting is not enabled, the SMS options will not be offered to the user. Unless you are carefully silo-ing patrons and their use of the OPAC, the context org for this setting should be the top org in the org hierarchy, otherwise patrons can trample their user settings when jumping between orgs.	True/False		LSA

Table 37. Security

Setting	Description	Data type	Notes	Edited by
Default level of patrons' internet access	Enter numbers 1 (Filtered), 2 (Unfiltered), or 3 (No Access)	Number		LSA
Maximum concurrently active self-serve password reset requests	Prevent the creation of new self-serve password reset requests until the number of active requests drops back below this number.	Number	Not in use	Sitka

Setting	Description	Data type	Notes	Edited by
Maximum concurrently active self-serve password reset requests per user	When a user has more than this number of concurrently active self-serve password reset requests for their account, prevent the user from creating any new self-serve password reset requests until the number of active requests for the user drops back below this number.	Number	Not in use	Sitka
OPAC Inactivity Timeout (in seconds)	Number of seconds of inactivity before OPAC accounts are automatically logged out.	Number		LSA
Obscure the Date of Birth field	When true, the Date of Birth column in patron lists will default to Not Visible, and in the Patron Summary sidebar the value will display as unless the field label is clicked.	True/False		LSA

Setting	Description	Data type	Notes	Edited by
Offline: Patron usernames allowed	During offline circulations, allow patrons to identify themselves with usernames in addition to barcode. For this setting to work, a barcode format must also be defined	True/False		
Patron opt-in boundary	Admin setting	Text		Sitka
Patron opt-in default	Admin setting	Text		Sitka
Patron: password from phone #	If true the last 4 digits of the patron's phone number is the password for new accounts (password must still be changed at first OPAC login)	True/False		LSA
Persistent login duration	How long a persistent login lasts, e.g. *2 weeks*	Duration		Sitka
Restrict patron opt-in to home library and related orgs at specified depth	Admin setting	number		Sitka
Self-serve password reset request time-to-live	Length of time (in seconds) a self-serve password reset request should remain active.	Duration		Sitka

Setting	Description	Data type	Notes	Edited by
Staff login inactivity timeout (in seconds)	Number of seconds of inactivity before staff client prompts for login and password.	Number		LSA

Table 38. Self Check and Others

Setting	Description	Data type	Notes	Edited by
Allow Fine printing	If true, there will be a print option on the fine list screen.	True/False		LSA
Allow Hold printing	If true, there will be a print option on the hold list screen.	True/False		LSA
Allow Items out printing	If true, there will be a print option on the items out list screen.	True/False		LSA
Audio Alerts	Use audio alerts for selfcheck events.	True/False		LSA
Block copy checkout status	List of copy status IDs that will block checkout even if the generic COPY_NOT_AVAILABLE event is overridden.	Number	Look up copy status ID from Server Admin.	LSA
Patron login timeout (in seconds)	Number of seconds of inactivity before the patron is logged out of the selfcheck interface.	Duration		LSA

Setting	Description	Data type	Notes	Edited by
Pop-up alert for errors	If true, checkout/renewal errors will cause a pop-up window in addition to the on-screen message.	True/False		LSA
Require Patron Password	If true, patrons will be required to enter their password in addition to their username/barcode to log into the selfcheck interface.	True/False		LSA
Selfcheck override events list	List of checkout/renewal events that the selfcheck interface should automatically override instead instead of alerting and stopping the transaction.	Text		LSA
Workstation Required	All selfcheck stations must use a workstation.	True/False		LSA
Default display grouping for serials distributions presented in the OPAC.	Default display grouping for serials distributions presented in the OPAC. This can be "enum" or "chron".	Text		Sitka

Setting	Description	Data type	Notes	Edited by
Previous issuance copy location	When a serial issuance is received, copies (units) of the previous issuance will be automatically moved into the configured shelving location.	Selection List		Sitka
URL verify: Maximum redirect lookups	Admin setting	Number		Sitka
URL verify: Maximum wait time (in seconds) for a URL to lookup	Admin setting	Number		Sitka
URL verify: Number of seconds to wait between URL test attempts	Throttling mechanism for batch URL verification runs. Each running process will wait this number of seconds after a URL test before performing the next.	Duration		Sitka
Claim Return: Mark copy as missing		True/False	Default: False	Sitka
Disallow circulation of items when they are on booking reserve and that reserve overlaps with the checkout period	When true, items on booking reserve during the proposed checkout period will not be allowed to circulate unless overridden with the COPY_RESERVED.override permission.	True/False		LSA

Setting	Description	Data type	Notes	Edited by
Limit Due Date by Patron Expiry	If True automatically adjusts item due date to match patron card expiry date if expiry date sooner than due date. If False item due date applied.	True/False		LSA
Recalls: An array of fine amount, fine interval, and maximum fine.	An array of fine amount, fine interval, and maximum fine. For example, to specify a new fine rule of $5.00 per day, with a maximum fine of $50.00, use: [5.00,"1 day",50.00]	Text	Brackets are required in the text.	LSA
Recalls: Circulation duration that triggers a recall.	A hold placed on an item with a circulation duration longer than this will trigger a recall. For example, "14 days" or "3 weeks".	Duration		LSA
Recalls: Truncated loan period.	When a recall is triggered, this defines the adjusted loan period for the item. For example, "4 days" or "1 week".	Duration		LSA
Use in-database circ policy	Admin setting	True/False		Sitka
Use in-database holds policy	Admin setting	True/False		Sitka
Use legacy hardcoded receipts/slips		True/False		LSA

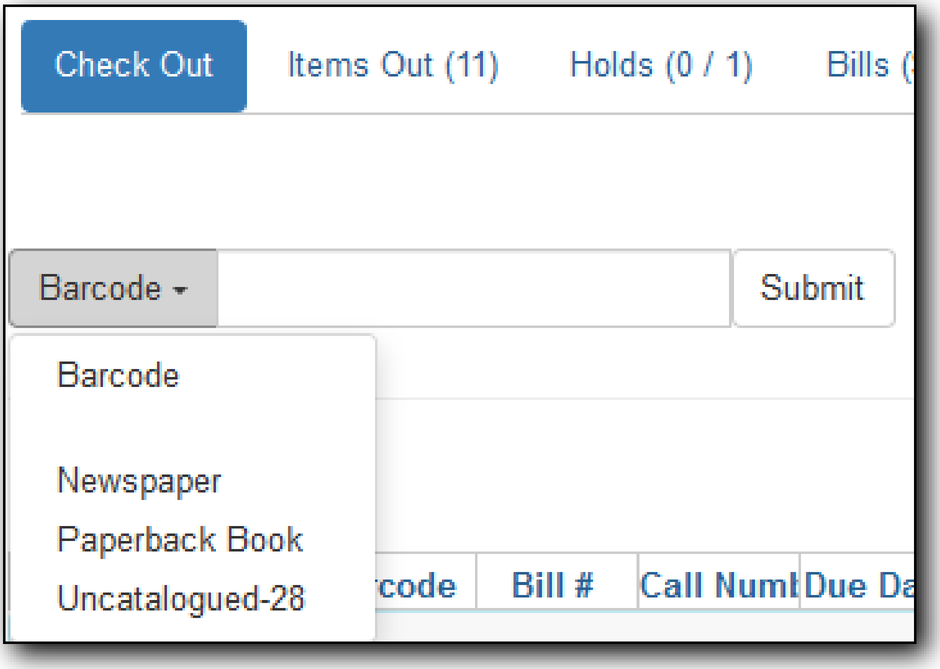
Setting	Description	Data type	Notes	Edited by
circ.renew.check_penalty		True/False		Sitka
global.credit.allow		True/False	Not in use	Sitka
org.opt_out_email_predue		True/False	Not in use	Sitka
ui.network.progress_meter	Switch off/on a bar indicating network in progress	True/False	Not in use anymore	LSA

Table 39. Vandelay

Setting	Description	Data type	Notes	Edited by
Default Record Match Set	Sets the Default Record Match set	Selection List	Populated by the Vandelay Record Match Sets	LSA
Vandelay Default Barcode Prefix	Apply this prefix to any auto-generated item barcode	Text		LSA
Vandelay Default Call Number Prefix	Apply this prefix to any auto-generated item call numbers.	Text		LSA
Vandelay Default Circulation Modifier	Default circulation modifier value for imported items	Selection List		LSA
Vandelay Default Copy Location	Default copy location value for imported items	Selection List		LSA
Vandelay Generate Default Barcodes	Auto-generate default item barcodes when no item barcode is present	True/False		LSA
Vandelay Generate Default Call Numbers	Auto-generate default item call numbers when no item call number is present	True/False	These are pulled from the MARC Record.	LSA

50.11. Non-catalogued Type Editor

Non-catalogued types diplay in a drop down menu on the Check Out and In-House screens.

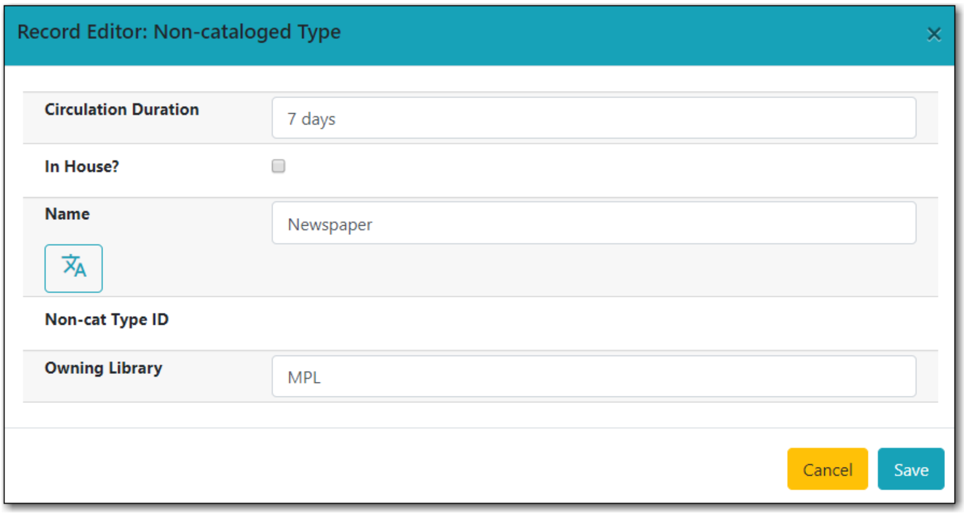


The non-catalogued types can be viewed and configured by going to **Administration** → **Local Administration** → **Non-cataloged Type Editor**.

To view the non-catalogued types at your library enter your library code into the Library filter. Multi-branch libraries can enter the system and then check the box to display the descendants.

50.11.1. Create a Non-Catalogued Type

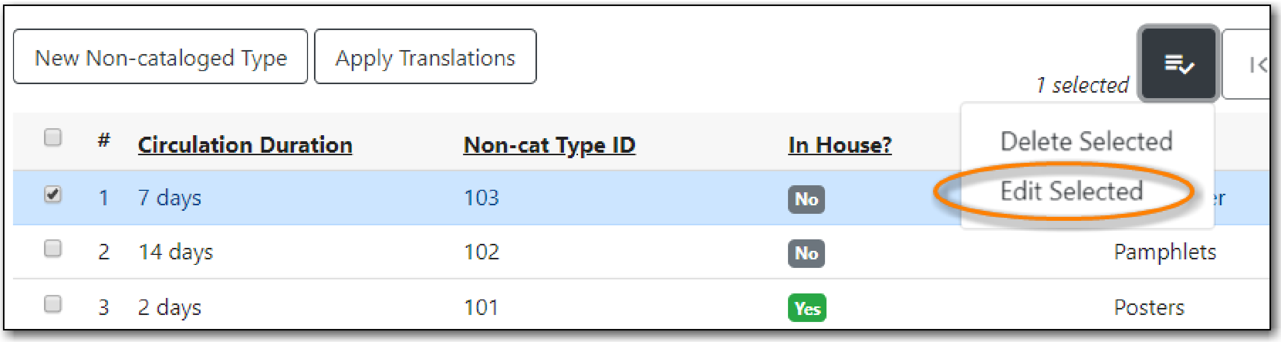
1. Click **New Non-cataloged Type**.
2. Enter the relevant information for your non-catalogued type and click **Save**.



NOTE	Check the **In House?** box for items that will circulate in house. This can be used to manually track computer use, meeting room rentals, etc.

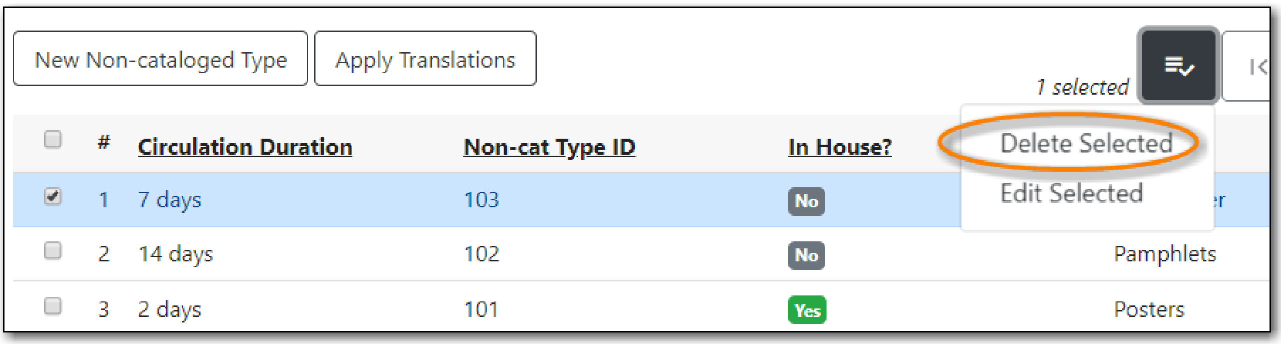
50.11.2. Edit a Non-Catalogued Type

1. Select the non-catalogued type you'd like to edit.
2. Click the actions button and select **Edit Selected**.
3. Make your changes and click **Save**.



50.11.3. Delete a Non-Catalogued Type

1. Select the non-catalogued type you'd like to delete.
2. Click the actions button and select **Delete Selected**.
3. Make your changes and click **Save**.



50.12. Hold-driven Recall

Academic libraries usually allow extended loan periods to some patron types on some materials. They will recall these items when other patrons request them. Hold-driven Recall automates this process.

When libraries recall an item they ususally shorten the loan period and block renewal. They may also change the fine rate and maximum fine amount. A notice (via email) is sent to the current borrower to inform him/her of the change.

Evergreen uses three library setting entries to trigger hold-driven recall and define change parameters. When a hold is placed and there is no availabe copy, Evergeen will check whether the Recall settings are set up for the library. If settings are on and recall condition is met, a recall will be triggered.

Go to **Administration → Local Administration → Library Settings Editor** to set them up.

1. Recalls: Circulation duration that triggers a recall

   This is the threshold that decides whether a recall is triggered. Recalls are triggered only when items are checked out with a loan period longer than the one specified in this entry. For example, in a library the longest general loan period is 35 days. Extended loan to faculty is 92 days. You may specify, e.g. 36 days or 90 days in this entry to trigger recalls on items checked out to faculty with extended loan period. But you need to consider the next entry to make your decision.

TIP	Evergreen uses the loan duration rule in circulation records as the loan period of a circulation. It does not calculate the loan period from the checkout and due dates. If you set specific due date on checkout, the actual loan period and the loan duration rule may not match.

2. Recalls: Truncated loan period

   When a recall is triggered, Evergreen will reset the due date in the current circulation record. The new due date is calculated based on the value entered in this entry and the above. The later date generated by these two entries will be the new due date. For example, the truncated loan period is 7 days and the threshold in the above entry is 36 days. On 2013-07-01 a recall is triggered on an item checked out on 2013-06-09, and the new due date based on truncated loan period will be 2013-07-08 (2013-07-01 + 7 days), while 2013-07-15 is based on the recall threshold (2013-06-09 + 36 days). Evergreen will set the new due date to 2013-07-15. If the above item is recalled on 2013-07-10, the due date from the truncated loan period will be 2013-07-17. This will be the new due date. In other words, the recall threshold is the minimum loan period an extended loan can be shortened to, and patrons with extended loan items will have at least the truncated loan period when they receive the recall notice.

CAUTION	Under extreme circumstance, overdue items' loan periods may be extended, e.g. an extended loan checked out in last term is recalled in this term.

3. Recalls: An array of fine amount, fine interval, and maximum fine.

This is optional. If you wish to set up new fine rules on recalled items, follow the example quoted in the Library Settings Editor. Make sure the brackets and double quotation around the fine interval are included.

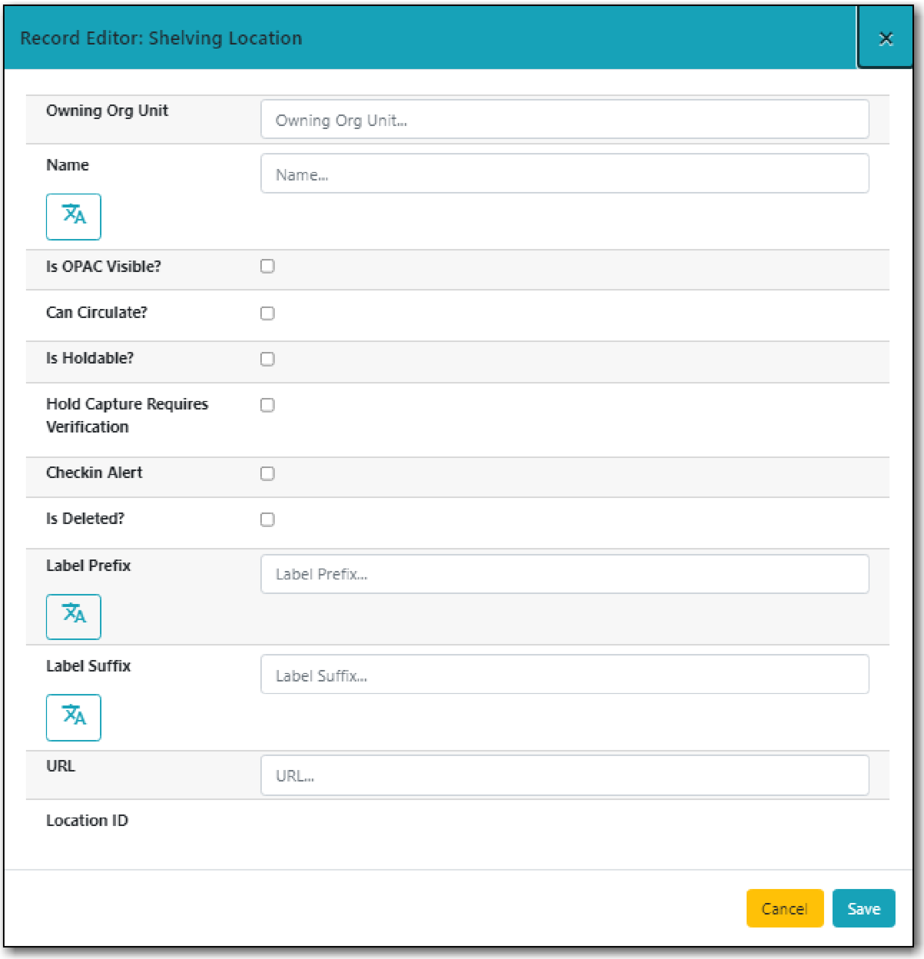
50.13. Shelving Location Editor

Go to **Administration** → **Local Administration** → **Shelving Locations Editor.**

To view the shelving locations at your library enter your library code into the Library filter. Multi-branch libraries can enter the system and then check the box to display the descendants.

50.13.1. Creating a Shelving Location

1. Click **New Shelving Location**.
2. Enter the relevant information for your shelving location and click **Save**.
   - **Circulate?** means an item in this location can be checked out.
   - **Checkin Alert** will prompt staff to route the item to the location when checking in items with this location.
   - **Hold Capture Requires Verification**, if set up, will generate a prompt when an item is captured for a hold.
   - **Holdable** means a patron is able to place a hold on an item in this location.
   - **OPAC Visible** means items in the location will display in your public catalogue.
   - **Label Prefix** and **Label Suffix**, if set up, will be automatically included when printing spine labels.

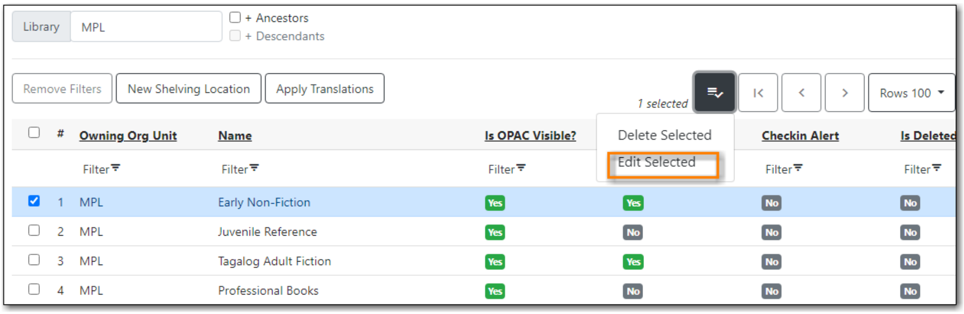


NOTE Text in the Label prefix and Label suffix fields will automatically be added to spine labels printed for items in the selected shelving location. It does not affect OPAC or staff client display.

TIP Whether an item can be circulated, is holdable, or visible on the OPAC, is controlled by three factors: item status, shelving location, and item attributes (the options in the Holdings Editor). Evergreen follows the aforementioned sequence to check the value of each factor until it encounters a NO. An item can be circulated, holdable or visible on OPAC when all three factors are set to YES.

50.13.2. Editing a Shelving Location

1. Select the shelving location you'd like to edit..
2. Click the actions button and select **Edit Selected**.
3. Make your changes and click **Save**.



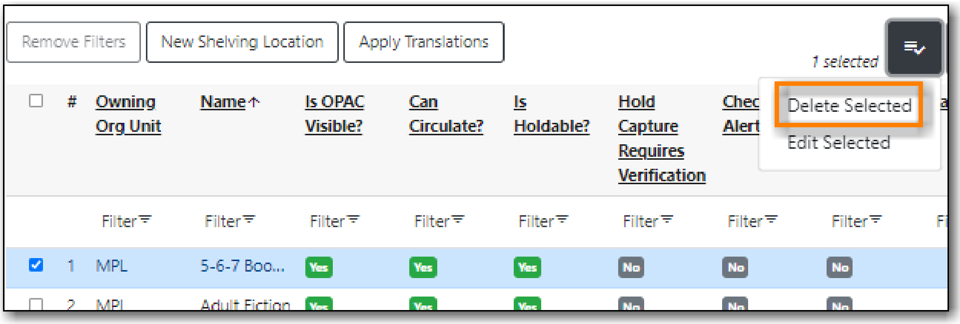
CAUTION

If your library uses the acquisitions module and loads vendor records make sure you let your vendors know about any changes you make to shelving location names that are used in their templates. If the shelving location name doesn't match between Evergreen and the $1 in the templates your MARC records will not load.

50.13.3. Deleting a Shelving Location

When deleting shelving locations it is important to make sure all non-deleted items have been moved to another shelving location first; items in deleted shelving locations will not display in the public catalogue. Co-op Support recommends running a report using the Sitka report template *Shelving Location : Copies with Selected Shelving Location* before deleting a shelving location.

1. Select the shelving location you wish to delete.
2. From the **Actions** menu selected **Delete Selected**.



3. The shelving location will still display in the list but *Is Deleted?* will have a value of *Yes*.

NOTE

In the Shelving Locations Editor you can use the filter to display only shelving locations where *Is Deleted?* is *No*.

Because deleted shelving locations also display in the reporter Co-op Support recommends renaming deleted shelving locations to start with Z. Deleted shelving locations will then sort alphabetically to the bottom of the list and it is very evident when running reports that filter on shelving location which shelving locations in the list are deleted.

50.14. Shelving Location Groups

Shelving location groups are currently not in use.

50.15. Shelving Location Order

Shelving location order is currently not in use.

50.16. Statistical Category Editor

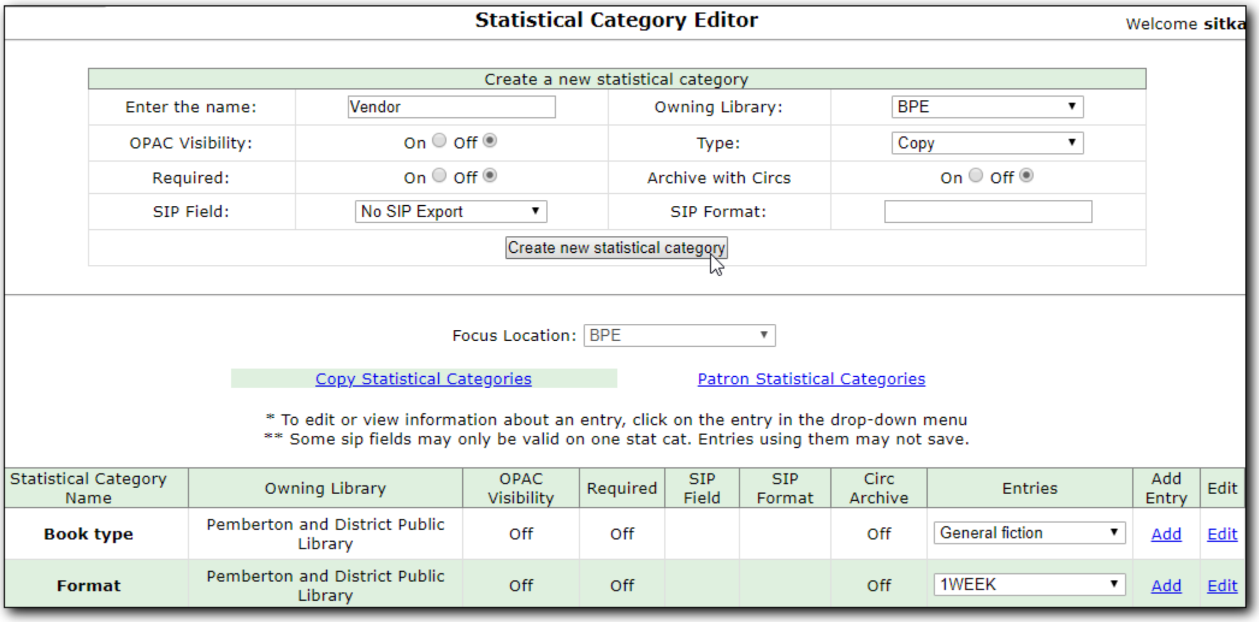
This is where you configure your statistical categories (stat cats). Stat cats are a way to save and report on additional information that does not fit elsewhere in Evergreen's default records. It is possible to have stat cats for copies or patrons.

1. Select **Administration** → **Local Administration** → **Statistical Categories Editor**.
2. To create a new stat cat, enter the name of the stat cat and select **Copy** or **Patron** in the dropdown menu. Check the respective **On** or **Off** radio buttons beside each option, and click **Create new statistical category**.

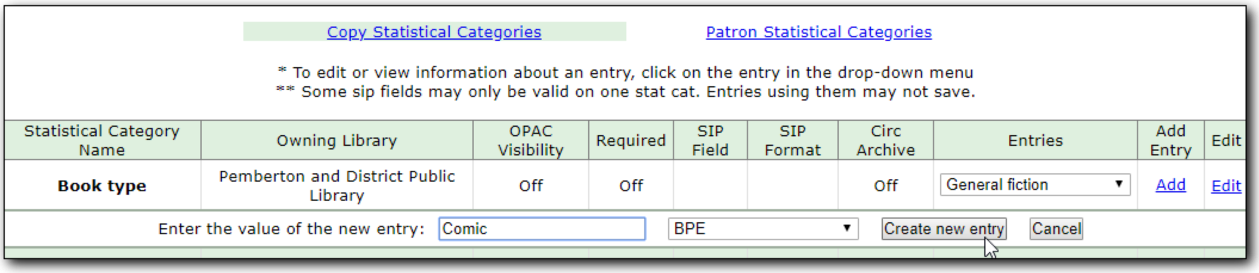
   OPAC Visibility: If On, the stat cat and its value are displayed in Copy Details on OPAC. **This feature is not working. The stat cat and its value will not be displayed in the OPAC.

   Required: If On, the stat cat becomes mandatory.

   Archive with Circs: If On, the stat cat and its value are kept in aged circulation records.

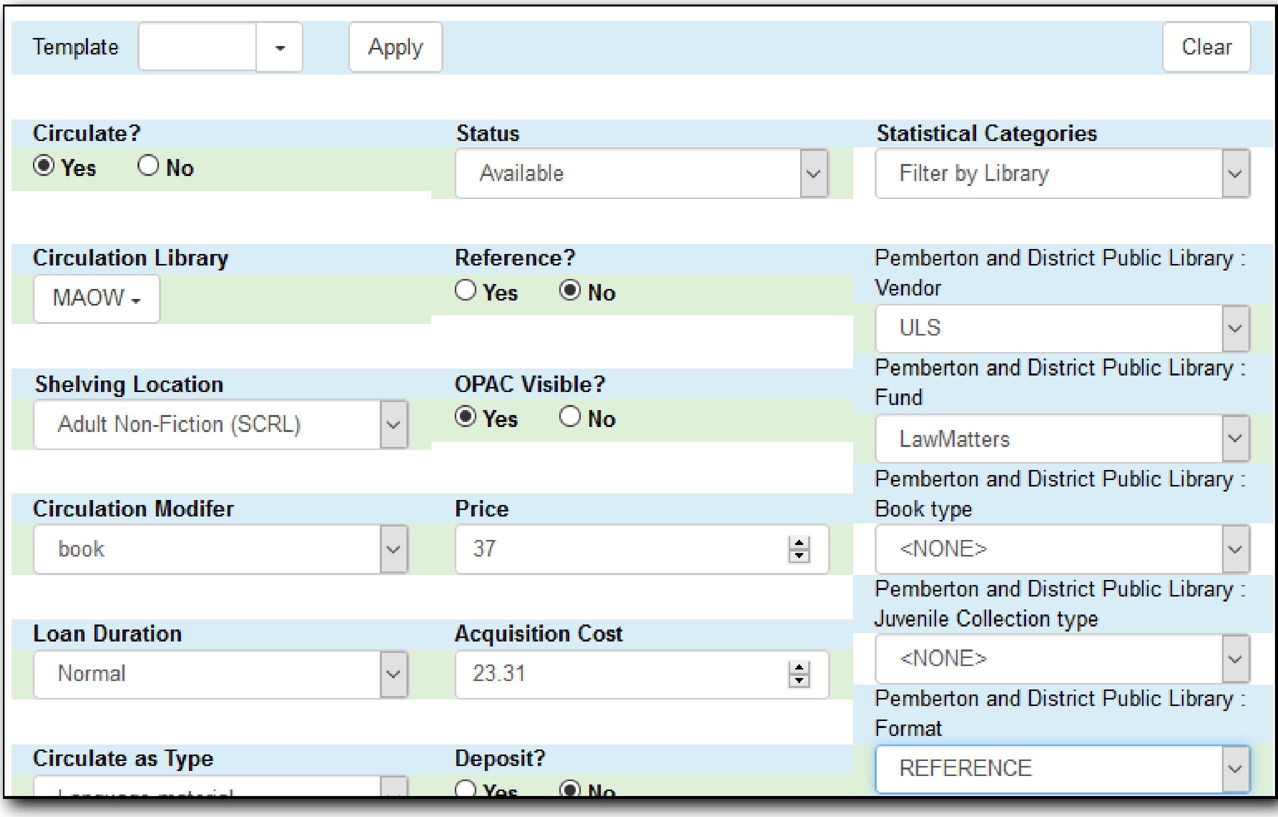


3. To add stat cat values, click **Add** in the line of the stat cat. Type in the value, then click **Create new entry** button. Confirm on the prompt. Repeat these steps if you need to add more values.

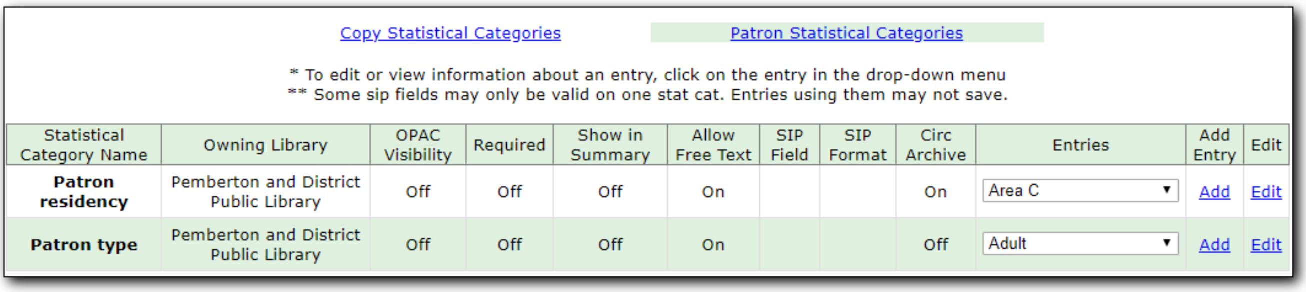


4. Clicking **Edit** on the above screen allows you to change the stat cat name and/or its properties.

Copy stat cats: The image above shows some examples of copy stat cats. You would see these when editing items in the Volume Copy Editor. You might use copy stat cats to track books you have bought from a specific vendor, or donations.

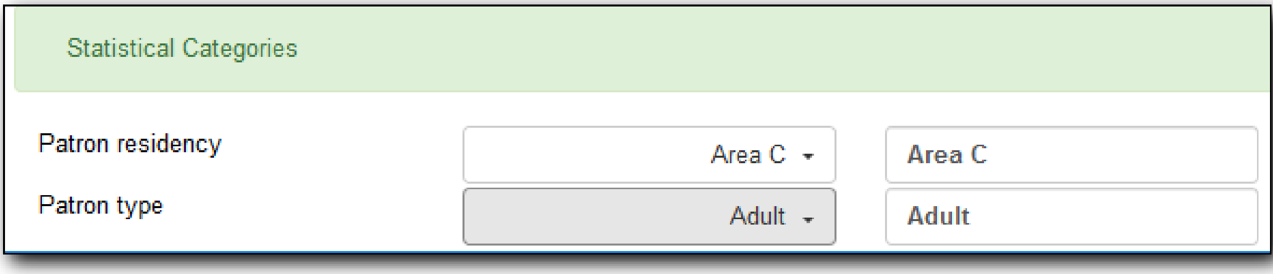


Patron stat cats: Below are some examples of patron stat cats. Patron stat cats can be used to keep track of information like the high school a patron attends, or the home library for a consortium patron, e.g. InterLink. You would see these in the lower part of the registration/edit patron screen.



There are two more options when creating a patron stat cat: **Allow Free Text** allows staff to type in the values when on patron registration/edit screen; **Show in Summary** displays the stat cat in patron summary.

This is what the patron stat cat looks like in the patron registration screen.



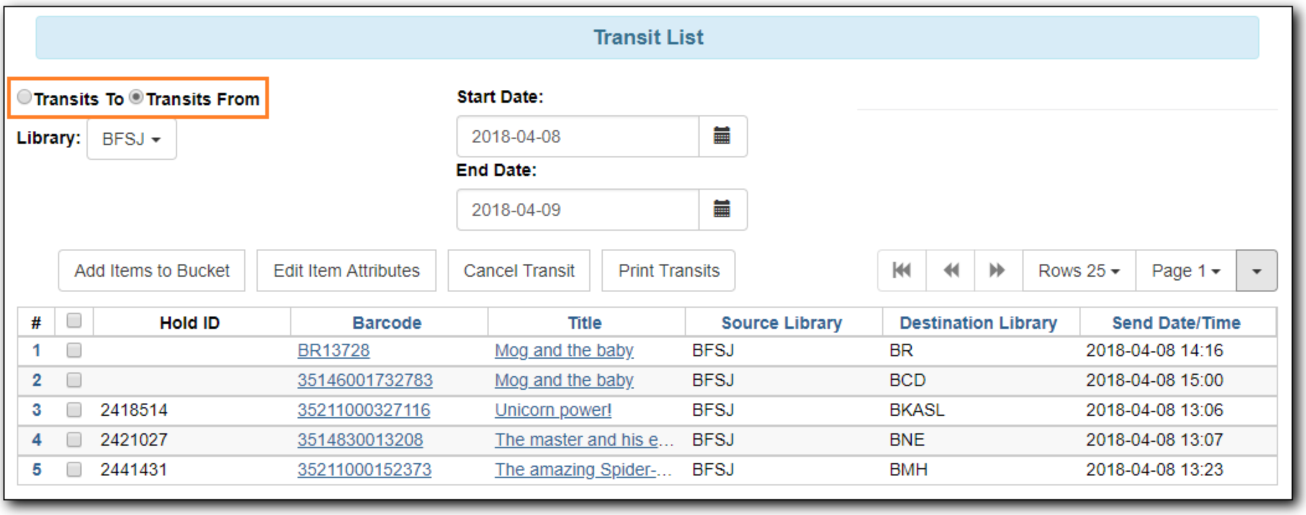
50.17. Surveys

Surveys are not used at this time.

50.18. Transit List

This is where you may list items in transit to your library or from your library to other libraries. You may select a date range when items were sent in transit.

1. Go to **Administration** → **Local Administration** → **Transit List**.
2. Select **Transit To** or **Transit From**.
3. Specify a date range.
4. Items were sent in transit during the date range and still have in transit status are listed.



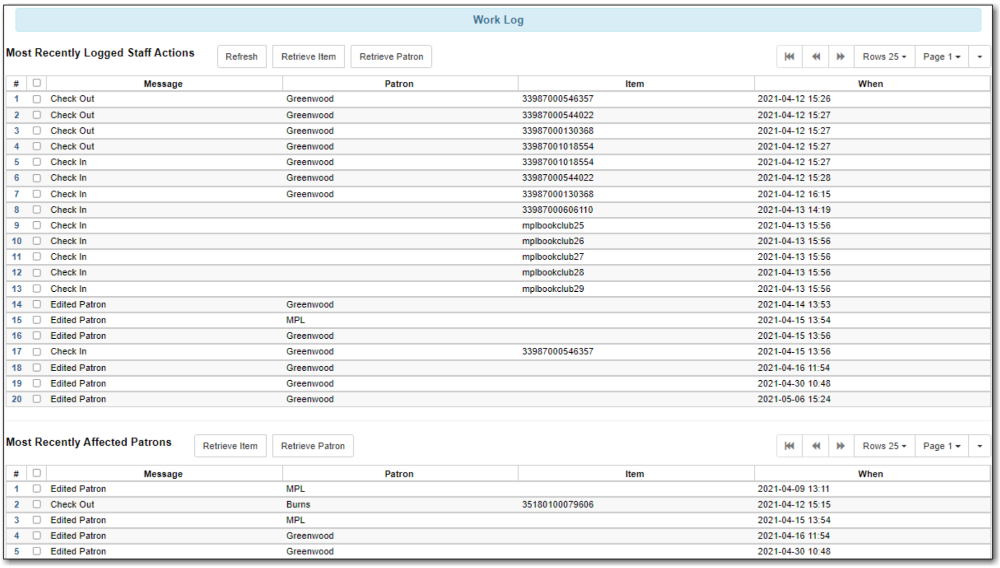
TIP If hold information, e.g. Hold ID in the above screenshot, is displayed, it means the item is in transit to fill a hold.

50.19. Work Log

The Work Log records checkins, checkouts, patron registration, patron editing, renewals, payments and holds placed from with the patron record for a given login.

To access the Work Log go to **Administration** → **Local Administration** → **Work Log**.

There are two seperate logs, Most Recently Logged Staff Actions and Most Recently Affected patrons. The Most Recently Logged Staff Actions logs the the transactions in order they have occured on the workstation. The Most Recently Affected Patrons log is a listing of the last patrons that transactions happened on.



Work Log

Most Recently Logged Staff Actions

Refresh | Retrieve Item | Retrieve Patron | Rows 25 | Page 1

#	Message	Patron	Item	When
1	Check Out	Greenwood	33987000546357	2021-04-12 15:26
2	Check Out	Greenwood	33987000544022	2021-04-12 15:27
3	Check Out	Greenwood	33987000130368	2021-04-12 15:27
4	Check Out	Greenwood	33987001018554	2021-04-12 15:27
5	Check In	Greenwood	33987001018554	2021-04-12 15:27
6	Check In	Greenwood	33987000544022	2021-04-12 15:28
7	Check In	Greenwood	33987000130368	2021-04-12 16:15
8	Check In		33987000606110	2021-04-13 14:19
9	Check In		mplbookclub25	2021-04-13 15:56
10	Check In		mplbookclub26	2021-04-13 15:56
11	Check In		mplbookclub27	2021-04-13 15:56
12	Check In		mplbookclub28	2021-04-13 15:56
13	Check In		mplbookclub29	2021-04-13 15:56
14	Edited Patron	Greenwood		2021-04-14 13:53
15	Edited Patron	MPL		2021-04-15 13:54
16	Edited Patron	Greenwood		2021-04-15 13:56
17	Check In	Greenwood	33987000546357	2021-04-15 13:56
18	Edited Patron	Greenwood		2021-04-16 11:54
19	Edited Patron	Greenwood		2021-04-30 10:48
20	Edited Patron	Greenwood		2021-05-06 15:24

Most Recently Affected Patrons

Retrieve Item | Retrieve Patron | Rows 25 | Page 1

#	Message	Patron	Item	When
1	Edited Patron	MPL		2021-04-09 13:11
2	Check Out	Burns	35180100079606	2021-04-12 15:15
3	Edited Patron	MPL		2021-04-15 13:54
4	Edited Patron	Greenwood		2021-04-16 11:54
5	Edited Patron	Greenwood		2021-04-30 10:48

Chapter 51. Server Administration

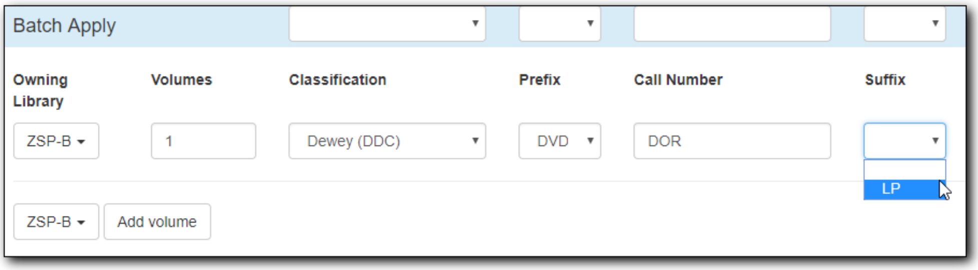
Most options under the Server Administration menu are global Sitka settings that cannot be changed locally. The exception inlcudes the call number prefix/suffix, and the Organizational Units submenu, which allows Local System Administrators to edit library contact information, hours of operation, and addresses.

There is some view-only information that is useful under Server Administration, in particular the list of Item Statuses.

51.1. Call Number Prefix and Suffix

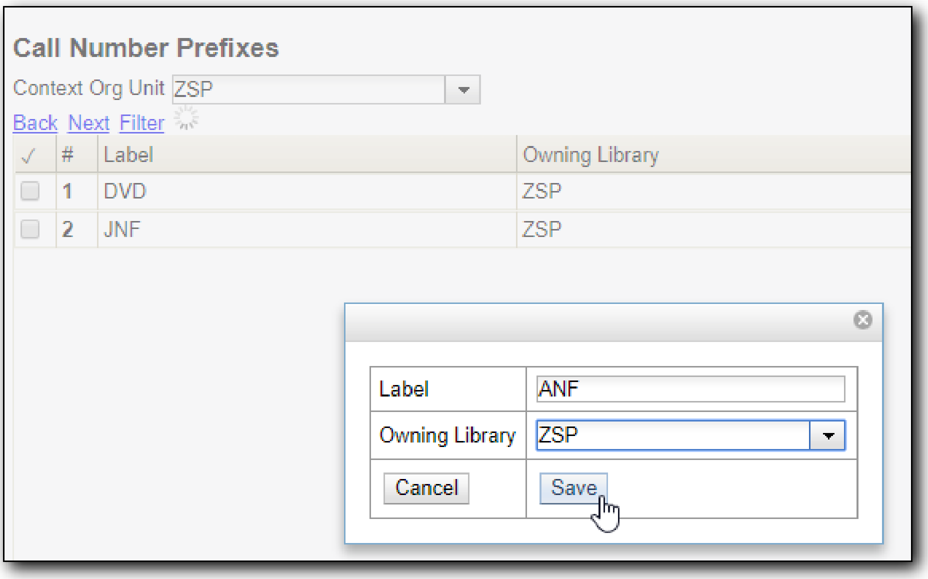
If you library uses prefixes and/or suffixes in call numbers, you can build a standard list, which will be displayed as dropdown lists when creating/editing call number record.

This is how it looks on the call number creating/editing screen.



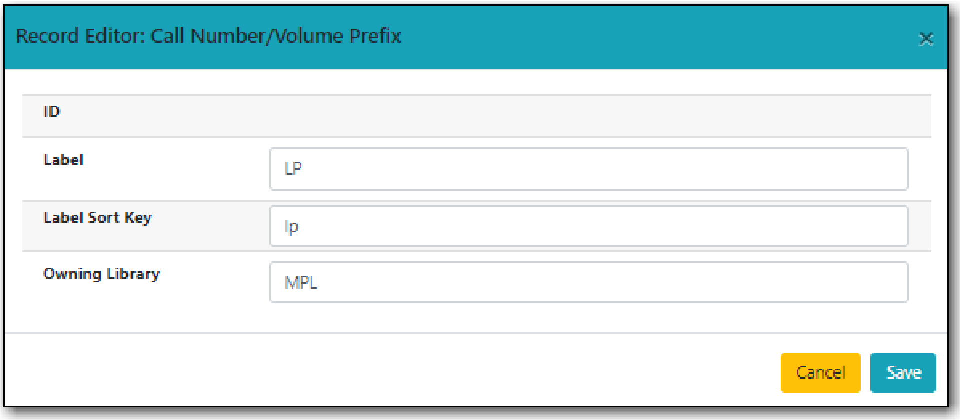
1. To create a call number prefix or suffix, go to **Administration** → **Server Administration- > Call Number Prefix** or **Call Number Suffix**.

   To view the group penalty thresholds for your library enter your library code into the Library filter. Multi-branch libraries can enter the system and then check the box to display the descendants.

2. Click **New Call Number/Volume Prefix/Suffix**.

3. Type in the Label and Label Sort Key.
4. Choose your library as the Owning Library.
5. Click Save.



To edit or delete a prefix/suffix, check the record, and then click **Edit Selected** or **Delete Selected**.

TIP Call Number Prefix/Suffix created here are different from Label Prefix/Suffix created on Copy Location Editor. The former are displayed as part of call number in OPAC, while the latter are on printed labels only.

51.2. Circulation Modifiers

Circulation modifiers are labels that can be assigned to items that Evergreen uses in conjunction with circulation policies and hold policies to determine how items should behave. Circulation modifiers can also be used in reports for statistical purposes.

Co-op Support has an on-going project to streamline the list of circulation modifiers available as the same lists displays to all libraries. The list below is those modifiers recommended for use by Co-op Support. Modifiers available in Evergreen but not on the list will eventually be removed.

NOTE

We recommend libraries choose a subset of these circulation modifiers to use and ensure all cataloguing staff are aware of the modifiers used at their library.

When you start using a new circulation modifier for items Evergreen will use your default circulation policy when checking out the item. Contact Co-op Support to update your circulation policies if the items should follow a more specific policy.

Name	SIP2 Media Type	Magnetic Media	Description
alternate-format	Other	False	Intended for items for print disabled patrons like DAISY readers
archives	Other	False	Intended for archival materials
audiobook-cassette	Other	True	Intended for audiobooks on cassette

audiobook-cd	Other	True	Intended for audiobooks on cd
best-seller	Book	False	Intended for collections of best sellers that need a unique modifier to identify the items for hold or circulation policies
binder	Other	False	Intended for loose-leaf binders
book	Book	False	Intended for books
book-and-disk	Book with diskette	False	Intended for books that come with a floppy-disc
bookclub	Other	False	Intended for book club sets
box	Other	False	Intended for anything that comes in a box or makes sense to use this generic modifier
cassette-and-book	Book with audio tape	True	Intended for books with come with a cassette inside
cassette-and-book-in-bag	Book with audio tape	True	Intended for titles are presented both as a book and cassette and circulate in a bag
cassettes	Audio Tape	True	Intended for cassettes, usually music
cd-and-book	Book with CD	False	Intended for for books with come with a CD inside
cd-and-book-in-bag	Book with CD	False	Intended for titles are presented both as a book and CD and circulate in a bag
cd-rom	CD/CDROM	False	Intended for cd-roms
circ-reserve	Other	False	A number of modifier start with *circ-reserve*. These are intended to be used by academic libraries with course reserves

compact-disc	CD/CDROM	False	Intended for CDs, usually music
course-reserve	Other	False	Intended for items that will be reserved for specific courses
dvd	CD/CDROM	False	Intended for dvds
dvd-feature	Other	False	Intended for feature dvds when a secondary modifier is need to distinguish the items from those using dvd for hold or circulation policies
dvd-rom	Other	False	Intended for dvd-roms
e-reader	Book	False	Intended for intended for physical e-readers
equipment	Other	False	Intended for any type of equipment the library circulates, may be used in conjunction with *library-equipment* if multiple hold or circulation policies are needed
film	Other	False	Intended for items that are physical film
game	Other	False	Intended for board games or other types of games
graphic-novel	Book	False	Intended for graphic novels
holiday	Other	True	Intended for holiday items
ill-no-renewal	Other	False	Intended for interlibrary loans that are not renewable
inter-library-loan	Other	False	Intended for interlibrary loans
juvenile-audio-cassette	Audio Tape	True	Intended for audiobooks for juvenile users

juvenile-audio-visual	Audio Tape	False	Intended for any audio-visual items for juvenile users
juvenile-collection	Other	False	Intended for collections for juvenile users
juvenile-holiday	Other	False	Intended for holiday items for juvenile users
juvenile-playaway	Other	False	Intended for playaways for juvenile users
juvenile-serial	Magazine	False	Intended for magazines or periodicals for juvenile users
juvenile-video	Video Tape	True	Intended for videos or dvds for juvenile users
kit	Audio Tape	True	Intended for anything considered a kit
language-learning	Other	False	Intended for items on learning a language
language-other	Other	False	Intended for items in a language different than the majority of the library's collection
laptop	Other	False	Intended for laptops
large-print	Other	False	Intended for large print items
library-equipment	Other	False	Intended for any type of equipment the library circulates, may be used in conjunction with *equipment* if multiple hold or circulation policies are needed
literacy-kit	Other	False	Intended for literacy kits
magazine	Magazine	False	Intended for magazines, often used by public libraries
map	Other	False	Intended for maps

new-books	Book	False	Intended for items newly added to the collection
newspaper	Magazine	False	Intended for newspapers
other	Other	False	Intended for items that don’t fit one of the other circulation modifiers
pamphlet	Other	False	Intended for pamphlets
paperback	Other	False	Intended for paperbacks if they need to be separate from other books for statistical or policy reasons
pattern	Other	False	Intended for patterns, such as for knitting, crocheting, or sewing
periodical	Magazine	False	Intended for periodicals, often used by academic libraries
playaway	Other	False	Intended for playways
puzzle	Other	False	Intended for jigsaw puzzles
quick-video-game	Other	False	Intended for video games with a shorter than normal loan period
quickread	Other	False	Intended for books or audiobooks with a shorter than normal loan period
readalongs	Other	False	Intended for readalongs
semester	Other	False	Intended for items that go out for an entire semester, used by academic libraries

special-collection	Other	False	Intended for a collection of items that need a unique modifier for statistical or policy reasons, see also *unique-collection*
spiral-binding	Other	False	Intended for items that are spiral bound
tablet	Other	False	Intended for electronic tablets
textbook	Book	False	Intended for textbooks
toy	Other	False	Intended for toys
unqiue-collection	Other	False	Intended for a collection of items that need a unique modifier for statistical or policy reasons, see also *special-collection*
vertical-file	Other	False	Intended for vertical files
video	Video Tape	True	Intended for VHS
video-games	Other	False	Intended for video games

51.3. Floating Group

Evergreen supports floating collections. Floating items stay at the checkin library, instead of being sent back to the item's original circulating library. Floating Groups are used to limit the range of libraries that an item can float within. Please contact Co-op Support if you wish make all or part of your items float within selected libraries/branches.

51.4. 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.

If you wish to use hard due dates please contact Co-op Support with the following:

- Date or dates for the hard due date
- Who and what the hard due date should apply to
  - Refer to Understanding Your Circulation Policies for the information on the parameters you can specify
- Whether the hard due should apply all the time or just truncate the regular due dates when

they would fall after the hard due date

- Libraries can have both types of hard due dates if you'd like different scenarios to apply to different patron groups or items. For example, you may want to have regular loan durations apply to students until the end of term when they start to truncate while faculty members always get to check out items for the entire semester.

TIP

Send your new hard due dates to Support on a regular basis to ensure your circulation works as expected.

For instance, you may wish to send the dates for your fall, winter, and summer terms to Support every August so that your dates can be entered for the entire year.

51.5. Item Status

This table below describes the item statuses with Sitka's property settings.

Item Status	Definition	Holdable	OPAC Viewable	Sets copy active	Is Available?	Hopeless Prone
Available	Item is on the shelf	Yes	Yes	Yes	Yes	No
Bindery	Sent to be rebound	No	Yes	No	No	No
Canceled Transit	A transit for the item was aborted	Yes	Yes	No	No	No
Cataloging	This status is used by Evergreen for pre-cat items.	Yes	Yes	Yes	No	No
Cataloguing Department	Item is being catalogued or in cataloguing department	Yes	Yes	No	No	No
Checked out	Item is on loan	Yes	Yes	Yes	No	No

Claimed Returned	Patron reports item has been returned. (Libraries develop own procedure for deciding when to make an item Claimed Return)	No	Yes	Yes	No	No
Cleaning	Item is being cleaned (ie. DVDs and CDs)	Yes	Yes	Yes	No	No
Damaged	Damaged and may not circulate again	No	Yes	Yes	No	Yes
Discard/Weed	Item is no longer in collection, it has been weeded or discarded	No	No	Yes	No	Yes
ILL	Item is being used for an inter library loan (borrower is not tracked in Evergreen)	Yes	Yes	Yes	No	No
In process	Item is being processed and will soon be available	Yes	Yes	No	No	No

In transit	Item is travelling between libraries and remains in the In Transit status until checked in	Yes	Yes	Yes	No	No
Long Overdue	Not currently used in Sitka.	No	No	No	No	No
Lost	Declared lost by patron or library (either manually or automatically)	No	Yes	Yes	No	Yes
Lost and Paid	Item was declared lost by patron or staff and has now been paid for.	No	Yes	Yes	No	Yes
Mending	Item is being repaired	Yes	Yes	Yes	No	No
Missing	Item cannot be found	No	Yes	Yes	No	Yes
On display	Item is on display and is not in its usual shelving location	Yes	Yes	Yes	Yes	No
On holds shelf	Item is awaiting pick-up by patron. Item is usually on a "holds shelf" within the library	Yes	Yes	Yes	No	No

On order	Item has been ordered but not yet received from a vendor	Yes	Yes	No	No	No
On reservation shelf	Used with room/booking module. When an item has been booked/reserved, it is placed in a unique location, ready for pick-up	No	Yes	Yes	No	No
Onsite consultation	Item is available for use on-site and possibly needs to be requested through staff. This is not intended for normal reference materials.	No	Yes	Yes	Yes	No
Reserves	In reserves collection	No	Yes	Yes	Yes	No
Reshelving	Item has been returned but not yet shelved. Status automatically changes to Available after 24 hours	Yes	Yes	Yes	Yes	No

Storage	On-site or off-site storage	Yes	Yes	Yes	No	No
Temporarily Unavailable	Not available for patrons to borrow but will become available at a later date	No	No	Yes	No	No

TIP

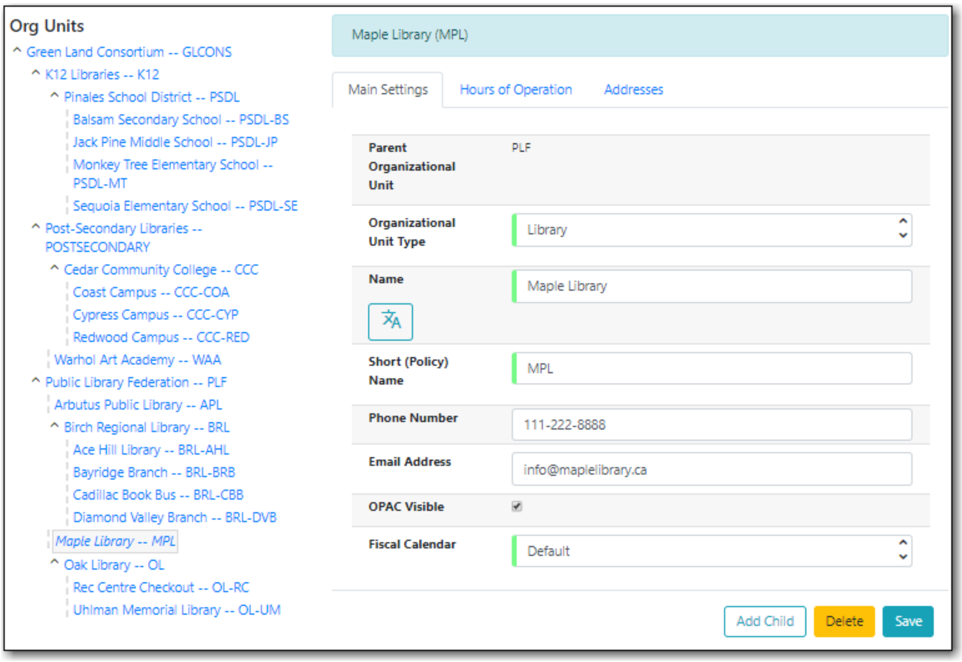
1. If the **Sets copy active** is set to NO, an item created with this status will not have the **Active Date** field filled. The date will be filled later when the item achieves a status with **Sets copy active** is set to YES.
2. If Is Available? is set to YES, items with that status will appear in search results when the **Limit to Available** checkbox is checked and can be checked out without needing to be first checked in or have any prompts regarding unavailable status appearing.

51.6. Organizational Units

Anyone with access to the staff client may view these settings, but only a Local System Administrator login can edit some parts.

51.6.1. Library Main Settings

1. Go to **Administration** → **Server Administration** → **Organizational Units**.
2. Find your library from the tree on the left side of the page and click it to open settings. Multi-branch library systems will see an entry for each branch.



3. The **Main Settings** tab opens displaying settings for your library. Only Main Email Address and Main Phone Number should be edited, please leave all other settings at their default values.
4. Click **Save** to record changes.

51.6.2. Library Hours of Operation

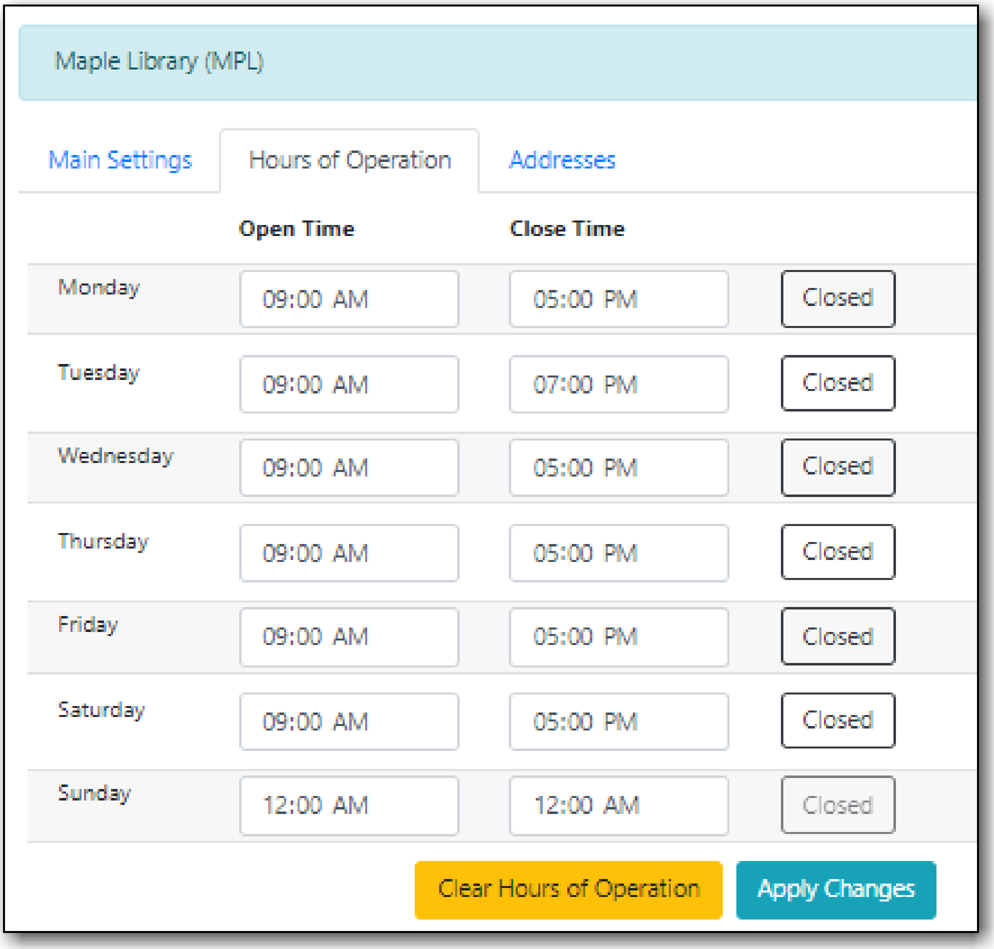
Local System Administrators can use the Organizational Units interface to set the library's hours of operation. These are regular weekly hours; holiday and other closures are recorded in the Closed Dates Editor.

NOTE

Hours of operation and closed dates affect due dates, overdue fines and holds targeting.

- Due dates: Due dates that would fall on closed days are automatically pushed forward to the next open day.
- Overdue fines: Overdue fines are not charged on days when the library is closed.
- Hold Targeting: By default items at a closed library are not targeted for holds. This means that available items that patrons have placed holds on will not appear on the Holds Pull List until the next open day. If you wish items to be targeted when the library is closed to the public, perhaps staff are still working and would like to pull items for holds, you can use the library settings **Target copies for a hold even if copy's circ lib is closed** and **Target copies for a hold even if copy's circ lib is closed IF the circ lib is the hold's pickup lib** to override the default behaviour.

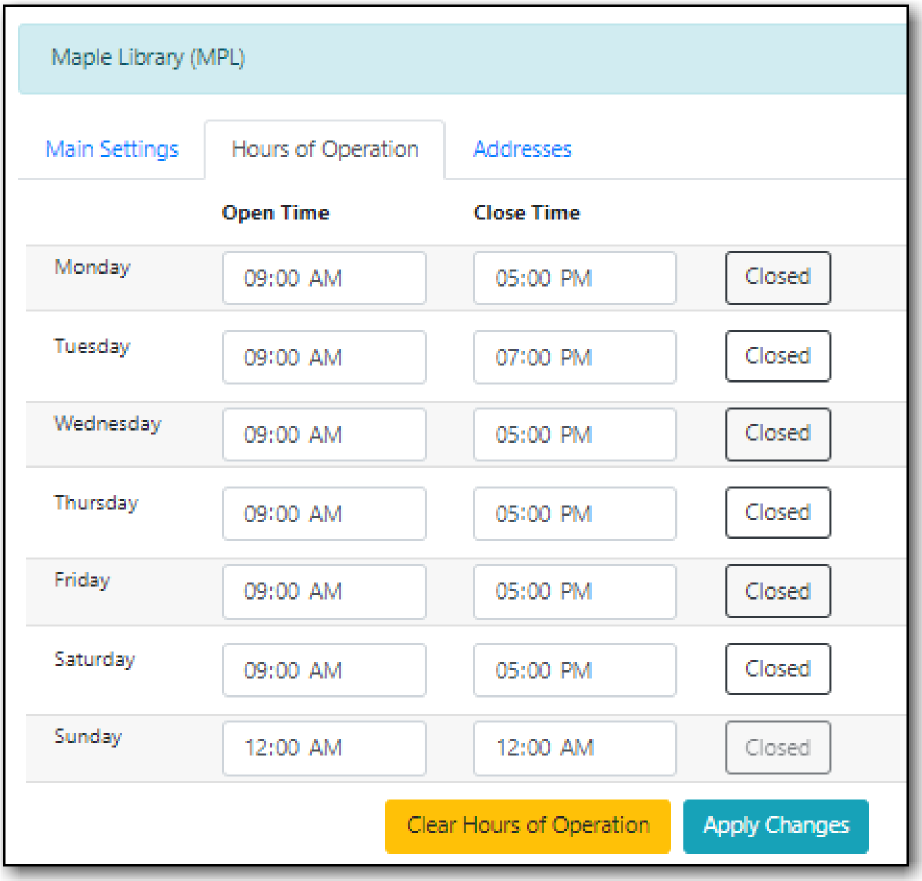
1. To review or edit your library's hours of operation, open the Organizational Units interface. Click the **Hours of Operation** tab.
2. Review your library's weekly hours, edit if necessary.
   a. To set a day as closed, click the corresponding **Closed** button. Closed days (Sunday in the example below) have open and close times of 12:00 AM to 12:00 AM.
3. Click **Save** to record any changes



51.6.3. Library Addresses

Addresses set in Organizational Units appear in patron email notifications, hold slips, and transit slips. Local System Adminstrators should ensure that the Mailing, Holds, Physical, and ILL addresses are set correctly.

1. Open the Organizational Units interface. Click the **Addresses** tab.
2. There are four address tabs: Mailing, Holds, Physical, and ILL. Co-op support recommends setting all four.
   - The Holds Address appears on hold transit slips when items are sent to fulfill holds at another branch.
   - The Mailing address is used in notices.



3. Click **Save** to record changes for each tab.

CAUTION The value in **State** (Province) field in Mailing address is used to generate the URLs to My Account link in email notices. To ensure correct URLs, please always use BC for BC libraries, MB for Manitoba libraries, and ON for Ontario libraries.

NOTE The Valid checkbox is an optional setting that does not affect current Evergreen functions, but the Co-op Support recommends checking it for all correct addresses.

Chapter 52. Evergreen Self Check Administrative Set-up

1. Library sets up a computer specifically for self check with the following:
    - a mouse
    - a barcode scanner
    - library security system (RFID pad, demagnetizing equipment, etc.)
    - a keyboard
    - a receipt printer
    - Internet Browser
    - The self check is known to be compatible with Chrome, Firefox and Internet Explorer.
    - a method for locking down access so patrons cannot use the computer for other functions
    - Co-op support recommends that you consult with your local IT support on the best method to lock down your computer.
2. Library contacts Sitka Support to get a self check interface set up with the library's logo and colours.
3. Co-op support supplies library with URL for self check and a self check specific Local System Administrator account.
4. Library saves URL as a favourite in browser or as a shortcut on the computer's desktop for easy access.
5. Library sets needed self check library settings. For details, refer to Self Check and Others
6. Library teaches patrons to use self check.
7. For instructions on using the native Evergreen Self Check, see Self Check

CAUTION The information in this section is specific to the native Evergreen Self Check which is available to all libraries. For information regarding a third party self check please contact the vendor.

Chapter 53. Sitka's Patron Deletion Tool

The patron deletion tool developed by the Sitka team allows local system administrators to delete inactive cards and patron accounts while retaining statistics. This is done outside of patron accounts, and a small batch of barcodes/accounts can be deleted at once. The table below describes a few scenarios where this tool may be used.

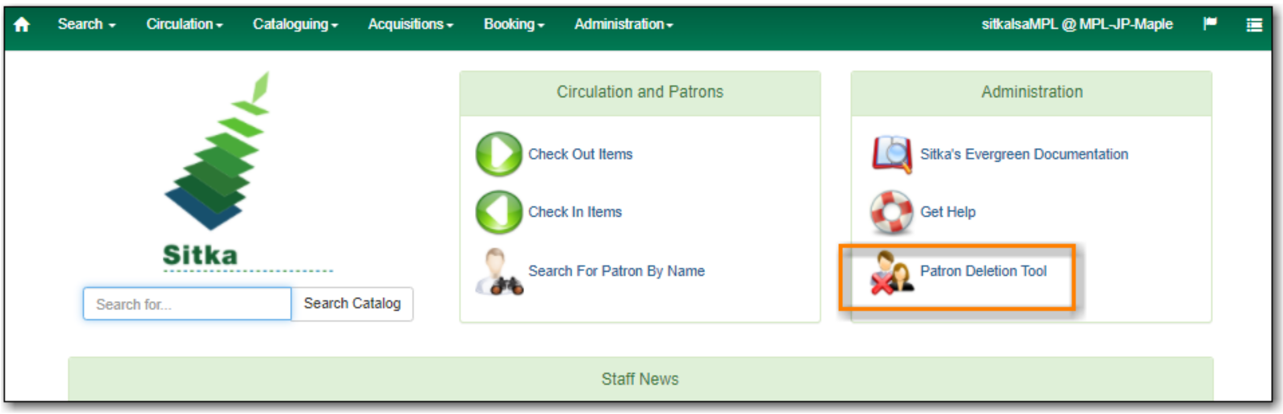
Staff can only delete cards and accounts for patrons whose home library is their library or one of their branches. The home library may need to be updated.

Scenario	Action
An active patron lost a card and was issued a new one (using Replace Barcode)	Delete the lost card (optional)
A patron is no longer active and their account should be removed completely	Delete patron account
An active patron has more than one account	Merge the accounts. Choose the card number that you want to keep as the lead record. See Merging Patron Accounts.

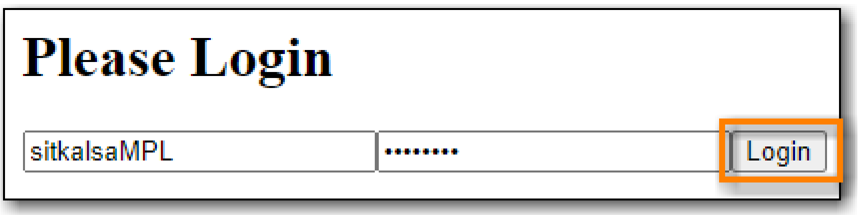
53.1. Accessing the Patron Deletion Tool

The patron deletion tool can be accessed from the staff client home page.

1. On the staff client home page click **Patron Deletion Tool** found in the Administration box.



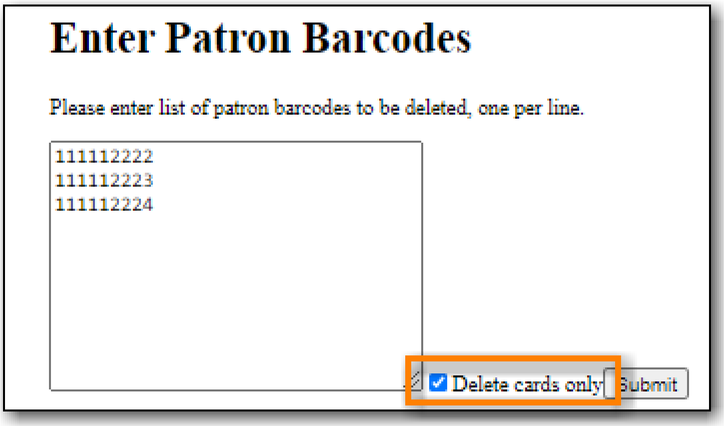
2. The Patron Deletion Tool will open in a new tab. Enter a local system administrator username and password and click **Login**.



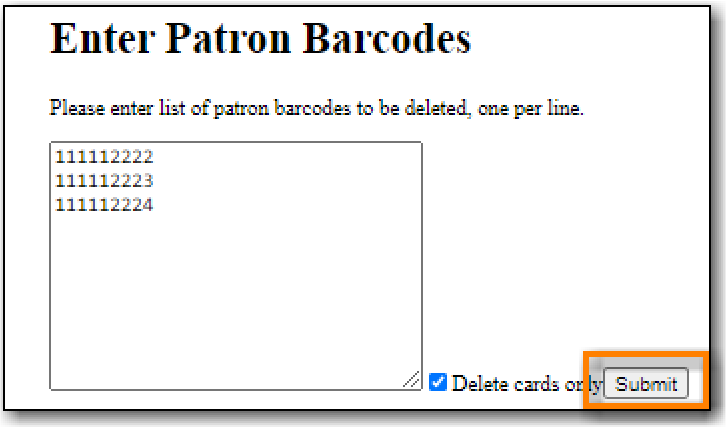
53.2. Deleting Inactive Cards

When a patron's card is marked lost and a new barcode is assigned, the old barcode remains in the Evergreen database as an inactive card. Deleting lost or inactive cards is optional, but recommended. Patrons cannot check out items or log into the OPAC with an inactive card, but the lost cards can be used to retrieve the active patron record in the staff client. Whether a library routinely deletes inactive cards is a matter of local policy.

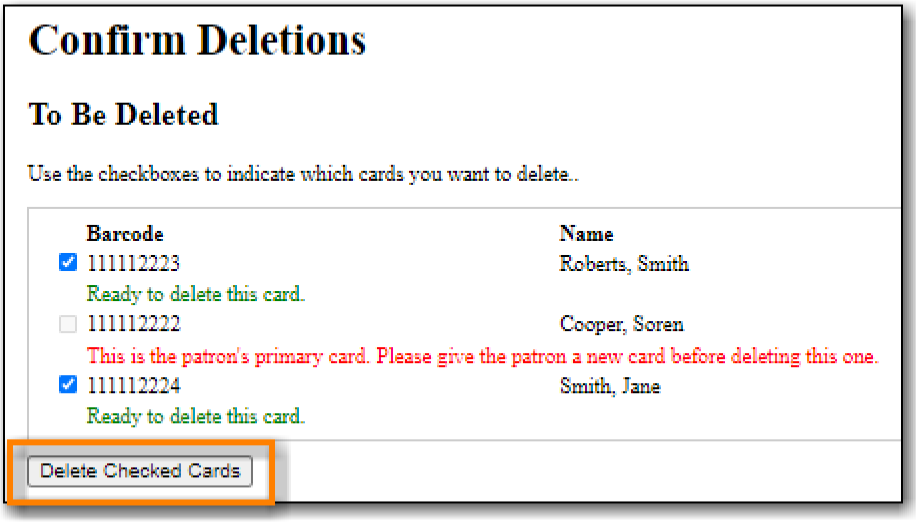
1. In the Patron Deletion Tool enter the barcodes for the cards to be deleted (one barcode per line).
2. Check the box for **Delete cards only**.



3. Click **Submit**.



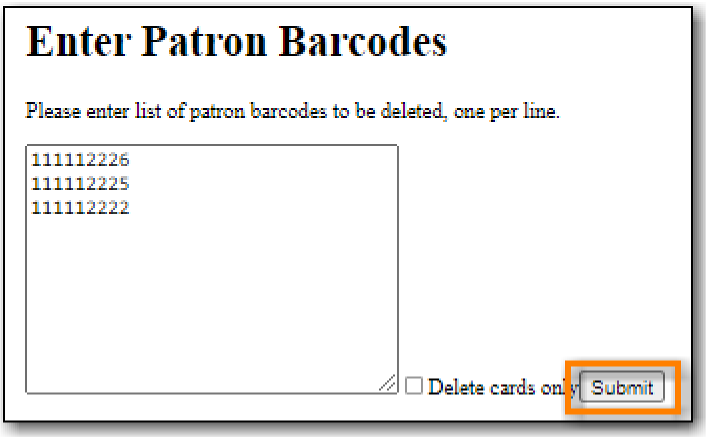
4. The confirmation page will appear. Confirm which cards you'd like to delete and click **Delete Checked Cards**.



5. The deletion report lists successfully deleted cards.

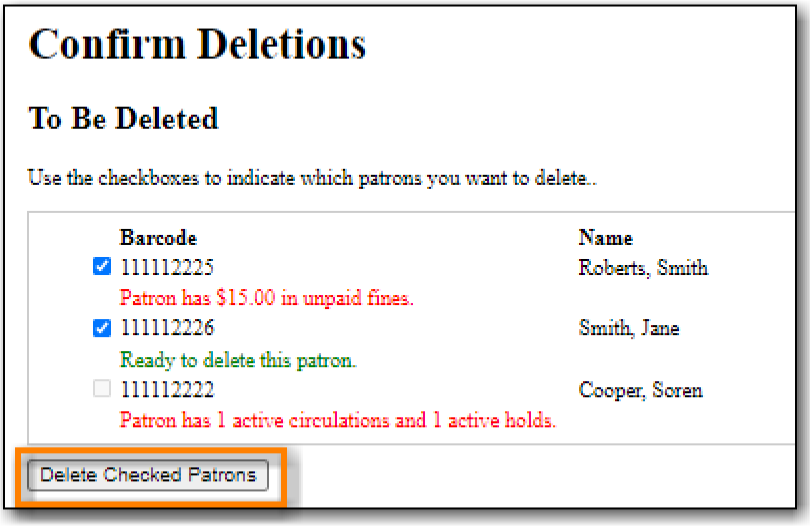
53.3. Deleting Patron Accounts

1. In the Patron Deletion Tool enter the barcodes for the accounts to be deleted (one barcode per line).
2. Ensure the box for **Delete cards only** is un-checked.
3. Click **Submit**.

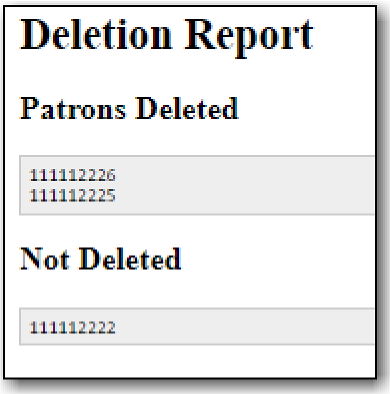


4. The confirmation page will appear. Confirm which patron accounts you'd like to delete and

click **Delete Checked Patrons**.



5. The deletion report lists successfully deleted cards.



NOTE

Deleted patron accounts remain in the Evergreen database for reporting purposes but are no longer accessible from the staff client. The deletion tool checks the following before deleting any account:

Open circulations. Accounts with items checked out cannot be deleted

Active holds. Accounts with active holds cannot be deleted

Bills. Accounts with unpaid bills are flagged but may still be deleted; if deleted the bills are voided

Chapter 54. Library Staff Accounts

In Evergreen 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.

> **NOTE** When a library staff account expires the staff member is not able to log into the Evergreen staff client until their account has been renewed.

There are three kinds of library staff accounts:

Staff Specific Accounts

- Account is specific to a particular staff member and includes their personal details like first and last name.
- Account is used for staff functions only, never used for personal borrowing.
- Account can be granted permissions to use the reporter and/or view report output.
- Account can be updated and transferred to a new staff member preserving access to recurring reports that run from the reporter. The new user MUST complete a reporter privacy waiver to comply with Sitka's privacy policy.

> **NOTE** Libraries are encouraged to use Staff Specific Accounts for all accounts that need access to the reporter in Evergreen to avoid the need to re-set up recurring reports.

Staff/Personal Accounts

- Account is specific to a particular staff member and includes their personal details like first and last name.
- Account is used both for performing staff functions and for personal borrowing.
- Account can be granted permissions to use the reporter and/or view report output.
- Account CANNOT be transferred to a new staff member as it is linked to personal borrowing data.

> **NOTE** Support recommends using Staff Specific Accounts instead of Staff/Personal Accounts. It is easier for libraries to manage accounts when staff and personal accounts are kept separate.

Generic Staff Accounts

- Account is generally specific to a department or function, such as circulation or cataloguing, and is used by multiple staff members.
- Account name is not tied to a specific person. For example, Circulation FrontDesk is a commonly

used name.

- Account CANNOT be granted permissions to use the reporter or view report output.

54.1. Creating Library Staff Accounts

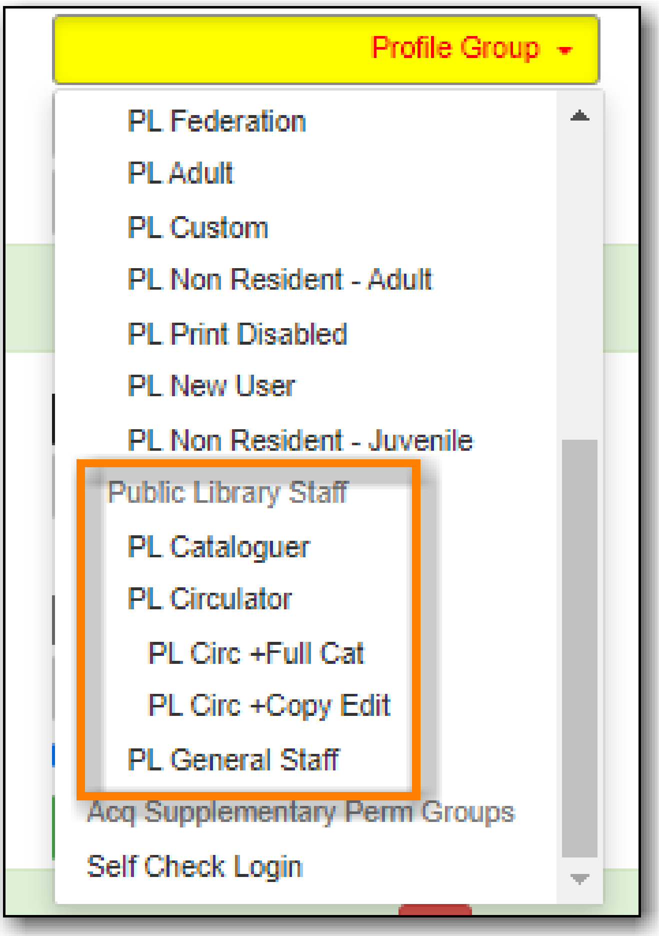
Sitka Training Video - Creating Library Staff Accounts (4:46)

To create a new library staff account register your user as you would a patron taking the following into consideration:

- It is best practice to use a temporary password and then have your staff reset their password to something only they know.
- For an account to be a staff account it needs to have a Main (Profile) Permission Group with library staff permissions. Choose the appropriate permission group for the access the staff member needs.

NOTE	The Local System Administrator permission group can only be assigned by Support. Libraries may create an account using any permission group and then submit a request to Support to have the account updated to local system administrator. Please include the account's barcode in the request.

The table in Staff Account Permission Groups shows what staff functions different permission groups can perform.



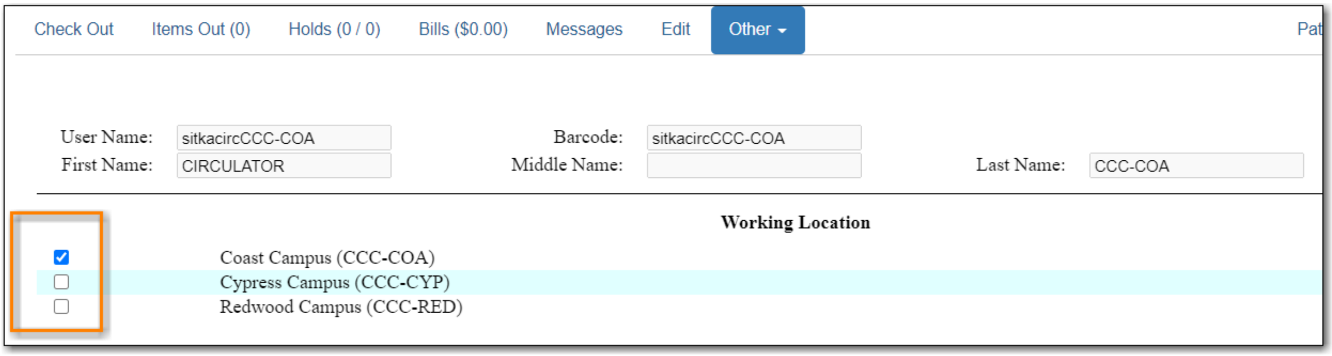
This example shows public library staff permission groups. A similar list of groups is available for each library type.

54.1.1. Working Locations

Sitka Snippet Video - Working Locations (1:05)

After creating the account you need to assign a working location:

1. Retrieve the account.
2. Go to **Other** → **User Permission Editor**.
3. Select the checkbox(es) in front of the library/branches that you want to assign to the account.
4. Scroll down to the bottom to click **Save**.



CAUTION	Staff accounts without a working location can not register/edit patron accounts, or access some cataloguing functions.

54.2. Editing Library Staff Accounts

Sitka Training Video - Editing Library Staff Accounts (1:08)

All library staff members can update their own username, password, and email addresses by logging into **My Account** in the public catalogue. They can use the **Forgot your Password** link on the **My Account** login screen as well, as long as their staff account contains a valid email address. Updating your staff account in the public catalogue is the same as updating it in the staff client.

NOTE	Some libraries have disabled editing of email addresses through My Account.

Local System Administrators can edit staff accounts in the staff client, with the exception of any LSA staff accounts. For edits to Local System Administrator accounts, other than username, password, or email address, contact Support. Please include the account barcode and the changes needed.

54.3. Resetting Staff Account Password

Staff passwords can be reset as follows:

1. Log into **My Account** and using the the *Change* link found on the **Personal Information** tab of

Account Preferences.

2. Use the **Forgot Your Password?** link in the **My Account** login screen on your OPAC. You must have an email address recorded in your staff account for this to method to work. **Sitka Snippet Video - Password Reset (1:20)**
3. Have a staff member with higher permissions than you, such as Local System Administrator, assign a new password to your account in the staff client.
4. Send in a request to Support to have a temporary password assigned and then use the *Change* link in **My Account**.

54.4. Staff Account Permission Groups

Below is a general outline of staff account permission levels.

To view a detailed list of permissions for a particular account, go to **Administration** → **User Permission Editor** in the staff client.

Action	General Staff	Circulators	Circ + Copy Edit	Circ + Full Cat	Catalogers	Local System Administrator (LSA)
Basic circulation functions	*	*	*	*	*	*
CheckIn bad status overrides	*	*	*	*	*	*
CheckIn Missing/Lost/ClaimedReturned overrides		*	*	*		*
CheckOut overrides	*	*	*		*	
MaxRenewal Reached override		*	*	*	*	*
Basic patron record	*	*	*	*	*	*
Bar patrons	*	*	*	*		*
Unbar patrons		*	*	*		*
Merge/delete patrons						*

Patron restriction overrides		*	*	*		*
Bills and payments	*	*	*	*		*
Holds	*	*	*	*	*	*
Item/volume records			*	*	*	*
Bib records				*	*	*
Buckets	*	*	*	*	*	*
Create/upload offline transactions	*	*	*	*	*	*
Process offline transactions						*
Transit	*	*	*	*	*	*
Abort remote transit			*	*	*	*
Receive serials		*	*	*	*	*
Create serials subscriptions				*	*	*

NOTE Only users with reporting permissions can access the Reports interface or view report output. To request reporting permissions staff must sign and submit a Reporter Privacy Waiver.

54.5. Granting Additional Permissions to Staff Accounts

Additional permissions can be granted to library staff in two ways.

Secondary Permission Groups

Sitka Snippet Video - Additional Permissions for Library Staff Accounts (2:03)

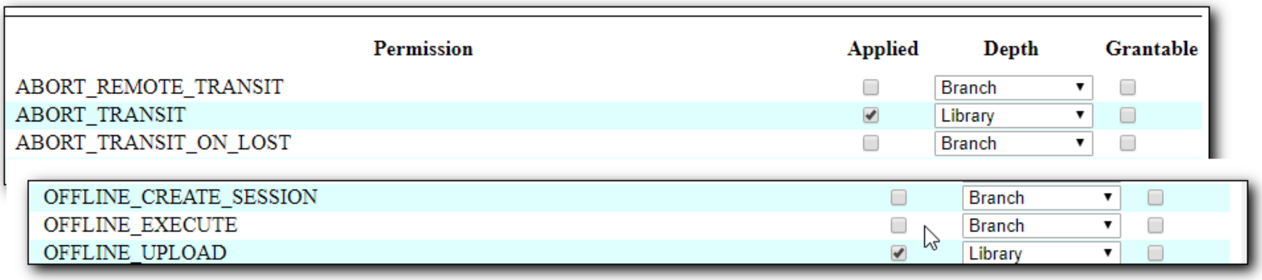
Acquisitions and reporter permissions are granted as secondary permission groups. Acq Admin users can grant acquisitions permissions. Reporter permissions are granted by Support after a Reporter Privacy Waiver is completed.

Individual Permissions

Local System Administrators may selectively grant additional permissions available to LSA accounts to other non-LSA accounts.

In the example below a Circ + Full Cat account is granted permission to process offline transactions, a function which otherwise requires an LSA login.

1. Log in to Evergreen with a local system administrator account.
2. Find the staff acount on **User Permission Editor**. You may search for the patron account, then go to **Others** → **User Permission Editor**, or go to **Administration** → **User Permission Editor** to search for the account by barcode.
3. When User Permission Editor is loaded, scroll down the permission list to find **OFFLINE_EXECUTE**.
4. Select the checkbox in **Applied** column.
5. Scroll down to the bottom to click **Save**.



TIP

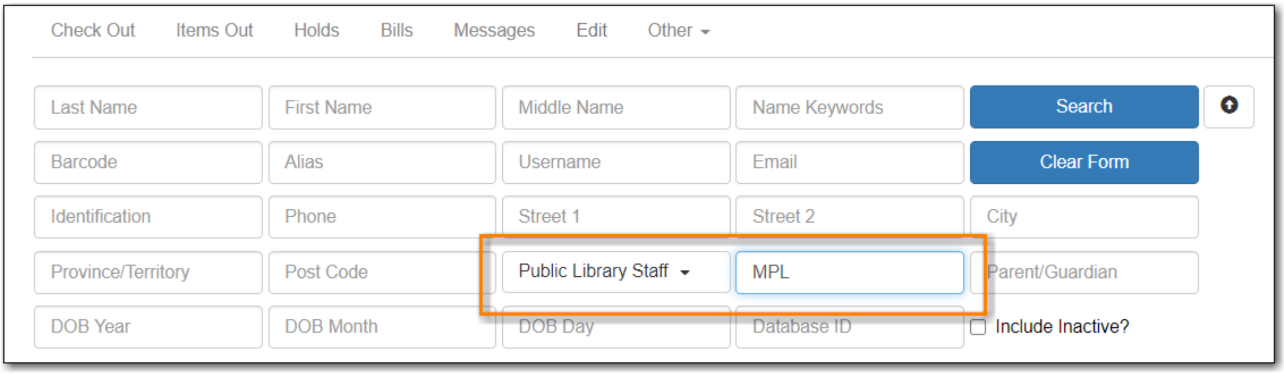
- **Permission**: List of permission names. For help correlating permissions to specific Evergreen functions please contact Support.
- **Applied**: If checked the permission is granted to this account.
- **Depth**: limits application to the staff member's library and should be left at the default. Evergreen blocks attempts to set Federation- or Sitka-wide privileges.
- **Grantable**: If checked this staff account will be able to grant the new privilege to other accounts (not recommended).

54.6. Searching for Library Staff Accounts

Library staff accounts can be retrieved via Patron Search and Check Out the same as a patron account.

You can easily retrieve a list of all library staff accounts at your library through the Patron Search.

1. Set **Profile Group** to the Library Staff group applicable to your library type.
2. Set the organizational unit to your library or system.
3. Click **Search**.



Support recommends reviewing your staff accounts on a regular basis and closing accounts for staff who no longer work at your library.

54.7. Closing Library Staff Accounts

Sitka Training Video - Closing Library Staff Accounts (1:56)

When a staff member leaves the library their staff access should be disabled in a timely manner.

A local system administrator at your library needs to do the following:

- remove the working location(s) from the account.
- change the main permission group to a patron permission group.
  - contact Support to have the permission group changed for local system administrator accounts.
- contact Support if the staff member had access to view report output or use the reporter.

If the former staff member will not be using the account as a personal borrowing account a local system administrator can use the patron deletion tool to delete the account.

54.7.1. Recurring Reports

If the account being closed is currently used to run recurring reports for the library you have two options for handling those reports:

1. If the account has only ever been used for staff access (no personal borrowing) you can update the name and details on the account (or contact Support in the case of a LSA). The new user MUST complete a reporter privacy waiver to comply with Sitka's privacy policy. **OR**
2. If the account has been used as both a staff and personal borrowing account the reports will need to be moved to a new staff member.

Moving Reports to a New Staff Member

1. Ensure that folder(s) the report templates currently reside in are shared with your library. Sharing them makes them visible to anyone at your library who has signed the Full Reporter Privacy Waiver and so has access to the Reporter.
2. The new staff member handling reports logs in and clones all the needed report templates into

their own folders, same as you would clone a report from the Sitka Templates folder.

3. Any recurring reports running from the old account need to be cancelled by going into the Reports folder for each report and deleting the report.

CAUTION	Deleting reports also deletes any output attached to the report so make sure to download any needed report output as Excel or CSV files and save them to your computer or network drive.

Chapter 55. Patron Notifications

Libraries can opt in to a number of automated patron notifications. These notifications are set up by Co-op Support. If you are unsure what notifications your library has set up, please contact Co-op Support.

Notifications are sent in three ways, depending on the notification:

- Email - sent directly to the patron
- SMS Text Message - sent directly to the patron
- Mail - sent to the library as a PDF to be printed and mailed out

55.1. Email Notifications

When sending out emails the BC Libraries Cooperative needs to follow all of the best practices and conventions in order to avoid our emails being marked as spam and to have the best chance of the emails being delivered successfully to your patrons. One of the important things we do is ensure that any emails sent from our servers have a *From* address with a domain that can be verified as coming from our servers. This means that all emails sent by Evergreen will come from

```
noreply-YOURLIBRARYCODE@catalogue.libraries.coop.
```

How this displays to your patrons will depend on their email client.

To discourage patrons from responding to these automated notifications most of them start with *This is an automated message. Please do not reply to this email.*

In the email notification templates the *Reply to* address is set to use the email address set for your library in the library setting *Sending email address for patron notices*. This ensures that if patrons do reply those replies are directed to the email of your choice. Bounced emails are also directed to this email address and we encourage staff to invalidate any email addresses that bounce to help keep us from being blacklisted by email providers.

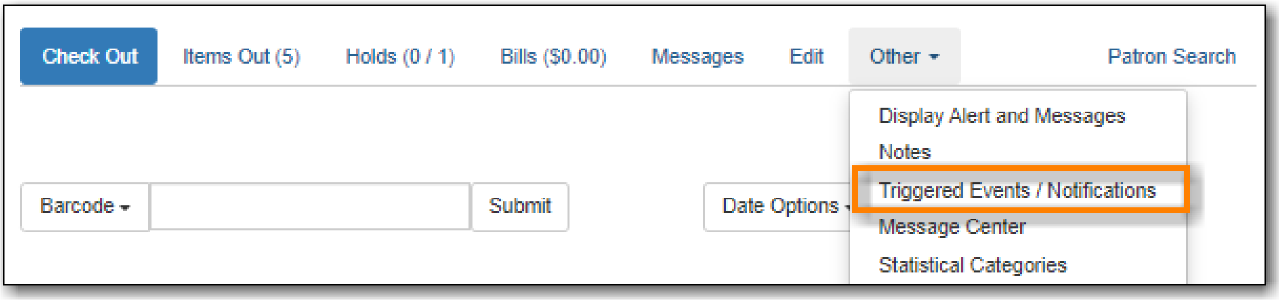
Email notifications from Sitka's Evergreen are not spam and should not be marked as spam by either patrons or staff. If patrons do not wish to receive them they can opt out of receiving most notification emails through the Notification Preferences in *My Account*. When this box is unchecked patrons will not receive courtesy, overdue, autorenew, emergency closing, new patron, patron account expiration, or fine limit exceeded notifications.

55.2. Checking for Notifications

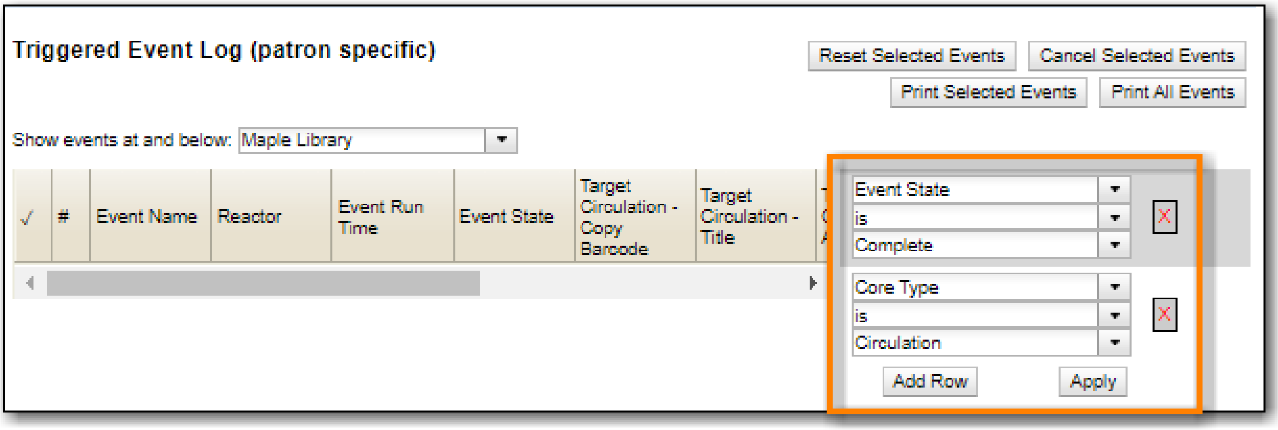
Evergreen keeps a record, called a triggered event, of courtesy, overdue, and hold notifications sent out via email and SMS text message. You can check to see whether or not a notification was generated.

These records are kept for 3 to 6 months, depending on the type of notification.

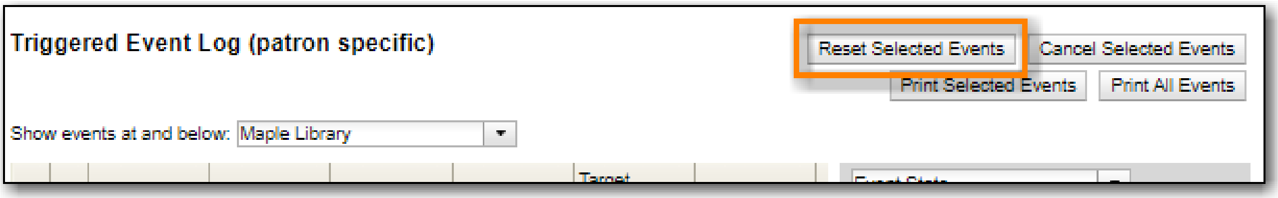
1. To view notifications in the patron account, select **Other** → **Triggered Events/Notifications**.



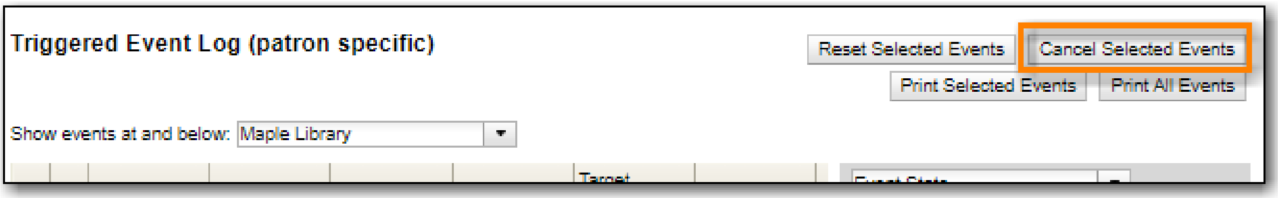
2. By default completed courtesy and overdue notifications are displayed with the oldest notifications listed first.
3. You can change the filters for **Core Type** or **Event State** to view hold notifications and notifications in different states.



4. You can re-send a completed notification by selecting it and clicking **Reset Selected Event**.



5. You can cancel a pending notificiation by selecting it and clicking **Cancel Selected Event**.



NOTE

Triggered events with a state of Invalid or Error encountered a problem during the generation process. In these cases no notices were generated.

States such as Pending may last for a short period of time while the event is being processed.

55.3. Courtesy Notifications

Courtesy notifications are generated and sent via email and/or SMS text message ahead of an item being due. **If a library has both email and SMS text message courtesy notifications enabled patrons will received both.**

CAUTION	If the due date is extended via **Edit Due Date** after the courtesy notification is sent out, no additional courtesy notification will be generated. Staff are encouraged to use the **Renew** or **Renew with Specific Due Date** functions instead to ensure additional notifications are generated in due course.

55.3.1. Email Courtesy Notifications

Courtesy notices are generated and sent via email to patrons before an item is due. The standard interval is 3 days ahead of the due date but this can be customized. Only patrons with email addresses in their patron account will receive email courtesy notifications.

To customize the wording or the interval of the notification please contact Co-op Support.

55.3.2. SMS Text Message Courtesy Notifications

The SMS text message courtesy template is shared by all Sitka libraries and cannot be customized.

Libraries must opt in to have these notifications turned on. Please contact Co-op Support to opt in.

Library courtesy notifications are generated and sent via SMS text message to patrons 3 days before an item is due. Patrons must have a default Default SMS/Text Number and Default SMS Carrier saved in their patron account to receive these notifications. See Patron Account Fields for more information on these fields.

CAUTION	The process that generates courtesy notices runs early in the morning. SMS text messages are sent around **2:00am** PT.

55.4. Overdue Notifications

Overdue notifications are available via email and paper. Library staff can also run reports to generate a list of patrons to manually phone.

55.4.1. Email Overdue Notifications

Overdue notifications can be sent via email at intervals desired by the library. The standard intervals are 7 and 14 days after an item is due but this can be customized.

To customize the wording or the interval of the notifications please contact Co-op Support.

55.4.2. Paper Overdue Notices

Evergreen can generate a PDF file of overdue notices which is then emailed to the library to be printed and distributed to patrons.

These notices are created and emailed daily. An email with an empty PDF file means that there are no items for that day that meet the criteria to have a paper overdue notice generated. If you do not receive the daily email with the PDF file please contact Co-op Support as this means that paper overdues are not generating as expected.

Paper overdues can be generated at the following intervals 1, 2, 3, 4, 5, 6, 7, 8, 9 or 10 weeks after the item becomes due. The intervals define when a second, third, or fourth, and so on, letter is sent out.

Paper overdues at 1 and 2 weeks overdue are generated for only for patrons without email addresses in their account. From the 3 weeks onwards the notices are generated for all applicable patrons.

The final paper overdue notice, at the interval of your choosing, can be set up as a billing notice and can include the item replacement cost and applicable processing fees. The replacement cost comes from the *Price* item attribute; if this attribute is blank the value set for the library setting *Default Item Price* is used instead. The processing fee uses the value from the library setting *Lost Materials Processing Fee*.

To set up paper overdues for your library, update your existing notices, or update the email address the PDF file is sent to please contact Co-op Support.

55.4.3. Overdue Notifications by Phone

In some circumstances staff may wish to manually contact patrons with overdue items via the phone.

You can use the report template *Overdues Within Time Span -Phone List for Patrons without Email (based on Checkout Library)* to generate a list of patrons with overdue items in the timeframe you specify that do not have an email address on file.

You can also use the report template *Overdues Within Time Span - General (Based on Checkout Library)* to generate a list of all patrons with overdue items in the timeframe you specify.

Both of these report template can be found under **Shared Folders** → **Sitka_templates** → **Circulation** → **Overdue and others**. These reports can be run as a one off or set up as a recurring report which emails the report to the specified staff email.

55.4.4. Overdue Mark Lost Notification

Evergreen can automatically mark items as lost that have been overdue for a specfied period of time. When this process runs the item is set the status of lost and a lost bill is applied to the patron's account. The bill includes the item's replacement cost from the *Price* item attribute, if this attribute is blank the value set for the library setting *Default Item Price* is used instead, and a processing fee from the value in the library setting *Lost Materials Processing Fee*.

When enabled the Overdue Mark Lost notification is sent via email to patrons when Evergreen automatically marks an item as lost. This notification is not sent when staff manually mark an item as lost.

If you use paper overdues you may to have this set up so that items are marked lost in tandem with a paper overdue billing notice being generated.

To customize the wording of the notification or set up the automatic to lost process please contact Co-op Support.

55.5. Circulation Notifications

55.5.1. Check Out Receipts

Patrons have the option to receive their check out receipt via email. This receipt is set globally and cannot be customized.

The Evergreen self check can also send a check out receipt via email. This receipt is also set globally and cannot be customized.

55.5.2. Autorenew Notification

Libraries that allow Evergreen to autorenew their items can also have Evergreen send an email notification to inform patrons whether or not their item(s) were successfully auto renewed.

To customize the wording of the notification or set up the autorenew process please contact Co-op Support.

55.5.3. Emergency Closing Notification

When the emergency closing function in the Closed Dates Editor is used to extend existing due dates Evergreen will send out an email notification to let your patrons know that their due dates have changed.

This notification is set globally and cannot be customized.

55.6. Hold Notifications

Evergreen has a number of notifications that can be sent via email regarding patron holds.

To opt in to a specific hold notification or to customize the wording of a notification please contact Co-op Support.

55.6.1. Hold Ready For Pickup

Depending on the notification option selected when a hold is placed, a patron will be notified via email, SMS text message, or a manual phone call when their hold is captured.

Email notifications are automatically sent to patrons when a hold is captured after a processing delay. By default the delay is 30 minutes but this can be customized if a library needs a longer or shorter processing delay.

SMS text message notifications are automatically sent 30 minutes after the hold is captured. This processing delay is global and cannot be customized. The wording of the SMS text message is also global and cannot be customized.

Phone notifications are done manually by library staff.

See Capturing Holds for information on determining how a patron has been notified about a captured hold.

55.6.2. Hold Expires from Hold Shelf Soon

An additional email notification can be sent to remind patrons of a hold that is awaiting pick-up. This notification can be scheduled to go out a few days before the hold expires from the hold shelf.

55.6.3. Holds Cancelled by Staff

An email notification can be sent to patrons when library staff cancel their hold in the staff client. If staff include a note when cancelling the hold that note will appear in the notification.

55.6.4. Shelf Expired Holds Cancellation

An email notification can be sent to patrons when holds are cleared from the hold shelf because they were not picked up and have now expired.

55.6.5. Hold Group Hold Placed for Patron

Libraries using Hold Groups can enable this email notification so that their patrons receive an email when a new hold is placed for them through a hold group.

55.7. Patron Account Related Notifications

55.7.1. Welcome to New Patron Notification

An email notification can be sent to patrons after you register them in Evergreen. The notification welcomes them to the library and can include any information you feel is relevant for your new patron. If the patron receives the email it is also a confirmation that the email address in their account is correct.

These notifications are sent for patrons that are automatically loaded into Evergreen from another source, such as a post-secondary's registrar's office.

By default the notification is sent within 2 minutes of the account being created. To customize the wording or the time frame of the notification please contact Co-op Support.

55.7.2. Patron Account Expiration Notification

An email notification can be sent to patrons to warn them their library account is about to expire. This is intended to give patrons time to renew their account before they lose access to library services and may be especially useful for patrons who use primarily use electronic resources.

By default the notification is sent 30 days before the patron's account expires. To customize the wording or the time frame of the notification please contact Co-op Support.

55.7.3. Fine Limit Exceeded Notification

An email notification can be sent to patrons when they reach the fine limit set in your Group Penalty Thresholds. When a patron exceeed the fine limit they are blocked from renewing items and checking out new items so can be useful to alert patrons before they come into the library.

To customize the wording of the notification please contact Co-op Support.

55.7.4. Test Notification

Library staff and patrons can initiate test email and test SMS text messages to confirm the information in the patron's account is correct. These test notifications are sent after a 1 minute delay. The notifications are set globally so the wording and delay cannot be customized.

55.7.5. Password Reset Notification

Through the public catalogue patrons and staff can initiate a password reset for their account. As part of this process an email notification is sent to the user within minutes. The notification is set globally so the wording and delay cannot be customized.

Chapter 56. Evergreen System Requirements

Evergreen runs smoothly on most modern computers with a good internet connection. To ensure your system is ready for migration here are a few tips and minimum requirements.

Internet Connectivity

Most internet traffic uses moments of brief connectivity rather than a persistent connection so it is not unusual when experiencing connectivity issues to notice it in the Evergreen staff client.

Evergreen will work down to a 3Mbps connection, but the performance will get progressively worse the lower the connection speed gets. While Evergreen will be functionally usable at 3Mbps it may of limited use at lower speeds. Ideally it runs at 12Mbps.

Table 40. Recommended Internet Connection Speeds

Category	Downstream	Upstream	Latency (to Sitka)
Bare Minimum To Function	3Mbps	786Kbps	less than 200ms
Adequate	6Mbps	1Mbps	less than 125ms
Ideal	12Mbps	2Mbpbs	less than 75ms

Most of the bandwidth usage in a library is not from Evergreen, but from other usage of the internet by both staff and patrons. When staff workstations share an ISP connection with public workstations libraries ideally should have at least 1.5-2x more down/upstream capacity than what is recommended in the table above.

Staff Terminals

Staff terminals connect to the central database using the Evergreen web client, currently supported by BC Libraries Cooperative in Chrome only .

- Windows 10, 8, 7, or Vista operating system. Win 10 users may need to manage Win 10 privacy settings based on best practice in Windows community or on advice of your IT department or vendor.
- Mac OS X operating system.
- Linux operating system.
- a reliable high speed internet connection
- 512Mb of RAM

OPAC Terminals

There is no stand-alone OPAC client for Evergreen. Patrons search the catalogue using a web browser. Each OPAC terminal will require at minimum:

- a reliable high speed internet connection
- a web browser, e.g. Firefox, Chrome or Internet Explorer

NOTE	The OPAC will not work in Internet Explorer on computers running Windows XP. Co-op Support recommends you update your operating system or use Firefox or Chrome.

To limit your OPAC terminals to catalogue searches local configuration will be required. Please see Managing Internet OPAC Stations for more information.

Barcode Scanners

Evergreen will work with virtually any barcode scanner - if it worked with your legacy system it should work on Evergreen.

Printers

Evergreen can use most desktop or roll printers configured for your terminal to print receipts, check-out slips, holds lists, spine labels, etc.

NOTE	Evergreen might not print correctly to receipt printers using the Windows XP Generic/Text Only printer driver. Please use a printer-specific driver instead.

Appendix A: Licensing

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