Sitka’s Evergreen Documentation

Evergreen 3.9

Last Updated February 17, 2023

Introduction

Chapter 1. New Features in Evergreen Version 3.9

New Features in Sitka's Evergreen 3.9 Playlist

1.1. Staff Client

- The Manage Actions Menu option allows you to remove actions you don't use from the Actions menu in newer interfaces.
- New setting to turn on full library names in the library selector in newer interfaces.
    - **Sitka Snippet Video - Turning On Full Library Names (1:19)**

1.2. Circulation

- Patron notes, alerts, and messages are now managed through a single interface.
- New Password reset link button in patron Edit to enable staff to initiate a password reset for a patron.
    - **Sitka Snippet Video - Resetting a Forgotten Password (2:10)**
- New patron photo URL field added to patron account. Access to this feature is not available by default. Please contact Co-op Support for more information.
- New look for the holds pull list.
    - **Sitka Training Video - Pull List for Hold Requests (2:59)**
- New look for the triggered events log.

1.3. Cataloguing

- New and improved Holdings Editor.
    - **Sitka Training Video - Holdings Editor (14:12)**

1.4. Staff Catalogue

Sitka Training Video - Search the Catalogue (5:56)

- More details button in search results that reveals either the grid with item information and/or URLs.
- Call number now displays in the brief details in the search results. This is the call number of the first item listed in the grid with item information.
- Holding counts display in the search results for the preferred library.
- Preferred library holdings display on top in the grid with item information.

See Viewing Search Results for Cataloguing Purposes.

1.5. Public Catalogue

- Re-designed public catalogue.
- Option for patrons to select their locale which determines the language their email notifications are sent in.

1.6. Course Reserves

- New course reserves module within Evergreen which replaces the existing 3rd party course reserves module.

See Course Reserves and Course Reserves.

1.7. Patron Notifications

- Email notifications can now be set up in French so that patrons who set their preferred locale to French get notifications in French. Co-op Support is working on setting up default templates in French. Libraries that wish the French notifications to match their customized English notifications must provide translations to Co-op Support.

1.8. Administration

- Shelving Location Order interface enables libraries to re-order their shelving locations for their pull list for hold requests.
    - **Sitka Snippet Video - Shelving Location Order (1:22)**

Chapter 2. Revisions and Attributions to Contributors

This manual was published August 15, 2022.

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

- Sitka's Evergreen Policy & Best Practices Manual contains policy and best-practice documents supporting Sitka's consortial installation of the Evergreen ILS.

Websites

- The BC Libraries Cooperative website (https://bc.libraries.coop/support/sitka/) provides information about the implementation of Evergreen in BC, Manitoba, and Ontario 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.
  - Library directors and managers can contact Co-op Support to request BC Libraries Cooperative accounts for their staff.

NOTE	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

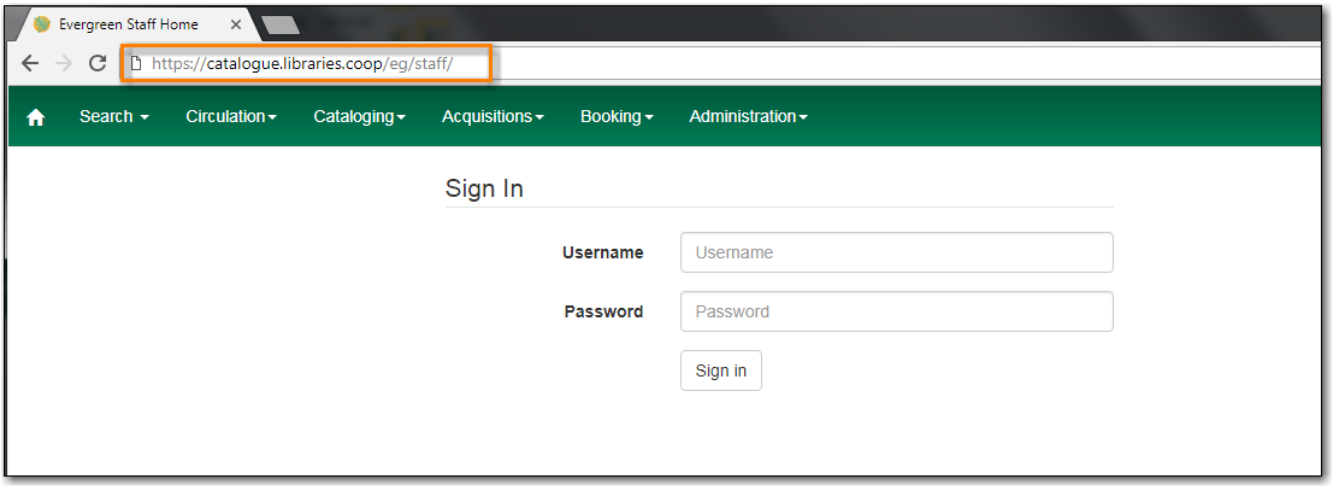
You can login on the RT website https://support.libraries.coop/rt/

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 URL to log into the staff client is **https://catalogue.libraries.coop/eg/staff/**



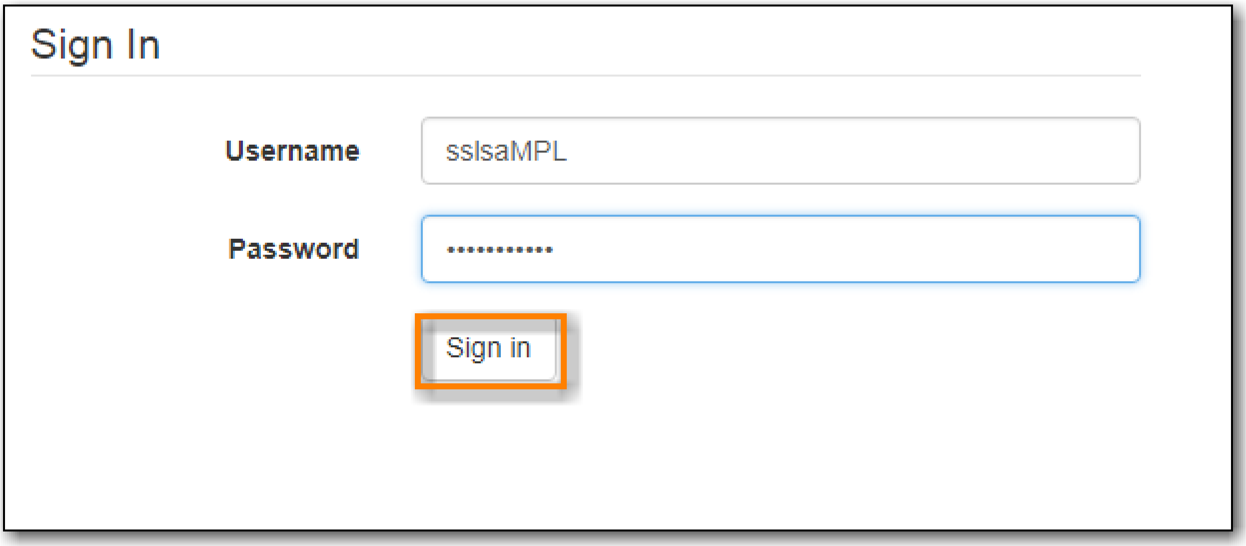
5.2. Registering a Staff Workstation

Sitka Snippet Video - Register Workstation (1:36)

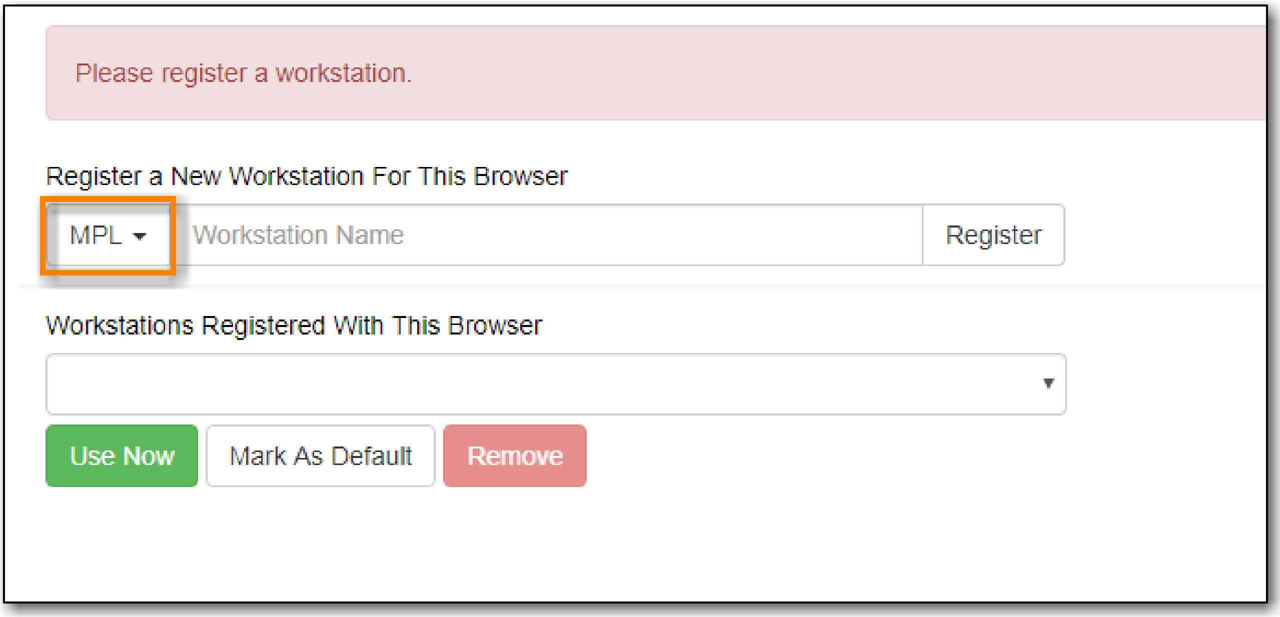
Before logging into Evergreen for the first time, you must register a workstation from your browser.

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

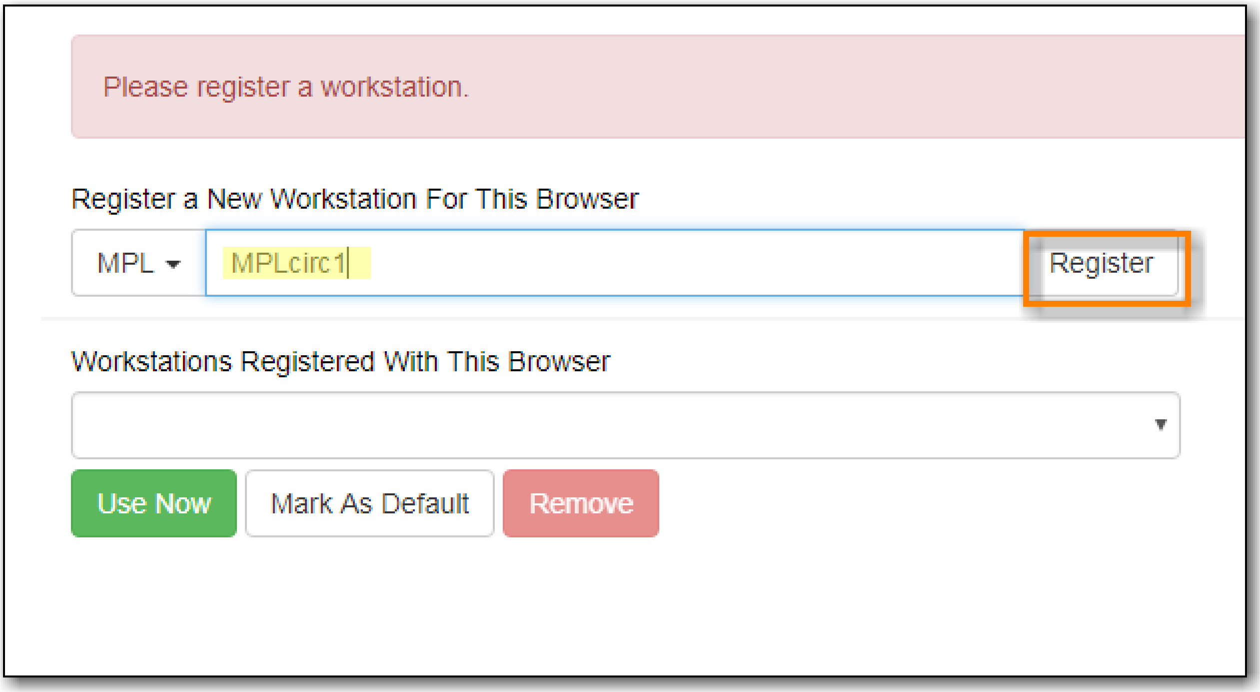
1. Navigate to the web client log in page. The URL to log into the staff client is **https://catalogue.libraries.coop/eg/staff/**
2. Enter a local system administrator username and password.
3. Click **Sign In**



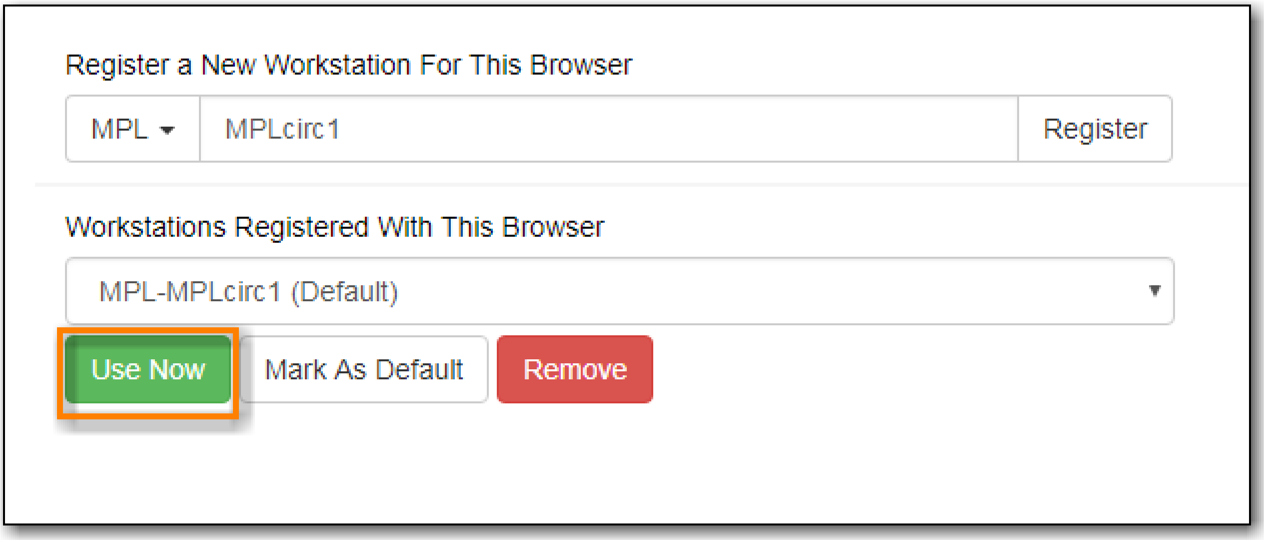
4. When you login for the first time on a new computer or a new server you will be prompted to register your workstation.
5. Choose your library short code from the drop down menu.



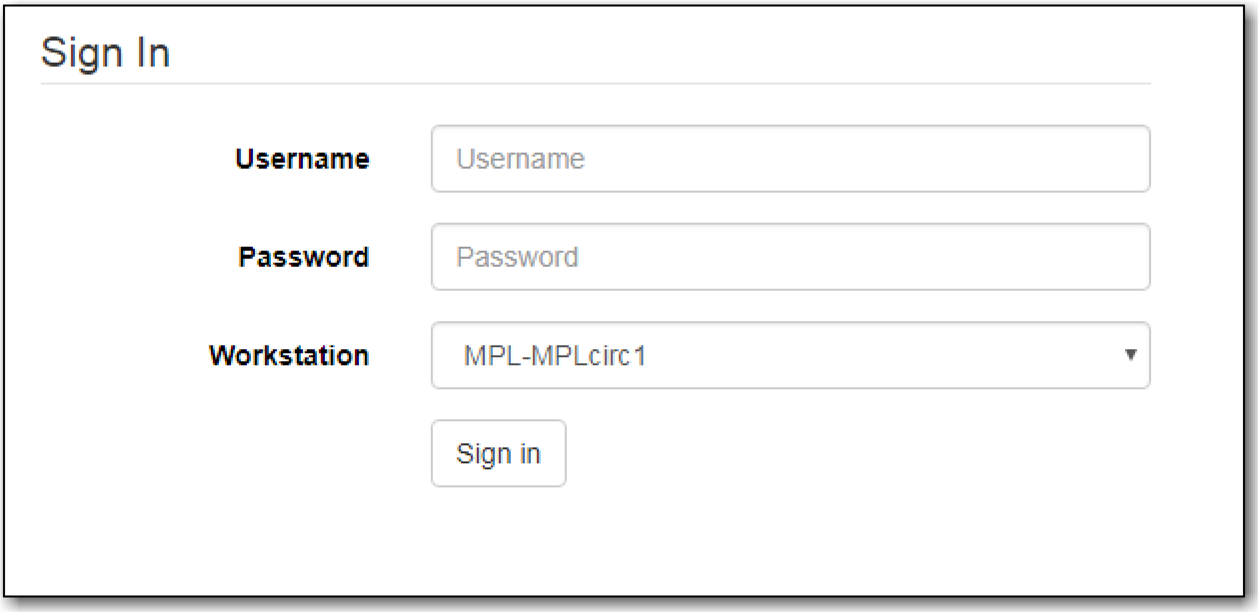
6. Enter a unique workstation name.
    a. It is important to remember your workstation name. Your workstation settings and preferences are stored on Sitka's Evergreen server with your workstation name. If you rename your workstation you will lose your stored settings and preferences.
7. Click **Register**.



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



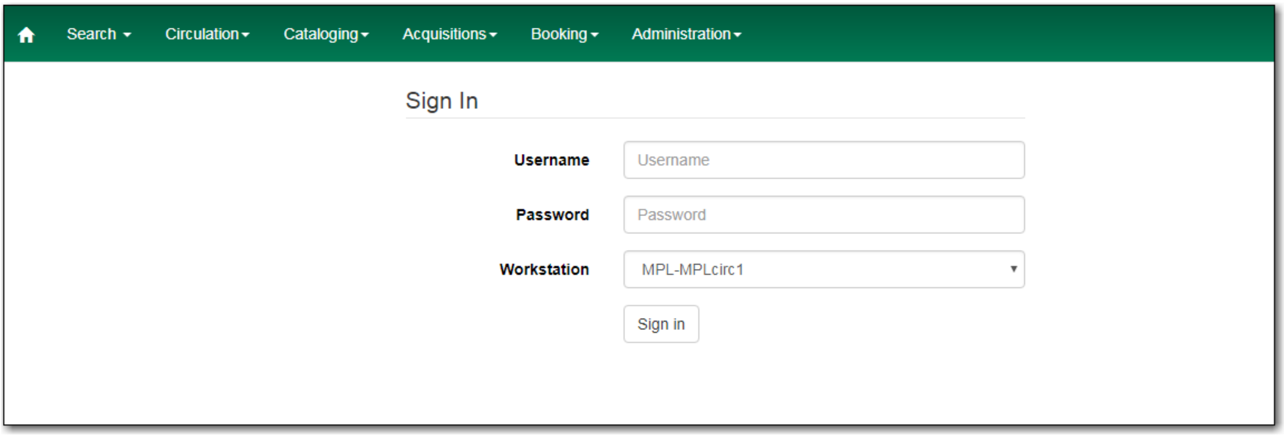
10. Your newly registered workstation should be selected by default on the login page.



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

5.2.1. Logging into Evergreen

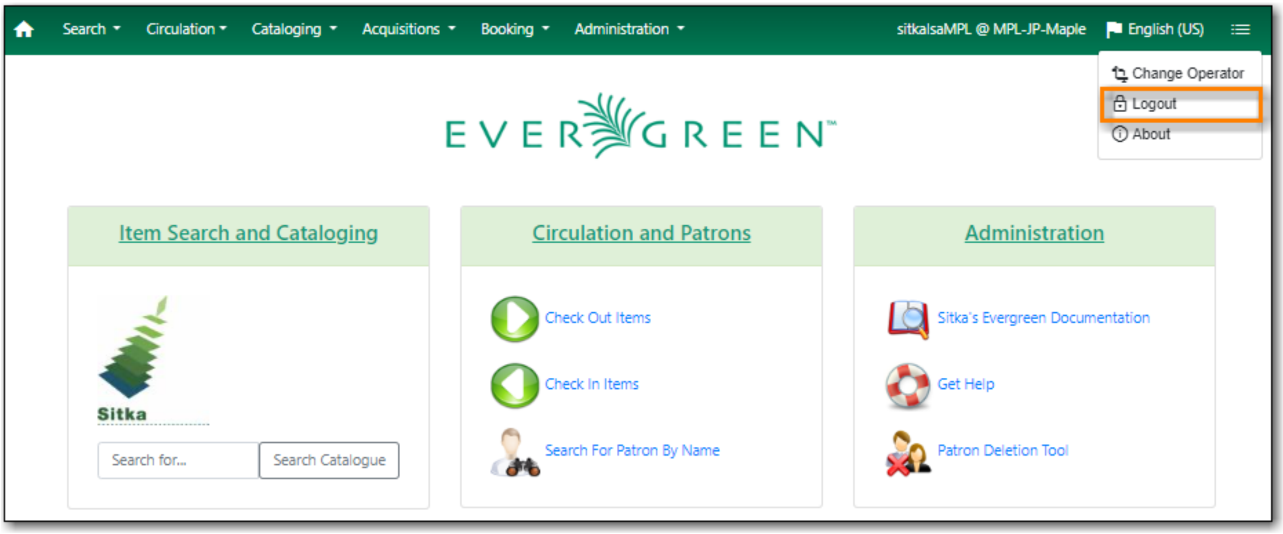
1. The URL to log into the staff client is **https://catalogue.libraries.coop/eg/staff/**
2. Enter your username and password.
3. Verify that the correct workstation is selected and click **Sign In**.



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

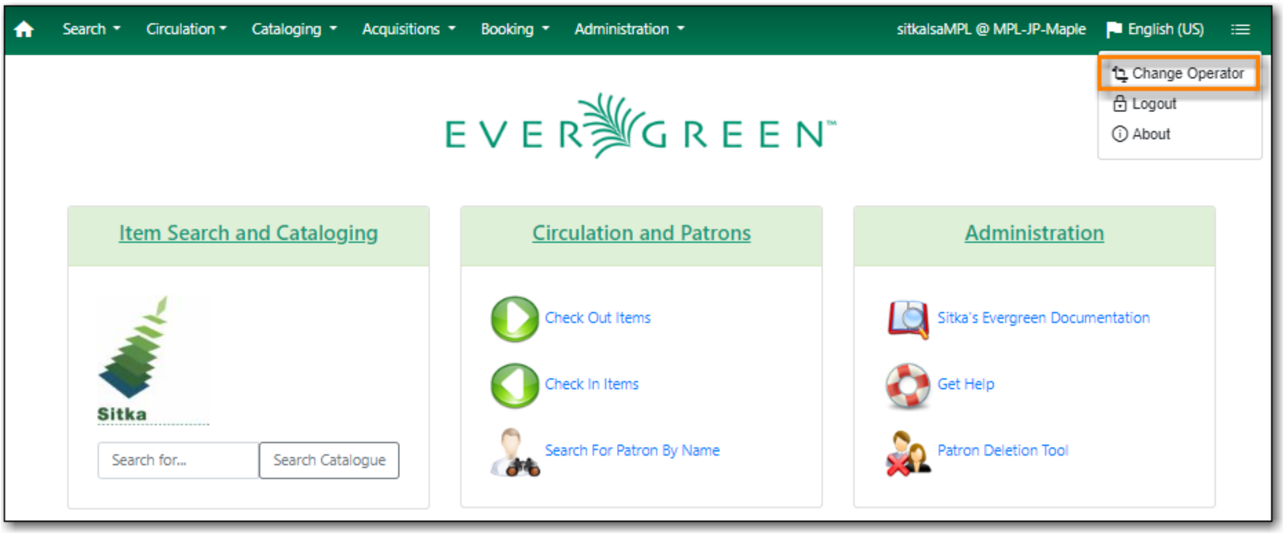
1. Click the menu button in the upper right-hand corner.
2. Select **Log Out** from the drop down menu.



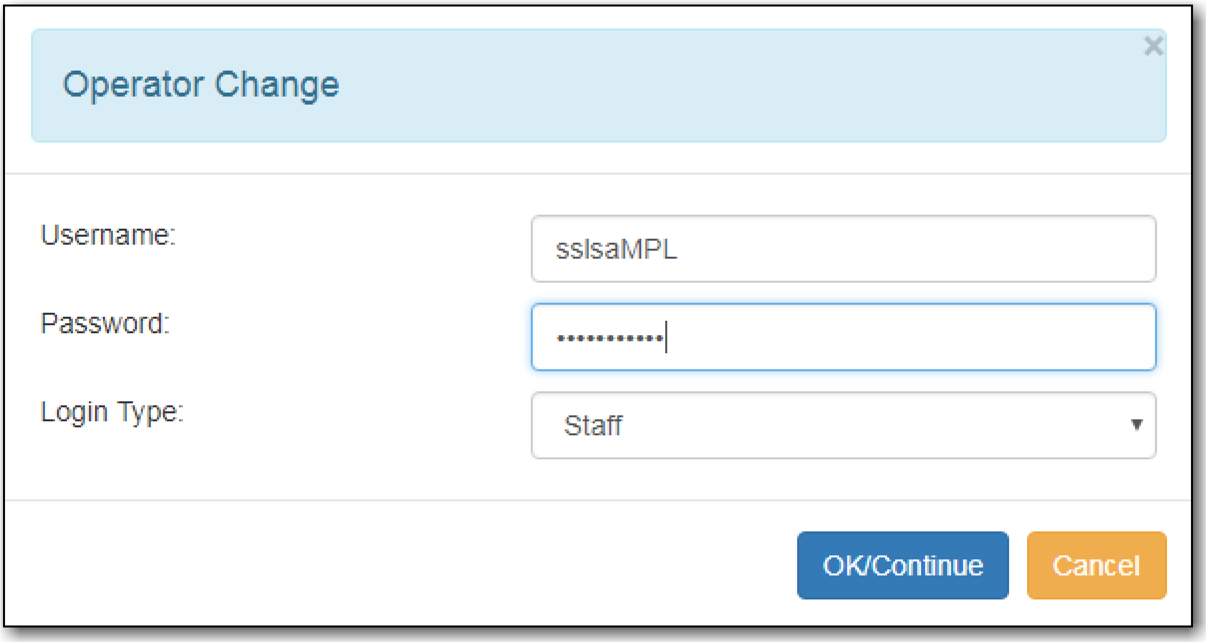
CAUTION	Closing all browser windows will automatically log you out of the web client. If you only close the tab where the web client is loaded, you will remain logged in.

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.



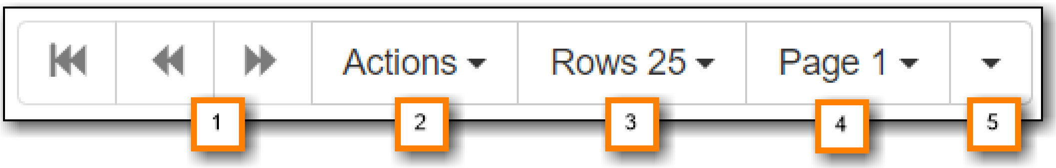
5. Click **OK/Continue**

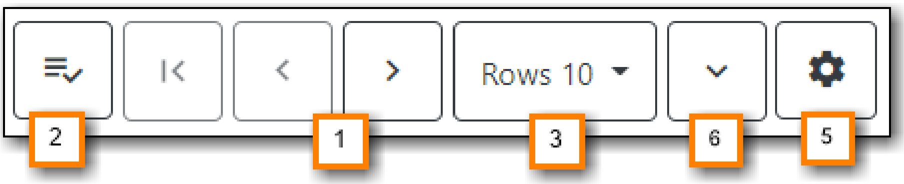
5.3. Configuring Your Workstation

5.3.1. 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 and Actions menus.

The function bar comes in two styles with similar functionality.





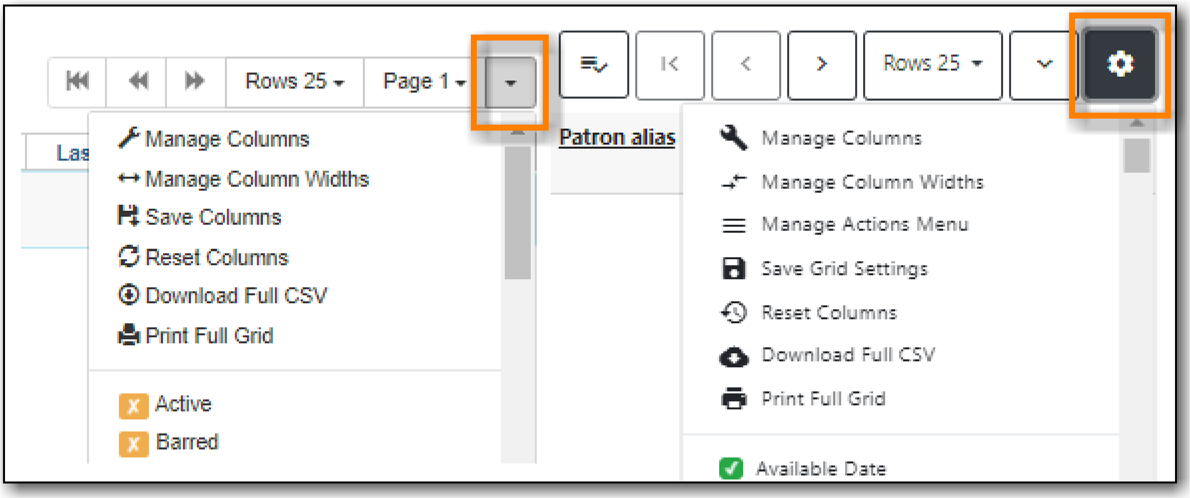
1. Page through pages
2. Actions Menu
3. Adjust number of rows
4. Jump to page
5. Show Grid Options menu
6. Text wrap

5.3.2. Column Configuration

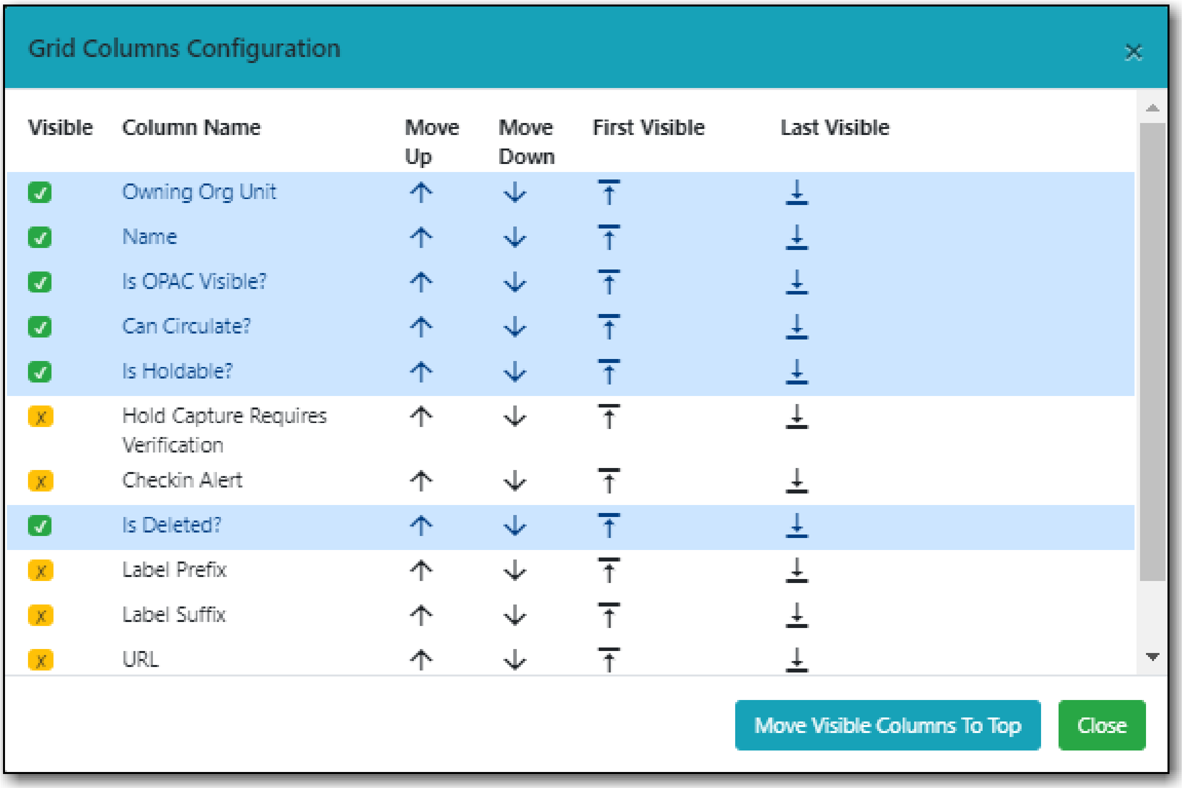
From many screens and lists, you can click on the column picker drop-down menu to change which columns are displayed. Various search results tables may not default to the most useful columns. For instance, the patron search results page may be easier to use if you change the columns to Card, Last Name, 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.

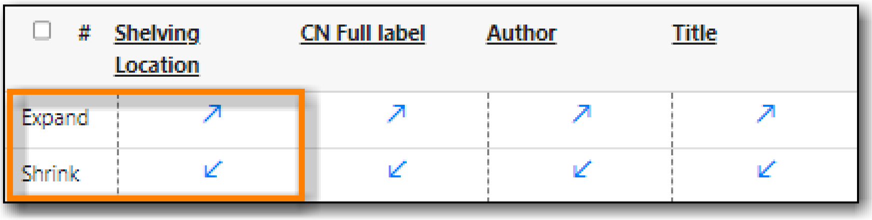


2. You can select the desired display columns from the dropdown list or,
3. Click **Manage columns** for more options.
    a. Click **Visible** to make a column visible or hidden [T/F].
    b. Click **Sort Visible Columns to Top**.
    c. Click **Move Up** or **Move Down** to change column position.
    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.

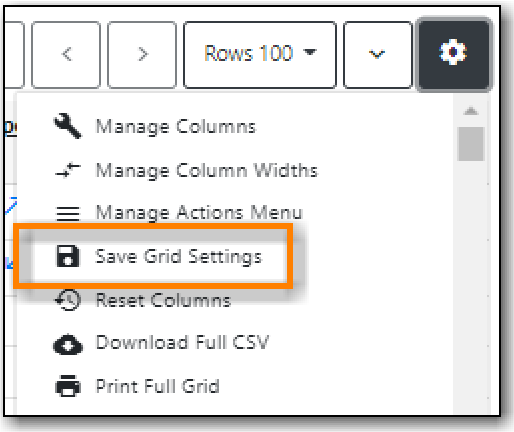


4. Click **Manage Column Widths**.

   a. Click **Expand** or **Shrink** to adjust column sizes.



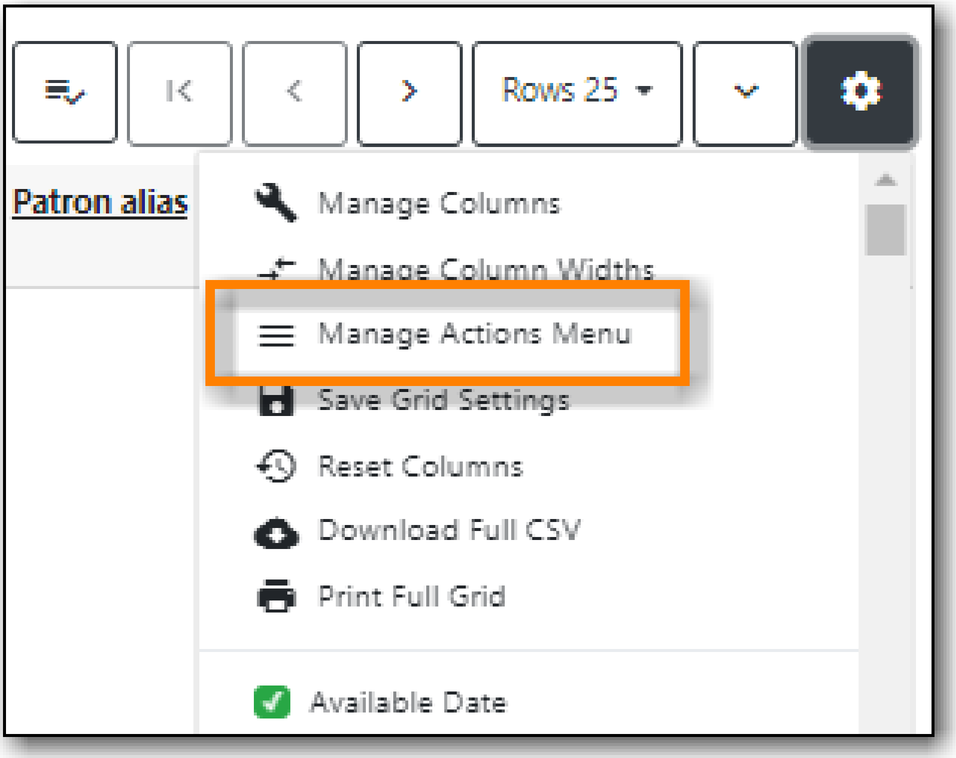
5. Click **Save Grid Settings**.



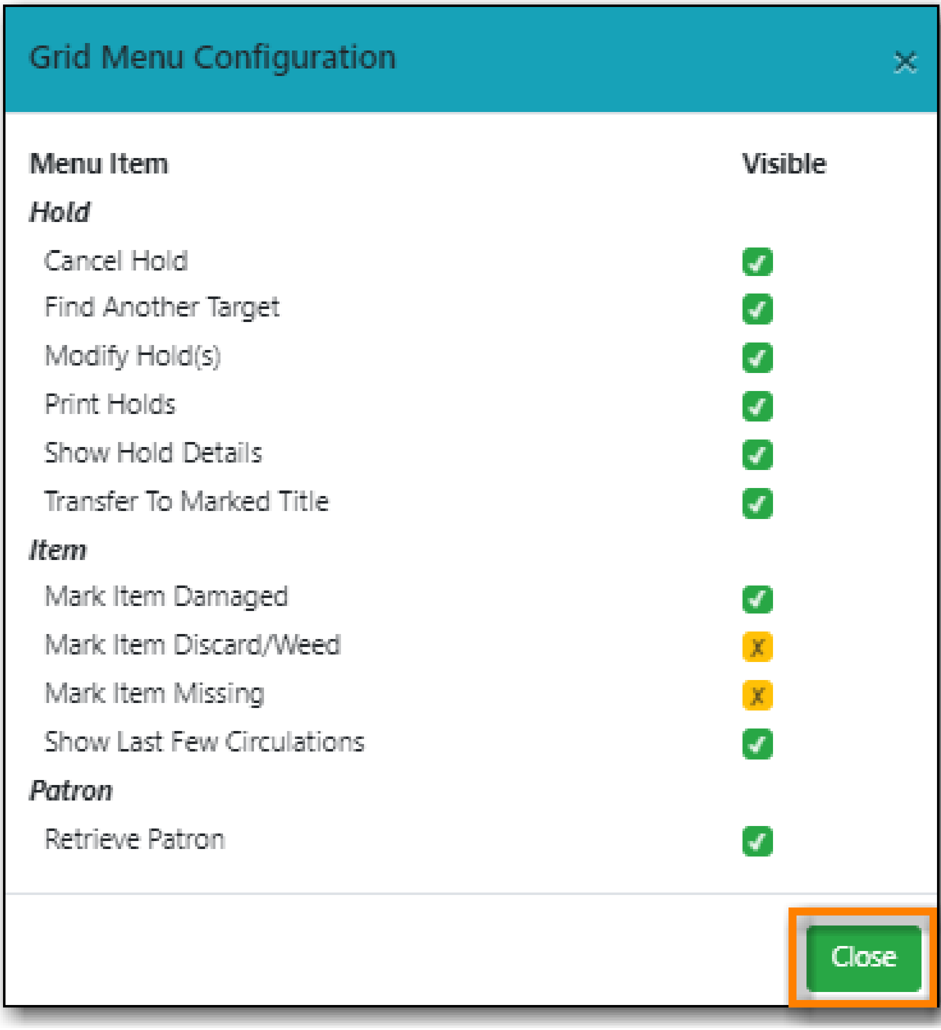
5.3.3. Manage Actions Menu

On one version of the Function Bar, found on some screens, you can choose **Manage Actions Menu** to change which actions are displayed and available. The action choices vary from screen to screen.

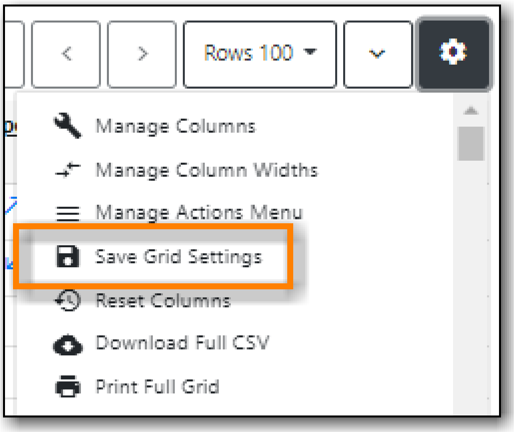
1. Click on the **Show Grid Options (gear icon)** menu.
2. Select **Manage Actions Menu**.



3. Make required changes and click **Close**.



4. Click on the **Show Grid Options (gear icon)** menu again.
5. Select **Save Grid Settings**.



5.3.4. Library Selector

Some interfaces include a library selector that enables staff to set the scope for the interface.

There are currently several styles of the library selector.

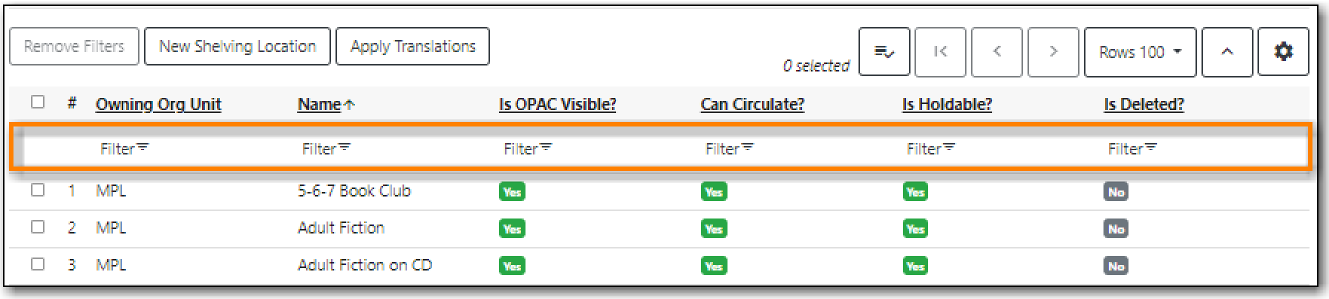
The library selector in newer interfaces shows the full names of the library if full names are enabled.

Where applicable **Ancestor** and **Descendants** checkboxes are included. Multi-branch libraries can set the library to their system and then check the **Descendants** checkbox to include all of their branches.

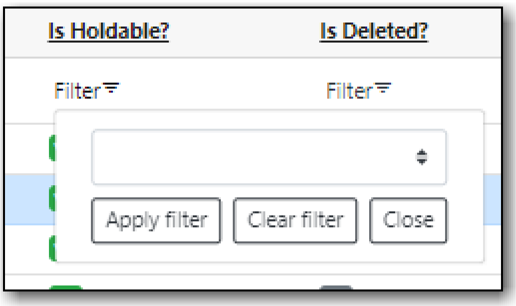
The library selector in older interfaces only shows the library shortcode. This older style of library selector will be phased out as future updates to Evergreen replace the older interfaces.

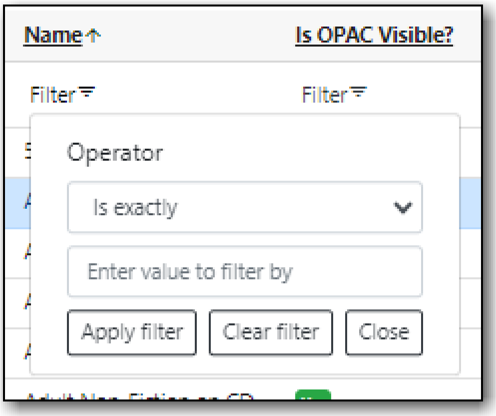
5.3.5. Filters

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

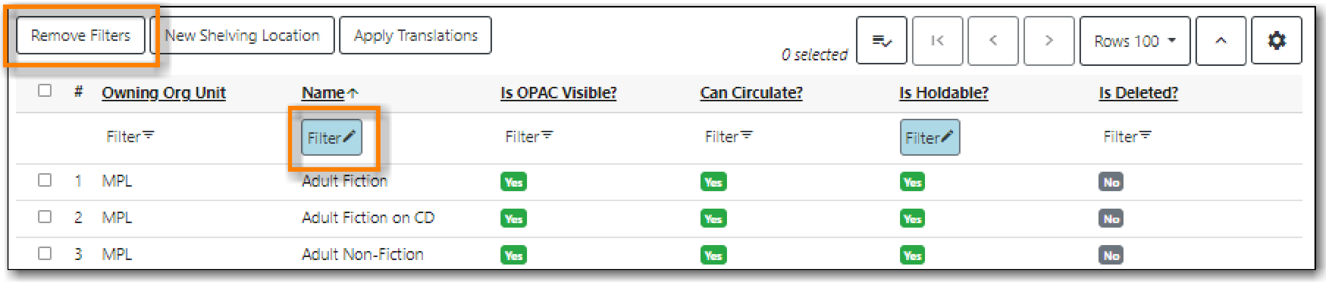


Depending on the data in the field the filters will either allow you to filter on true/false or the text values.





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.



5.3.6. Workstation Administration

Workstation specific information can be set by going to **Administration** → **Workstation**.

Here staff can:

- register additional workstations
- configure printer settings
- customize receipt printer templates
- view and remove stored preferences
- view information about Hatch
- run latency tests
- disable and test sounds for the staff client
- set the library selector to include the full name of libraries

Staff should not use the search preferences settings found in Workstation Administration. Instead search preferences should be set from within the staff catalogue. See Search Preferences.

5.4. 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

5.5. 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 Download the executable file from Hatch and refer to the Installation Instructions
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

5.5.1. 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.

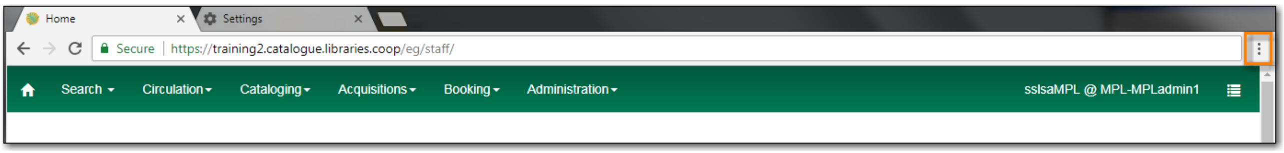
Chapter 6. Best Practices for Using the Browser

6.1. Setting Browser Defaults for Web Client

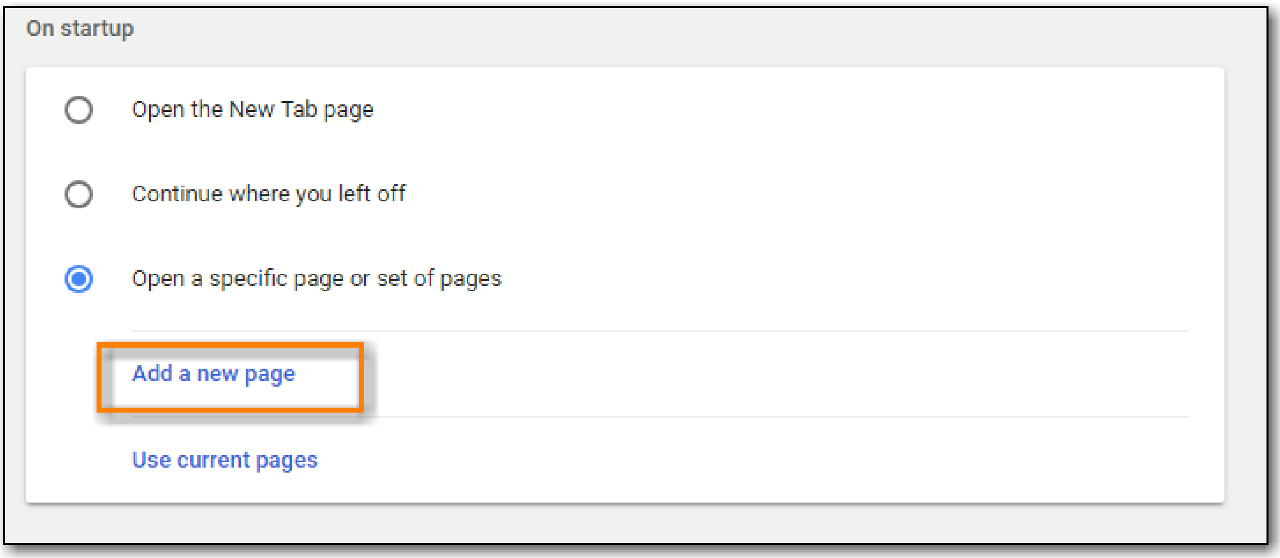
To ensure that staff can easily get to the web client portal page on login without additional steps, you can set the browser's home page to default to the web client.

Setting the Web Client as the Home Page in Chrome

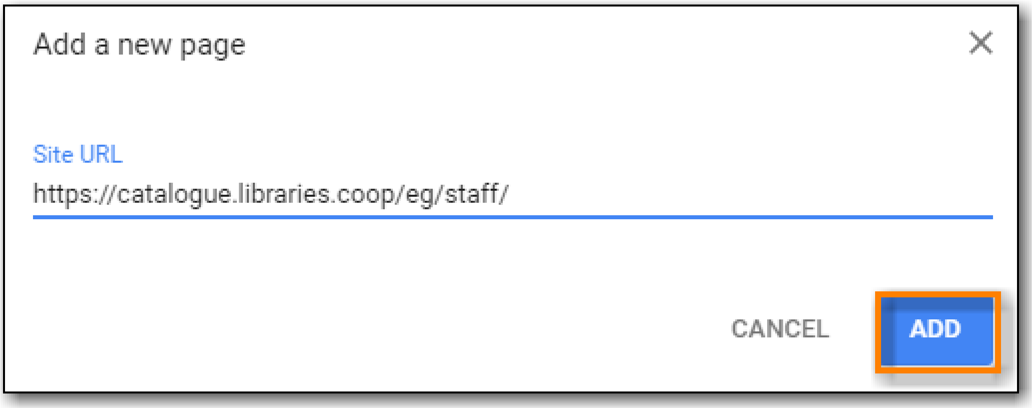
1. Click **Menu**. (three vertical dots in the upper-right corner).



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

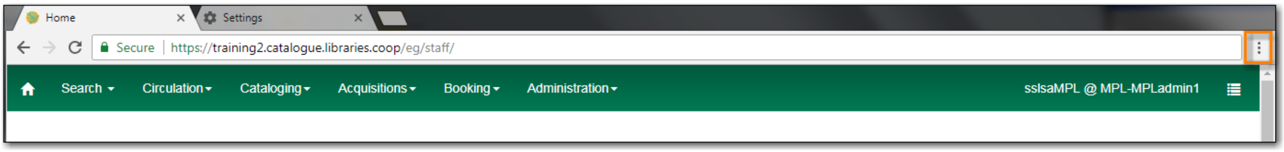
Some users may want to automatically open the web client's portal page in a new tab. Chrome will not open your home page by default when you open a new tab. However, optional add-ons will allow you to set the browsers to automatically open the home page whenever open opening a new tab. These add-ons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



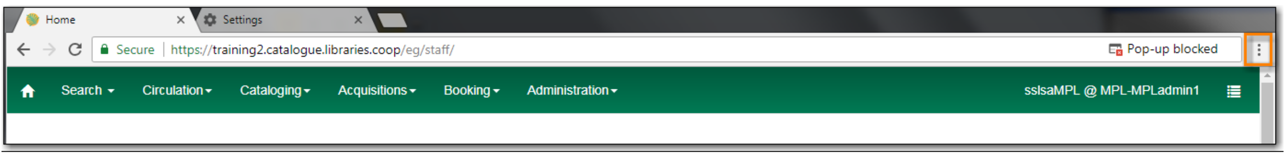
2. Click **Help**.
3. Click **About Google Chrome**.
4. You should see a message saying *Google Chrome is up to date.*

6.3.2. Allow Pop-ups

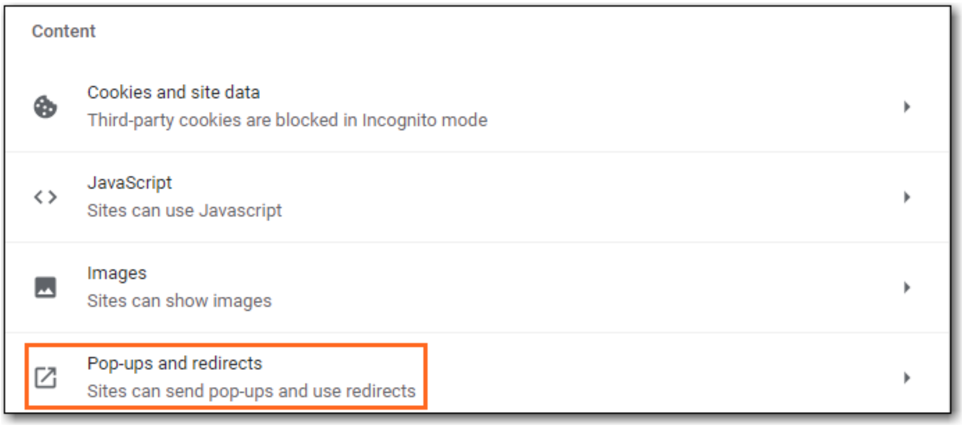
Your browser must allow pop-ups from **https://catalogue.libraries.coop** or you will see a small icon or message when a pop-up is triggered.

Allow Pop-ups

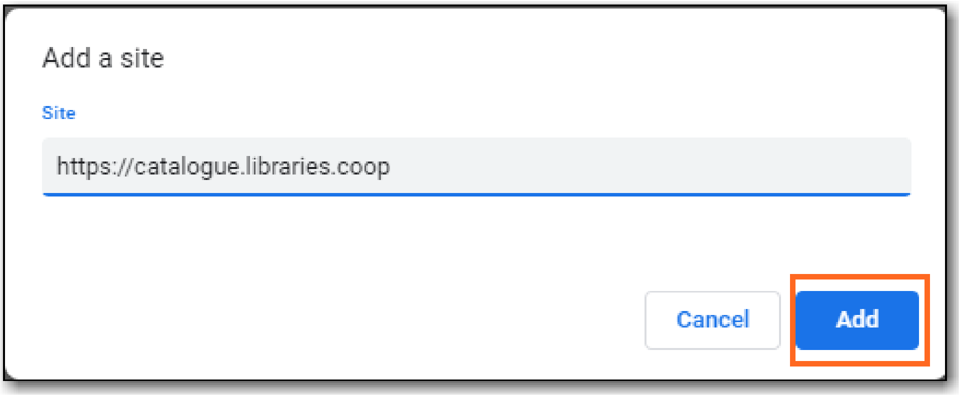
1. Click **Menu**.



2. Click **Settings**.
3. Click **Privacy and Security** on left side of screen.
4. Scroll down and click **Site settings**.
5. Scroll down to **Content** and click on **Pop ups and redirects**.



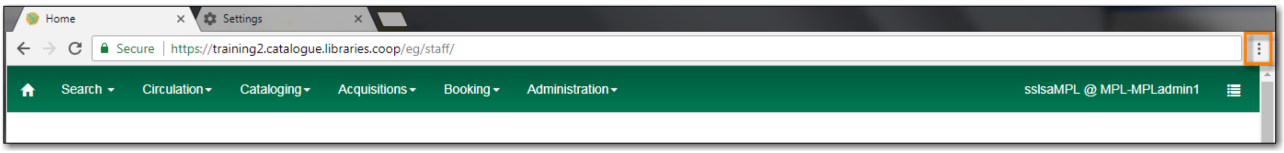
6. Under **Customised behaviors** click **Add** beside **Allowed to send pop-ups and use redirects** .
7. Site: **https://catalogue.libraries.coop**.
8. Click **Add**.



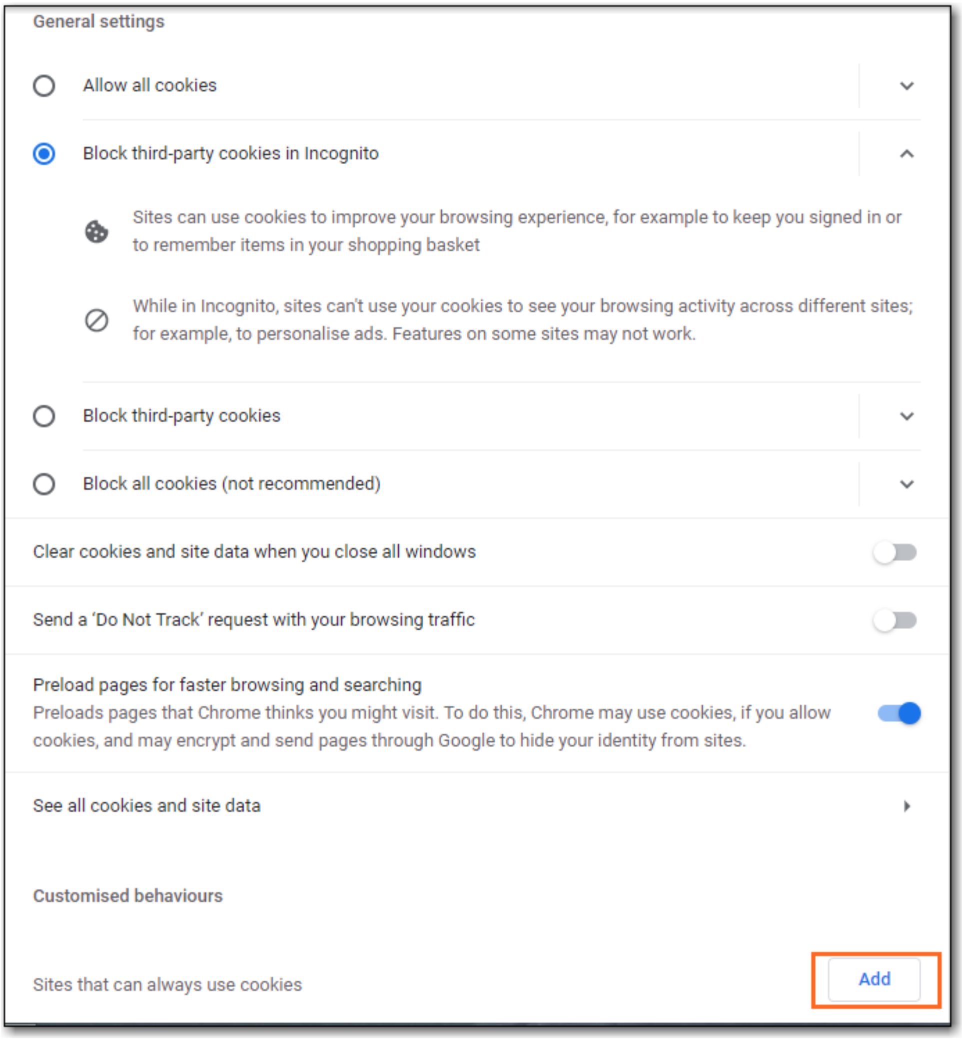
6.3.3. Allow Cookies

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 close all windows* 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**.

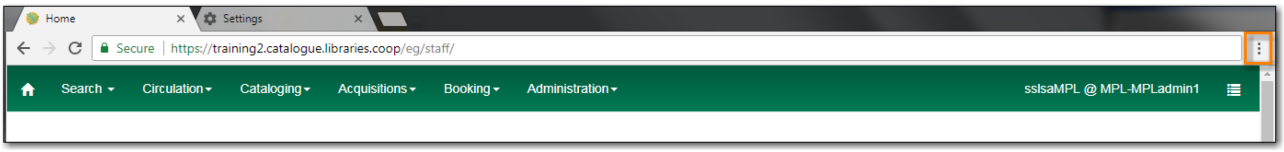


Security Software and Cookies

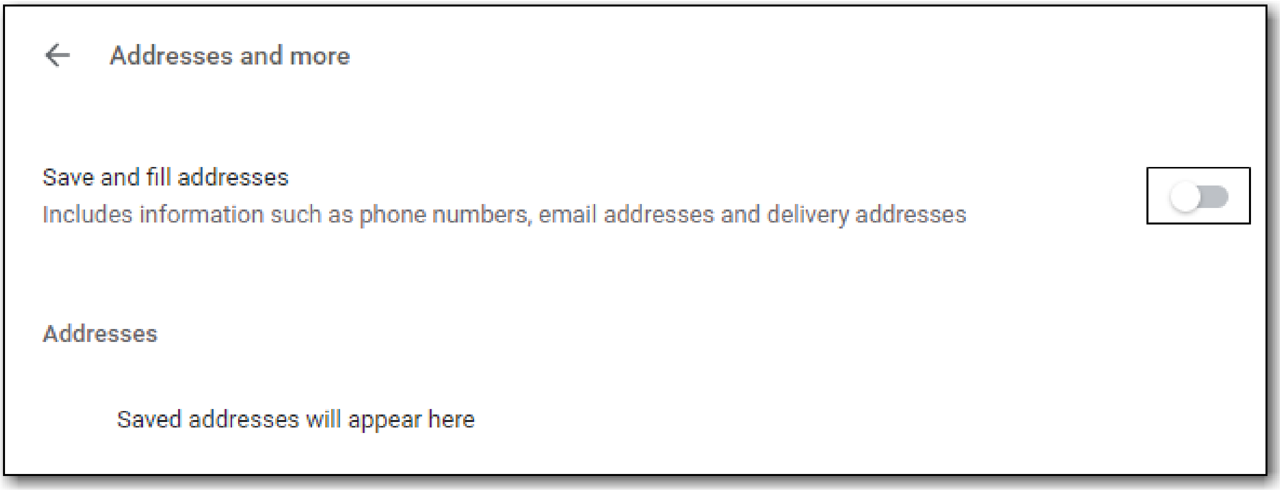
If you have cookies enabled in your browser, but they are disappearing, check your computer's security or antivirus software to see if it may be deleting your cookies on a regular basis.

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**.

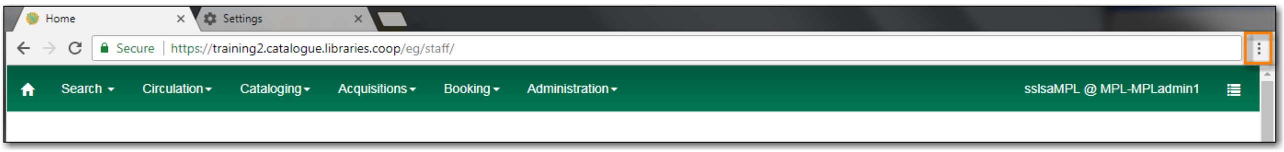


6.4. Troubleshooting

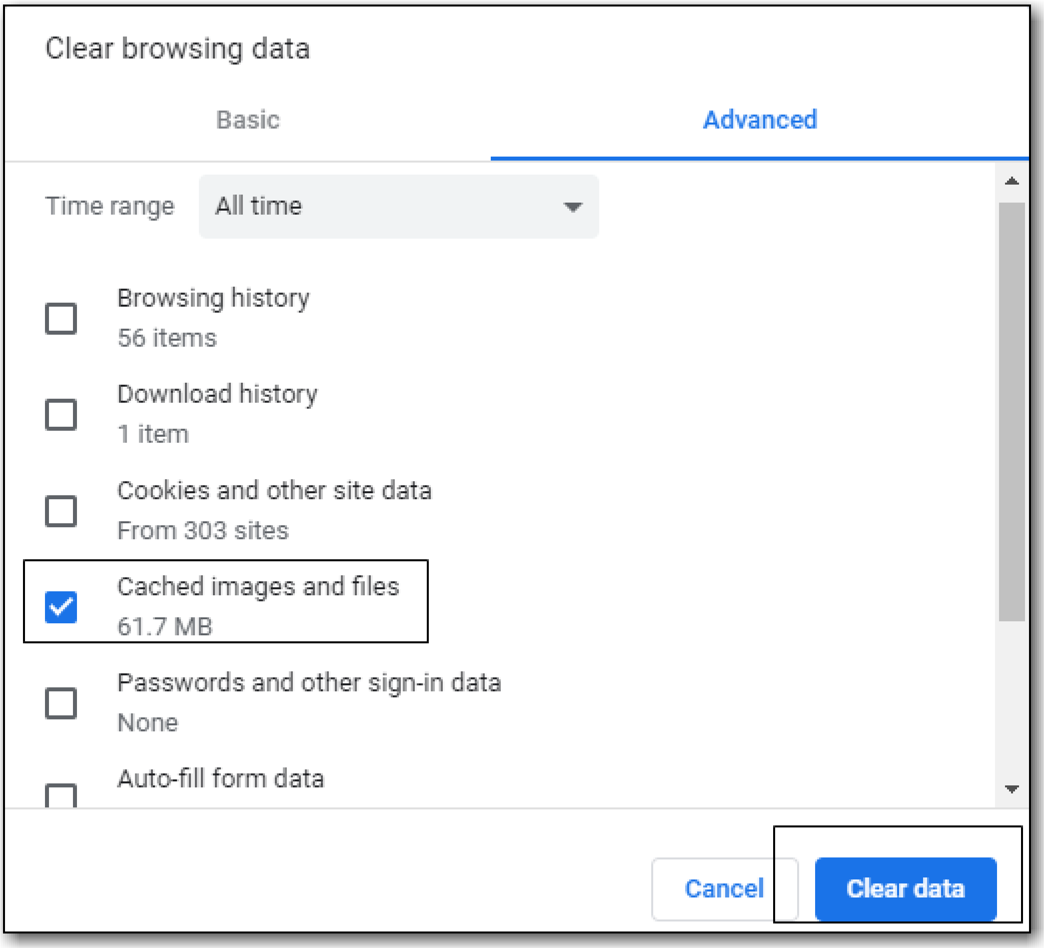
6.4.1. Clear Cache

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**.

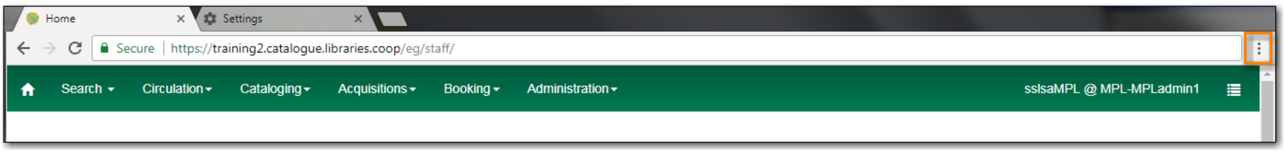


6.4.2. Clear Cookies

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**.



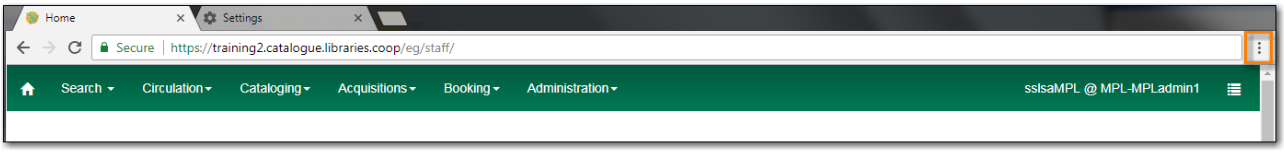
2. Click **More tools**.
3. Click **Clear browsing data**.
4. Check the box next to *Cookies and other site data*.
5. Check the box next to *Cached images and files*.
6. Set Time Range
   a. **All time** (recommended)
7. Click **Clear Data**.
8. Return to https://catalogue.libraries.coop/eg/staff

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**.

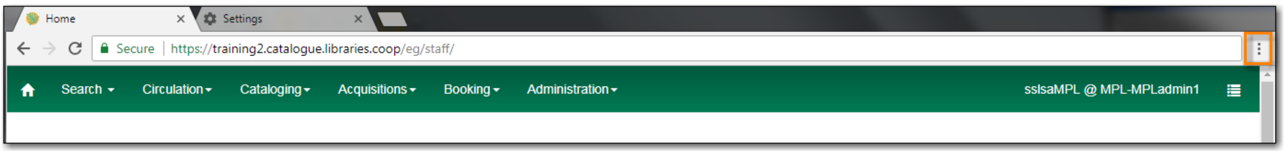


2. Click **Settings**.
3. Click **Reset and clean up**.
4. Click **Restore settings to their original defaults**.
5. Click **Reset settings**.
6. Return to https://catalogue.libraries.coop/eg/staff

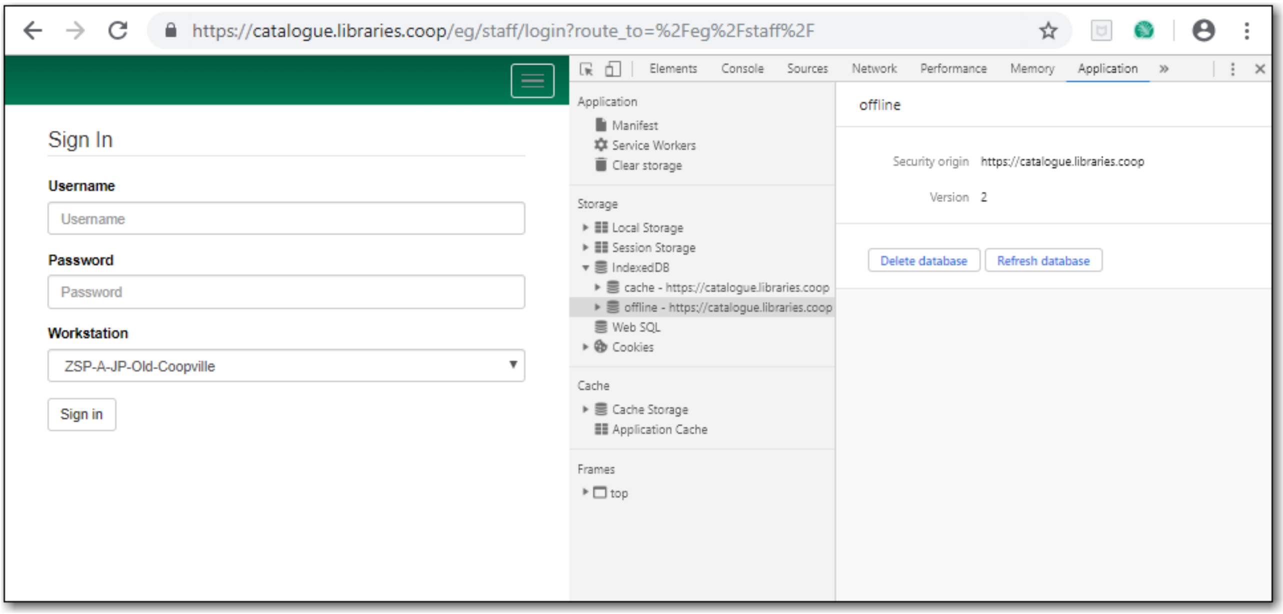
6.4.4. Delete the Offline Database

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.

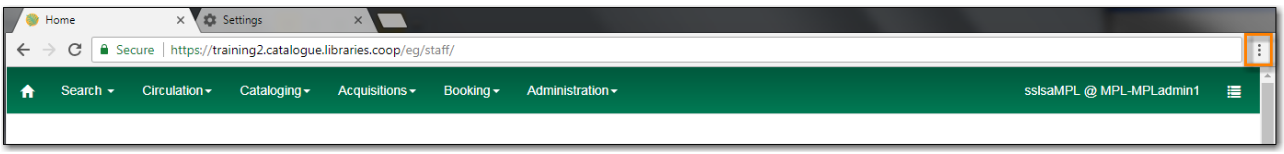
1. Reconnect your browser to Hatch
2. Log in with a Local System Administrator account.
3. Register workstation and click **Use Now** to log in again.
4. Navigate to **Administration** → **Workstation** → **Print/Storage Service ("Hatch")**.
5. Select **Use Hatch For Printing**.
6. Click on the Home 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

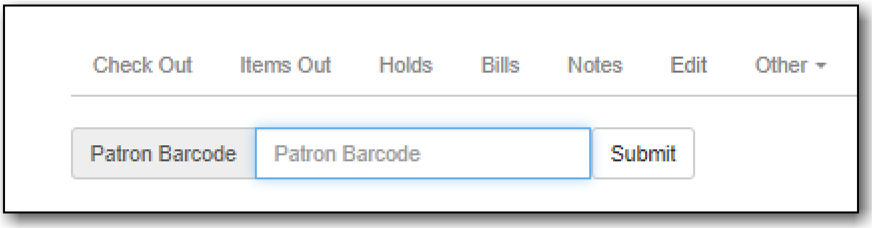
7.1. Retrieving Patron Accounts

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**.

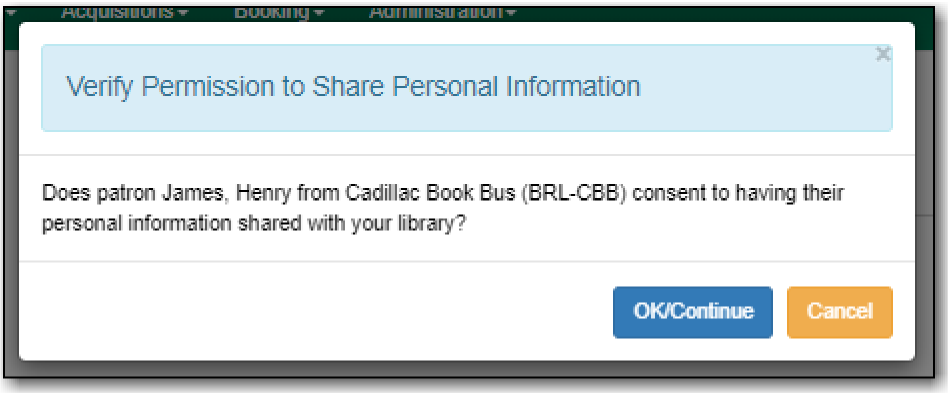


3. The patron’s account will open.

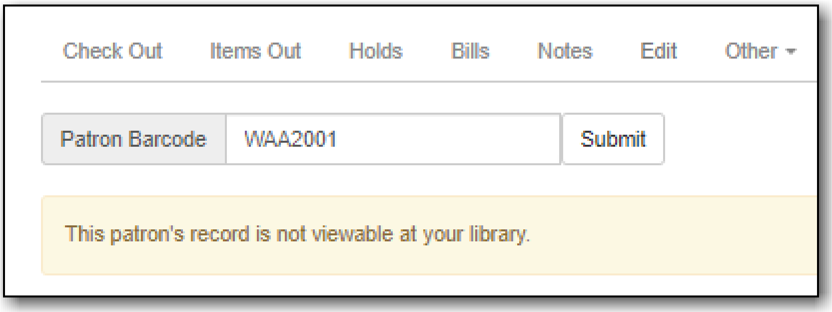
Patron Opt-In

Libraries participating in reciprocal 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.

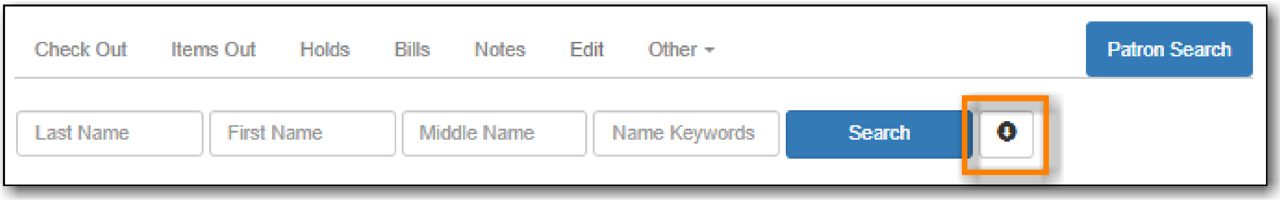


7.1.2. Retrieving an Account via Search Term

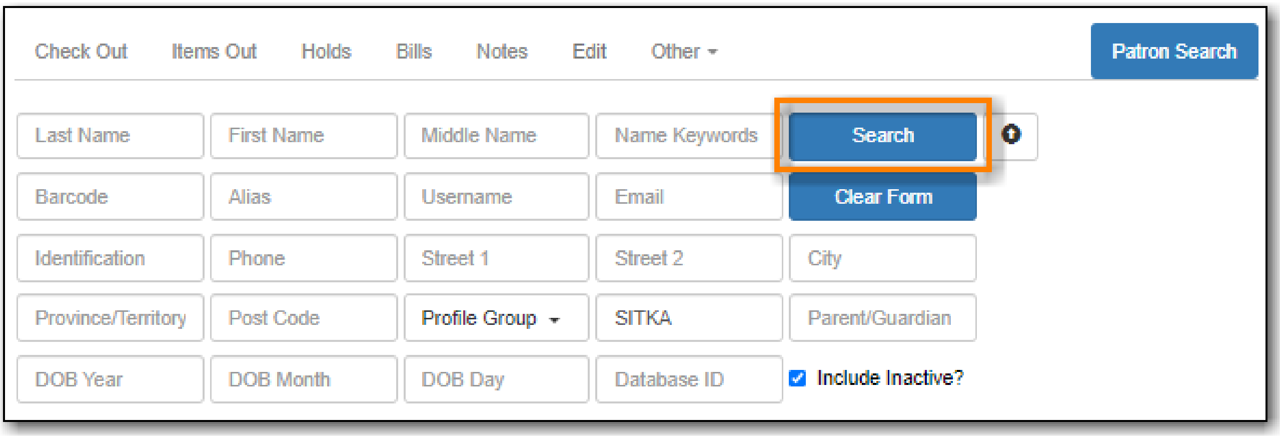
Sitka Snippet Video - Patron Search (1:04)

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**.



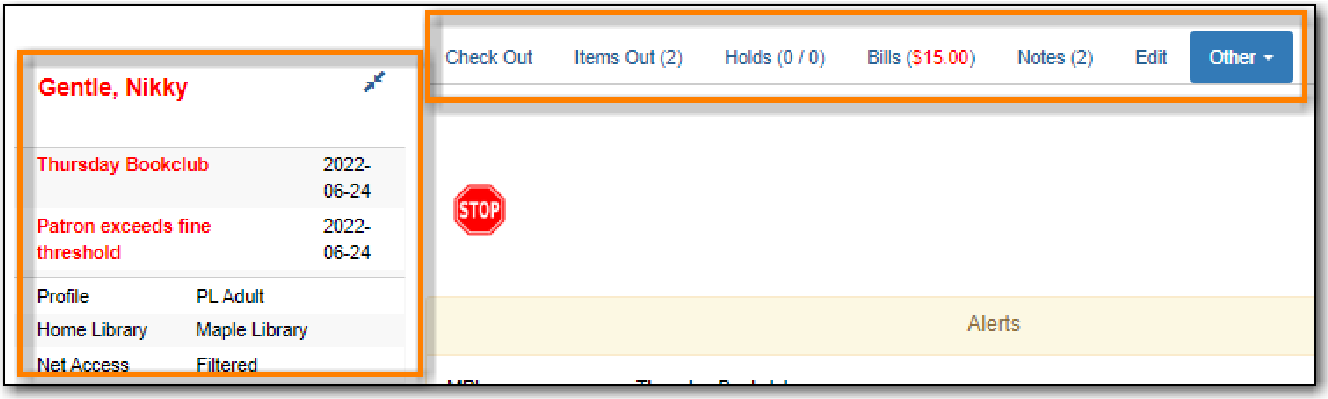
TIP

- To ensure all relevant patrons are searched, Co-op Support recommends having *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. Working with Patron Accounts

The patron account has a summary, which displays on the left side of the patron account, and a tabbed interface allowing staff to look at different aspects of the patron account.



7.2.1. Patron Summary

The patron summary pulls together pertinent information about the patron so it can be seen at a glance.

Some things of note in the patron summary.

- The patron's name displays at the top of the summary. The patron's name will be in red if they have alerts, blocks, or owe fines.
  - Evergreen will use the patron's preferred name and fall back to the primary name if there is no preferred name.
- Any alerts and/or blocks will appear under the patron's name.
- Last Activity - Last time a circulation was done on the account or the account was accessed for 3rd party authentication.
- Last Updated - Last time the account was updated via the **Edit** tab.
- Create Date - Date on which the account was originally created.
- Expire Date - Date on which the account will expire. This can be updated via the **Edit** tab.
- Sitka does not use Long Overdue
- If a library used Homeroom or Student ID as *Primary Identification* it will display in the ID1 field.
- The patron's primary name displays in the Legal Name field in the summary.
- The patron's email address is a Mail To link.
- Any addresses associated with the patron display and can be easily copied to the clipboard or printed.

The patron summary can be hidden using the arrows beside the patron's name. This choice is sticky and will stay on collapsed or expanded view until changed.

7.2.2. Check Out Tab

For information on the **Check Out** tab see Check Out.

7.2.3. Items Out Tab

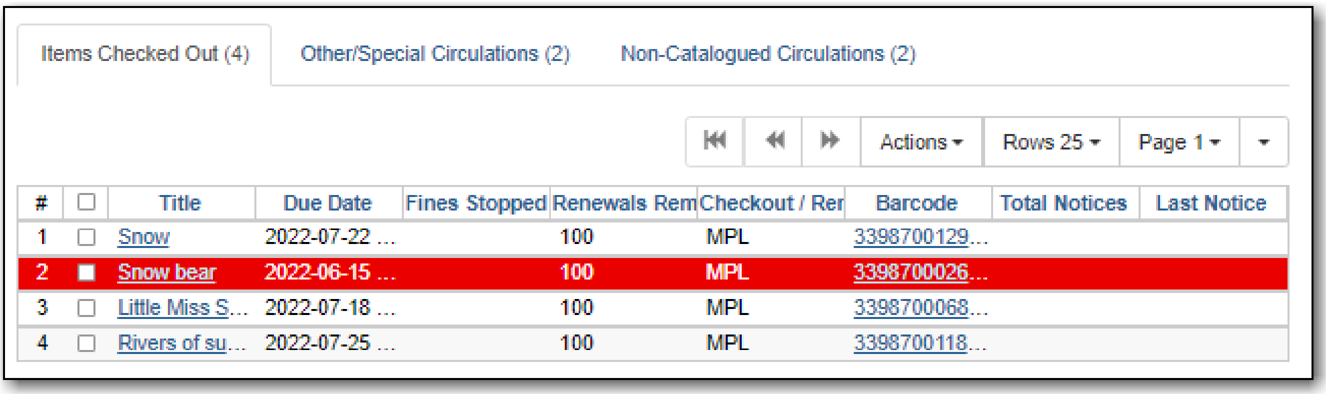
The *Items Out* tab shows items currently out to a patron. It is subdivided into three tabs.

Items Checked Out

The *Items Checked Out* tab shows the items currently out to the patron.

- Overdue items will display highlighted in red.
- Using the **Actions** menu staff can perform functions such as printing an items out receipt, renewing items, marking items with a different status, and showing triggered events for notifications sent to patrons about particular items.

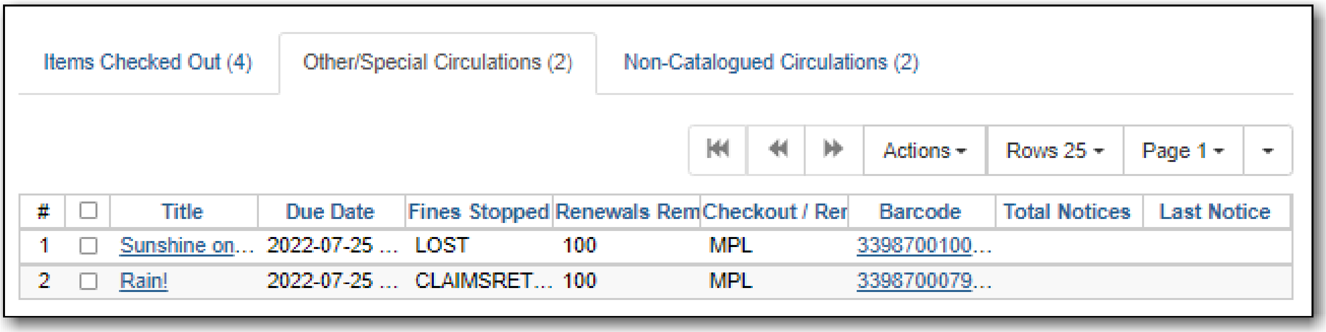
NOTE Staff should only use **Check In** from the **Actions** menu if a checked out item has accidentally been deleted; deleted items cannot be checked in via the Check In interface.



Other/Special Circulations

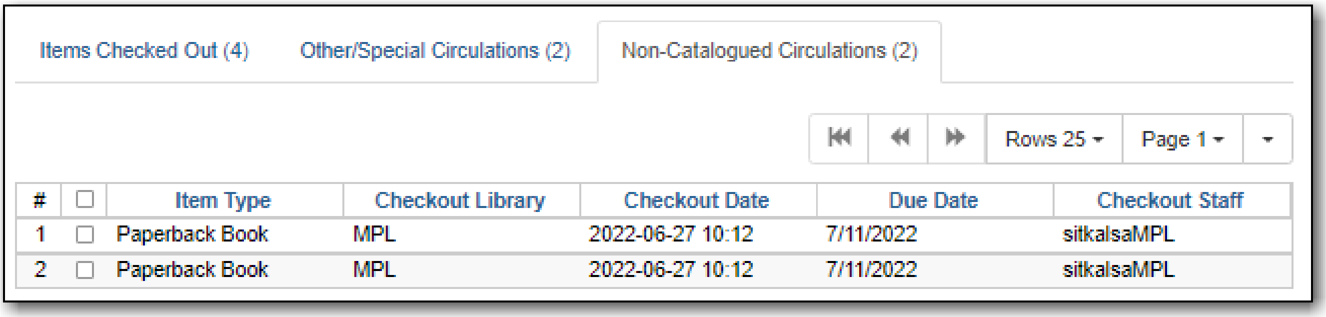
The *Other/Special Circulations* tab shows items that are considered to be lost by the patron or that the patron claims they have returned.

The *Fines Stopped* column will show the reason the item has been moved to this tab. Items are removed from this tab when they are checked in, changed to a different status, or paid for. See Mark Items for more information on handling these items.



Non-Catalogued Circulations

The *Non-Catalogued Circulations* tab shows a count of non-catalogued items. These items will disappear from the patron's account when they reach their due date as non-catalogued check out is for statistical purposes only. See Non-catalogued Items for more information on handling these items.

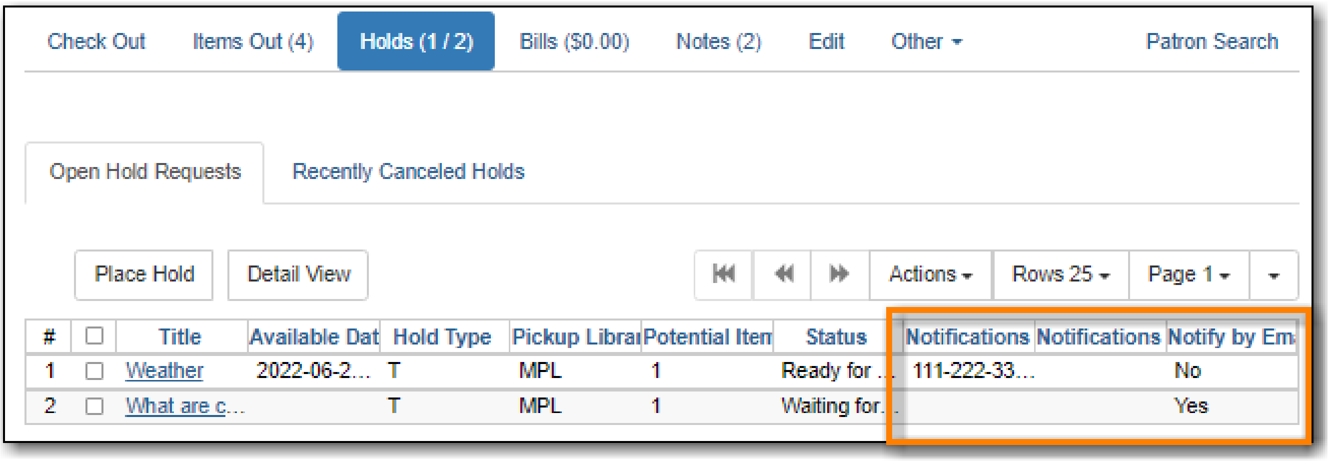


7.2.4. Holds Tab

The *Holds* tab is divided into two tabs which show a patron's open hold requests and their recently cancelled holds.

Open Hold Requests

This tab shows holds that are waiting to be filled or are ready to be picked up by the patron.

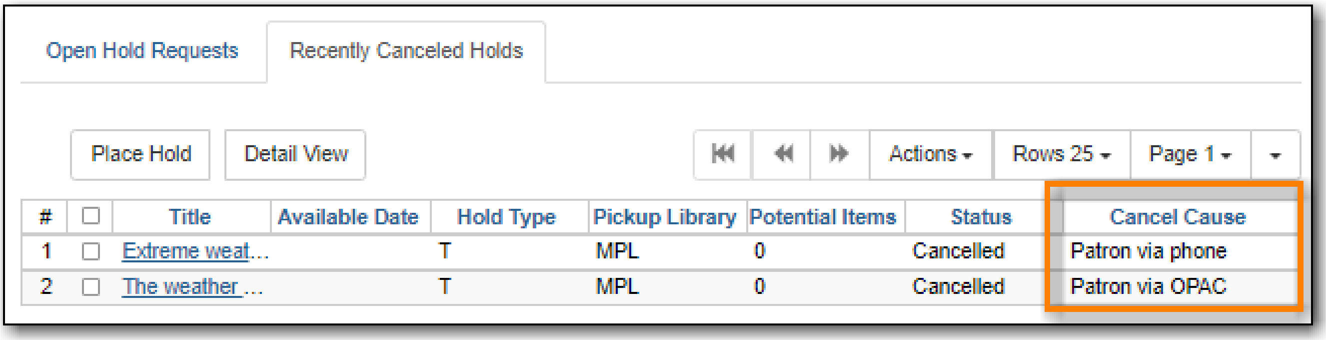


Staff can place new holds for the patron from this tab as well as manage their existing holds.

The columns *Notifications Phone Number*, *Notifications SMS Number*, and *Notify by Email?* can be used to determine how a patron will be or should have been notified about a particular hold.

Recently Canceled Holds

This tab shows holds that have been cancelled. Holds can be cancelled by the patron, by staff, or by Evergreen. The *Cancel Cause* column will indicate why the hold was cancelled and from that staff can determine whether the cancellation was done by the patron, staff, or Evergreen.



See Cancelling Holds for information on how holds are cancelled.

7.2.5. Bills Tab

For information on the **Bills** tab see Bills and Payments.

7.2.6. Notes Tab

For information on the **Notes** tab see Patron Notes.

7.2.7. Edit Tab

For information on the **Edit** tab see Editing Patron Accounts.

7.2.8. Other Menu

Additional options for the patron account can be found in the **Other** drop down menu.

Display Alerts	Evergreen will display the initial alert/blocks page.
Triggered Events/Notifications	Check to see if emails and/or SMS messages have been generated for patrons. See Checking for Notifications.
Message Center	Obsolete interface. This functionality can be found in the **Notes** tab.
Statistical Categories	View information about any patron statistical categories assigned to the patron. For more information on statistical categories see Statistical Category Editor.
Hold Groups	View any hold groups the patron is part of. For more information on hold groups see Hold Groups.

Surveys	View the patron's responses to surveys. For more information on surveys see Surveys.
Group Member Details	See any groups the patron is part of. Sitka does not recommend using patron groups.
User Permission Editor	View and update staff working locations and individual permissions.
Test Password	Allows you to enter the password assigned to the account and confirm it works.
Acquisitions Patron Requests	Not currently used by Sitka.
Booking: Manage Reservations	This link opens the Manage Reservations interface in the same tab with the patron's barcode pre-filled.
Booking: Create Reservations	This link opens the Create Reservation interface in the same tab.
Booking: Pick Up Reservations	This link opens the Booking Pickup interface in the same tab with the patron's barcode pre-filled.
Booking: Return Reservations	This link opens the Booking Return interface in the same tab with the patron's barcode pre-filled.
Completely Purge Account	Not used by Sitka. See Sitka's Patron Deletion Tool for information on deleting patrons.

7.3. Registering New Patrons

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

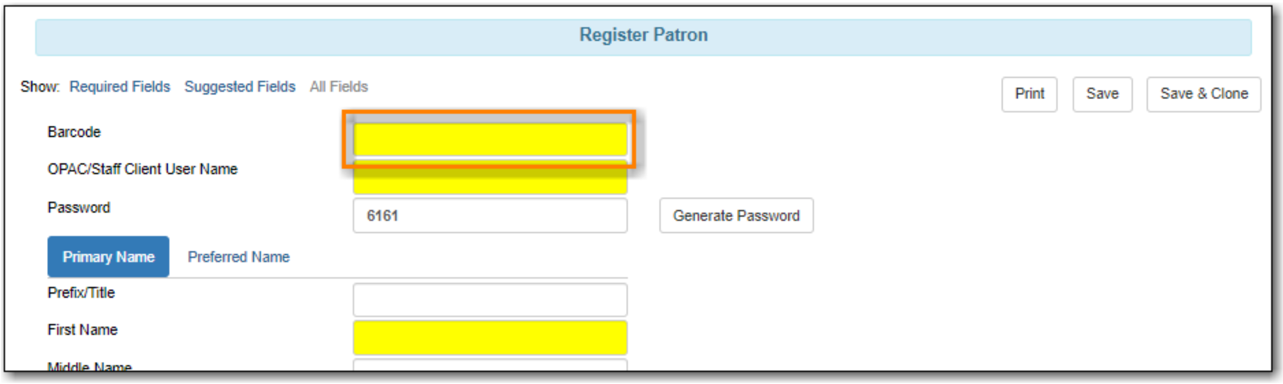
Public libraries with reciprocal borrowing agreements, such as BC One Card, should ask the patron if they have a library card at another public library and then retrieve the account via barcode.

As the registration form is completed Evergreen will alert you if the name, 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.

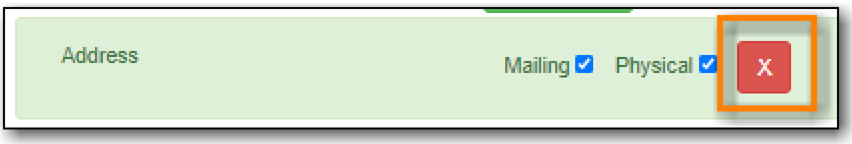
7.3.1. Registering a Patron

1. Select **Circulation → Register Patron.**
2. The fields that 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.

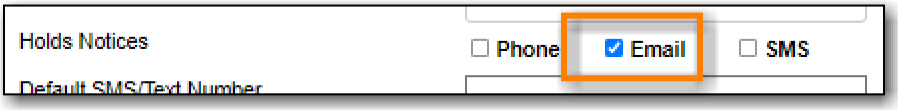


4. If you do not wish to record the address, you need to delete the fields by clicking the red X. Blank address fields will result in an error.

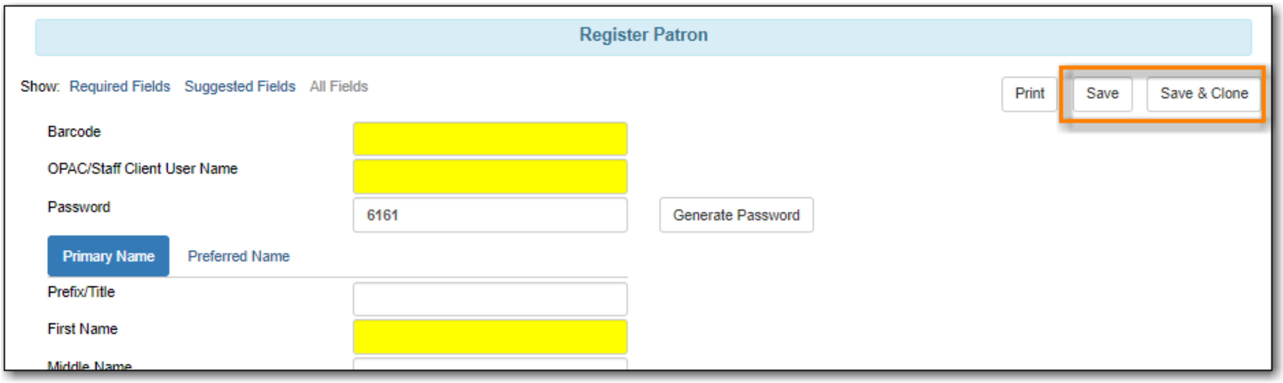


5. The **Holds Notices** default setting is **Email** which makes **Email Address** a required field. You can override this setting, and the required field, with the patron's actual preferences as needed.

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 & Clone** will save the record and open a new record with some shared details such as phone number and optionally address.



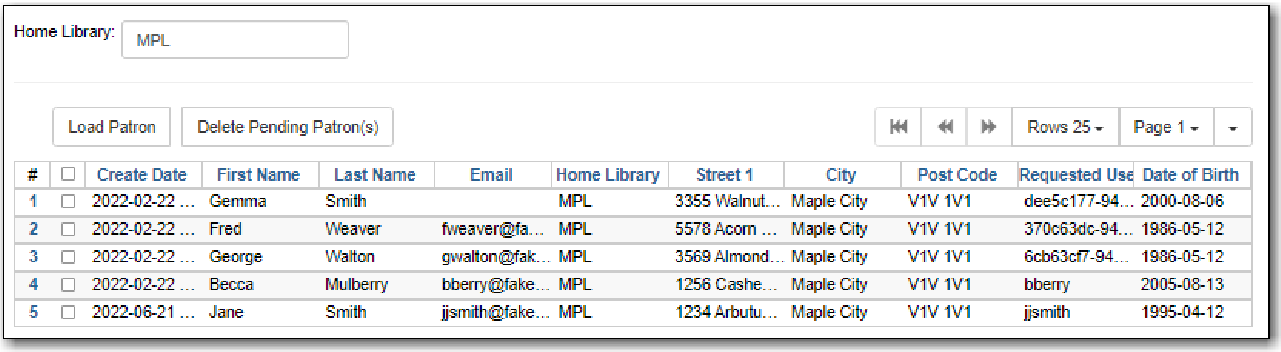
7. If any required fields have been missed an alert will appear asking you to enter valid values for all the required fields.

7.3.2. Managing Pending Patrons

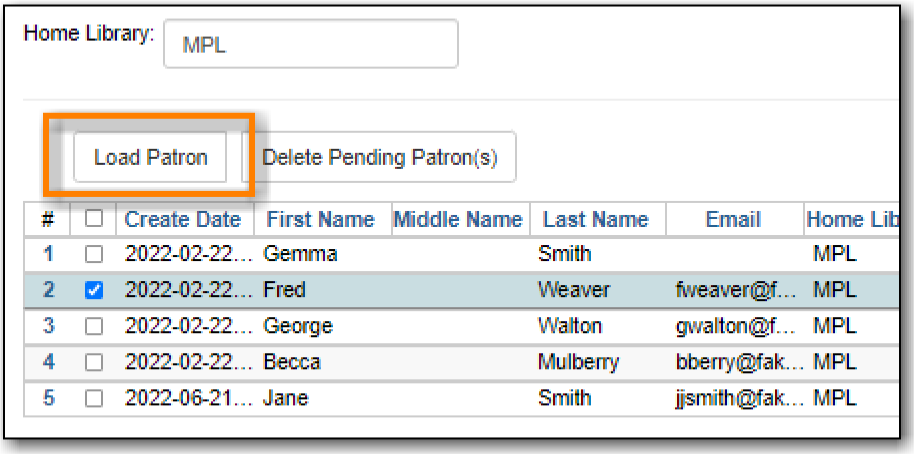
Libraries can turn on self-registration so prospective patrons can request an account via the public catalogue.

These self-registrations become pending patrons in Evergreen which staff can save or delete.

1. In the staff client select **Circulation** → **Pending Patrons**.
2. Pending patrons for your library or branch will display.



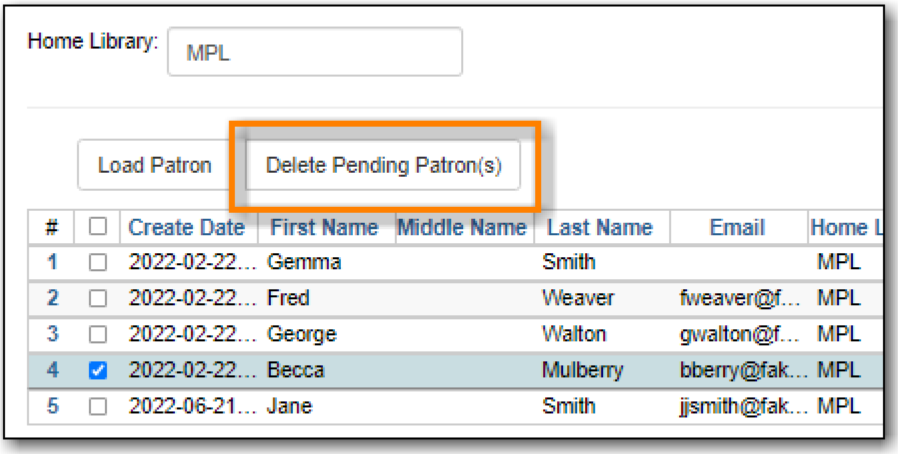
3. To create an account for the patron, select the pending patron and click the **Load Patron** button.



4. The patron's information will be loaded into the registration form. Fill in any additional patron information required by your library and click **Save** to create the patron account.

NOTE	After loading the patron into the registration form you should click in the pre-filled fields (name, email, street address) to trigger Evergreen to check for duplicate patrons.

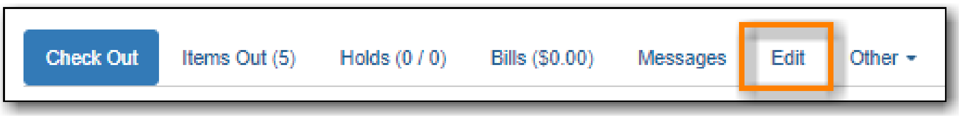
5. You also have the option to delete pending patron accounts if the account is determined to be duplicate or no longer needed. Select the pending patrons you wish to delete and click the **Delete Pending Patron(s)** button.



7.4. Editing Patron Accounts

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.



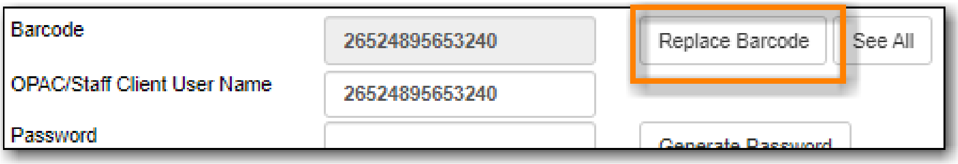
4. Make the needed edits and click **Save** at top right of screen.

> **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)**

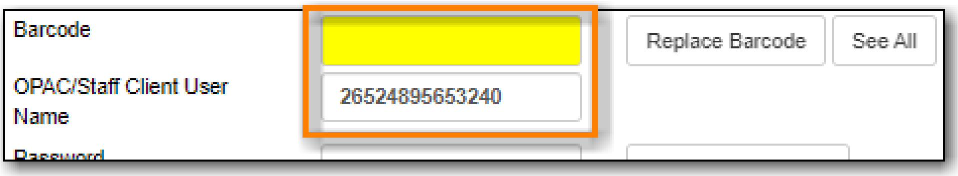
7.4.1. Barcodes

Replace Barcode

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.

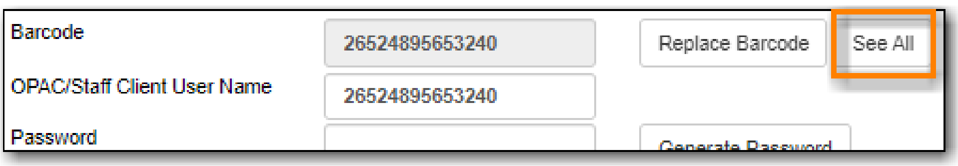
Co-op Support recommends deleting barcodes that have been replaced. See Deleting Inactive Cards.

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.

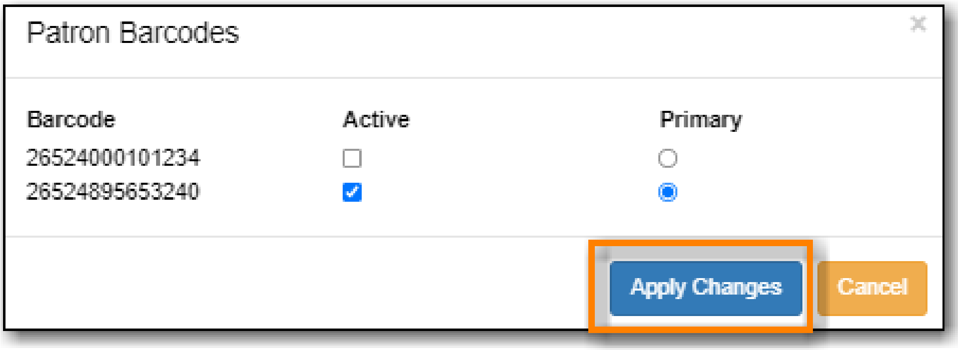
If a patron presents an inactive card Evergreen will retrieve the account with a warning that the barcode is inactive and will not allow check outs. Staff can then decide which cards should be active or inactive. Best practice is to delete inactive patron cards.

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.

7.4.2. Resetting a Patron Password

Co-op Support recommends libraries encourage their patrons to reset their own passwords whenever possible. Patrons can use the Forgot Your Password link in the public catalogue or staff can use the **Send Password Reset Link** button found beside the Password field on the *Edit* tab of the patron account.

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 the patron account for security reasons. As well, Co-op staff cannot retrieve existing passwords.

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

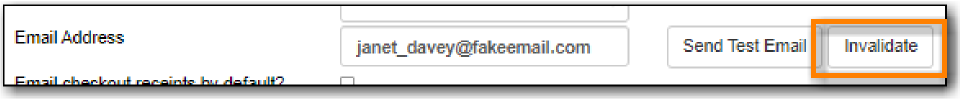
1. Enter new email address or SMS number, and click **Save**.
2. Click **Send Test Email** or **Send Test Text**.

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

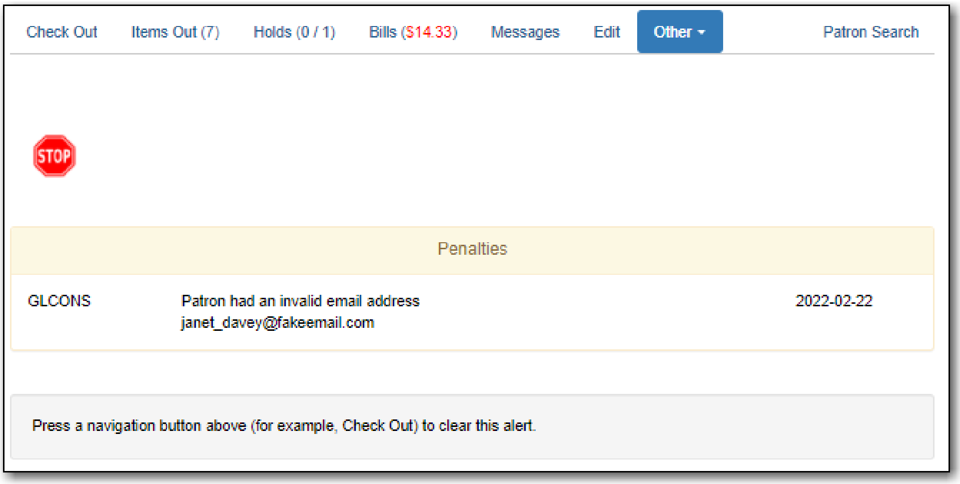
7.4.4. Invalidating an Email Address

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.



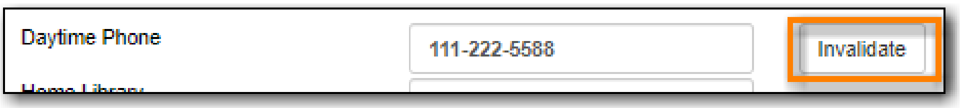
3. Evergreen will automatically archive the penalty when a new email address is entered.
4. To resolve the penalty manually see Staff Generated Notes.

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.

7.4.5. 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**.



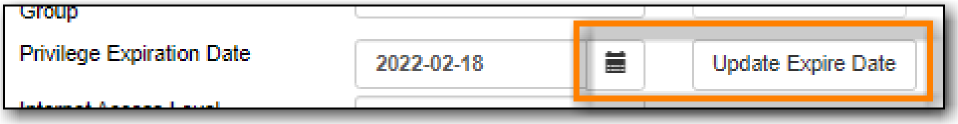
2. The phone number will be removed and a penalty will be added to the **Messages** tab which will

display when the patron’s account is retrieved.

3. To resolve the penalty manually see Staff Generated Notes.

7.4.6. Renewing a Library Card

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



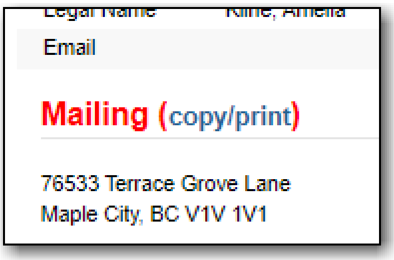
2. Click **Save** at top right of screen.

> **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.

7.4.7. 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.



7.4.8. 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**.

7.4.9. 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.

7.5. 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. **Sitka Snippet Video - Changing an Existing Password (1:07)**
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 as 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 displays 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 and 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.
Photo URL	Can be set as required by libraries	This field allows libraries to link to a picture of a patron. Sitka does not store the photos. Additional permissions are required to use this field. Please contact Co-op Support for more information.
Patron Preferred Language	No	Patrons can set English or French as their preferred language to receive email notifications in that language. Patrons can update their preference via My Account.

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	N/A	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 Co-op 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	N/A	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	N/A	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	N/A	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.

User Settings

Field	Required?	Description
Default Hold Notification 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.
Collections: Exempt	No	Not currently used by Sitka
Holds Notices Check Boxes	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 a value is entered in *Default SMS/Text Number*	To receive text messages patrons 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	N/A	Checked by default, this setting enables patrons to automatically be sent 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

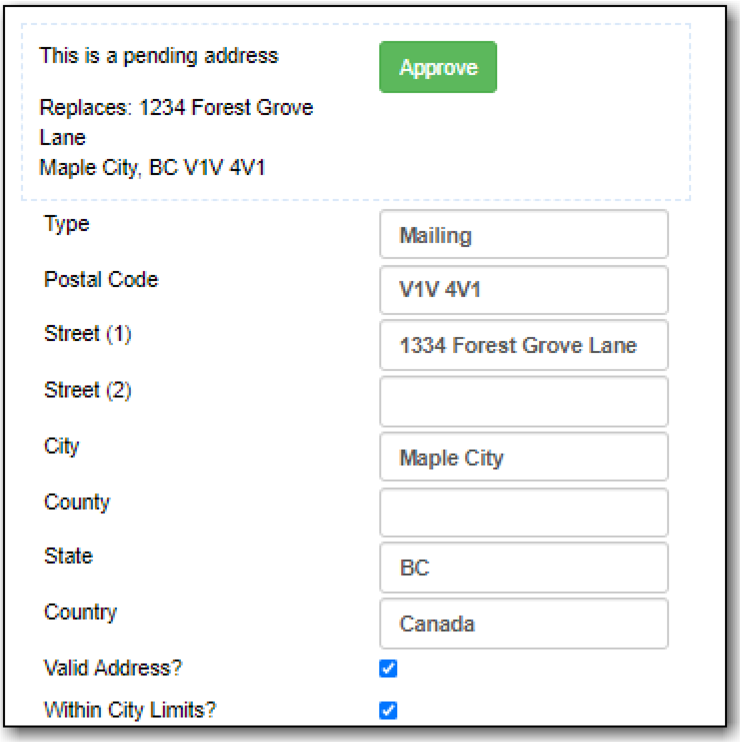
Libraries can choose to require at least one address on every account. When required a patron account cannot be saved if an address is not included.

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?	N/As	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*.
Within City Limits?	N/A	Unchecked by default, this check box indicates that the address is within the city limits. This can be used in reporting.

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.

7.5.1. 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. These customizations apply to both the staff client patron registration form and the patron self-registration form.

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.

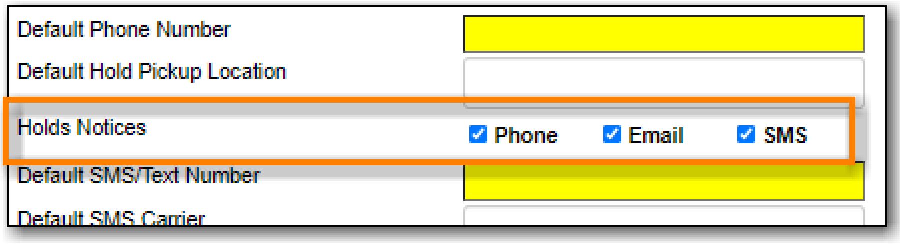
Libraries can decide to set additional fields as required to conform with local policy. The applicable library settings are:

- 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.

Field Examples

Libraries can display examples for how information should be input for certain fields. The applicable library settings are:

- Example dob field on patron registration
- Example for day_phone field on patron registration
- Example for email field on patron registration
- Example for evening_phone field on patron registration
- Example for other_phone field on patron registration
- Example for phone fields on patron registration
- Example for post_code field on patron registration

7.6. Patron Notes

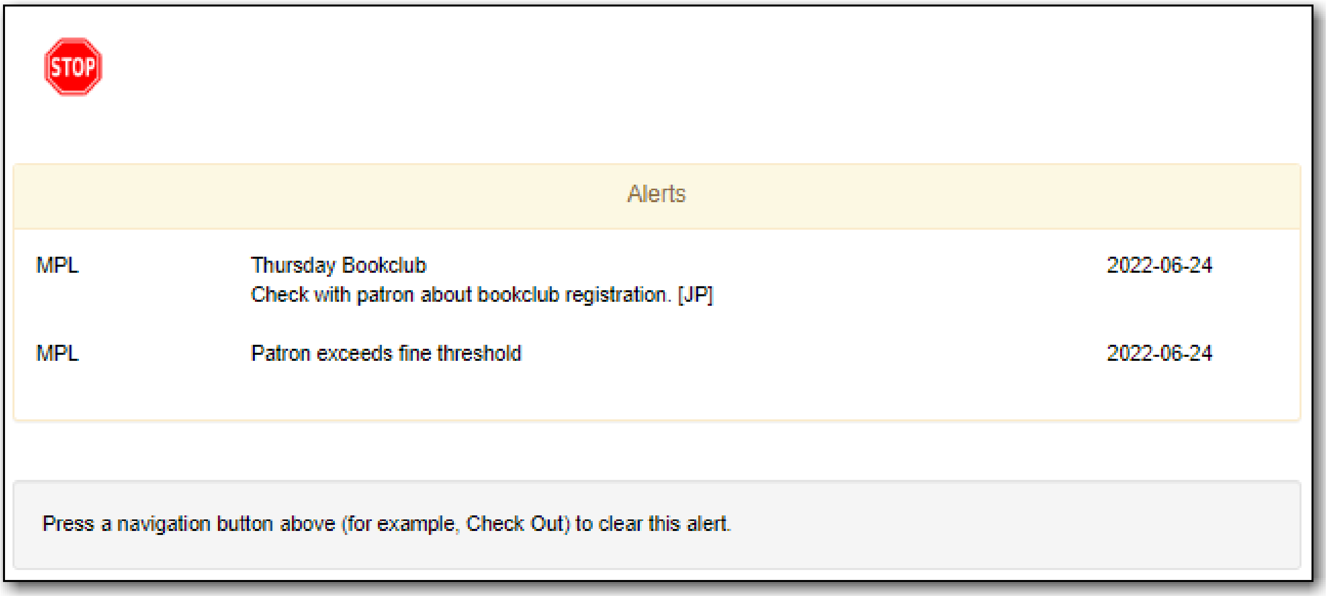
There are three types of patron notes in Evergreen:

- Note - information recorded on the patron account.
- Alert - information recorded on the patron account that generates an alert when the patron's account is retrieved.
- Block - information recorded on the patron account that blocks patrons from checking out, renewing, and placing items on hold.

Notes, alerts, and blocks can be applied to a patron's account automatically by the system or manually by staff. These can be viewed and managed on the *Notes* tab in the patron account.

7.6.1. System Generated Notes

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 and place holds on items.

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

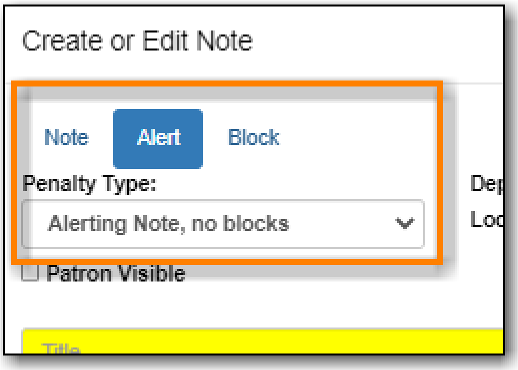
Evergreen will remove these blocks and alerts when the cause is resolved.

Blocks can also be overridden by staff with appropriate permissions when placing holds, checking out items, or renewing items.

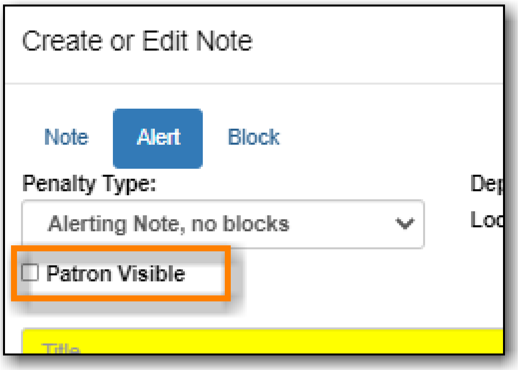
7.6.2. Staff Generated Notes

To add a note:

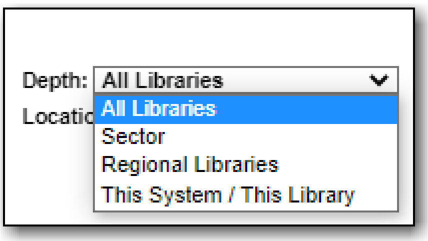
1. In the patron's account click on the **Notes** tab.
2. Click **Create Note**.
3. Select the type of note you would like to created by clicking the appropriate button or selecting the option from the **Penalty Type** drop down.



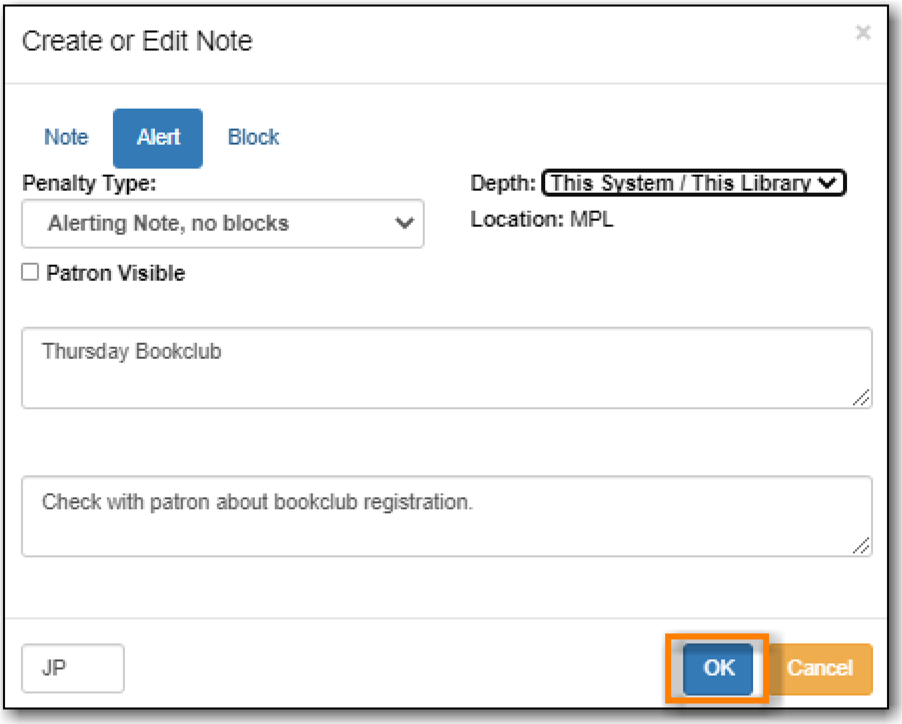
4. If the note should be visible to patrons in My Account check the box for **Patron Visible**.



5. Select the depth at which the note should be visible. Libraries participating in reciprocal borrowing may wish to set some notes at the *Regional Libraries* level so all libraries that interact with the patron account can see the note.

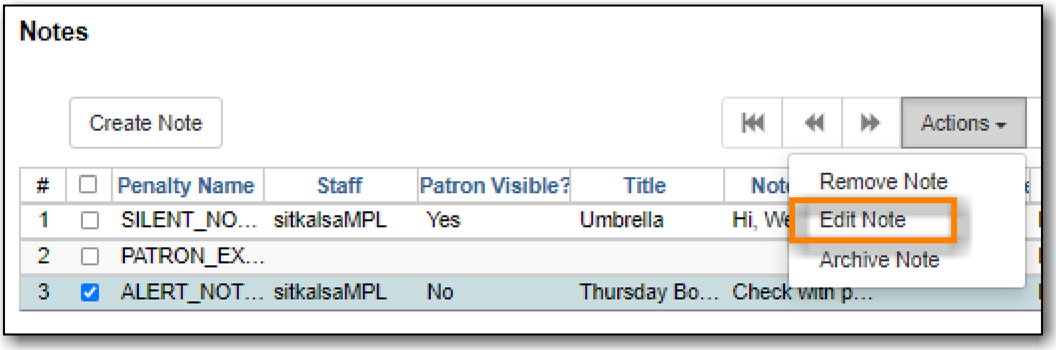


6. Enter a **Title** for the note.
7. Optionally, enter additional text for the note.
8. Enter your initials and click **OK** to save the note.

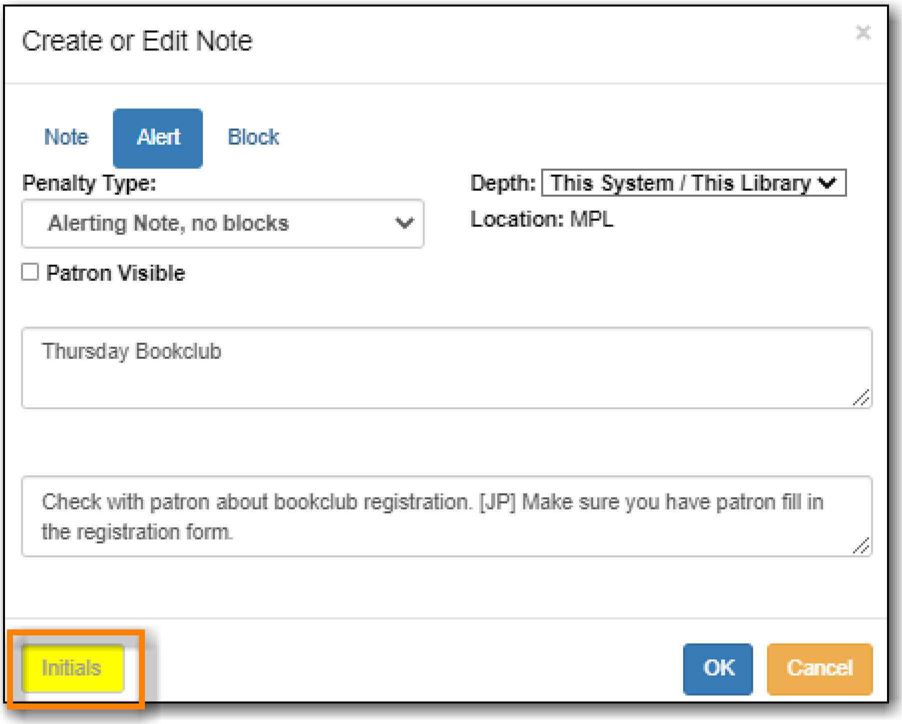


To edit a note:

1. In the patron's account click on the **Notes** tab.
2. Select the note you would like to edit.
3. From the **Actions** menu select **Edit Note**.



4. Make the needed changes and enter your initials.

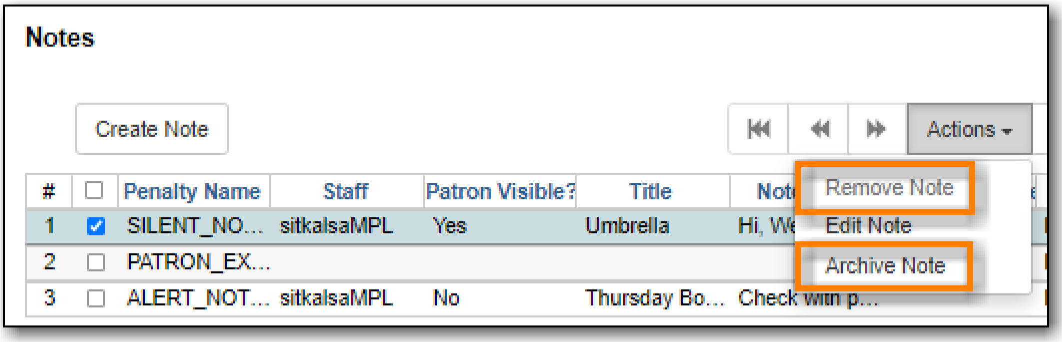


5. Click **OK**.

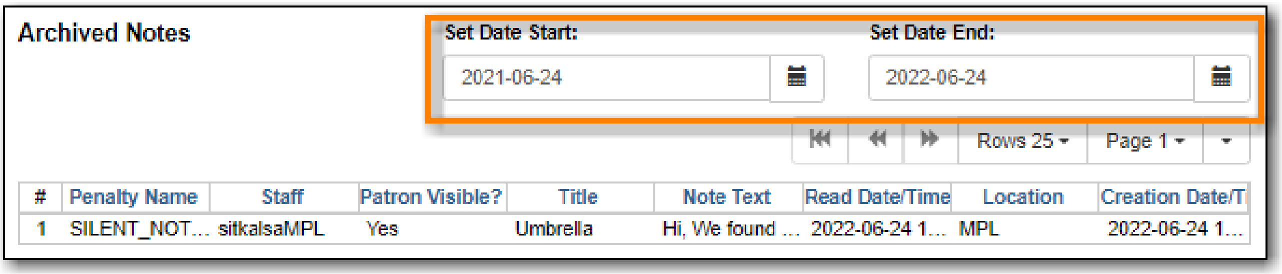
NOTE Patron visible notes cannot be edited after the patron has viewed the note.

To delete or archive a note:

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



4. If archived, the note will now display in the archived section. By default archived notes from the last year display. Use the date selectors to adjust this period as needed.



NOTE Patron visible notes cannot be deleted after the patron has viewed the note. Instead, these notes must be archived to remove them from the active notes section.

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.

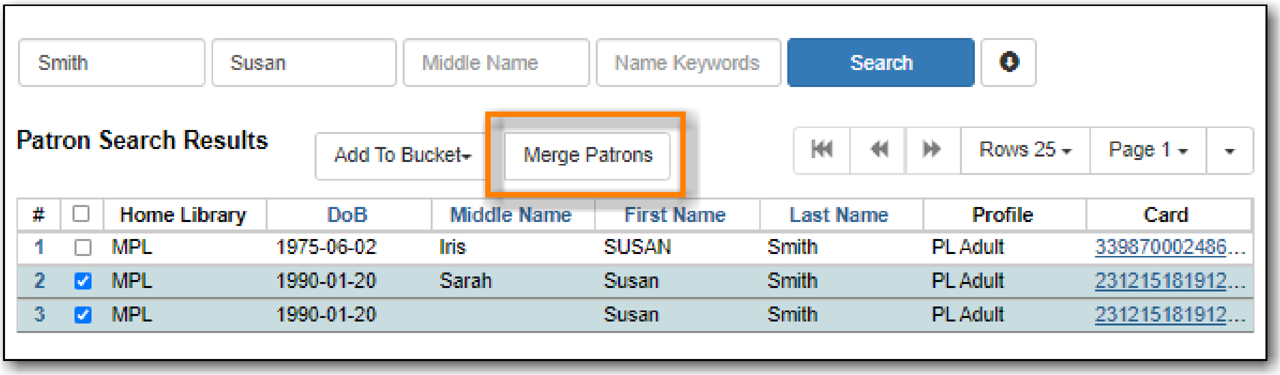
1. To retrieve a shared bucket click **Circulation→User Buckets** and click the **Bucket View** tab.
2. Click **Buckets** and select **Shared Bucket**.
3. A dialogue box will appear. Enter the ID of the bucket you wish to retrieve and click **Load Bucket**.
4. The shared bucket will load in the **Bucket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

7.8. Merging Patron Accounts

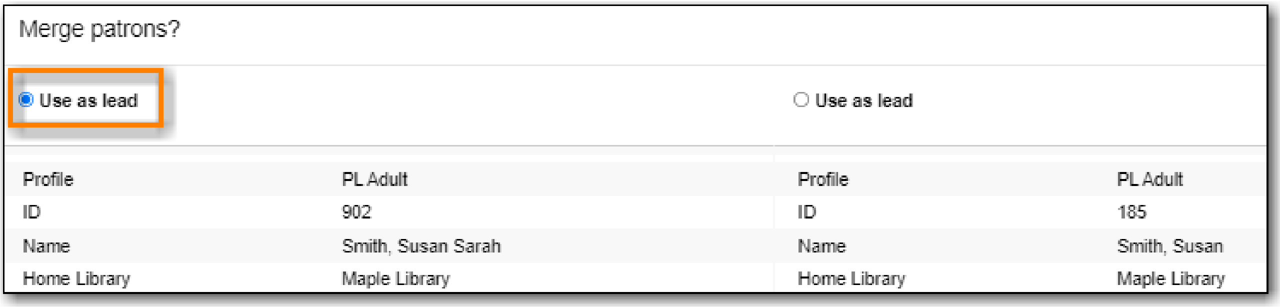
NOTE

- 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

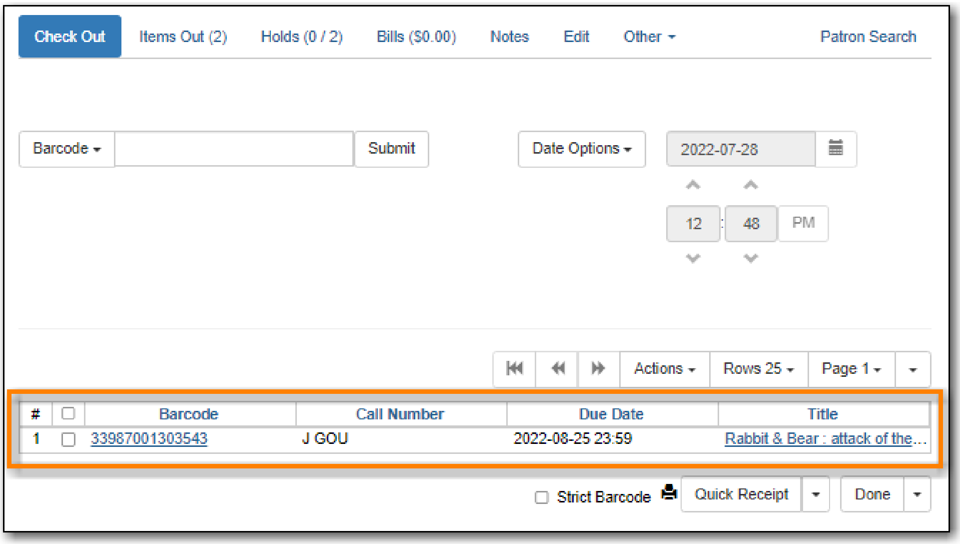
Sitka Training Video - Check Out (3:12)

Three types of items can be circulated in Evergreen:

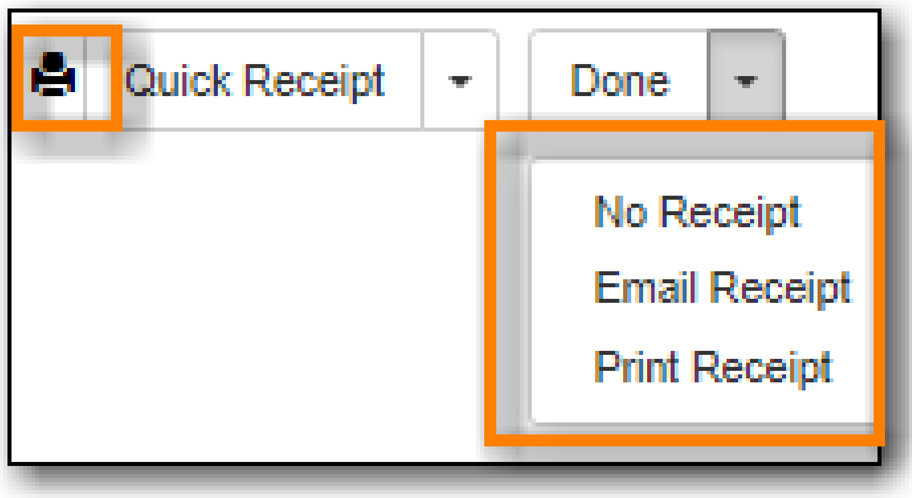
- Catalogued - item that are catalogued in Evergreen
- Pre-catalogued - items that haven't been catalogued yet or have been borrowed via interlibrary loan
- Non-catalogued items - items that won't be catalogued but that the library wants to track statistics for

To check out an item:

1. Retrieve the patron's account.
2. On the *Check Out* tab, scan or enter item barcode.
3. The item will appear below in the grid. The due date will be determined by your circulation policies.



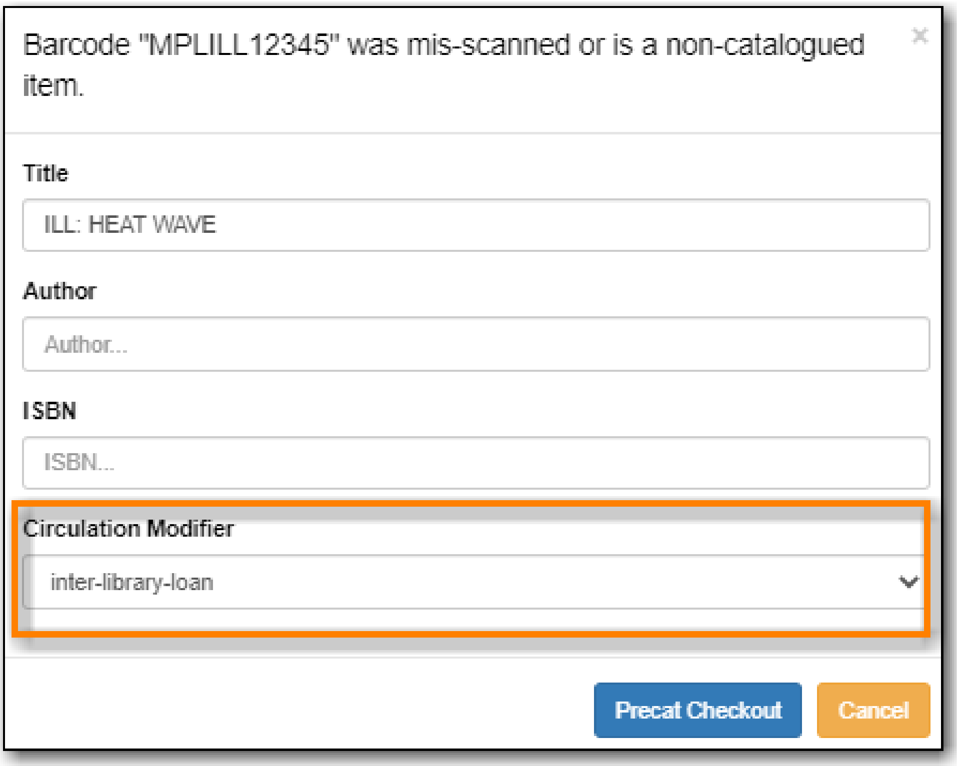
4. Click **Done** to exit the **Check Out** screen and generate a check out receipt for the patron.
   a. The icon will indicate the patron's receipt default - print or email. Staff can select a different option from the drop down menu.



8.1.1. Pre-catalogued Items

To check out an interlibrary loan or an item that hasn't been catalouged yet:

1. Retrieve the patron's account.
2. On the *Check Out* tab, scan or enter a temporary item barcode.
3. Enter the the item information into the pop-up. The circulation modifier applicable to the item must be chosen from the drop down menu in order for the item to follow the expected circulation policy.



4. Click **Precat Checkout**.
5. The item will appear below in the grid. The due date will be determined by your circulation policies.

NOTE Information on using pre-catalogued items for interlibrary loans can be found in the Using Pre-cats for Incoming ILL section of Sitka's Evergreen Policy & Best

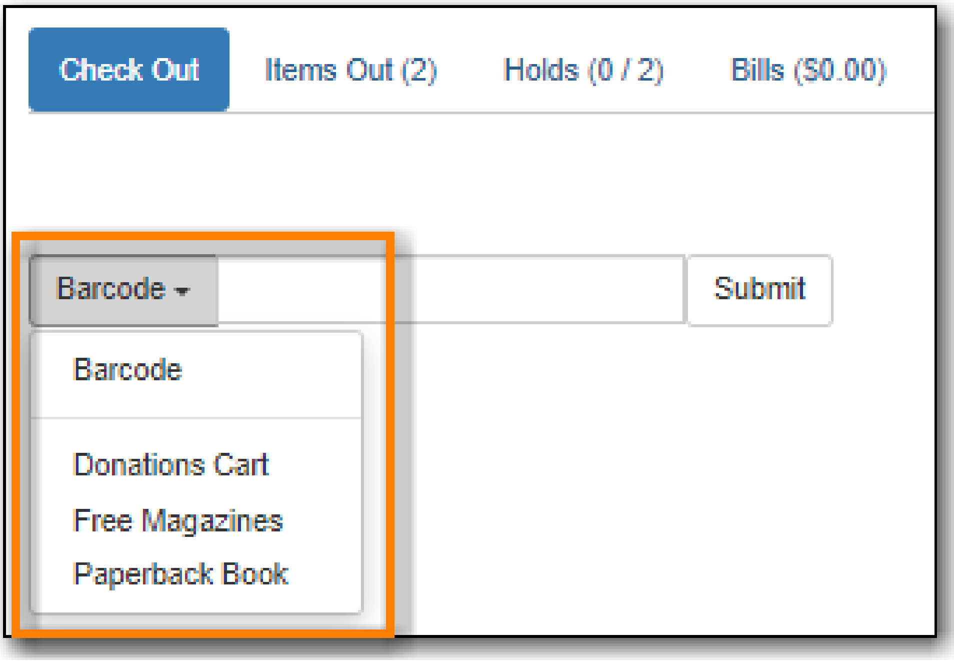
Practices Manual. Pre-cats should never be used to check out Interlibrary Connect items.

8.1.2. Non-catalogued Items

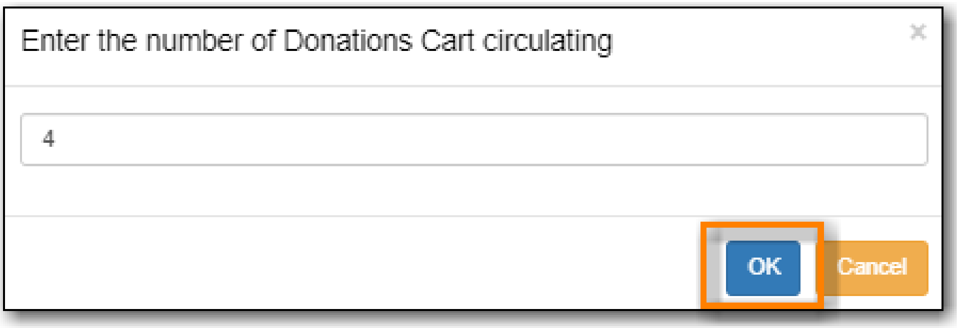
Libraries can create non-catalogued types to track statistics for items that the library will not catalogue and does not expect to have returned.

To check out a non-catalogued item:

1. Retrieve the patron's account.
2. On the *Check Out* tab, click on the drop down arrow beside **Barcode** to choose the applicable non-catalogued type.



3. Click **Submit**.
4. Enter the number of items and click **OK**.

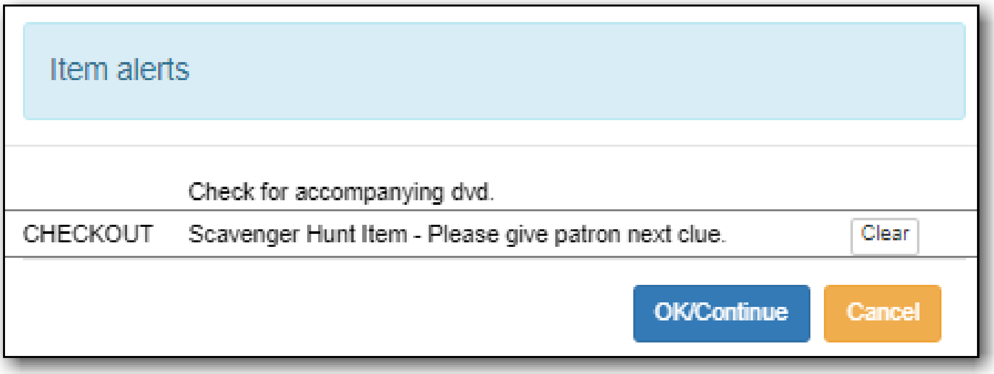


5. A record of the check out will appear in the grid.
6. The items can be viewed on the Non-Catalogued Circulations tab in Items Out until the due date passes at which time the items disappear from the patron's record.

8.1.3. Exceptions at Check Out

Item Alerts

If an item has a check out alert it will appear when the item is scanned at check out.



Staff can click **OK/Continue** after reading the alert to proceed with check out.

Temporary alerts will have a **Clear** button which can be used to clear the alert when it is no longer needed.

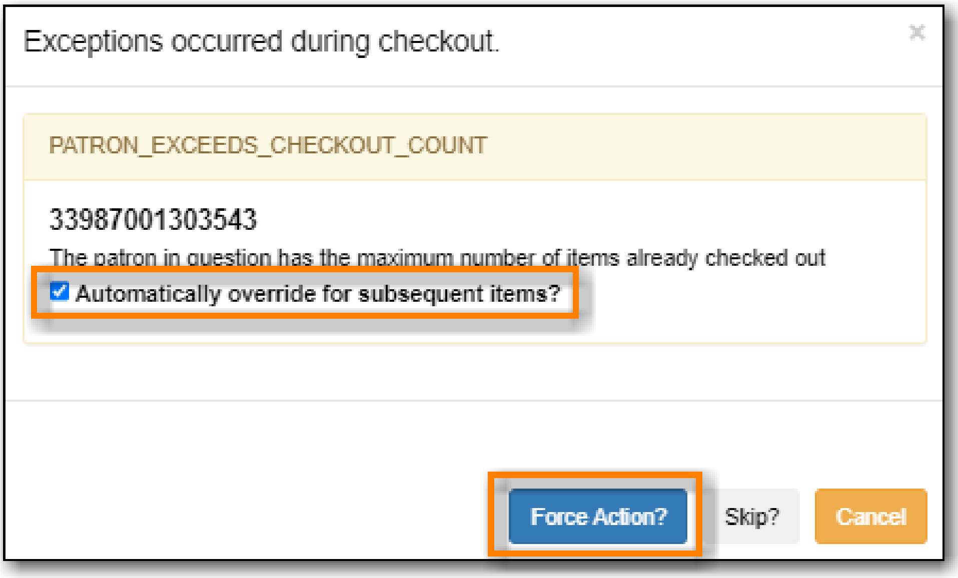
Overriding at Check Out

An item can be blocked from circulation for the following reasons:

- Patron has a system generated or staff generated block on their account
- Item is in a non-circulating status
- Item is in a non-circulating shelving location
- Item has been set to Circulate = No in the item record
- The library's circulation policies block the patron from borrowing the item
- Item is on the holds shelf for another patron

To override an exception at check out:

1. Check or un-check the box for **Automatically override for subsequent items** as applicable to the check out.
2. Click **Force Action?**. Staff must have the appropriate permissions to force the check out.

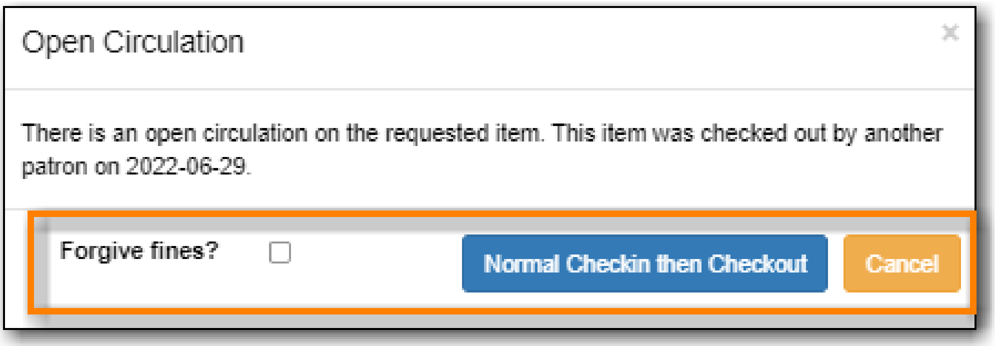


3. The item will appear below in the grid. The due date will be determined by your circulation policies.

Open Circulation

Occasionally a patron may try to check out an item that is already checked out. This most commonly occurs with items that got missed at check in. Staff have three options to resolve the open circulation:

- Click **Normal Checkin then Checkout** - this checks the item in and then out to the new patron
- Check the box for **Forgive Fines and then click *Normal Checkin then Checkout** - this checks the item in, forgives any existing fines, and then checks the item out to the new patron
- Click **Cancel** - this cancels the check out and allows staff to manually resolve the open circulation



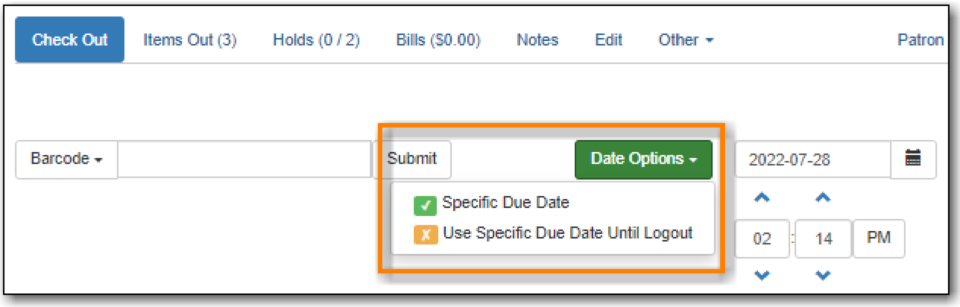
Specific Due Date

Staff can assign specific due dates to items at check out which override the due date the system would assign.

To assign a specific due date:

1. Retrieve the patron's account.
2. On the *Check Out* tab, click on **Date Options**.

3. Select **Specific Due Date** or **Use Specific Due Date Until Logout**.



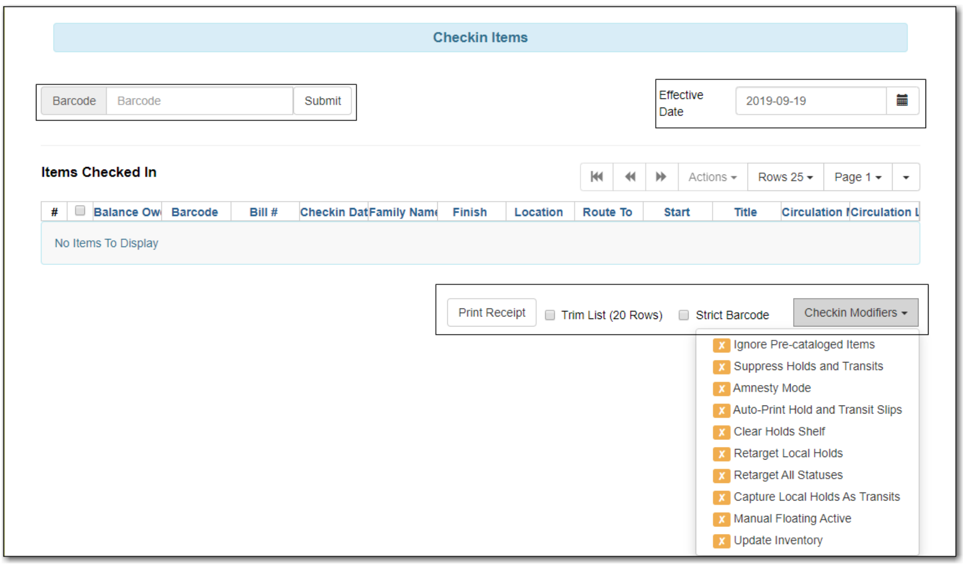
4. Use the calendar widget or enter a date.
   a. For hourly loans use the time picker to select the due date time. (Daily loans always have 11:59pm/23:59pm as the due date time regardless of what is selected for due date time.)
5. Scan or enter item barcode.
6. The item will appear below in the grid. The specified due date will display.

8.2. Check In

[Sitka Training Video - Check In (3:44)]

8.2.1. Regular Check In

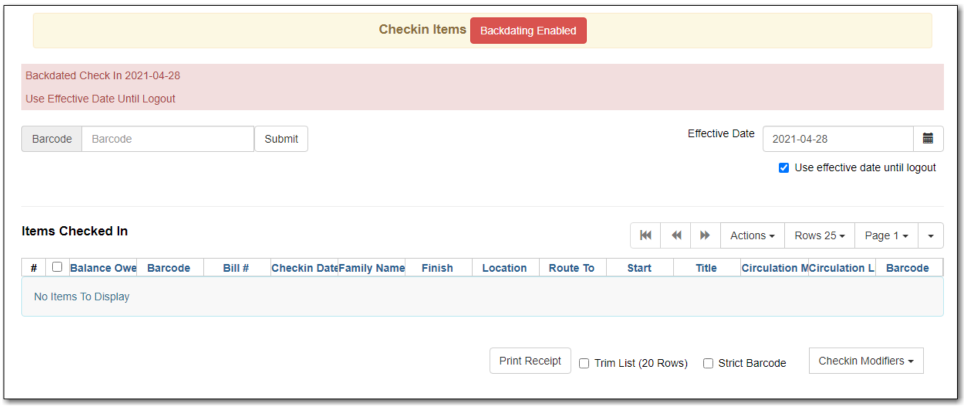
1. Click **Check In Items**.
2. Scan barcodes.



8.2.2. Backdated Check In

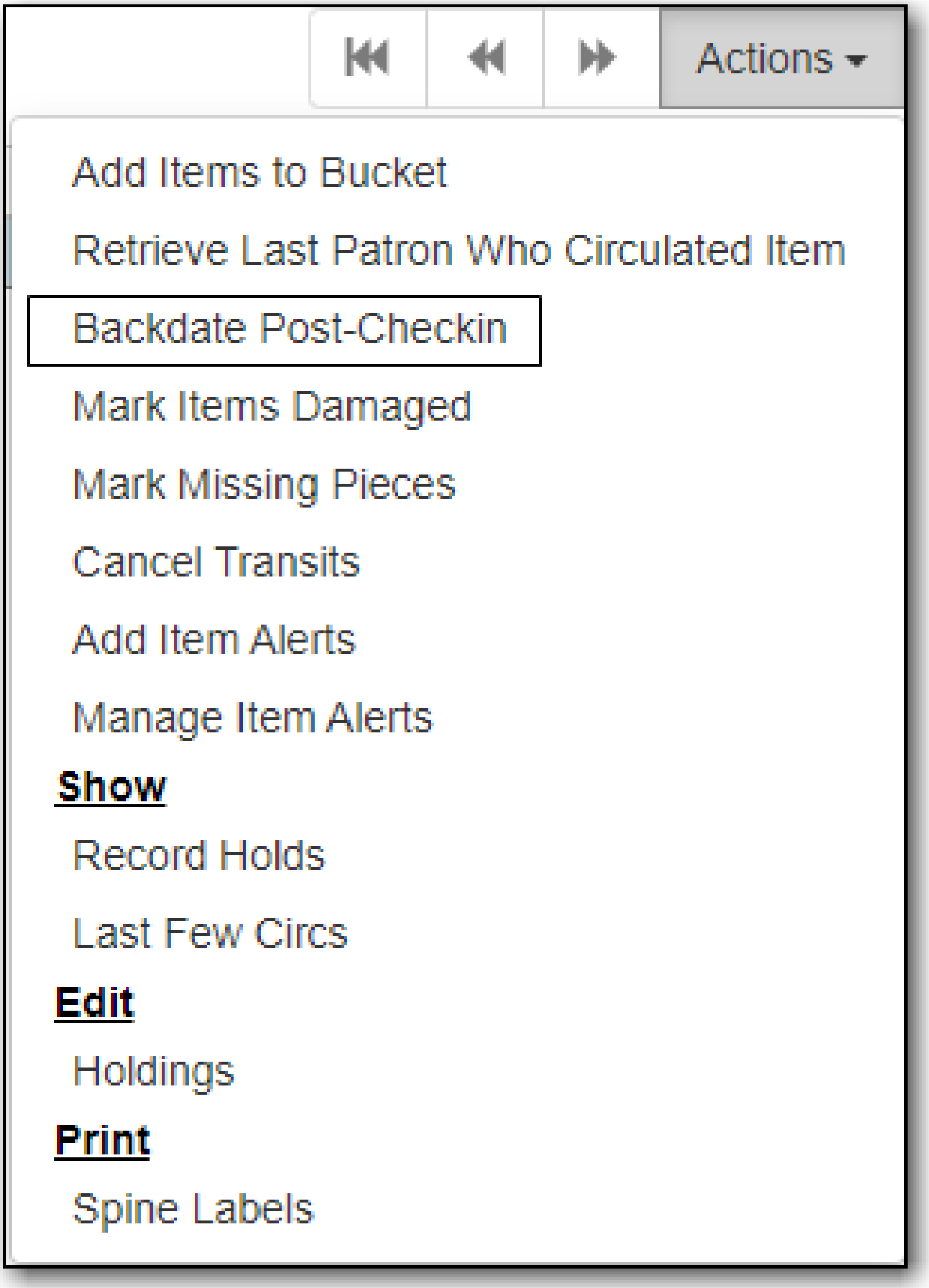
This is useful for clearing a book drop.

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. 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.

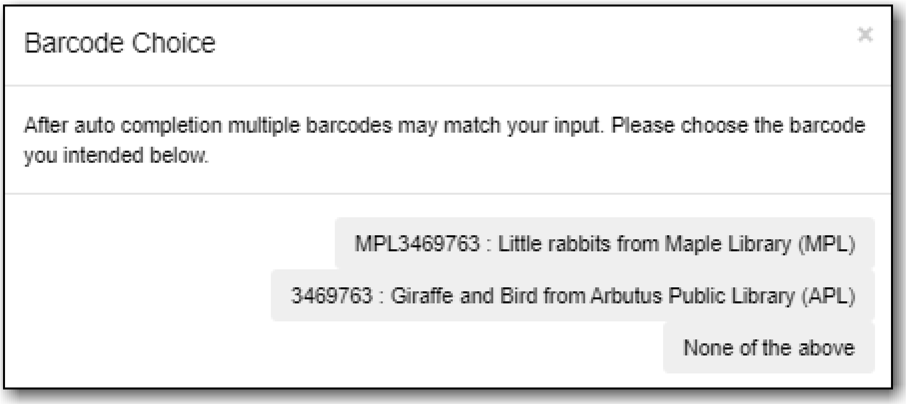
8.3.1. Registering Patrons with Barcode Completion

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.

8.3.2. 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.

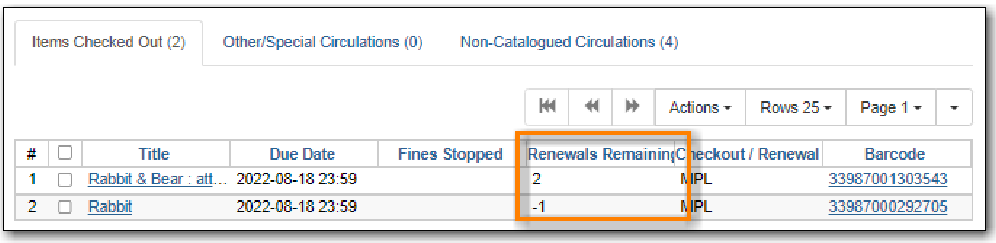
8.3.3. 3rd Party Services

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.

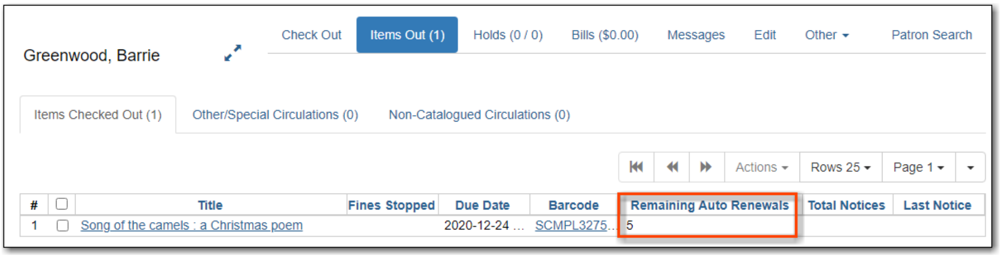
For example, Maple Public Library uses barcode completion with the prefix MPL. The patron's barcode is 123456 on their card and is MPL123456 in the Sitka database. To log into their Overdrive account the patron must enter MPL123456.

8.4. Renewing Items

Items that are checked out can be manually renewed by staff or by patrons. The new due date is calculated from the renewal date unless a specific due date is specified. The number of renewals allowed for a circulation is determined by the library's circulation policy.

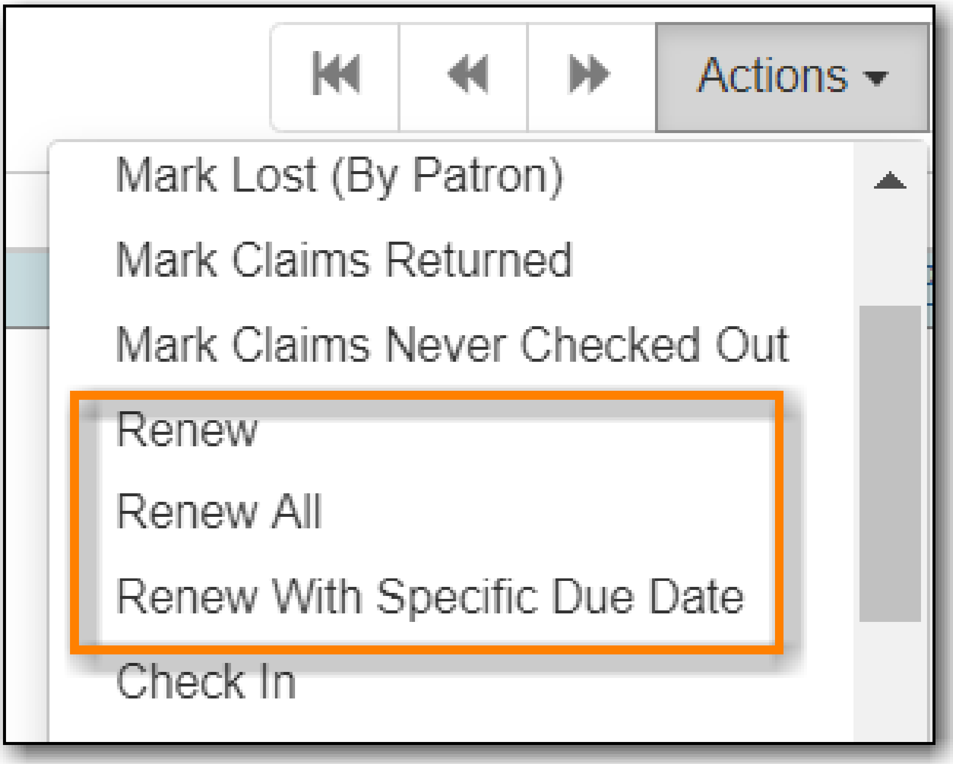


Evergreen can also be set up to auto-renew items when they reach their due date. Items will not be automatically renewed if the item has holds, exceeds the maximum number of auto-renewals allowed, or if the patron has been blocked from renewing items. An email notification is sent to patrons to inform them of the renewal or if the item could not be renewed.



8.4.1. Renewing Items

1. Retrieve the patron's account.
2. Click the **Items Out** tab.
3. Select the item(s) you wish to renew and click **Actions**.
4. 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.

8.4.2. Exceptions at Renewal

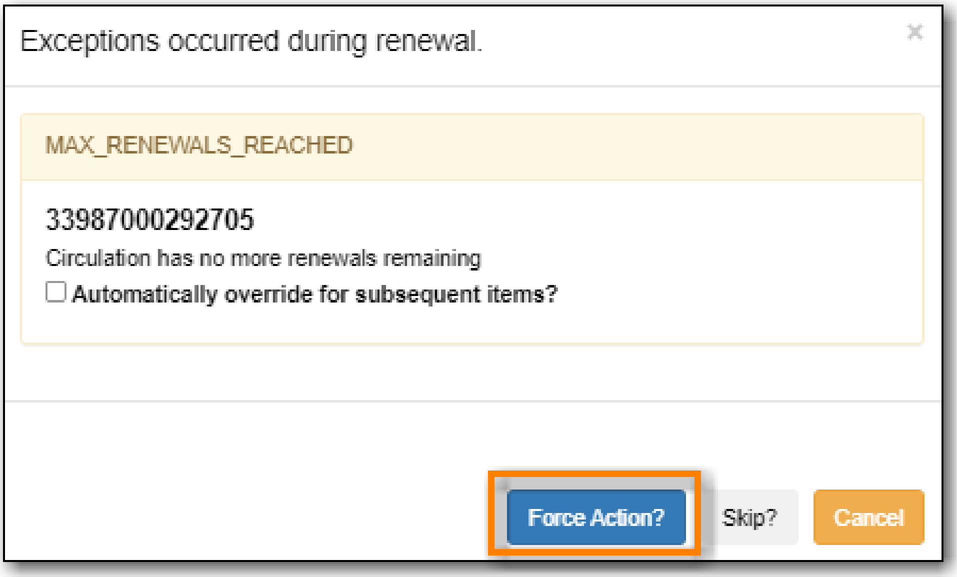
An item can be blocked from renewing for the following reasons:

- Patron has a system generated or staff generated block on their account
- The item has no more renewals allowed as per the library's circulation policies

- The item is needed to fill a hold

To override an exception when renewing:

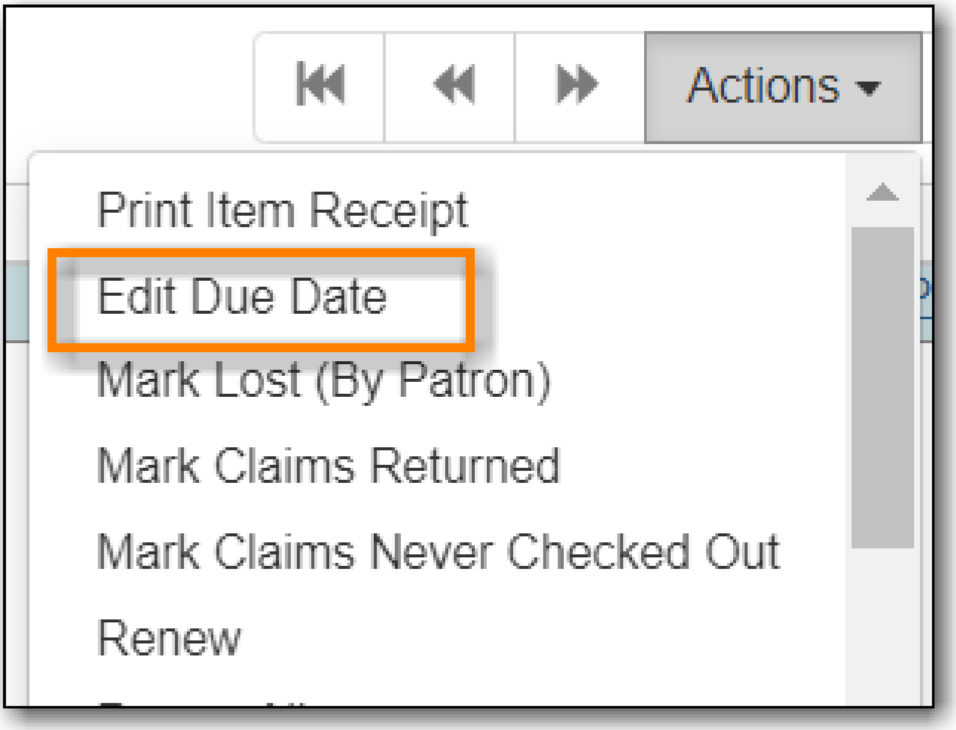
1. Check or un-check the box for **Automatically override for subsequent items** as applicable to the check out.
2. Click **Force Action?**. Staff must have the appropriate permissions to force the check out.



3. The item will be updated in the grid. The new due date will be determined by your circulation policies.

8.4.3. 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.

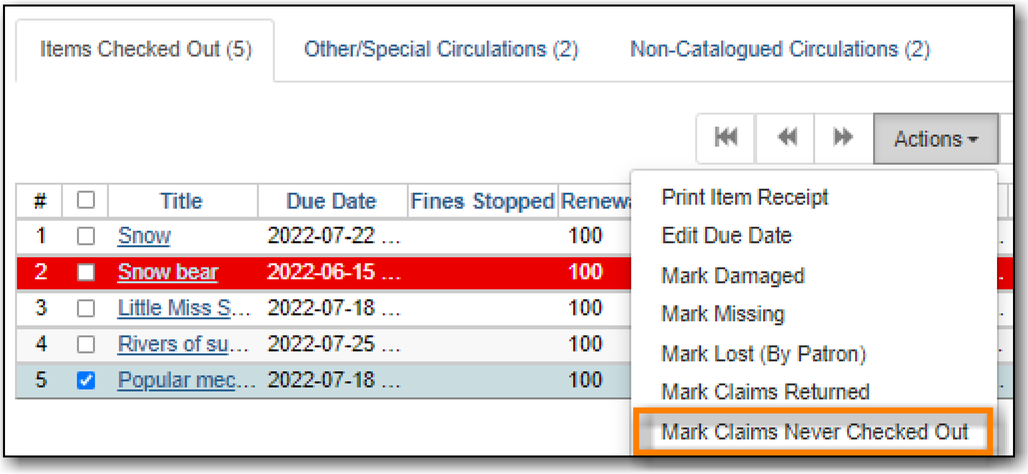
8.5. Mark Items

Items can have their status changed via the *Mark* functions on the Actions menus. See Item Statuses for more information on how particular item statuses behave.

8.5.1. Claims Never Checked Out

If a patron believes an item was erroneously checked out on their account and staff cannot locate it to check it in the item can be marked as claims never checked out.

1. Go to the *Items Out* tab in the patron account.
2. Select the item and click **Actions** → **Mark Claims Never Checked Out**.



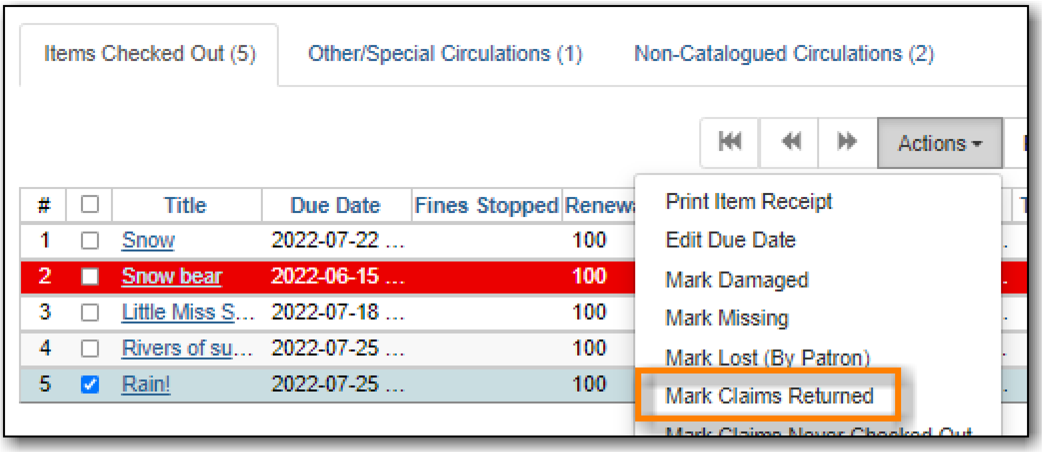
3. A pop-up appears where staff can confirm that they wish to mark the item by clicking **OK/Continue**.
4. The item is checked in and set to *Missing*. The item is no longer associated with the patron's account.

Libraries may wish to routinely run reports on items with the status of *Missing* so they can be searched for and replaced/deleted as appropriate.

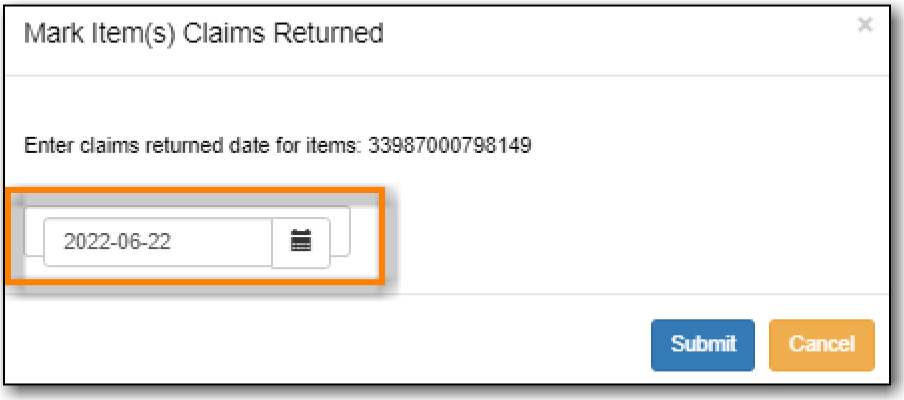
8.5.2. Claims Returned

If a patron believes an item out on their account was returned and staff cannot locate it to check it in the item can be marked as claims returned.

1. Go to the *Items Out* tab in the patron account.
2. Select the item and click **Actions** → **Mark Claims Returned**.

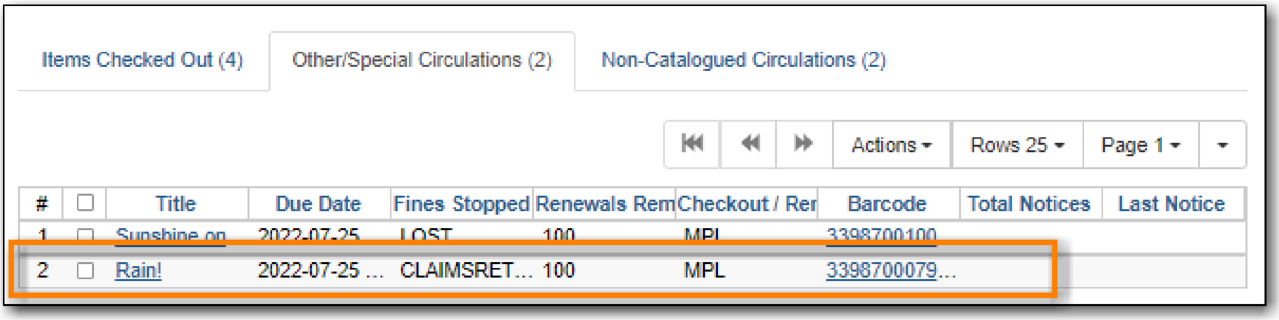


3. Enter the date on which the patron claims they returned the item and click **Submit**. If the chosen date is in the past any overdue fines will be adjusted accordingly.



4. The item’s status is updated to *Claimed Returned*. It remains associated with the patron’s account and is now displayed on the *Other/Special Circulations* tab.

NOTE	Some libraries prefer to use the status *Missing*. This can be set using the library setting *Claim Return: Mark copy as missing*.



5. The patron’s **Claims-returned Count** is automatically increased. This can be viewed in the patron summary and the *Edit* tab.

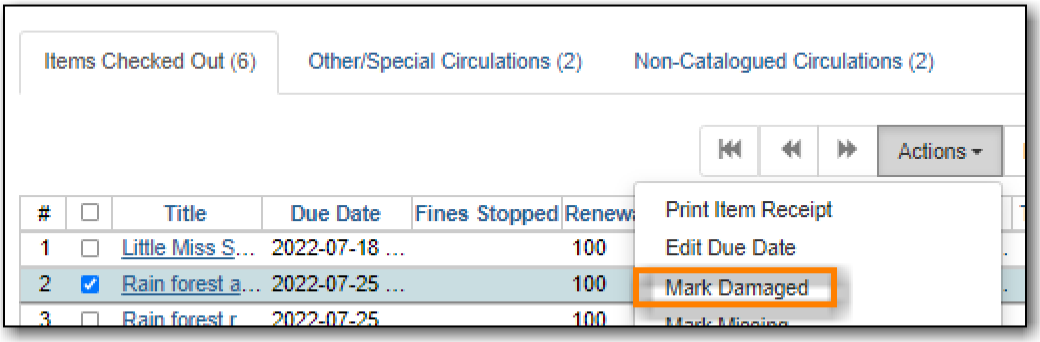
NOTE	Libraries can use the library setting *Max Patron Claims Returned Count* to set a maximum number of items a patron can claim as returned before a staff override is required.

A claimed returned items is resolved when it is checked in or when the status is updated to *Missing* or *Lost* following local library policy. An alert displays on check in to let staff know a claimed returned item has been found. When an item is located staff may wish to adjust the patron’s **Claims-returned Count** accordingly on the *Edit* tab.

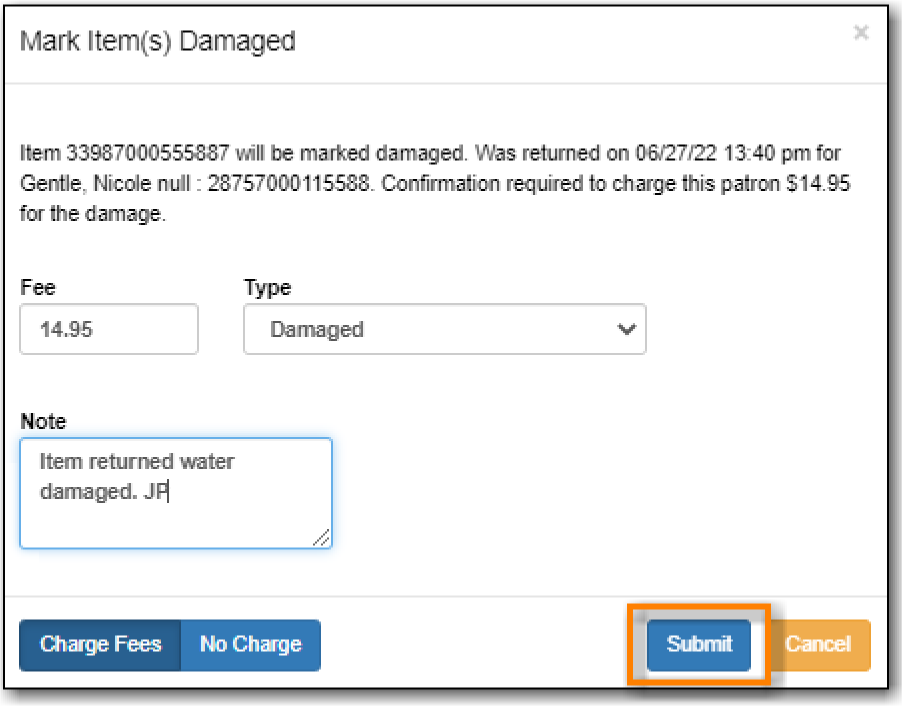
8.5.3. Damaged

If a patron damages an item it can be marked as damaged at check in, via the Item Status interface, or from within a patron’s account.

1. On the appropriate interface select the item and click **Actions** → **Mark Damaged**



2. A pop-up appears indicating that the item will be marked damaged. Click **Submit**.
3. If your library has the library setting *Charge item price when marked damaged* set to True a second pop-up will appear.
   a. If needed, adjust the amount being billed. The processing fee from the library setting *Charge processing fee for damaged items* is included in the total.
   b. Select the bill type from the drop down menu.
   c. If needed, add a note.
   d. If you are not charging the patron in this particular case, click **No Charge**.
   e. Click **Submit**.



4. The item's status is updated to *Damaged* and removed from the patron's account. If the patron has been billed for the damage the bill will display in the *Bills* tab. The bill displays as a single charge which includes the processing fee.

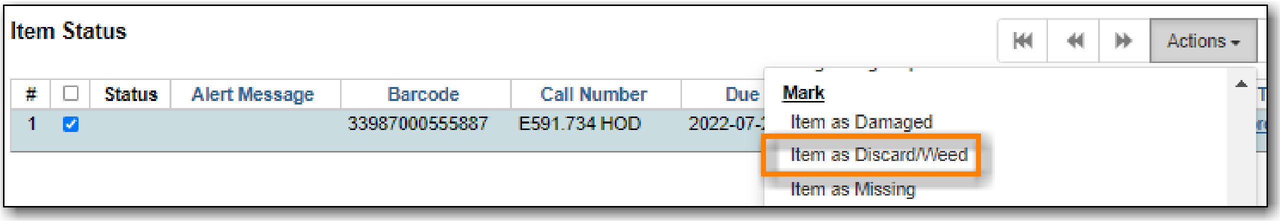
A damaged item is resolved when it is checked in to return it to circulation, when the status is updated to *Discard/Weed*, or when the item is deleted. An alert displays on check in to let staff know a damaged item has been checked in.

NOTE Checking in a damaged item does not affect any bills that were generated when the item was set to *Damaged*.

8.5.4. Discard/Weed

If an item is slated to be removed from the collection it can be marked as discard/weed at check in, via the Item Status interface, or from the Holds Shelf. Libraries may wish to use the *Discard/Weed* status when items to be discarded need to be reviewed before being deleted.

1. On the appropriate interface select the item and click **Actions** → **Mark as Discard/Weed**.



2. A pop-up appears where staff can confirm that they wish to mark the item by clicking **OK/Continue**.
3. The item is set to *Discard/Weed*.

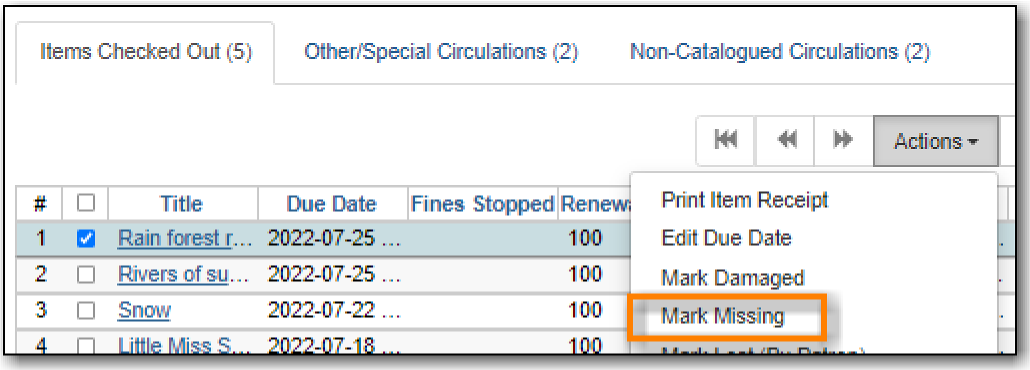
A discarded item is resolved when it is checked in to return it to circulation or deleted from Evergreen.

NOTE Staff may wish to put discarded items into item buckets to make it easier for subsequent staff to view and work with the items. See [cat-copy-bucket] for information on using item buckets.

8.5.5. Missing

If an item cannot be located it can be marked as missing via the Item Status interface, from within a patron's account, or from the Holds Shelf.

1. On the appropriate interface select the item and click **Actions** → **Mark Missing**



2. A pop-up appears where staff can confirm that they wish to mark the item by clicking **OK/Continue**.
3. If the item is currently checked out a second pop-up will ask staff to confirm that they wish to check in the item.

4. The item is set to *Missing* and, if previously checked out, is no longer associated with the patron's account.

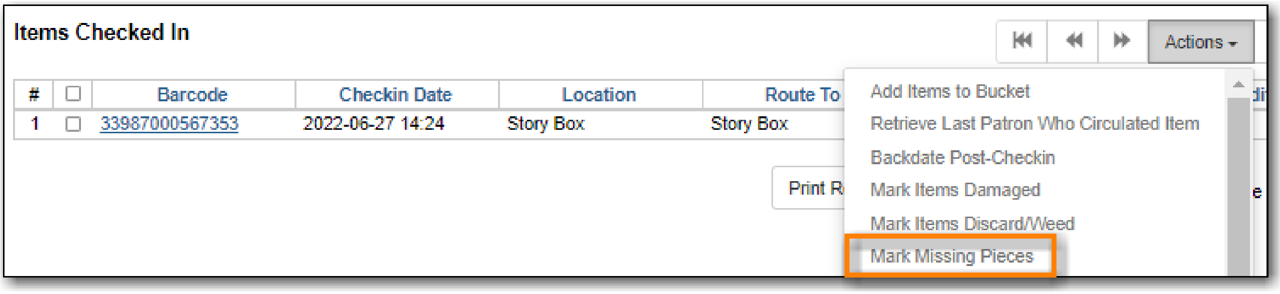
A missing item is resolved when it is found and checked in or when it is deleted from Evergreen.

8.5.6. Missing Pieces

If an item is returned with pieces missing it can be marked as missing pieces from Check In or the Scan Item as Missing Pieces interface. The feature currently functions slightly different depending on which interface it is accessed through.

Mark Missing Pieces via Check In

1. Go to **Circulation** → **Check In**.
2. Check the item in.
3. Select the item and click **Actions** → **Mark Missing Pieces**.

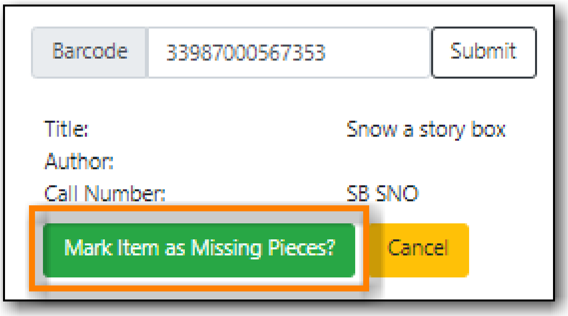


4. A pop-up appears where staff can confirm that they wish to mark the item by clicking **OK/Continue**.
5. A print dialog will appear. Staff can print the slip to keep with the item.
6. The *Create Note* pop-up will appear. Use the pop-up to create a note, alert, or block on the patron's account. This note can be set as patron visible so it displays to the patron in My Account.
7. Click **OK**.
8. The note is applied to the last borrower's account and the item is set to *Damaged* and checked back out to the patron's account.

NOTE This method of setting an item as missing pieces is missing the letter that is generated at the end of the process. If that letter is important to your workflow you should always mark items missing pieces via the Scan Item as Missing Pieces interface.

Scan Item as Missing Pieces

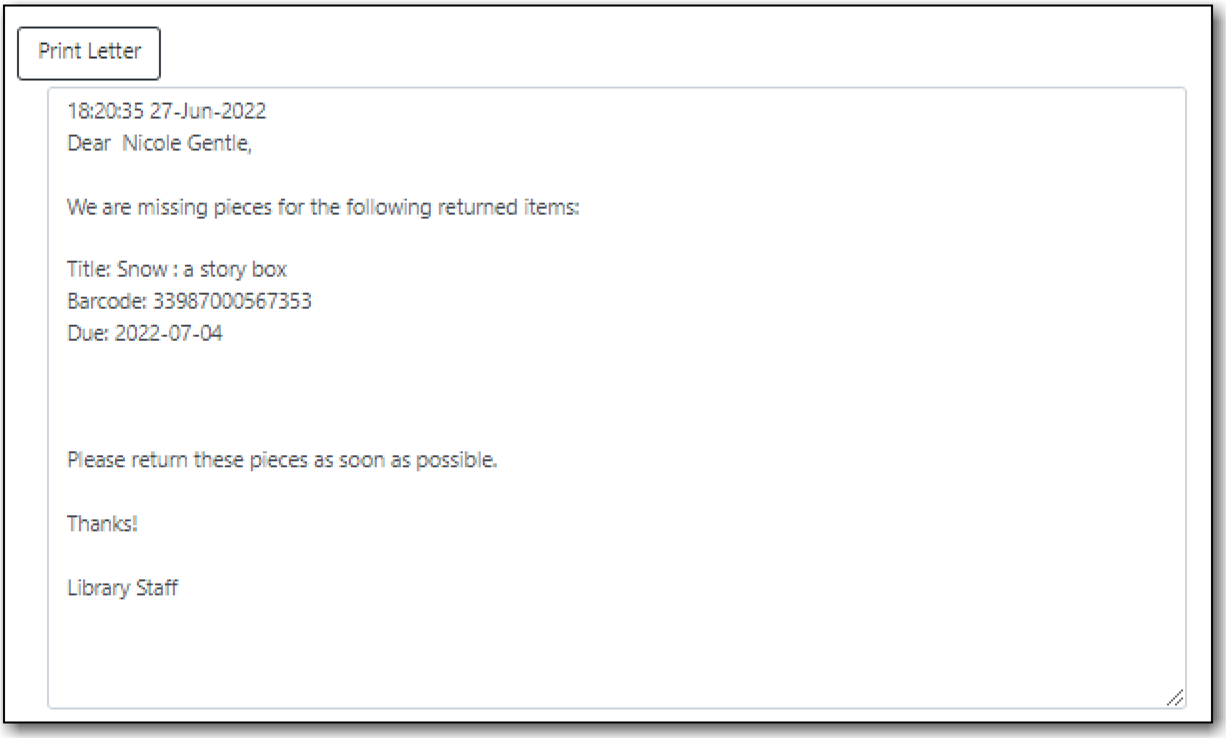
1. Go to **Circulation** → **Scan Item as Missing Pieces**.
2. Scan the item's barcode.
3. Click **Mark Item as Missing Pieces?**.



4. A print dialog will appear. Staff can print the slip to keep with the item.
5. The *Create Note* pop-up will appear. Use the pop-up to create a note, alert, or block on the patron's account.

NOTE This pop-up is the old Notes pop-up and is missing the functionality that allows staff to select the display depth and set a note as patron visible so it displays to the patron in My Account.

6. Click **OK**.
7. The note is applied to the last borrower's account and the item is set to *Damaged* and renewed on the patron's account, if there are remaining renewals.
8. A letter is generated that can be edited and then printed and mailed to the patron.



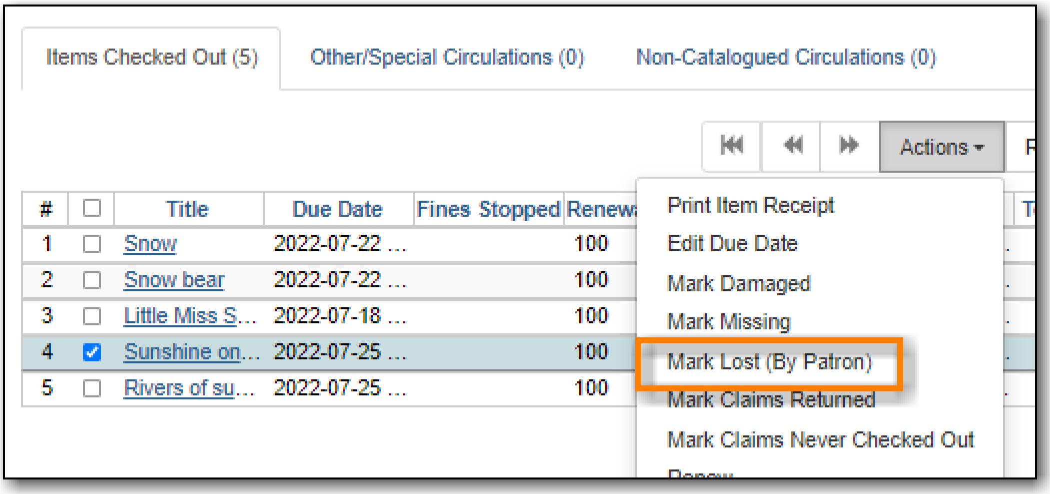
A missing pieces item is resolved when the pieces are returned and the item is checked in or the pieces are never returned and the item is deleted. Notes related to the item must be manually removed from the patron's account.

NOTE Libraries can choose to use a different item status for missing pieces instead of *Damaged*. The library setting *Item Status for Missing Pieces* is used to set this.

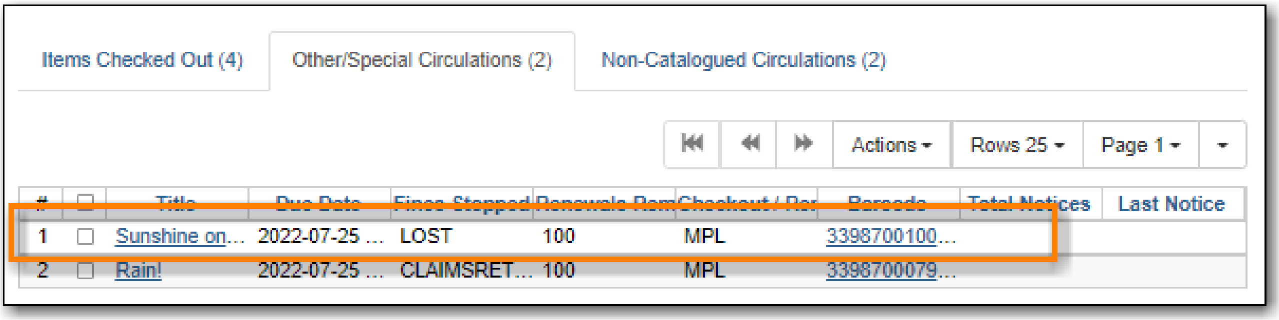
8.5.7. Lost

If a patron loses an item, it can be marked as lost in their account.

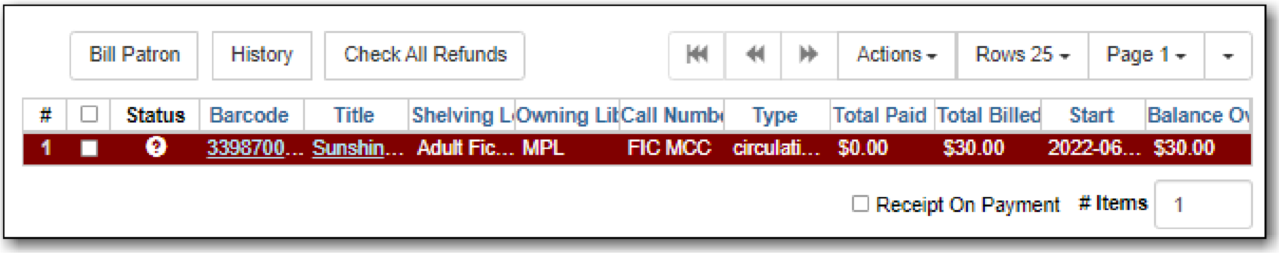
1. Go to the *Items Out* tab in the patron account.
2. Select the item and click **Actions** → **Mark Lost (By Patron)**.



3. The item's status is updated to *Lost*. It remains associated with the patron's account and is now displayed on the *Other/Special Circulations* tab.



4. A bill is automatically added to the patron's account on the *Bills* tab for the replacement cost of the item and displays in dark red. A processing fee is included if the library has a value in the library setting *Lost Materials Processing Fee*.



NOTE Evergreen can also automatically mark an item as lost after the item is a set number of days overdue. See Overdue Mark Lost Notification for information on this process.

A lost item is resolved when it is checked in or paid for. A checked in lost item will continue to display on a patron's *Other/Special Circulations* tab until all bills linked to the item are resolved.

This includes replacement charges, overdue charges, and manual charges added to the existing bills. See Bills and Payments for more information on managing **Lost** bills.

8.6. In-House Use

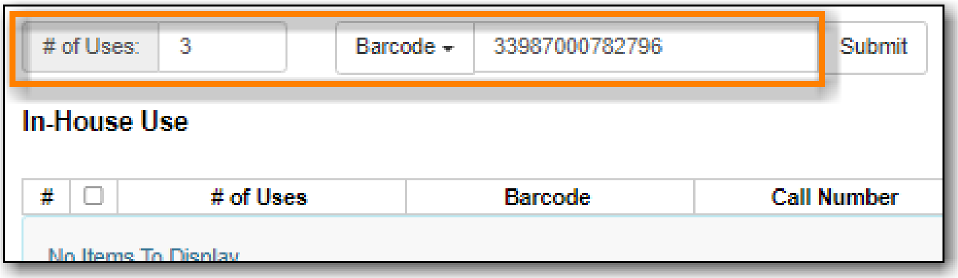
In-house use can be recorded for catalogued and non-catalogued items.

The library setting *Record In-House Use: # of uses thresholds for Are You Sure? dialog* allows you to set a threshold at which Evergreen will ask staff to confirm that they really want to record that many in-house uses. The library setting *Record In-House Use: Maximum # of uses allowed per entry* allows you to set a maximum number of uses that Evergreen will allow to be recorded at a time. These settings can be useful in preventing an accidental scan of a barcode in the *# of Uses* from inflating in-house statistics.

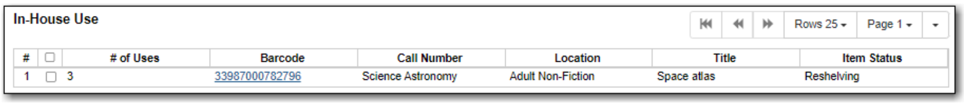
NOTE The statistics for in-house use are separate from regular circulation statistics. The in-house use count of catalogued items is not included in an item's total use count.

8.6.1. Catalogued Items

1. Go to **Circulation** → **Record In-House Use**.
2. Enter the number of uses if it is more than the default of 1.
3. Scan or enter barcode.



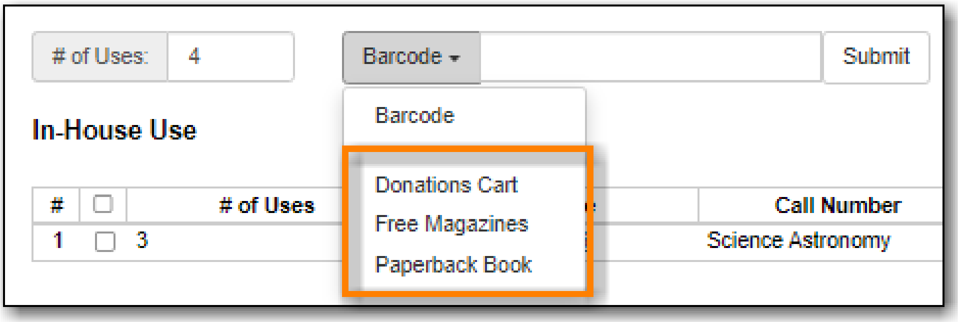
4. The in-house use will be recorded in the grid.



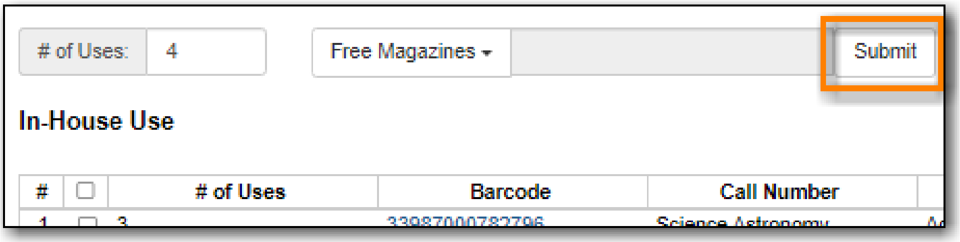
TIP Keep an eye on the *Item Status* column when recording in-house use. You may need to take further action if you find items with a status other than *Available* or *Reshelving*.

8.6.2. Non-catalogued Items

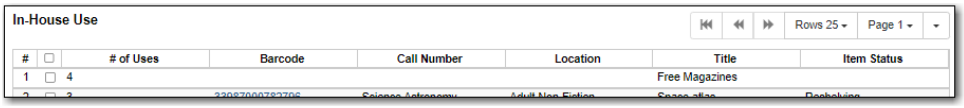
1. Go to **Circulation** → **Record In-House Use**.
2. Enter the number of uses if it is more than the default of 1.
3. Click on the drop down arrow in **Barcode** to choose the non-catalogued item type.



4. Click **Submit**.



5. The in-house use will be recorded in the grid.



8.7. Item Status

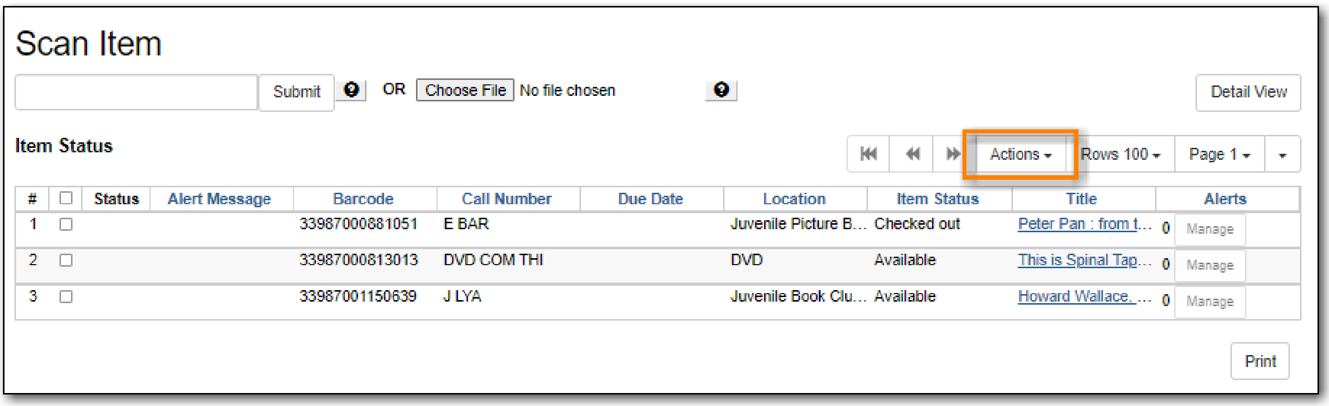
Sitka Snippet Video - Item Status (2:26)

Sitka Snippet Video - Batch Update (4:30)

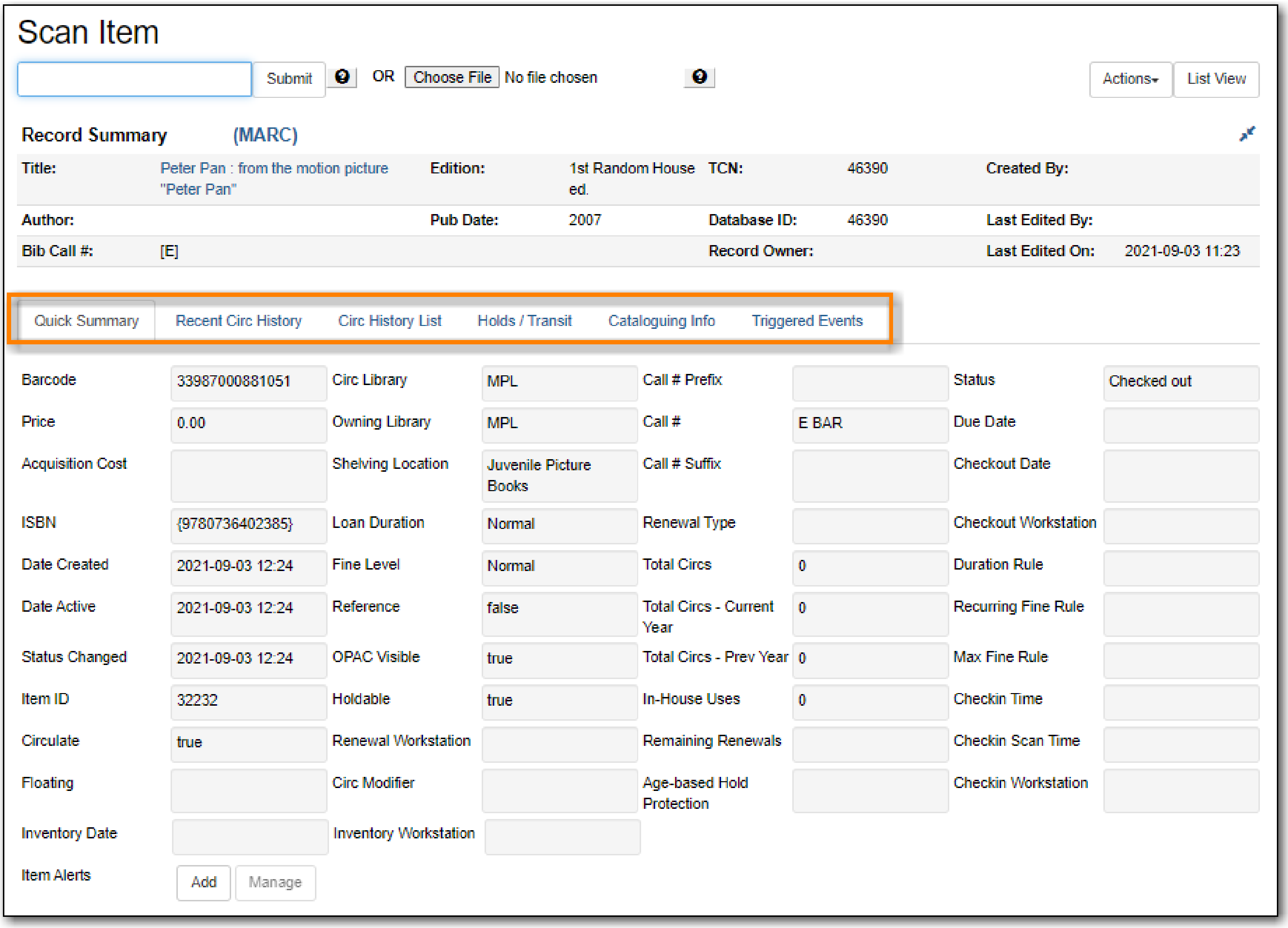
The *Item Status* screen is very useful to circulators and cataloguers at your library. Scanning a barcode into *Item Status* does not affect the item's current status.

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.

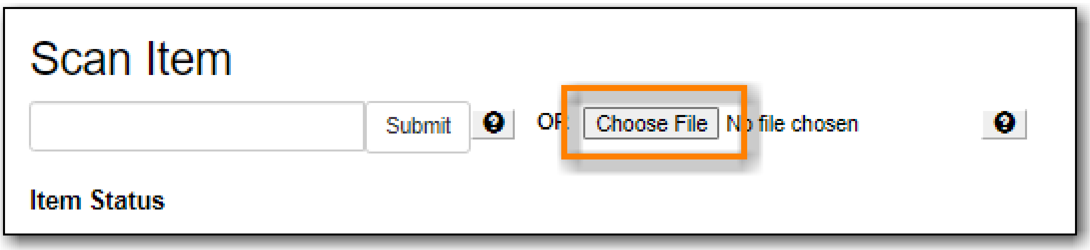


Clicking on the item's title in either the *List View* or *Detail View* will open the record in the staff catalogue.

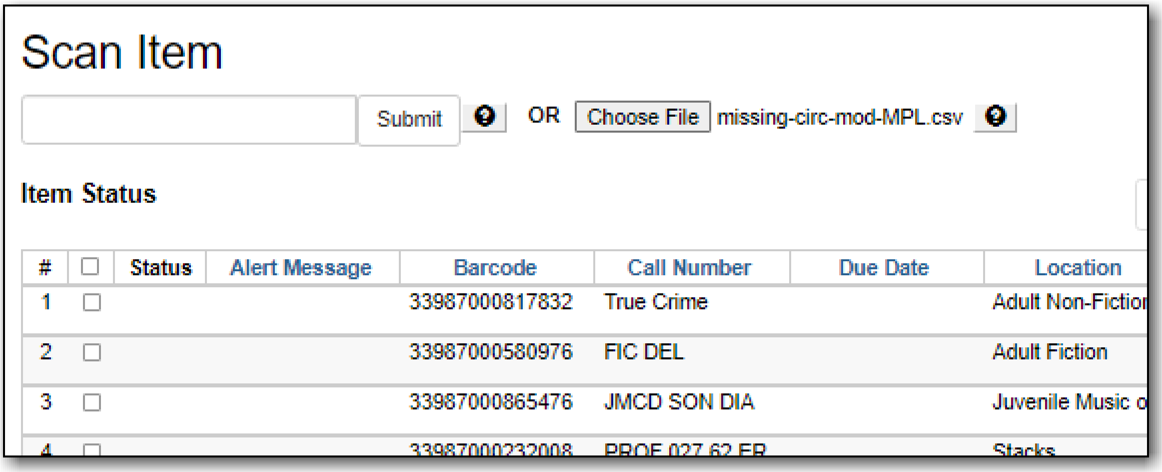
8.7.1. Upload from File (Choose file)

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.

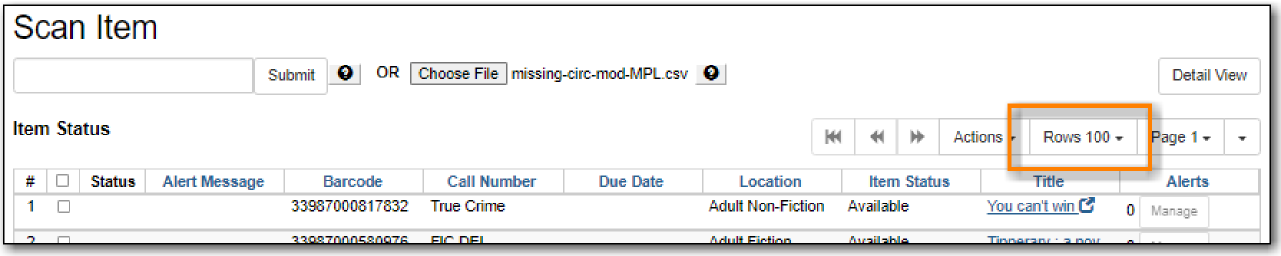
1. Run a report in Evergreen to list the items you'd like to load into *Item Status*.
2. Open the report in a program like Excel and remove all columns other than the barcode column, remove the header row, and save the file as a .csv file.
3. In Evergreen, open *Item Status*.
4. Click **Choose File**.



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.



Chapter 9. Bills and Payments

9.1. Billing a Patron

There are two categories of bills in Evergreen:

System Generated Bills

Bills created by Evergreen show a type of *circulation*. Evergreen will generate bills when items are marked as lost or damaged and include any set processing fees. Additionally, once an item is overdue, Evergreen will generate on-going overdue fines based on a library's circulation policies; overdue fines are generated overnight.

Staff Generated Bills

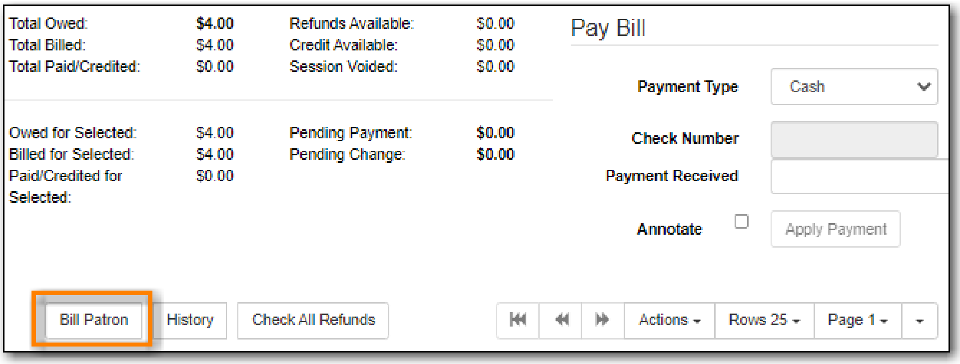
Bills created manually by staff show a type of *grocery*. Sitka libraries share a list of billing types which staff can choose from.

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.

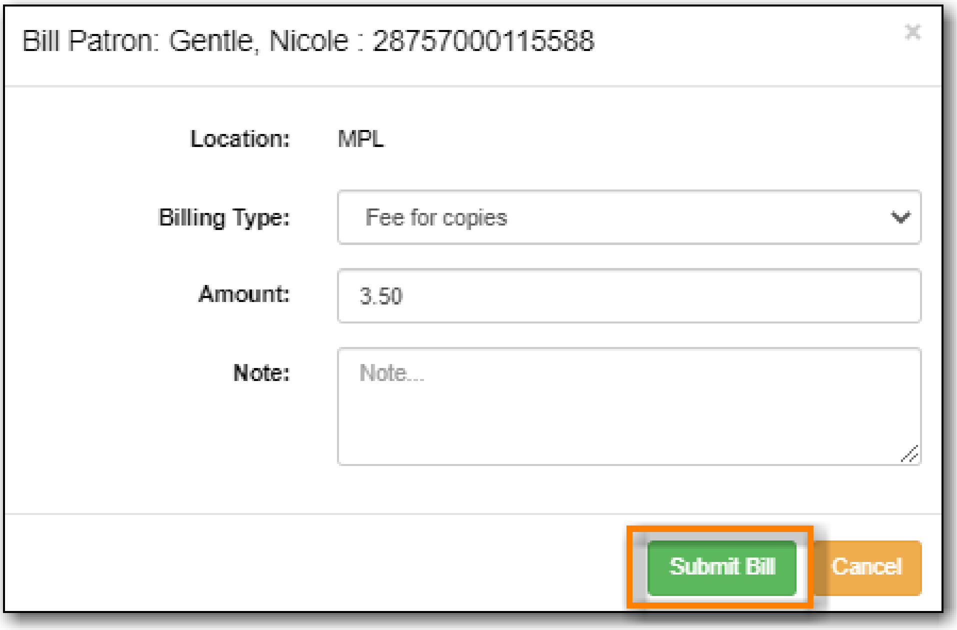
9.1.1. Creating a Bill

Staff can manually add bills to a patron's account for fees like non-resident memberships, photocopying, replacing lost library cards, and more.

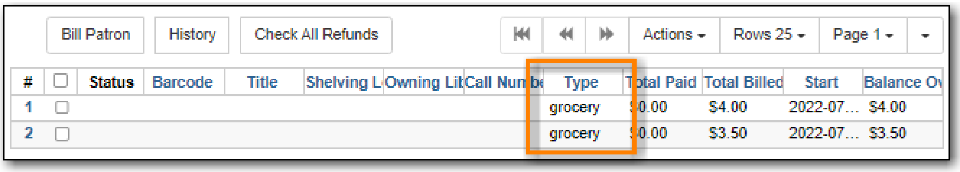
1. In the patron's account click on the **Bills** tab.
2. Click **Bills** in patron account.
3. Click **Bill Patron**



4. In the pop up that appears, select the appropriate billing type from the drop down menu.
5. Enter the amount you wish to bill the patron.
6. Optionally, include a note about the bill.
7. Click **Submit Bill**.



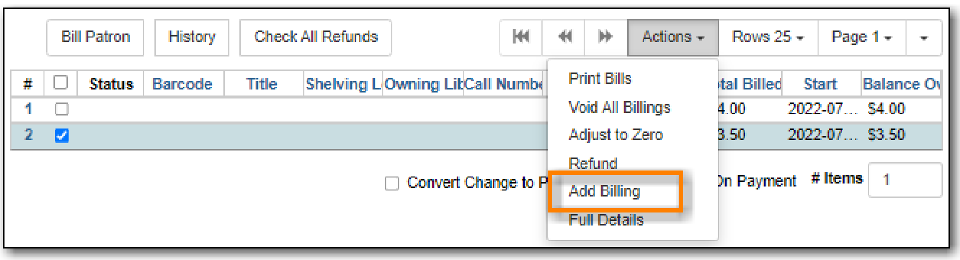
8. The bill will display with a type of *grocery* to indicate that the bill was manually created by staff.



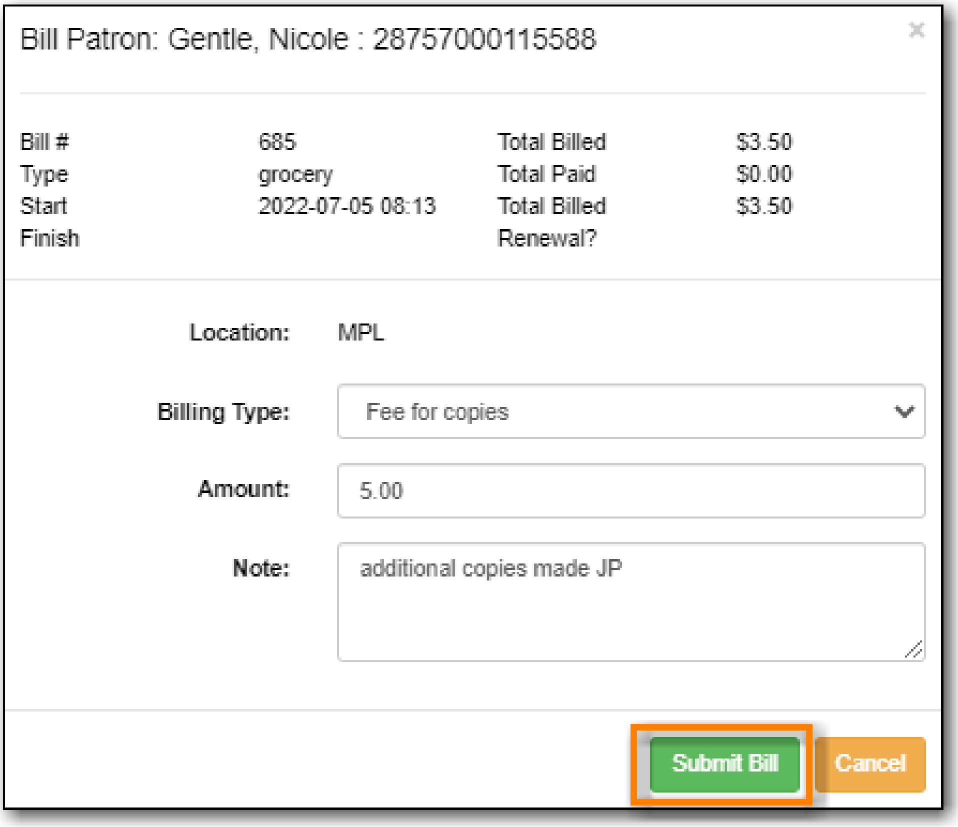
9.1.2. Adding a Charge to an Existing Bill

If the patron incurs additional charges that are related to existing charges, staff can add the new charge to the existing one instead of creating a new bill.

1. In the patron's account click on the **Bills** tab.
2. Select the bill you wish to add additional charges to and click **Actions** → **Add Billing**.



3. In the pop up that appears, select the appropriate billing type from the drop down menu.
4. Enter the amount you wish to bill the patron.
5. Optionally, include a note about the bill.
6. Click **Submit Bill**.



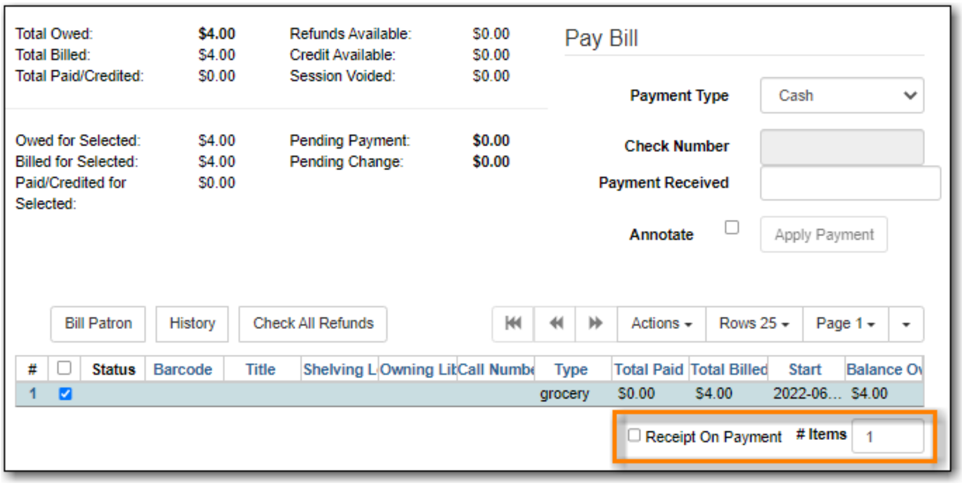
7. The bill will be updated to reflect the new total.

9.2. Making Payments

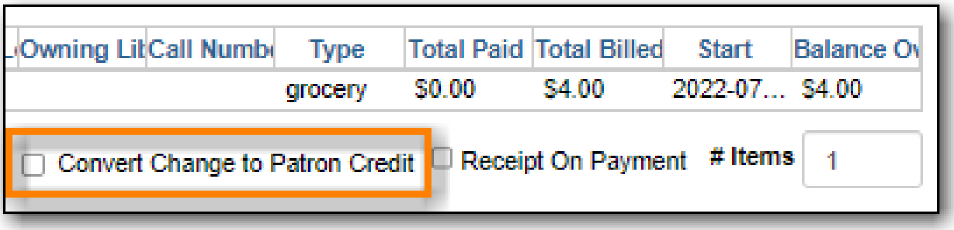
Bills can be paid by cash, cheque, or credit, or be resolved by forgiveness, work, or goods.

If the patron should not have to pay the bill (e.g. the patron should not have been billed in the first place) see Adjusting the Bill Balance to Zero and Voiding Bills for additional options to resolve the bill.

1. In the patron's account click on the **Bills** tab.
2. Select or de-select bills to pay. Oldest bills are paid first by default.
3. If the patron would like a printed receipt check the box for **Receipt On Payment** and enter the number of copies to print in the # **Items** field.

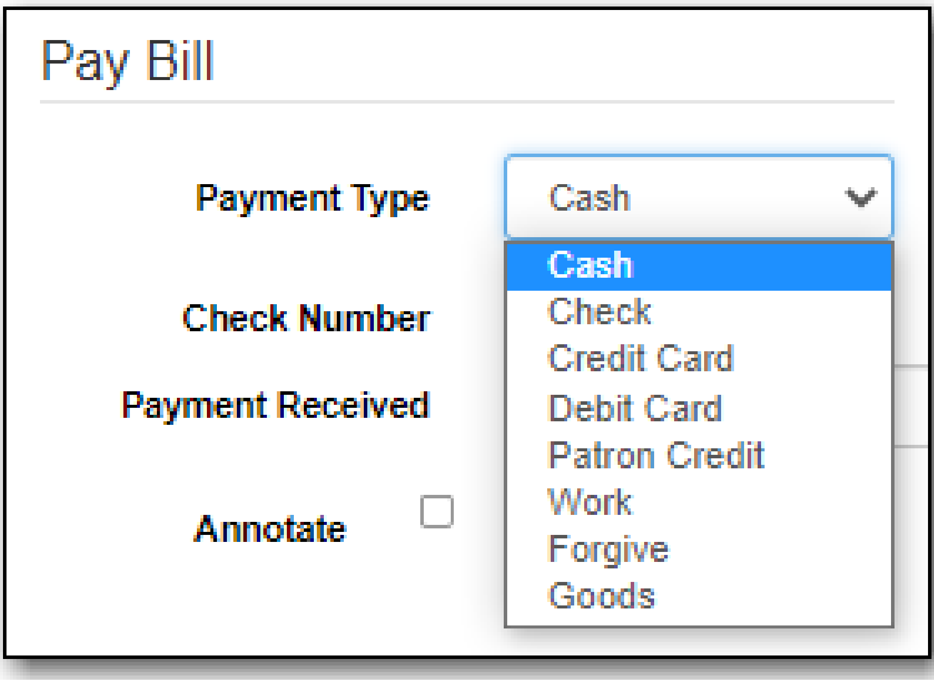


4. If the patron is paying in cash and would like their change added as credit to their account check the box for **Convert Change to Patron Credit**.



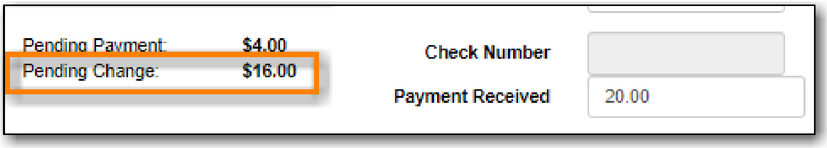
NOTE Libraries that do not allow patrons to have credit can set the library setting *Disable Patron Credit* to TRUE to turn off this feature.

5. Select the payment type from the drop down menu.

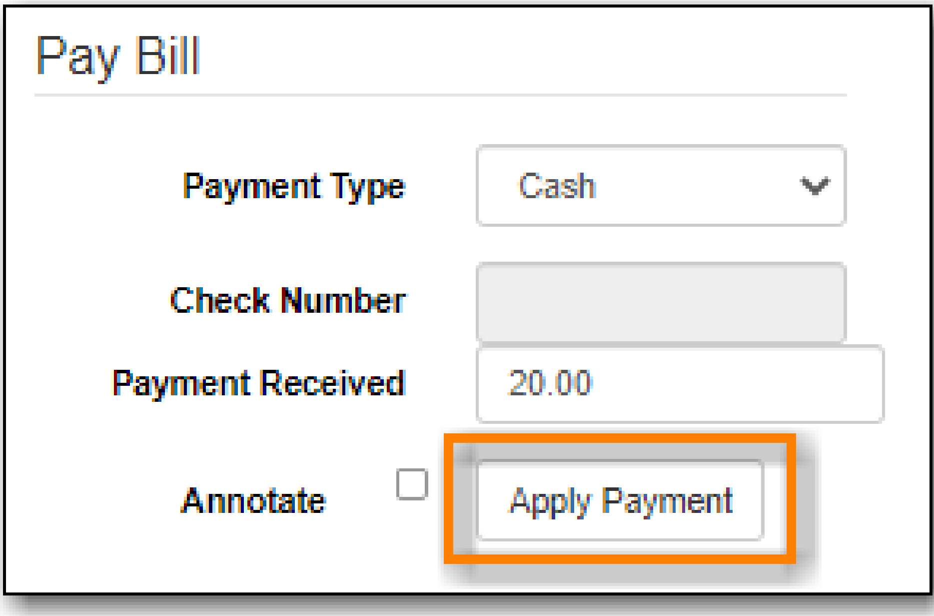


6. Enter the amount given by the patron in the **Payment Received** field.

TIP If the patron is paying in cash you can enter the total amount received and the amount of change to give to the patron will display in the *Pending Change* field.



7. Check the box for **Annotate** if you wish to include a note with the payment.
8. Click **Apply Payment**.



9. The payment is applied and a receipt will print if that option was checked.

NOTE Details of payments can be seen by clicking on the History button.

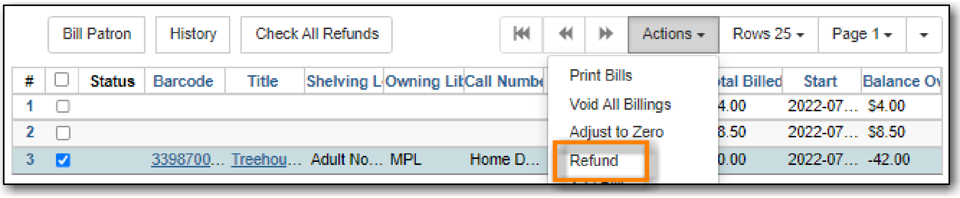
9.3. Refunding Payments

If a paid bill is voided, either by staff or by the system, it may result in a negative balance on the patron's account. 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.

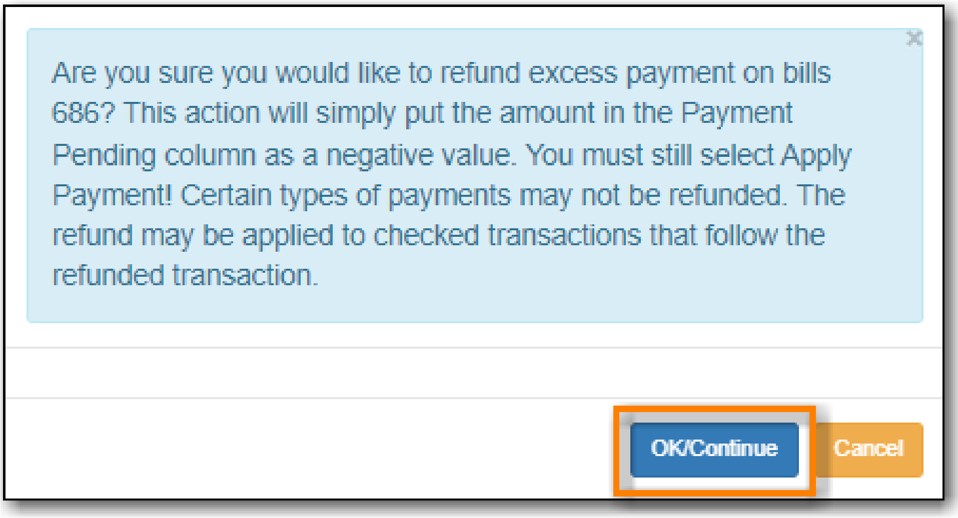
On occasion staff may need to manually void a payment in order to trigger the refund. See Voiding a Paid Bill.

NOTE The most common scenario resulting in a negative balance is a lost item that has been paid for being returned within the library's refund interval. See LINK for information on lost settings.

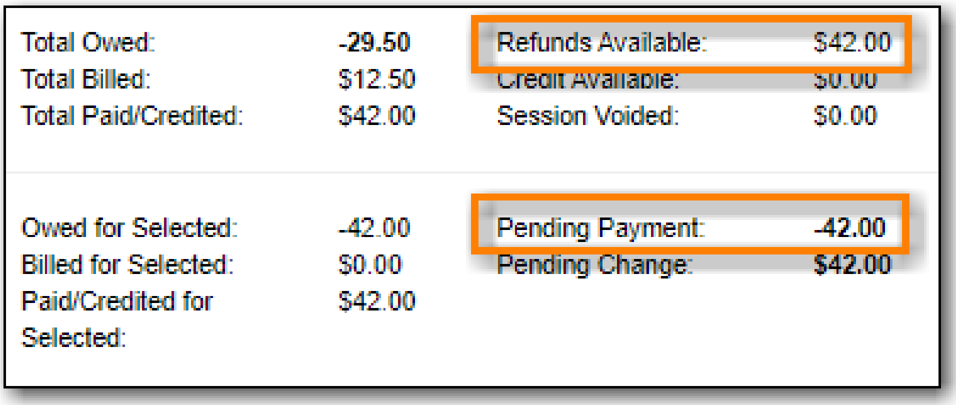
1. In the patron's account click on the **Bills** tab.
2. Select the line for the refund and go to **Actions** → **Refund**.



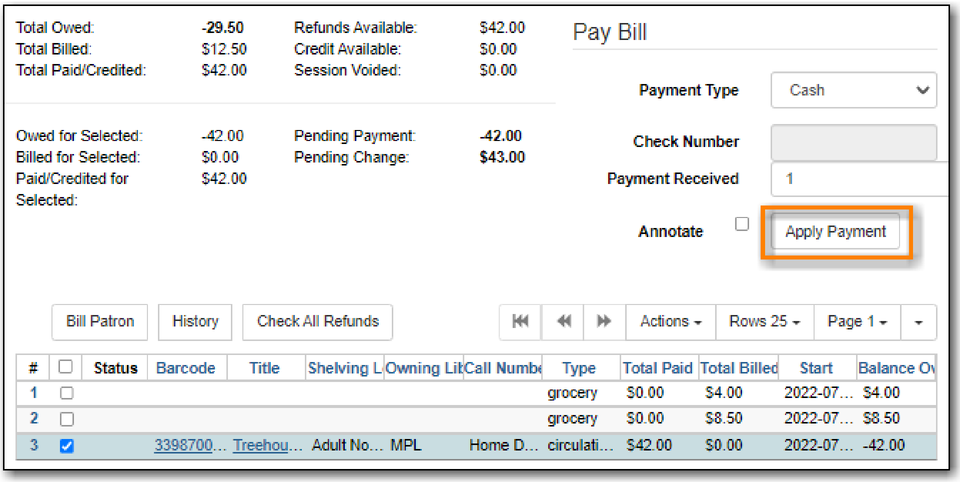
3. Click **OK/Continue**.



4. In the summary section of the **Bills** tab you will see the amount you are refunding reflected in the *Refunds Available* and *Pending Payment* fields.



5. 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.)
6. Click **Apply Payment**.



7. The payment has been refunded and you can return the money to the patron.
8. A record of the refund is available in the patron's bill history in the full details of the payment.

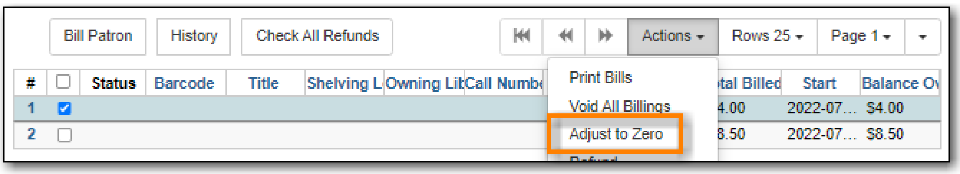
9.4. Adjusting the Bill Balance to Zero

This function sets any balance to zero and can be used to clear bills that you have determined the patron should not pay, possibly because they shouldn't have been billed in the first place. A record of the adjustment is kept in the patron's transaction history.

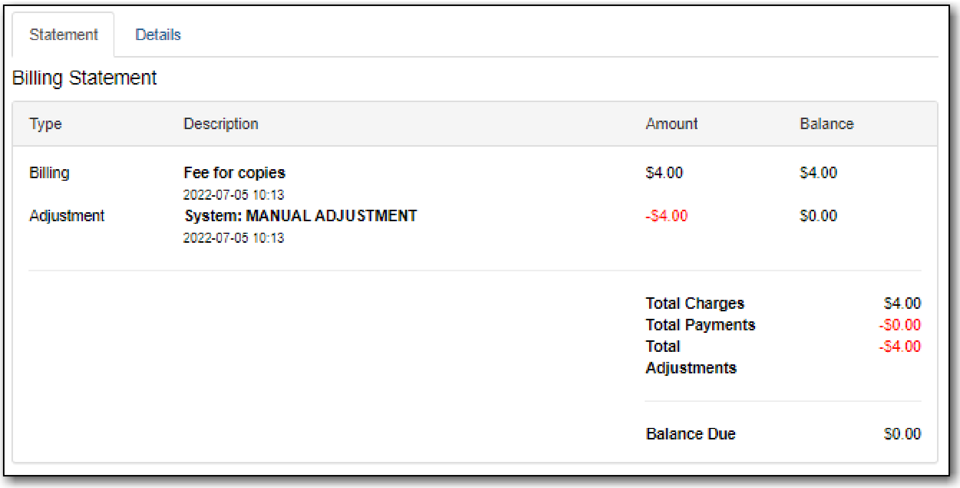
For bills that the patron should have been billed but that staff are choosing to forgive Co-op Support recommends using the *Forgive* payment instead to enable staff to track amounts that are forgiven. See Making Payments.

Adjust to zero can also be used to clear a negative balance from a patron account. If money is being returned to the patron staff should refund the payment instead of adjusting it.

1. In the patron's account click on the **Bills** tab.
2. Select the bill line item and click **Actions** → **Adjust to Zero**.



3. Click **OK/Continue** on the pop-up that appears.
4. The bill has been adjusted to zero and no longer appears on the bill screen.
5. A record of the adjustment is available in the patron's bill history in the full details of the payment.



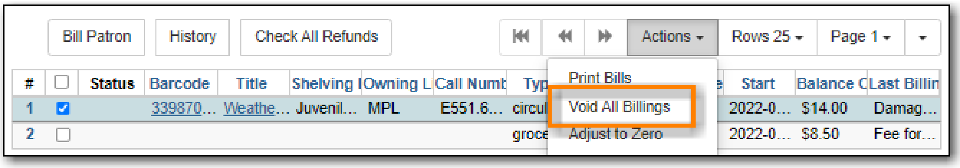
9.5. Voiding Bills

Local system administrators can void bills, either entirely or in part.

9.5.1. Voiding a Bill

When an entire bill is voided there is no record of the bill or that is was voided. Co-op Support recommends you use the adjust to zero function instead of voiding entire bills.

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

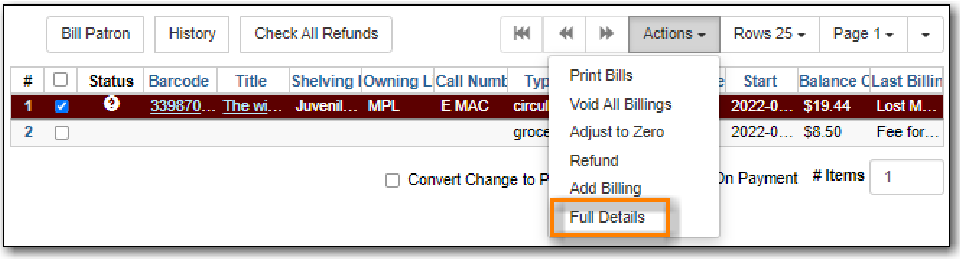


3. Click **OK/Continue** on the pop-up that appears.
4. The bill will no longer display on the patron's bill tab. There is no record in the patron's account of the bill.

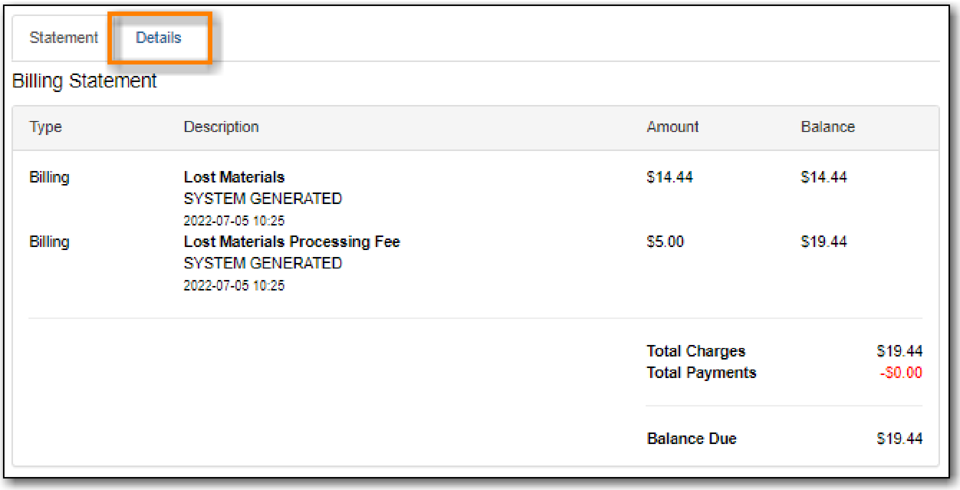
9.5.2. Voiding Part of a Bill

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.

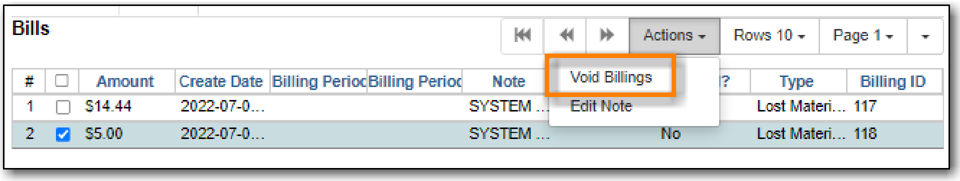
1. In the patron's account click on the **Bills** tab.
2. Select the bill line you wish to partially void and click **Actions** → **Full Details**.



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**.



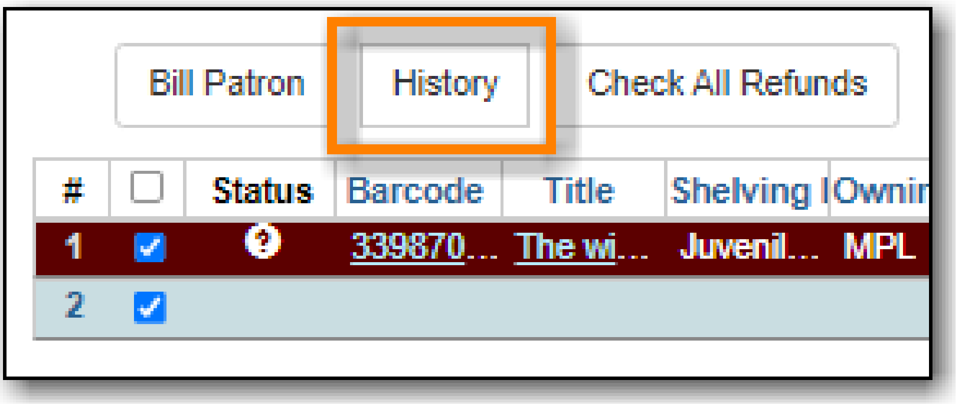
CAUTION	Due to a bug, you must have the column Billing ID displayed in order to select individual bill lines.

5. Click **OK/Continue** on the pop-up that appears.
6. The amount owing for the bill will be updated.

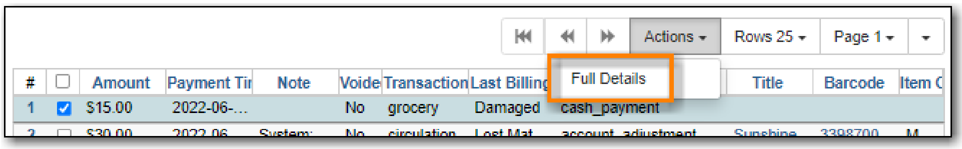
9.5.3. Voiding a Paid Bill

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

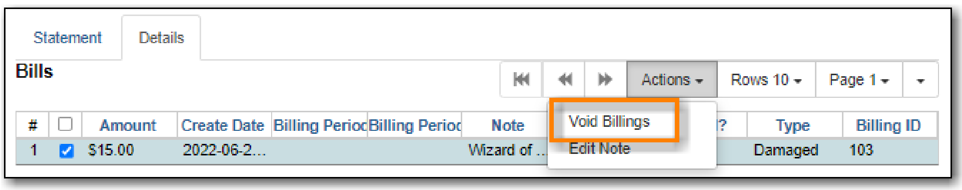
1. In the patron's account click on the **Bills** tab.
2. Click **History**



3. Click on the **Payments** tab.
4. Select the relevant transaction and go to **Actions** → **Full Details**.



5. The bill will open on the Statement tab. Click the **Details** tab.
6. Select the bill(s) you wish to void and go to **Actions** → **Void Billings**



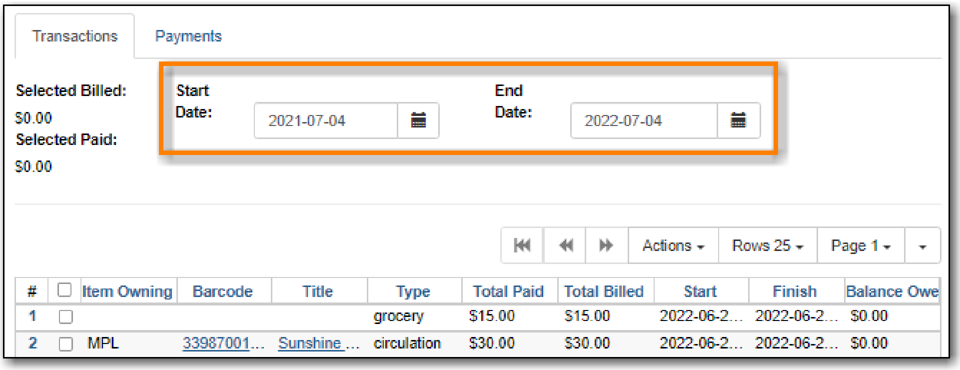
7. Click **OK/Continue** on the pop-up that appears.
8. The patron will now have a credit of the amount voided on their account.

9.6. Viewing Bill History

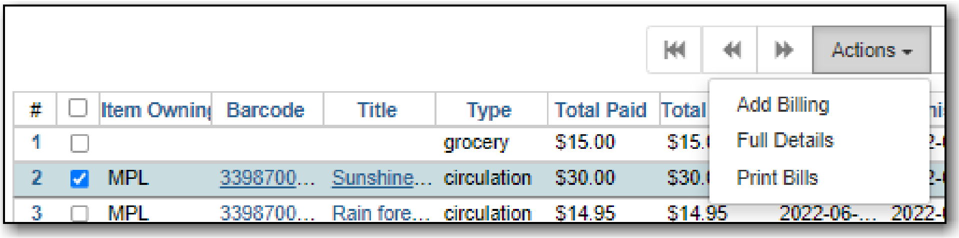
In bill history, staff can see both open and closed transactions that have taken place with the patron's account, as well as a history of payments made by the patron.

9.6.1. Transactions Tab

1. In the patron's account click on the **Bills** tab.
2. Click **History**
3. By default transactions from the last 12 months will display. Use the calendar widgets to choose select a different timeframe if needed.



4. Select a line and go to the **Actions** menu to see the full details, add billing, or print the bill out.

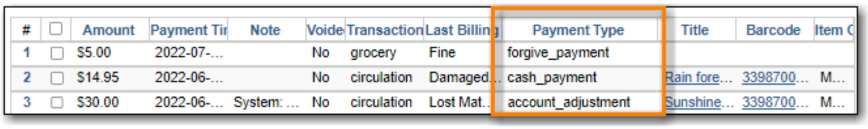


9.6.2. Payments Tab

1. In the patron’s account click on the **Bills** tab.
2. Click **History**
3. Select the **Payments** tab.
4. By default transactions from the last 12 months will display. Use the calendar widgets to choose select a different timeframe if needed.
5. For more information about a particular payment, select the line item and click **Actions** → **Full Details**.

TIP

The value in the Payment Type field will show how the bill was paid.



Bills can be paid automatically by the system adjusting bills when lost items are returned or manually by staff accepting a form of payment, using patron credit or forgiving a patron’s fines.

Chapter 10. Holds

10.1. Working with Holds

10.1.1. Basic Hold Workflow

1. A hold is placed by the patron or by library staff on behalf of the patron
2. Library staff capture the hold. This can happen when an item on hold is returned and checked in or when staff pull and check in available items listed on the pull list.
3. The patron is notified automatically by text or email, or manually by staff
4. The item is placed on the hold shelf.
5. The hold is complete when the patron checks out or cancels their hold or when staff cancel or clear the hold.
6. Staff regularly check their hopeless holds list to resolve unfillable holds.

10.1.2. Is it Holdable?

A number of factors determine whether or not a hold can be placed.

- The status of the item
  - Some item statuses are not holdable
- How the item is catalogued
  - Shelving locations can be set to Holdable = NO
  - Items can be set to Holdable = NO
- The library's hold policies can block holds based on:
  - Patron types
  - Circulation modifiers
  - Owning/Pickup library
  - Age based hold protection
  - Maximum number of holds allowed at a time
- The library setting *Has Local Copy Block*
  - When this is set to TRUE holds cannot be placed on available items

Individual patrons can also be blocked from placing holds due to exceeding group penalty thresholds.

10.1.3. 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.

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.)
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

Hold level	Abbreviation	When to use How to use	Who can use	Hold tied to
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

10.1.4. Hold Statuses

Holds will have one of the following statuses:

Status	Description
Cancelled	The hold has been cancelled. Staff need to check the item in to return it to circulation or capture the next hold.
In Transit	The item is in transit to the pickup library from another library.
Ready for Pickup	The item is on the holds shelf and ready for pick up. The status of the item will show as *On Holds Shelf*.
Reserved/Pending	The hold has been captured and has not been put on the holds shelf. The status will be automatically changed to *Ready for Pickup* once the delay period specified in library setting *Hold Shelf Status Delay*.
Suspended	The hold is suspended and will not be filled until it is automatically or manually activated.
Waiting for Capture	An available item has been assigned to the hold but it hasn't been captured for the hold yet. The item will display on the *Pull List for Hold Requests*.
Waiting for Item	All holdable item are currently checked out or otherwise not available.
Wrong Shelf	The pickup library for the hold has changed. Staff need to check the item in to send it into transit to the new pickup library.

10.1.5. Age Based Hold Protection

Age based hold protection enables libraries to block holds from being filled for patrons from other libraries or branches until the item has been active for a specified amount of time.

Age based hold protection can be set up as part of your hold policies or can be applied on a per item basis via item attributes. Protection via hold policies will apply to holds on all items or holds using specified circulation modifiers. Protection via item attributes is applied by cataloguers on an item by item basis.

Single branch libraries can use age based hold protection via hold policies OR via item attribute; you should not use both at the same time. Multi-branch libraries can use a combination of age based hold protection through hold policies AND item attributes to control hold filling between their branches and other libraries.

Make sure you know if and how your library does age based hold protection.

10.2. Placing Holds

Sitka Training Video - Placing Holds (6:18)

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

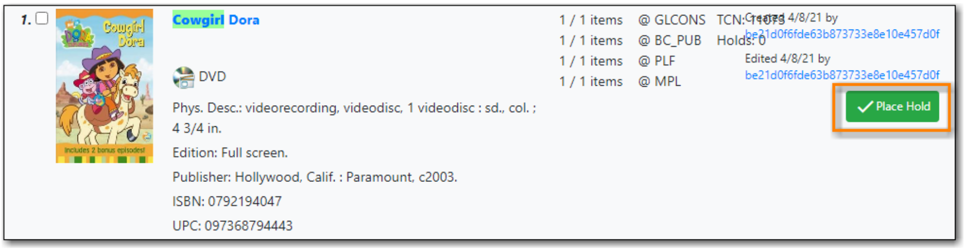
Sitka Snippet Video - Suspend a Hold While Placing the Hold (1:10)

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

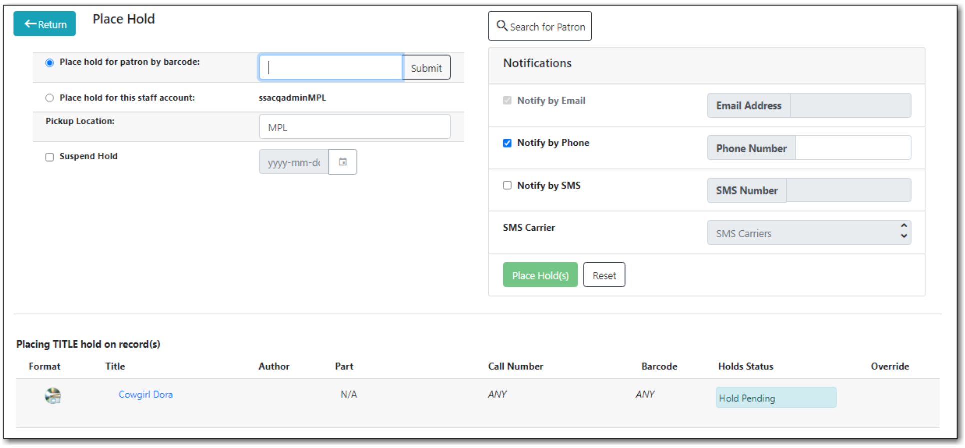
10.2.1. Placing Title Level Holds

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

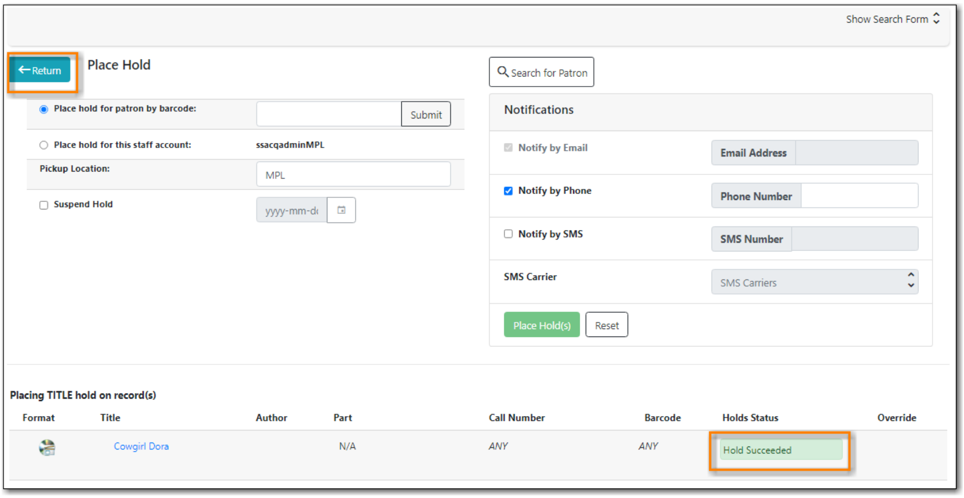
1. To place a title level hold, click the **Place Hold** button to the right of the record on the search result list, or on the record summary screen.



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.

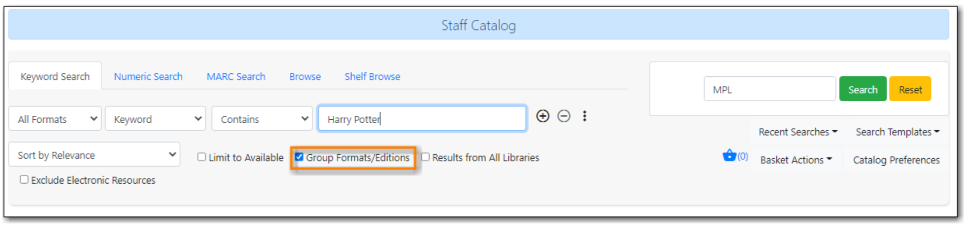


10.2.2. Placing Meta-record Level Holds

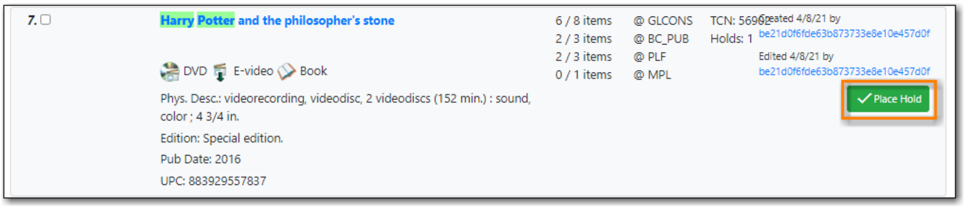
You can request acceptable formats and languages of a title at time of hold placement, or you can group formats at time of search. Records are grouped by title, author, and format. Format information is from the MARC record leader and fixed fields.

Group Formats and Editions Search

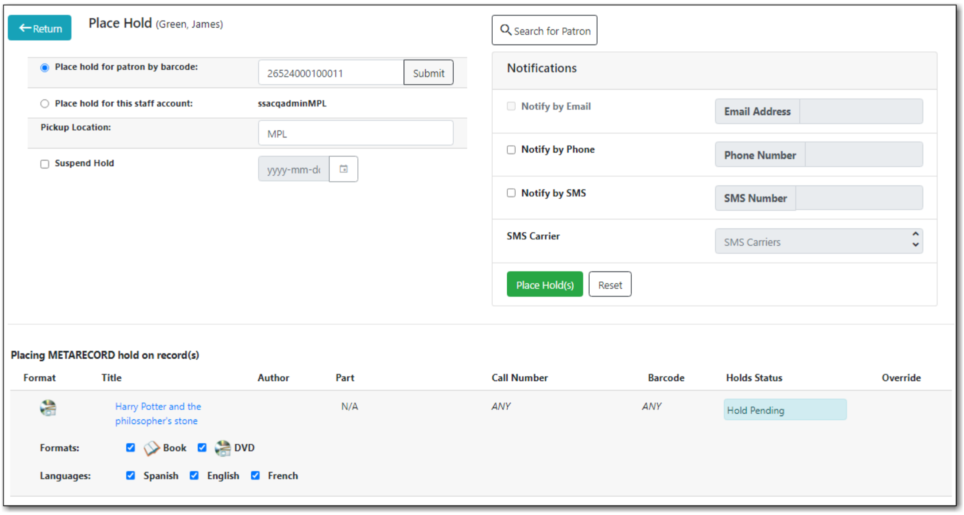
1. On the **Keyword Search** tab, check the box for **Group Formats and Editions**.



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



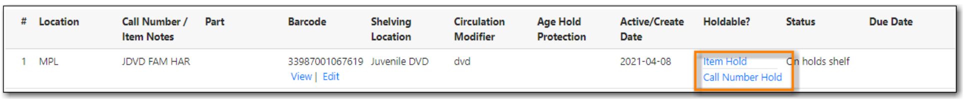
5. Click **Place Hold(s)**.

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.

10.2.3. Placing Call Number and Item Level Holds

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 the **Holdable?** column.



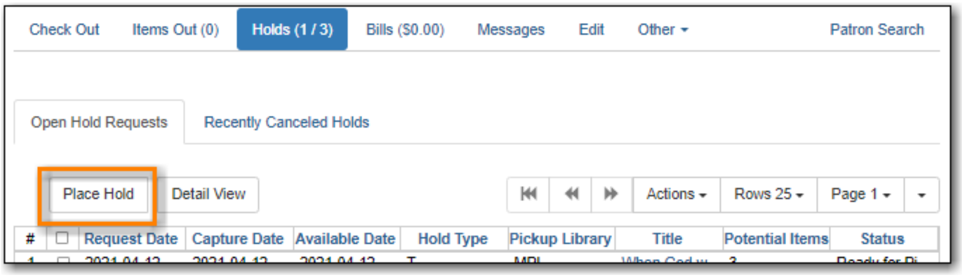
3. Edit the patron hold notification fields as required and click **Submit**.

CAUTION	Co-op 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. Do not use Recall Hold or Force Item Hold.

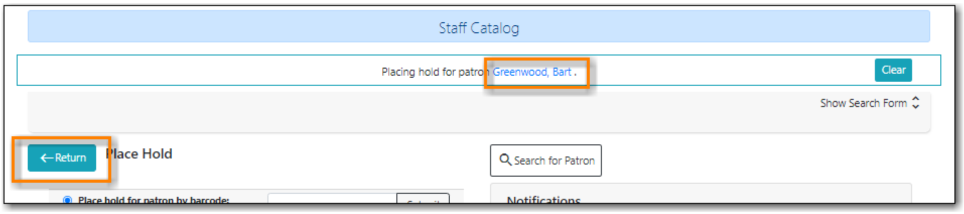
10.2.4. Placing Holds via a Patron Account

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

1. Click the **Holds** tab in the patron's account .
2. Click **Place Hold**.



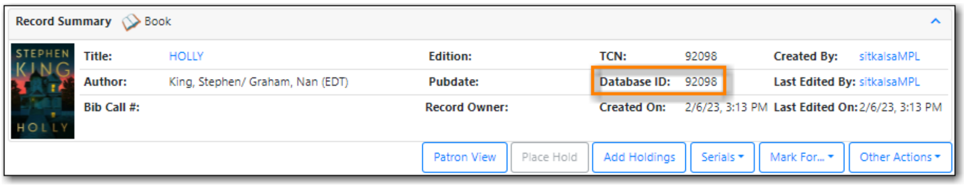
3. The catalogue will open.
4. Search for the title and place your hold as described in Placing Holds.
5. Click **Return** to return to your search results or click on the patron's name to return to the patron's account.



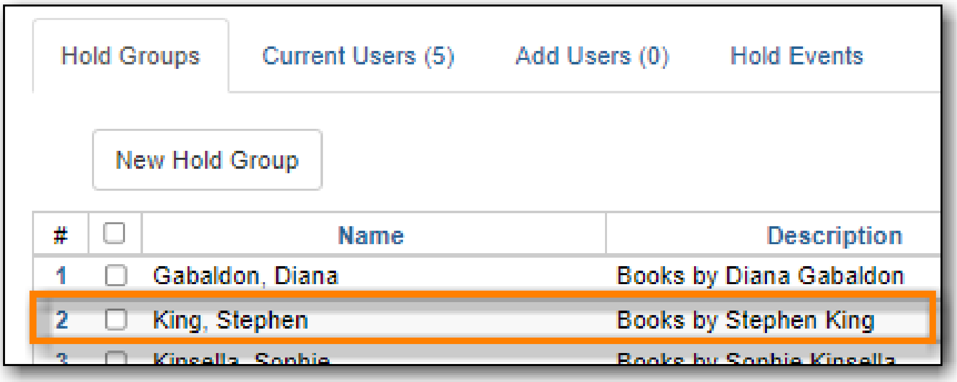
10.2.5. Placing Holds For a Hold Group

Holds can be placed for an entire hold group at once:

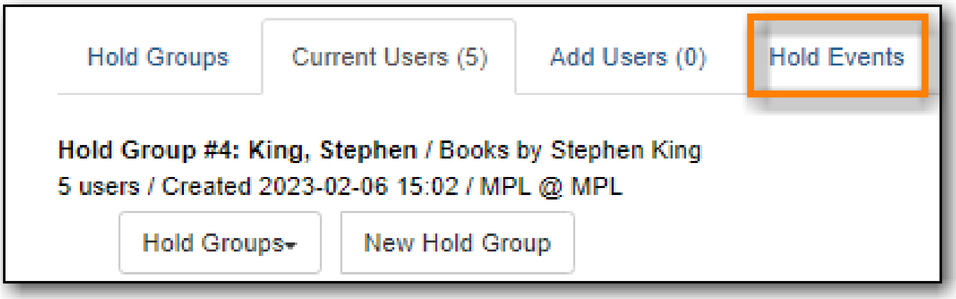
1. In the staff catalogue find the bibliographic record for the title you would like to place the group hold on.
2. Copy or record the *Database ID* for the record.



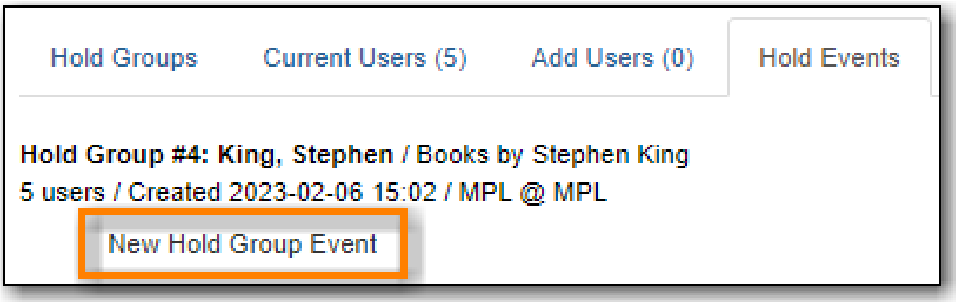
3. Go to **Circulation** → **Hold Groups**.
4. From the **Hold Groups** tab, double-click the hold group you wish to open.



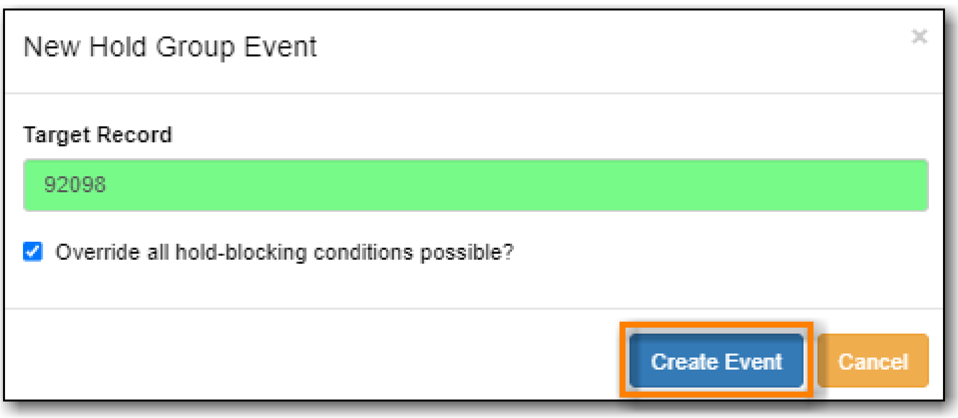
5. The group will be opened on the **Current Users** tab. Click on the **Hold Events** tab.



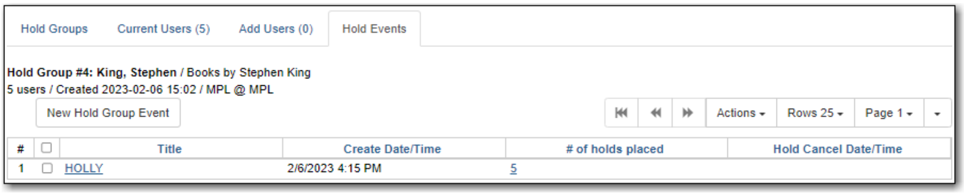
6. Click on **New Hold Group Event**.



7. Enter the Record ID number for the bibliographic record on which you wish to place the hold.
8. Use the checkbox to override all hold-blocking conditions possible if desired.
9. Click **Create Event**.



10. Holds are placed for all members of the groups.



NOTE When the library setting *Randomize group hold order* is set to TRUE Evergreen will randomize the patrons in the group when the holds are placed so the same patron isn't always first in line.

10.2.6. Hold Placement Status Messages

When placing a hold in the staff client library staff may see the following messages in the *Holds Status* column:

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 items attributes 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.

The following messages indicate that the patron's account has a system or staff generated block on it preventing holds from being placed. The thresholds for staff generated blocks are determined by your group penalty thresholds.

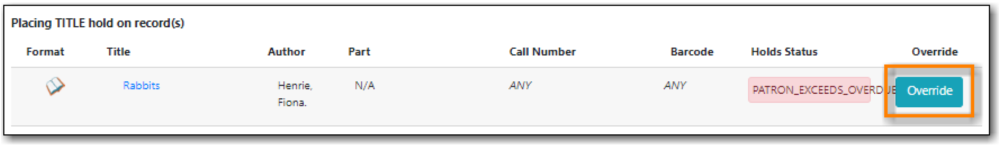
PATRON_EXCEEDS_FINES - This indicates that the patron has a system generated block because they have exceeded your fine threshold.

PATRON_EXCEEDS_OVERDUE_COUNT - This indicates that the patron has a system generated block because they have exceeded your overdue item threshold.

PATRON_EXCEEDS_LOST_COUNT - This indicates that the patron has a system generated block because they have exceeded your lost item threshold.

STAFF_CHR - This indicates that the patron has had a manual block placed on their account by staff.

Staff with appropriate permissions can choose to override these blocks and place the hold.

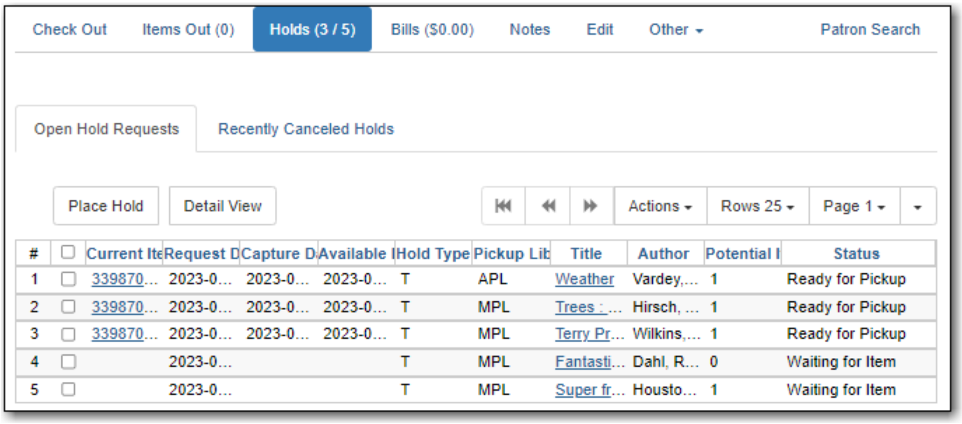


10.3. Viewing Holds

10.3.1. Via the Patron Account

Library staff can view a patron's current holds and recently cancelled holds from within the patron's account.

1. Open the patron's account.
2. Select the **Holds** tab.
3. By default **Open Hold Requests** display.

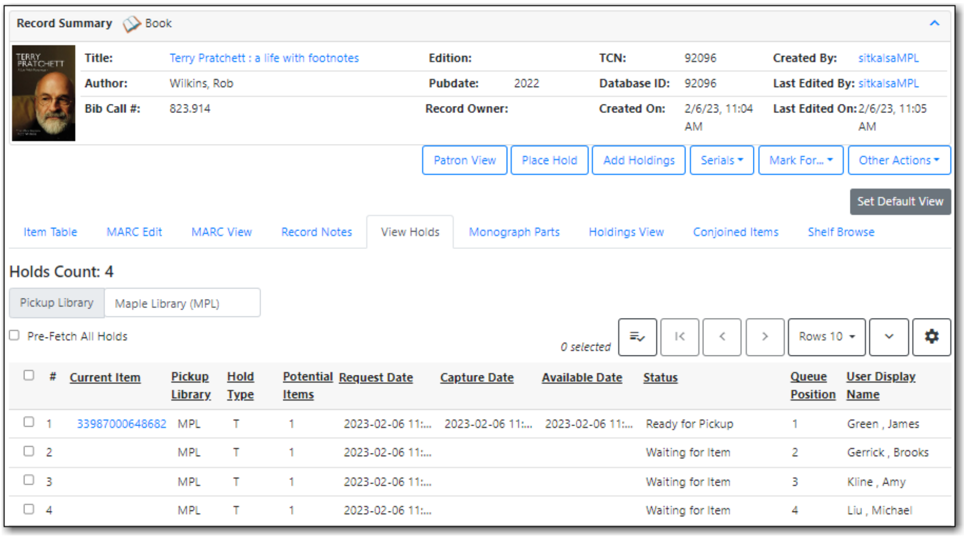


4. From here library staff can use the **Actions** menu to:
   a. Modify a hold.
   b. Cancel a hold.
   c. Find another target for the hold.
   d. Transfer the hold to another title.
   e. Mark the current item as *Damaged*, *Discard/Weed*, or *Missing*.

10.3.2. Via the Staff Catalogue

Library staff can view the current holds on a particular title by looking at the bibliographic record in the staff catalogue.

1. Open the bibliographic record for the title.
2. Select the **View Holds** tab.
3. Any holds placed on the particular title, or any volumes or item attached to it, will display.



4. From here library staff can use the **Actions** menu to:
    a. Modify a hold.
    b. Cancel a hold.
    c. Find another target for the hold.
    d. Transfer the hold to another title.
    e. Mark the current item as *Damaged*, *Discard/Weed*, or *Missing*.

10.3.3. Via the Public Catalogue

Patrons can view and manage their own holds through *My Account* in the public catalogue. See Items on Hold for more information.

10.3.4. Via the Holds Shelf

Items that have been captured for a hold can be viewed on the Holds Shelf. See Holds Shelf for more information.

10.4. Managing Holds

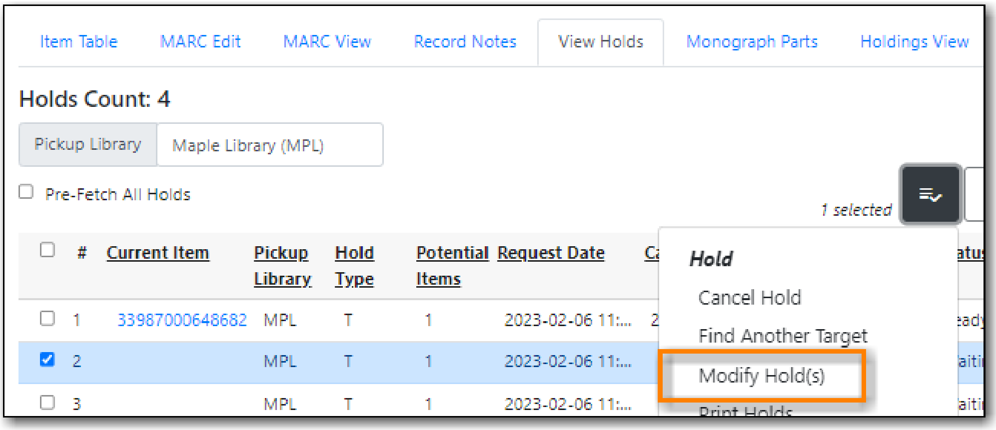
Library staff can manage holds through the staff catalogue, the patron account, and in some cases, the holds shelf. Patrons can manage some aspects of their holds via My Account in the public catalogue.

10.4.1. Modifying Holds

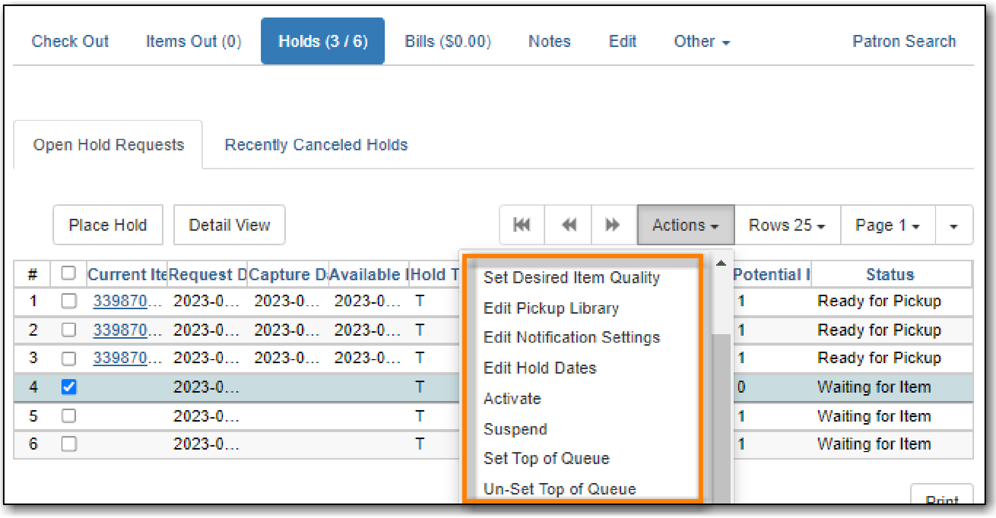
- Set Desired Item Condition/Quality
- Edit Pickup Library
- Edit Notification Settings
- Edit Hold Dates

- Suspend and Activate
- Top of Queue

Holds can be modified from the *View Holds* tab in the bibliographic record by selecting a hold and going to **Actions** → **Modify Hold(s)**.



Holds can be modified from the *Holds* tab in the patron's account by selecting a hold and going to the **Actions** menu and choosing the desired action.

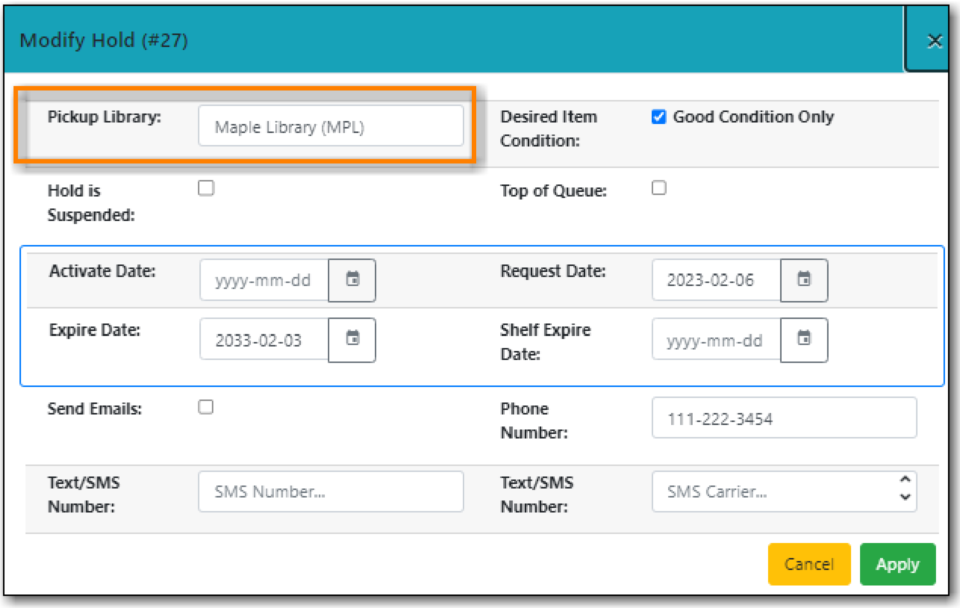


Set Desired Item Condition/Quality

Co-op Support does not recommend the use of Item Quality/Condition. To prevent issues with filling holds libraries should leave the quality for all holds and items as *Good*.

Edit Pickup Library

1. On the *View Holds* tab in the staff catalogue, select the hold to edit and go to **Actions** → **Modify Hold(s)**.
2. In the pop-up that appears, click the drop down for *Pickup Library*.



3. Select a valid pickup library: a library within your system or your interlibrary connect zone.
4. Click **Apply**.
5. If the item is already captured for a hold the hold status will be updated to *Wrong Shelf*. The item needs to be checked in so it can transit to its new pickup library.

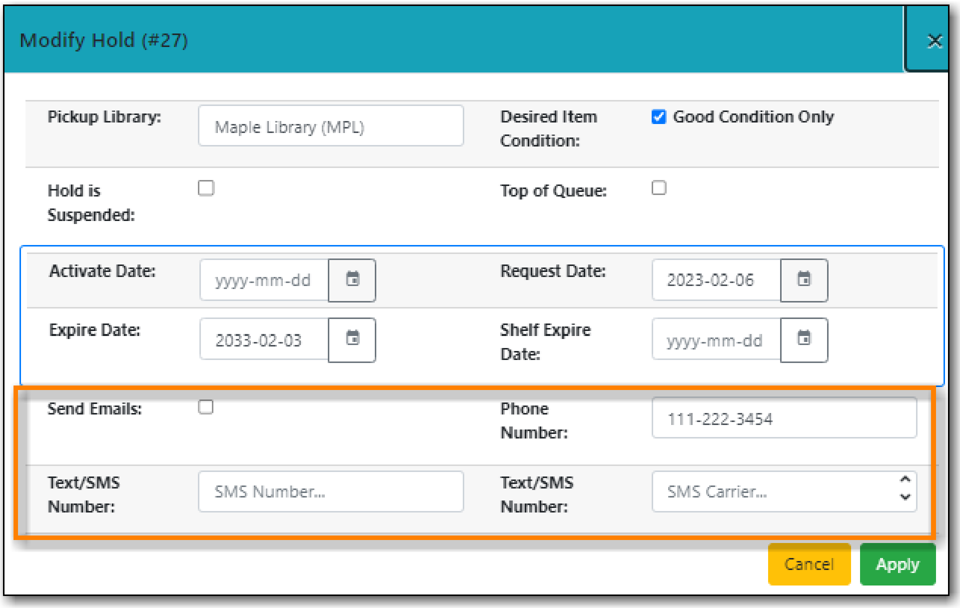
OR

1. On the *Holds* tab in the patron's account, select the hold to edit and go to **Actions** → **Edit Pickup Library**.
2. In the pop-up that appears, click the drop down for *Pickup Library*.

3. Select a valid pickup library: a library within your system or your interlibrary connect zone.
4. Click **Submit**.
5. If the item is already captured for a hold the hold status will be updated to *Wrong Shelf* . The item needs to be checked in so it can transit to its new pickup library.

Edit Notification Settings

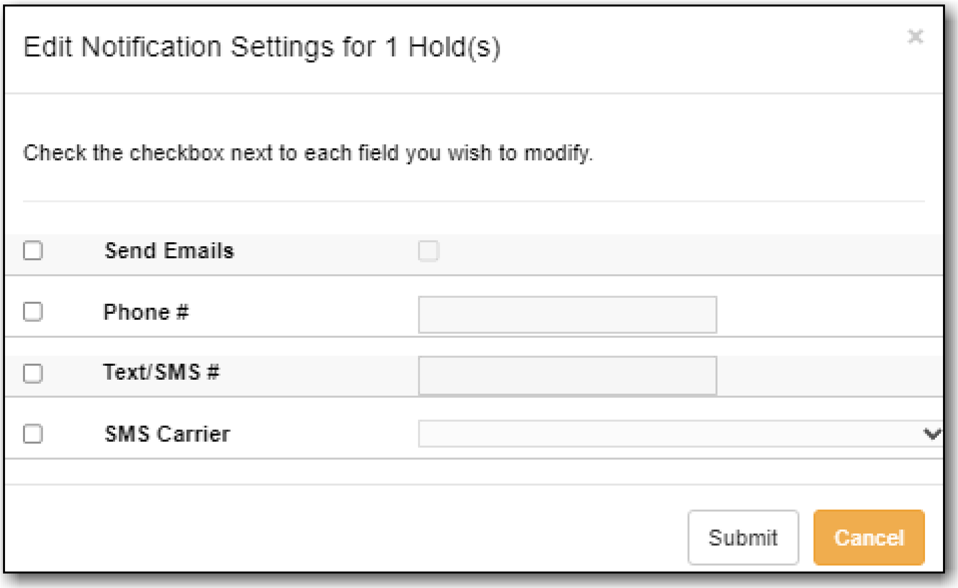
1. On the *View Holds* tab in the staff catalogue, select the hold to edit and go to **Actions** → **Modify Hold(s)**.
2. In the pop-up that appears, add and/or remove information from the notification fields to change how the patron will be notified.



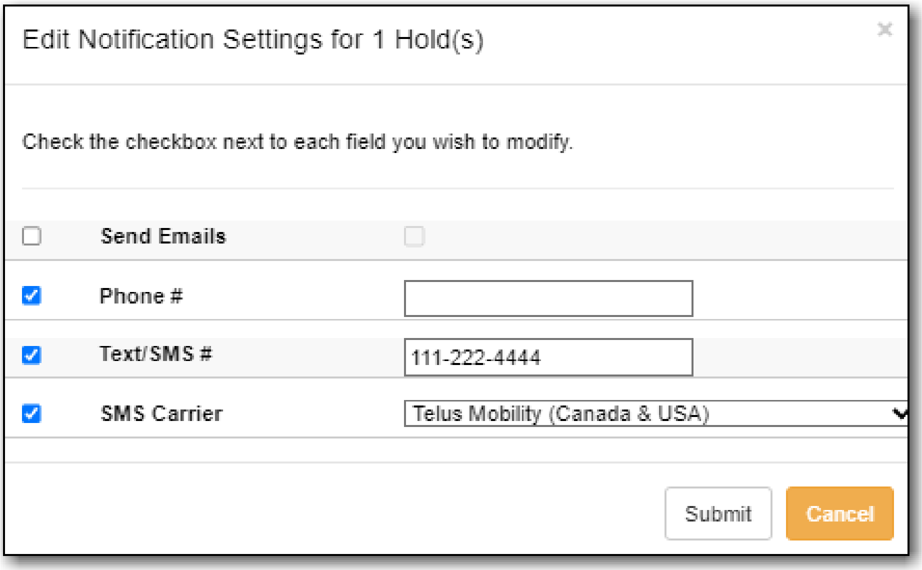
3. Click **Apply**.

OR

1. On the *Holds* tab in the patron's account, select the hold to edit and go to **Actions** → **Edit Notification Settings**.
2. Initially all fields in the pop-up will be blank and un-selected.



3. Check the box(es) beside the notification methods you wish to edit.
   a. To remove a method of notification check the box and leave the field blank.
   b. To add or edit a method of notification check the box and fill in the relevant information.

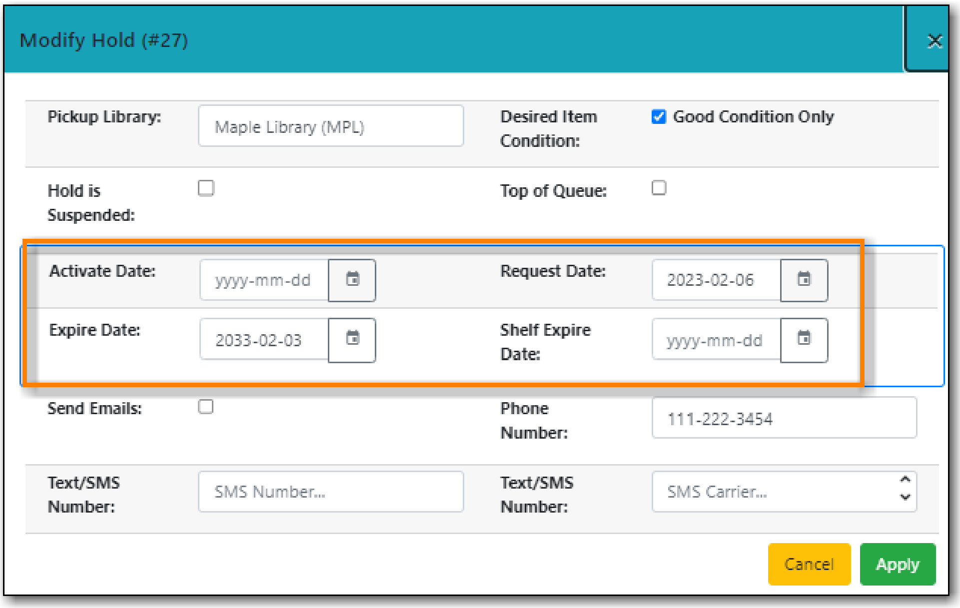


4. Click **Submit**.

NOTE Patrons can edit their own notification settings via My Account.

Edit Hold Dates

1. On the *View Holds* tab in the staff catalogue, select the hold to edit and go to **Actions** → **Modify Hold(s)**.
2. In the pop-up that appears, edit the hold dates you wish to change.

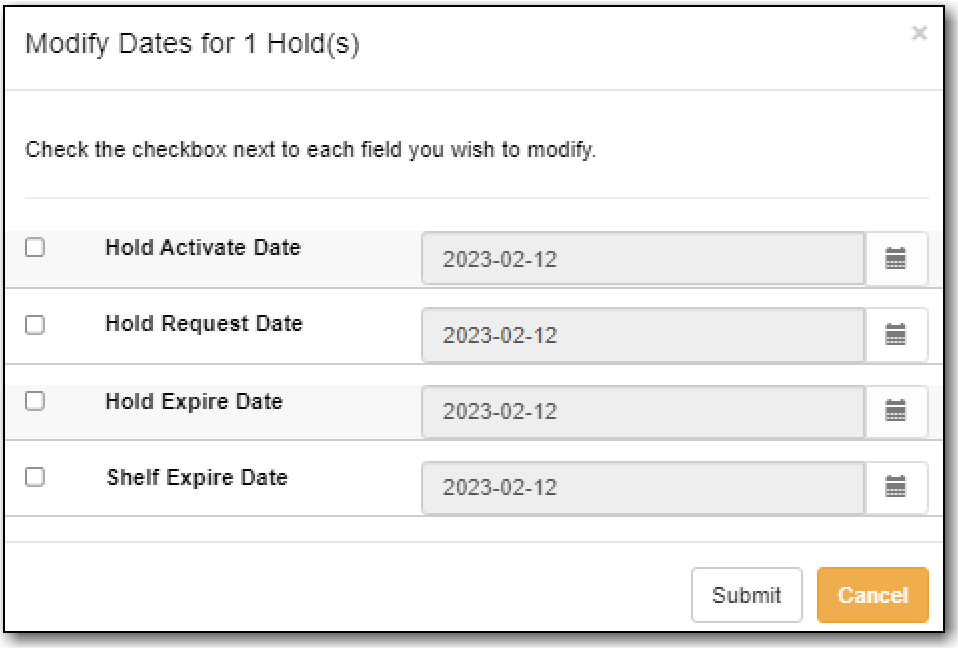


- Activate Date: The date on which a suspended hold will be activated.
- Expire Date: The date on which the hold will expire in Evergreen if it is never filled.
- Request Date: The date on which the hold was placed. Holds are generally filled in the order they were placed so editing the request date can change the order of the queue.
- Shelf Expire Date: The date on which the hold will expire from the holds shelf, based on the value in the library setting *Default hold shelf expire interval*.

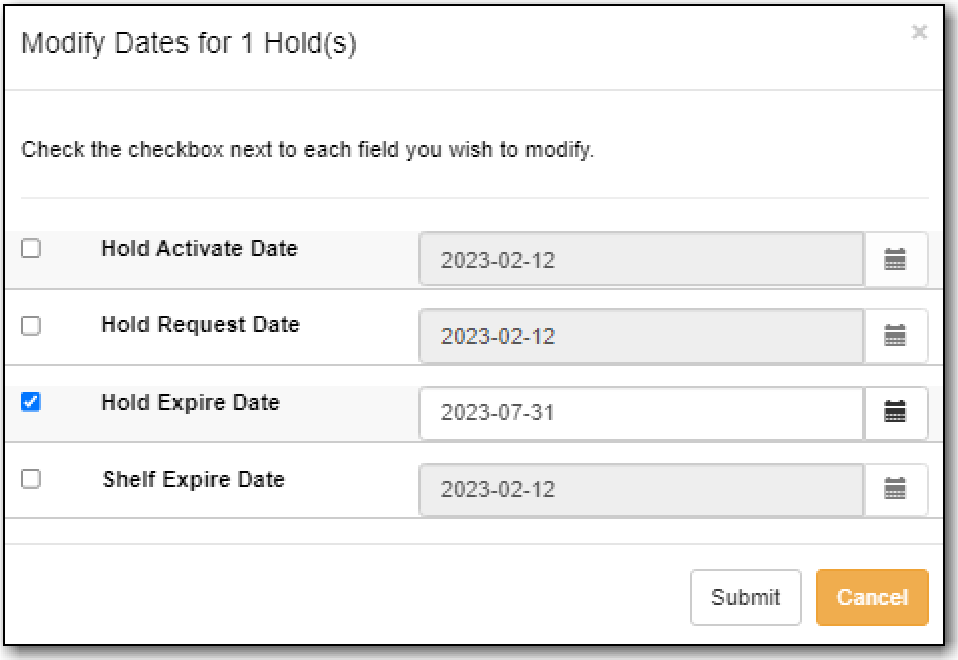
3. Click **Apply**.

OR

1. On the *Holds* tab in the patron's account, select the hold to edit and go to **Actions** → **Edit Hold Dates**.
2. Initially all fields in the pop-up will display today's date and be un-selected.



3. Check the box(es) beside the hold date(s) you wish to edit and enter the new date(s).



   - Activate Date: The date on which a suspended hold will be activated.
   - Expire Date: The date on which the hold will expire in Evergreen if it is never filled.
   - Request Date: The date on which the hold was placed. Holds are generally filled in the order they were placed so editing the request date can change the order of the queue.

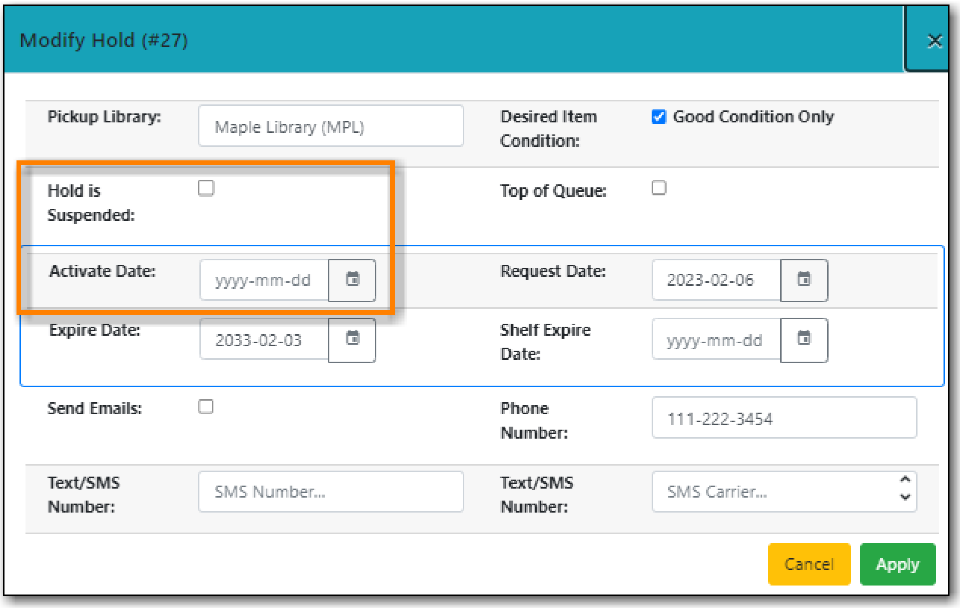
- Shelf Expire Date: The date on which the hold will expire from the holds shelf, based on the value in the library setting *Default hold shelf expire interval*.

4. Click **Submit**.

NOTE Patrons can edit the Request Date and Activate Date via My Account.

Suspend and Activate

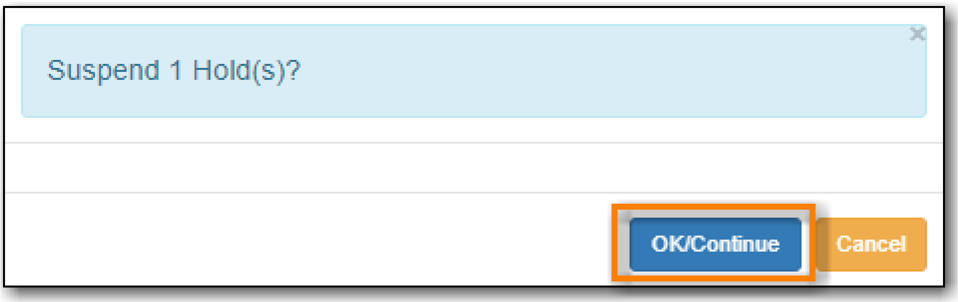
1. On the *View Holds* tab in the staff catalogue, select the hold to edit and go to **Actions** → **Modify Hold(s)**.
2. In the pop-up that appears, check or un-check the box for *Hold is Suspended* to suspend or activate the hold.



3. When suspending a hold you can add an *Activate Date* so that the hold will automatically be activated after hours on the activation date; otherwise, staff or the patron will need to manually activate the hold.
4. Click **Apply**.

OR

1. On the *Holds* tab in the patron’s account, select the hold to edit and go to **Actions** → **Suspend** or **Actions** → **Activate**.
2. Click **OK/Continue** on the pop-up that appears

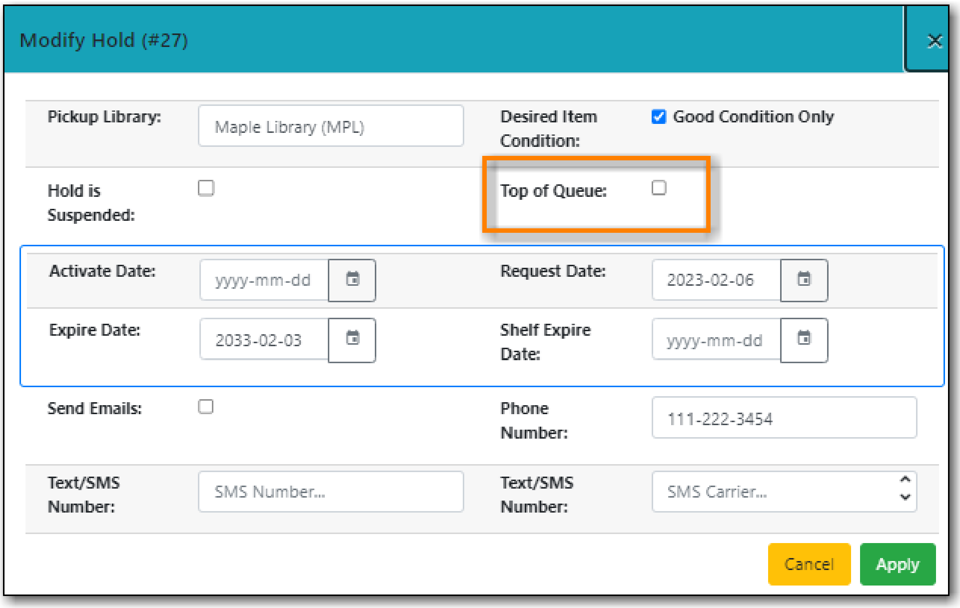


3. The hold will be suspended or activated.
4. For suspended holds you can go to **Actions** → **Edit Hold Dates** to add an activation date so the hold will automatically be activated after hours on the activation date; otherwise, staff or the patron will need to manually activate the hold.

NOTE Patrons can suspend and activate their holds via My Account.

Top of Queue

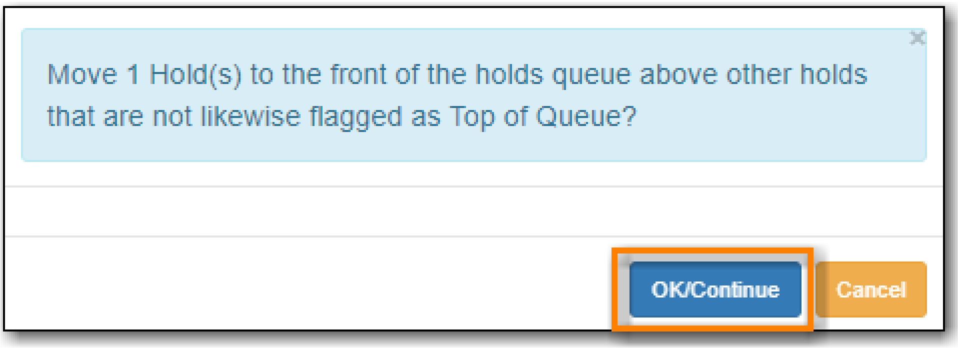
1. On the *View Holds* tab in the staff catalogue, select the hold to edit and go to **Actions** → **Modify Hold(s)**.
2. In the pop-up that appears, check the box for *Top of Queue*.



3. Click **Apply**.
4. The hold will now have the queue position of 1.

OR

1. On the *Holds* tab in the patron's account, select the hold to edit and go to **Actions** → **Set Top of Queue** or **Actions** → **Un-Set Top of Queue**.
2. Click **OK/Continue** on the pop-up that appears



3. The hold will be set or un-set to the top of the queue.

NOTE

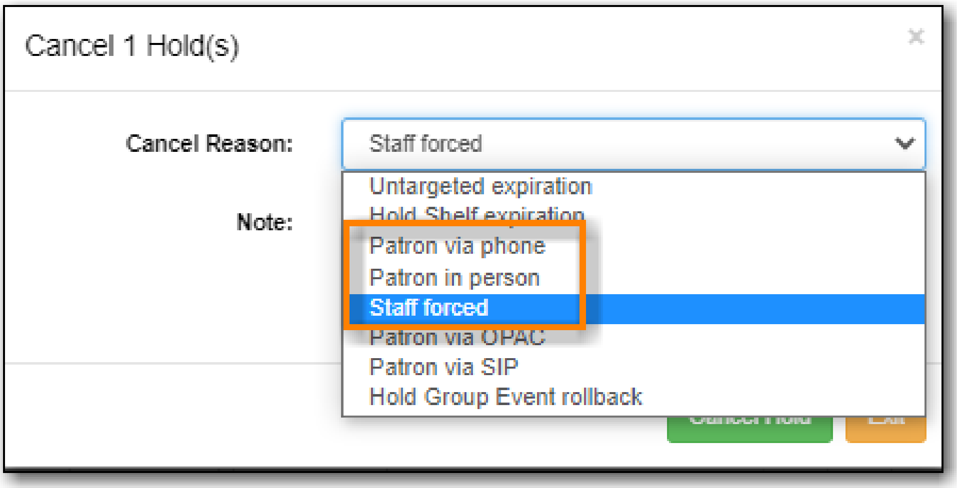
If you want to move a hold to the top of the queue and an item has already been assigned to the hold currently on top of the queue you need to do the following.

1. Set the new hold to the top of the queue.
2. Suspend the original top hold.
3. Find another target for the new hold at the top of the queue.
4. Activate the original top hold.

10.4.2. Cancelling Holds

Holds can be cancelled individually by library staff and patrons

1. On the *View Holds* tab in the staff catalogue or on the *Holds* tab in the patron's account, select the hold you wish to cancel and go to **Actions** → **Cancel Hold**.
2. Choose the appropriate cancel reason from the drop down menu: *Patron via phone*, *Patron in person*, or *Staff forced*. The other listed cancel reasons apply to automated cancellations.

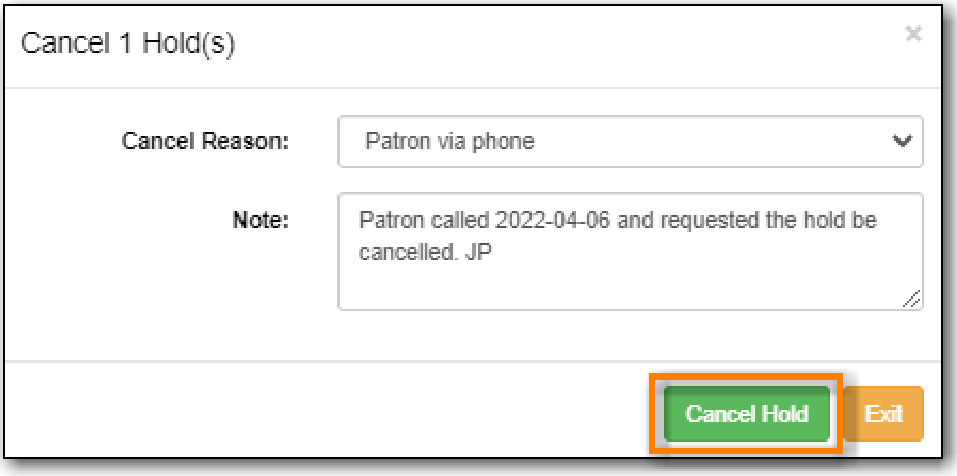


3. Enter a note if applicable.

CAUTION

If your library 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.

4. Click **Cancel Hold**.



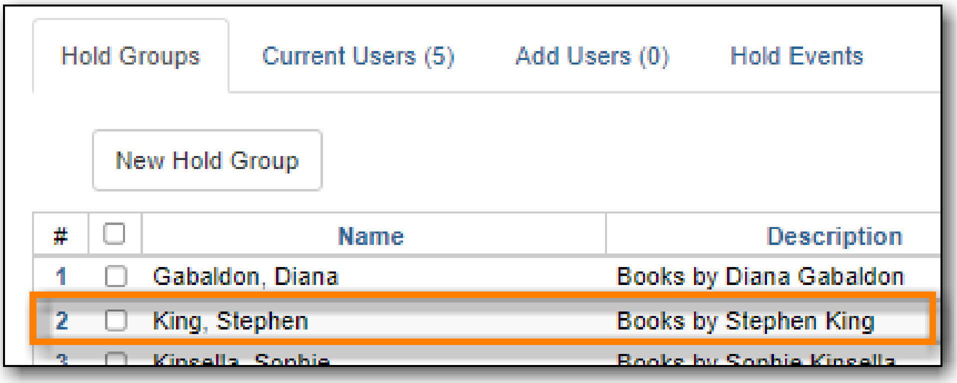
5. If the item was on holds shelf, check it in. The item will go into *Reshelving* or be captured to fill the next hold.

NOTE Patrons can cancel their own holds via My Account.

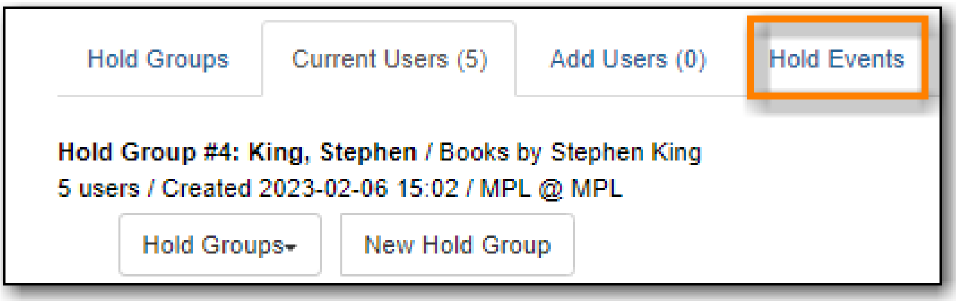
10.4.3. Cancelling Holds for a Hold Group

Library staff can also cancel a set of holds placed for a particular hold group.

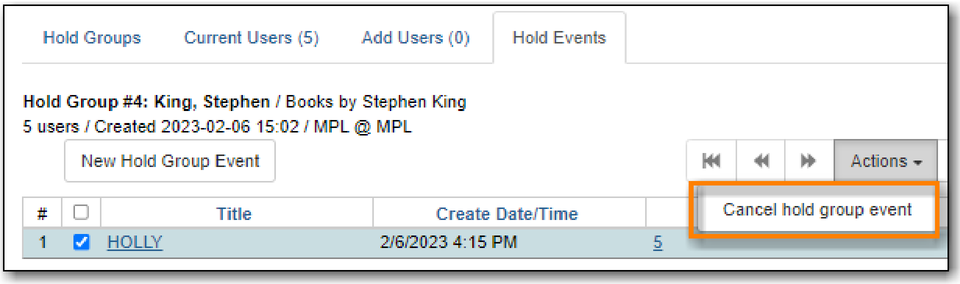
1. Go to **Circulation** → **Hold Groups**.
2. From the **Hold Groups** tab, double-click the hold group you wish to open.



3. The group will be opened on the **Current Users** tab. Click on the **Hold Events** tab.



4. Select the set of holds you wish to cancel.
5. Click **Actions** → **Cancel hold group event**.

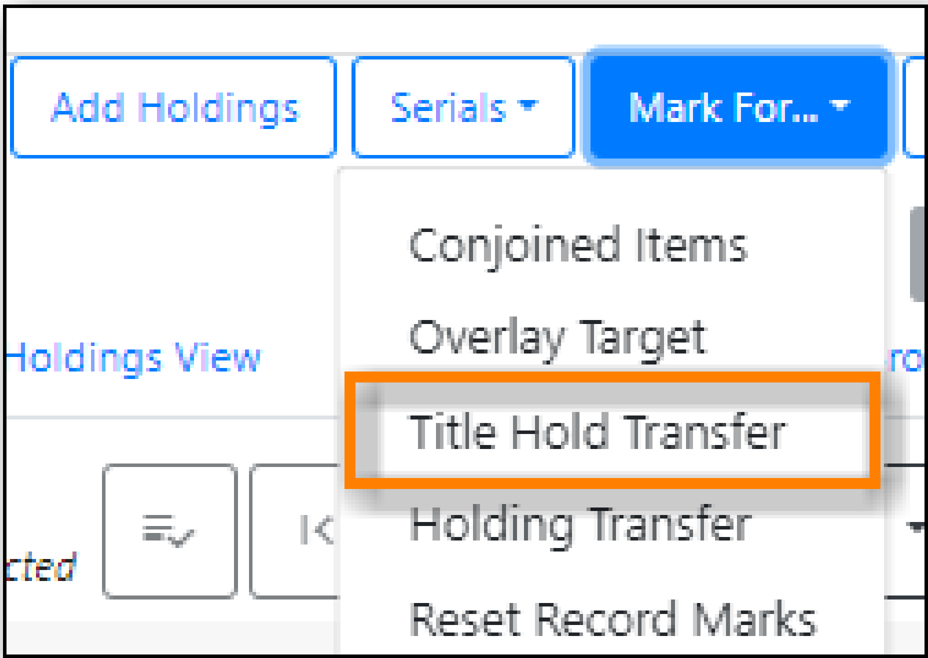


6. Click **OK/Continue**
7. All holds in the set are cancelled.
8. If an item was captured for one of the holds and on holds shelf, check it in. The item will go into *Reshelving* or be captured to fill the next hold.

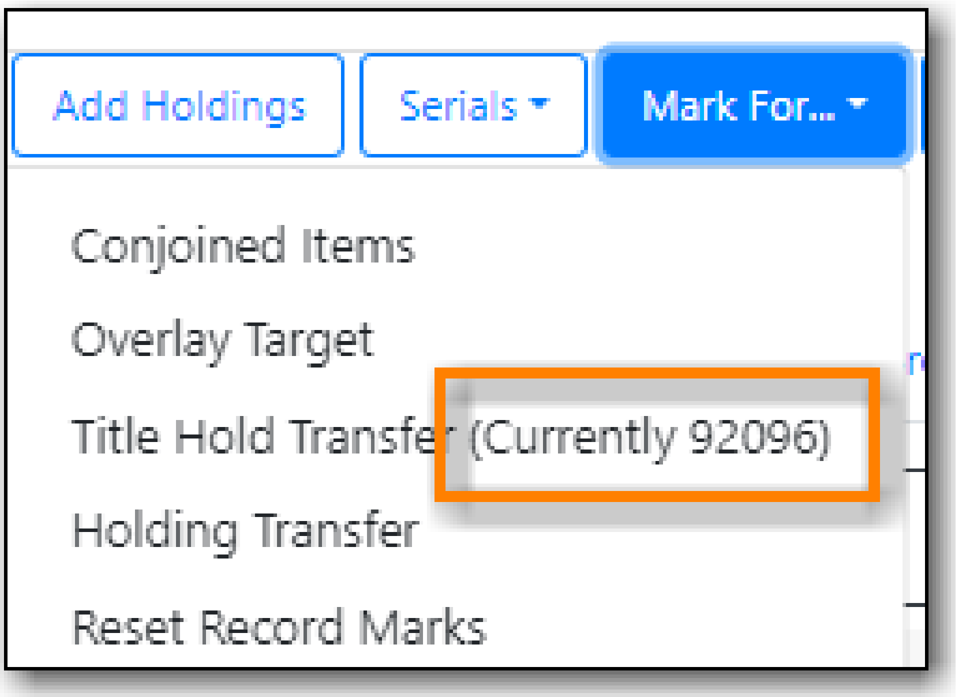
10.4.4. Transferring Title Holds

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

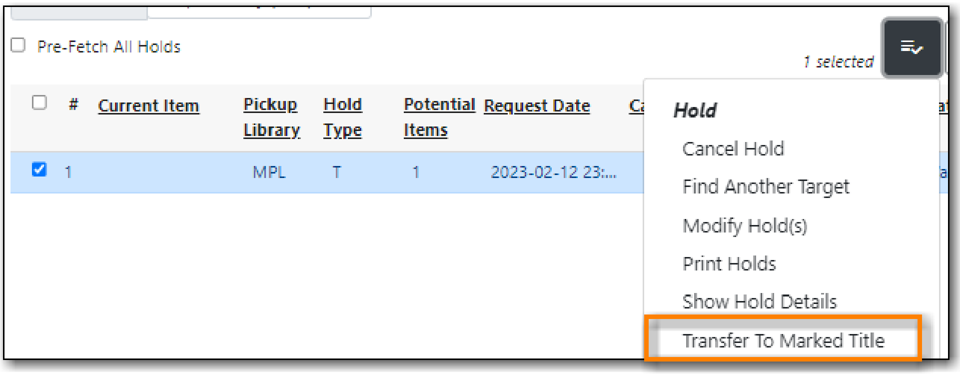
1. In the staff catalogue, retrieve the bibliographic record you would like the holds to be transferred to.
2. Click **Mark for → Title Hold Transfer**.



3. The bibliographic record ID of the marked record will now display beside the **Title Hold Transfer** menu option.



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



7. Click **Transfer**.
8. The title hold is moved to the marked bibliographic record.

10.4.5. Marking Items

When a hold has an item assigned to it the item can be marked as *Damaged*, *Discard/Weed*, or *Missing* via the **Actions** menu.

For more information on marking items with these statuses see Mark Items.

10.4.6. Retargetting Holds

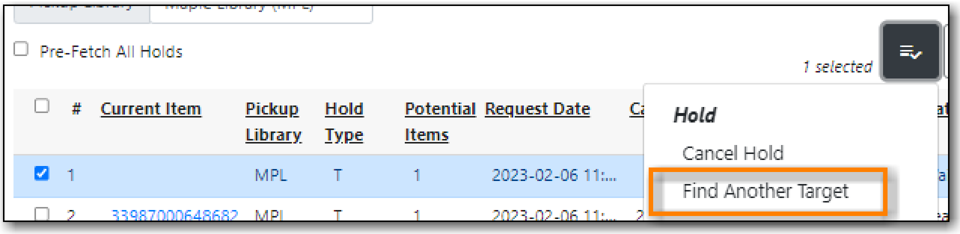
Newly created items, or items whose status was just changed from a non-holdable to a holdable status, may not trigger holds on regular check in. This is because Evergreen automatically updates the table of items eligible to fill a particular hold every 24 hours. Library staff can retarget holds which forces Evergreen to update the table of eligible items right away.

You can retarget local holds in two ways:

- on the check in screen, using the checkin modifiers *Retarget Local Holds* and *Retarget All Statuses*.
- by manually retargetting the hold from staff catalogue or patron account.

TIP	Co-op Support recommends multi-branch libraries manually retarget holds through the staff catalogue or patron account in order to retarget all holds in the system. For single branch libraries, Co-op Support recommends using the retarget related checkin modifiers at check in.

1. On the *View Holds* tab in the staff catalogue or on the *Holds* tab in the patron's account, select the hold you wish to retarget and go to **Actions** → **Find Another Target**.

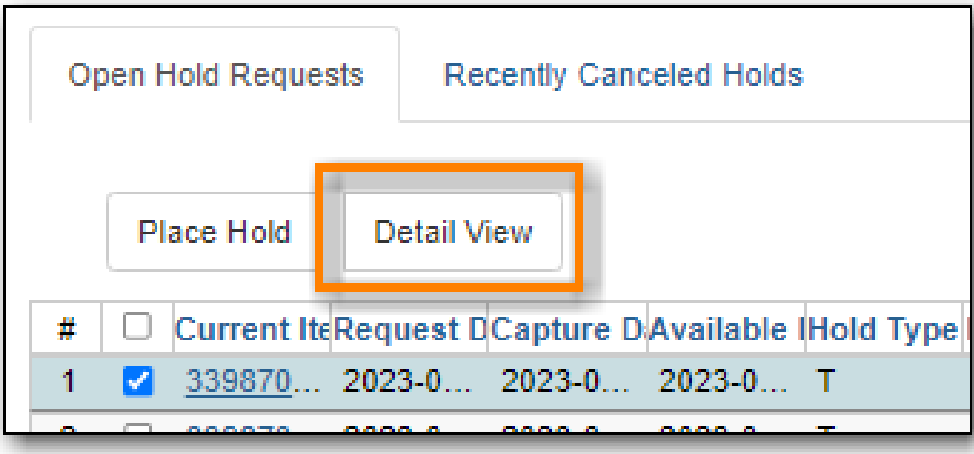


2. Click **Retarget**.
3. The hold is retargeted. If there is an item available to fill the hold it will be assigned to the hold with the hold status of *Waiting for Capture*.
4. Check in the item to capture the hold.

10.4.7. Hold Details View

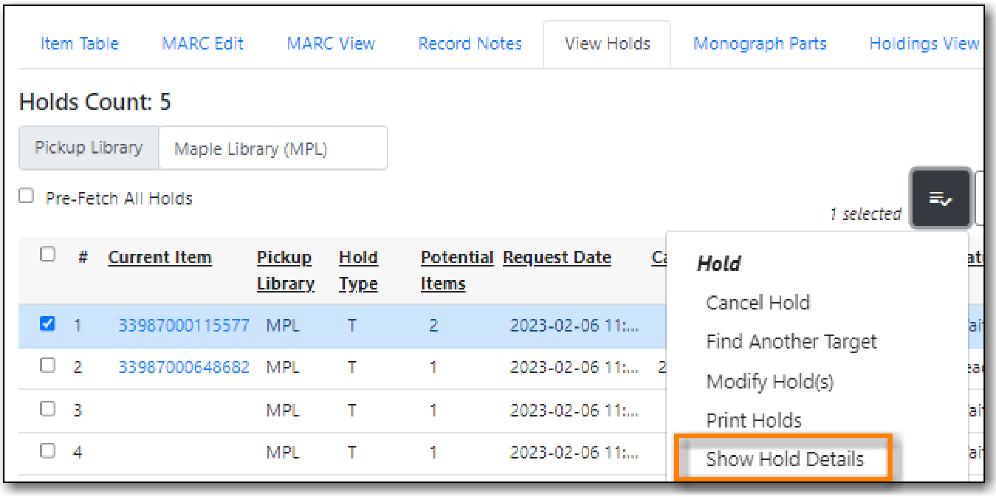
Additional information about a hold can be seen in the hold details view.

On the *Holds* tab in the patron's account or on the *Holds Shelf* select the hold you wish to view and click the **Detail View** button.

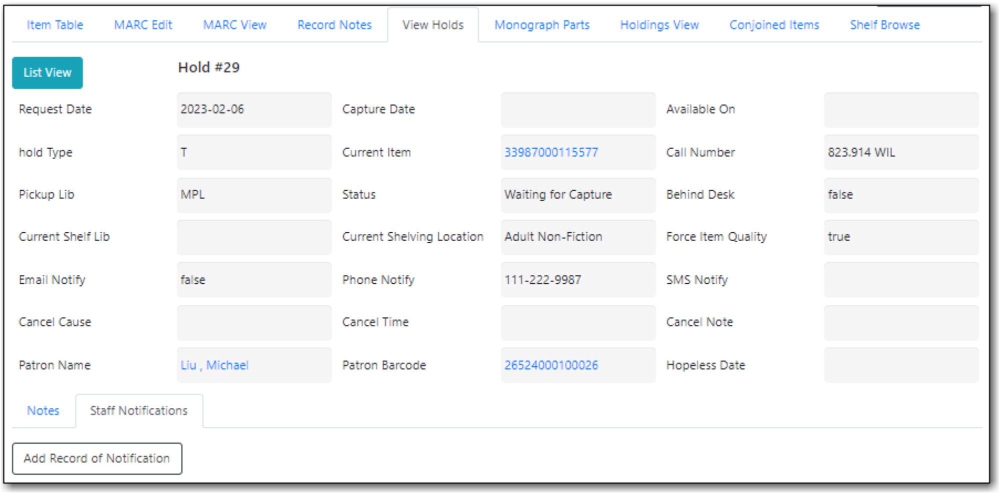


On the *View Holds* tab in the staff catalogue select the hold you wish to view and go to **Actions** →

Show Hold Details.

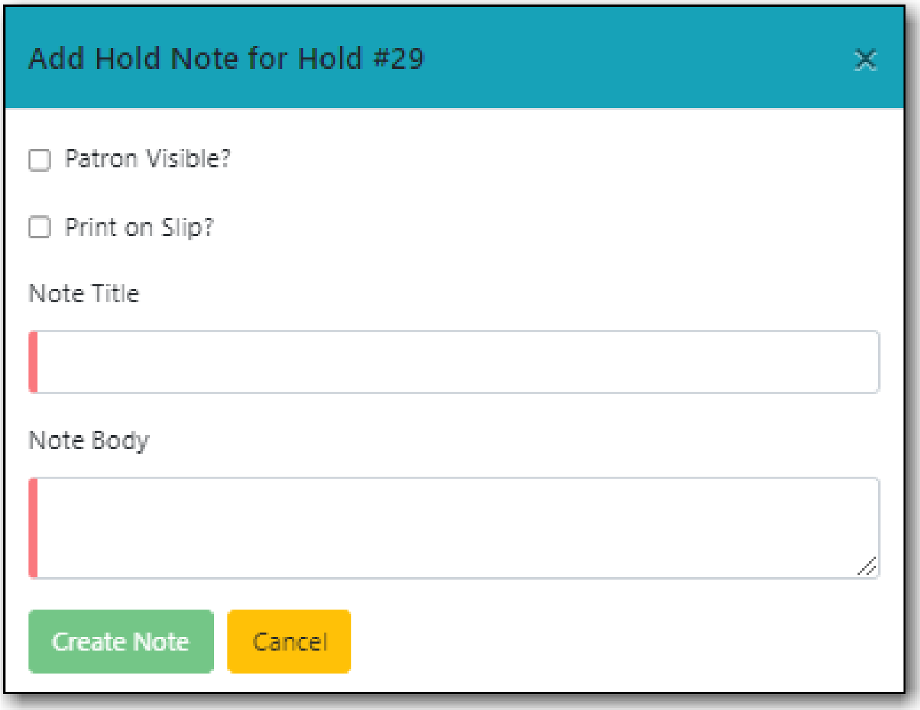


Useful information about the hold displays.

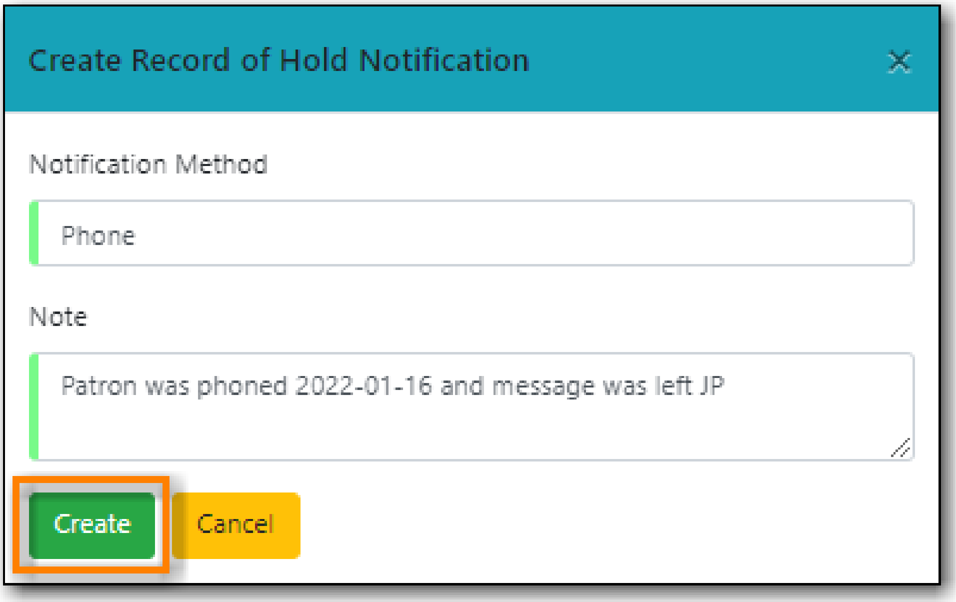


Notes and Staff Notifications can be added to the hold record.

1. On the *Notes* tab click **New Note**.
2. Enter the relevant information.
   - Notes that have *Patron Visible* checked will appear in the patron's account in the public catalogue.
   - Notes that have *Print on Slip* checked will print on the hold slip.



3. Click **Create Note**.
4. The note will display.
5. On the *Staff Notifications* tab click **Add Record of Notification**.
6. Enter the information about the notification and click **Create**.



7. The record of notification will display.

10.5. Pull List for Hold Requests

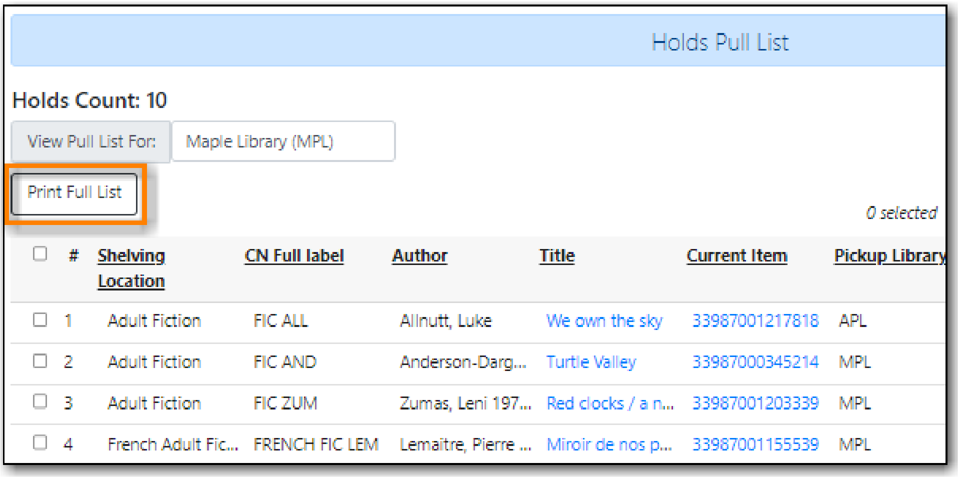
Sitka Training Video - Pull List for Hold Requests (2:59)

Items that are available on your shelf and have been requested to fill a hold will appear on the pull list for hold requests. Staff can print the list, pull the items from the shelf, and then check them in to capture the holds. Co-op Support recommends checking the pull list at once day; libraries with a high volume of holds may find it beneficial to check the list multiple times a day.

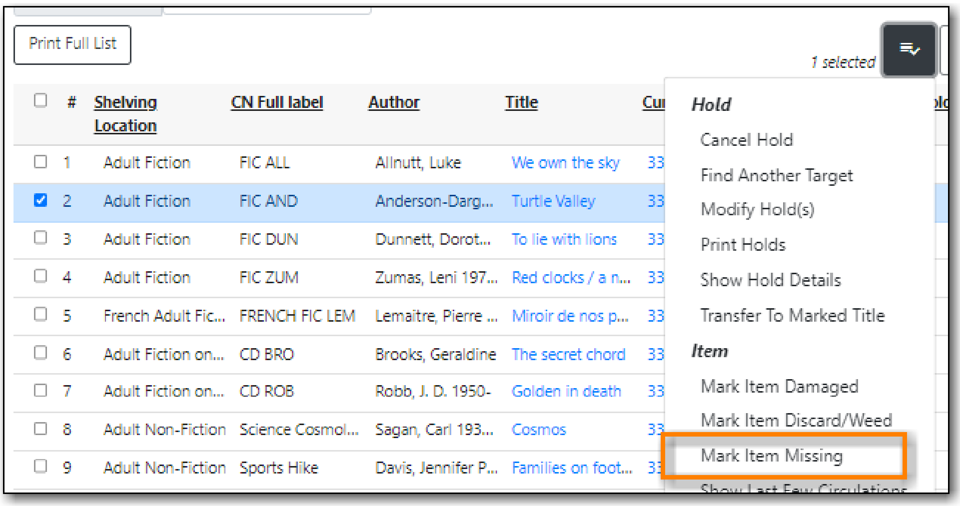
1. Go to **Circulation** → **Pull List for Hold Requests**.
2. The pull list displays. By default the items on the list are grouped first by shelving location, then by call number.

TIP	The order the shelving locations display in can be adjusted to better reflect the physical arrangement of your shelves. See Shelving Location Order.

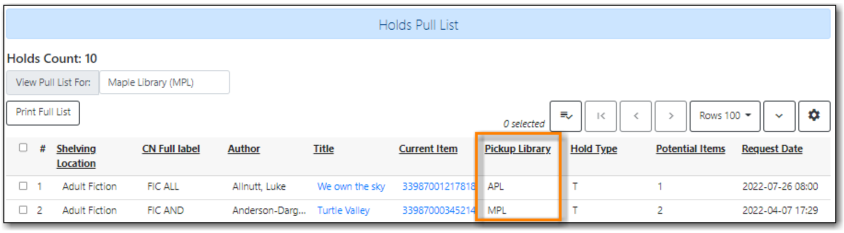
3. Multi-branch libraries can use the library selector to look at the pull lists for any of their branches.
4. Click **Print Full List**.



5. Pull the items from your shelves and check them in to capture the holds.
6. Items that cannot be found should have their status set to *Missing* via the Actions menu.



NOTE	The *Pickup Library* column will show which library the item is going to to fill the hold. Libraries participating in Interlibrary Connect can use this column to distinguish between local and ILC holds and may choose not to pull ILC holds on a day their Interlibrary Loan staff member is away.

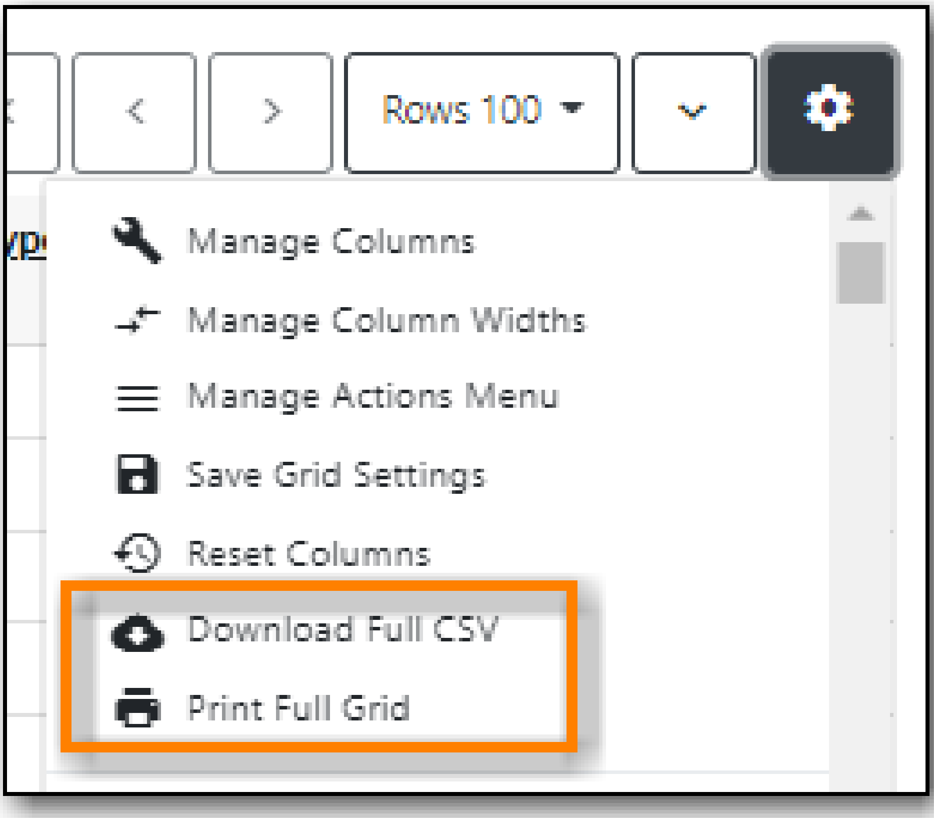


Evergreen will re-target ILC holds to another library after 24 hours if the item hasn't been captured for a hold, unless there is no other item in the ILC zone that can fill the hold.

10.5.1. Print or Export Pull List for Hold Requests

The default pull list print through the **Print Full List** button includes only columns for Hold Type, Title, Author, Shelving Location, Call Number, and Item Barcode.

- To print exactly what is displayed on the screen, click **Show Grid Options (Gear Icon)** → **Print Full Grid**.
- To export the visible columns to a CSV file, click **Show Grid Options (Gear Icon)** → **Download Full CSV**.



10.6. Holds Filling Explained

When library staff or patrons initiate a hold through the staff or public catalogue, Evergreen checks all related library settings, hold policies, and holdings under the title, to decide whether or not the hold can be placed.

If the hold can be placed Evergreen creates a hold request record which includes information such as patron, pickup library, request time, and notification method and contact details.

10.6.1. Selection Depth

Evergreen also records the range of libraries' items that may be used to fill the hold in the hold record. This 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.

The value in for **Selection Depth** will either be 2 or 3. 3 means the hold will be filled by items belonging to the owning library or system. 2 means the hold can be filled by any holdable item within the library’s reciprocal borrowing zone.

Selection depth is not editable and Evergreen will not reassess the selection depth when the holdability of items change. To change the selection depth for a hold staff have to manually cancel then place the hold anew. A common situation where this may be needed if a library’s item has gone missing and they now want the hold to be filled by an interlibrary connect item.

10.6.2. Holds Targeter and Potential Targets

When a hold is placed Evergreen creates an eligible item table which includes all eligible items that could potentially fill the hold. This table is not viewable within the staff client.

In the first 24 hours after a hold is placed, Evergreen looks for potential items to add to the eligible item table approximately every about 15 minutes. After the first 24 hours, Evergreen checks for eligible items once a day at approximately the time the hold was initially placed. The time is recorded in the hold request record in a field called **Previous Check Time**, which is viewable when viewing holds. If a potential target is found, it will be added to the hold target table. Items that are age hold protected will not be used to fill holds at other libraries.

While checking for eligible items to add to the table Evergreen is also retargeting the hold. It does this by removing the current target, checking the table, and picking another target, which may or may not be the originally targeted item.

When an item is checked in, Evergreen quickly goes through the eligible item table to see if the item can fill a hold and captures it if it can.

When an eligible item has the status of *Available* or *Reshelving* Evergreen will add it to the library’s pull list for hold requests. Though there may be multiple eligible items available, only one item may be put on the pull list at a time. If a different item is checked in first Evergreen will opportunistically capture the hold and the item will disappear from the pull list. Items will also disappear from the pull list as Evergreen retargets holds daily and assigns new hold targets.

When there are multiple eligible items available, Evergreen will first choose the pickup library’s copy, if available. Otherwise it will randomly pick up an item at another library, unless the pickup library imposes special rules prioritizing a preferred hold target source.

Newly catalogued items and items coming out of a non-holdable status (such as *Lost*) are not automatically added to the eligible item table. These items will be added when Evergreen does its daily check but libraries may prefer to force an earlier update of the table. This is done by retargeting the hold.

10.6.3. Holds Queue and Filling Sequence

Holds are queued based on request time unless manually changed by library staff.

Separate holds queues are formed based on the potential target item range. For example, there is a hold queue for item level holds and another for title level holds. If a hold is targeting your library's item for pick up at your library then other libraries' holds are not counted in the queue of holds.

Item level holds have a simple queue, which includes all holds targeting the item.

The title level holds queue counts all holds targeting any of the eligible items attached to that particular bibliographic record that the title hold may target, including the item level holds. You may notice missing queue numbers in item level holds queues; they are taken by the title level holds.

For libraries participating in reciprocal borrowing there will be separate queues based on the selection depth of the hold. Holds with a selection depth of 3 will have a separate queue based on the pickup library since they specially target the items owned by the pickup library. This means each library or system has its own queue if it has holdable copies.

Holds with a selection depth of 2 are queued together with the holds with a selection depth of 3 as items from any library in the zone including the pickup library can fill the hold. When looking at You may see missing queue numbers in selection depth 3 holds queues, which are taken by selection depth 2 holds.

To view holds with a selection depth of 3 for your library simply filter the holds by pickup library, where the pickup library is your library. The queue is arranged based on request time. As you view the queue you may notice that some queue numbers are missing. This means there hold with a selection depth of 2 that is filling that hold queue position.

10.7. Capturing Holds and Hold Transits

Sitka Training Video - Capturing Holds (2:29)

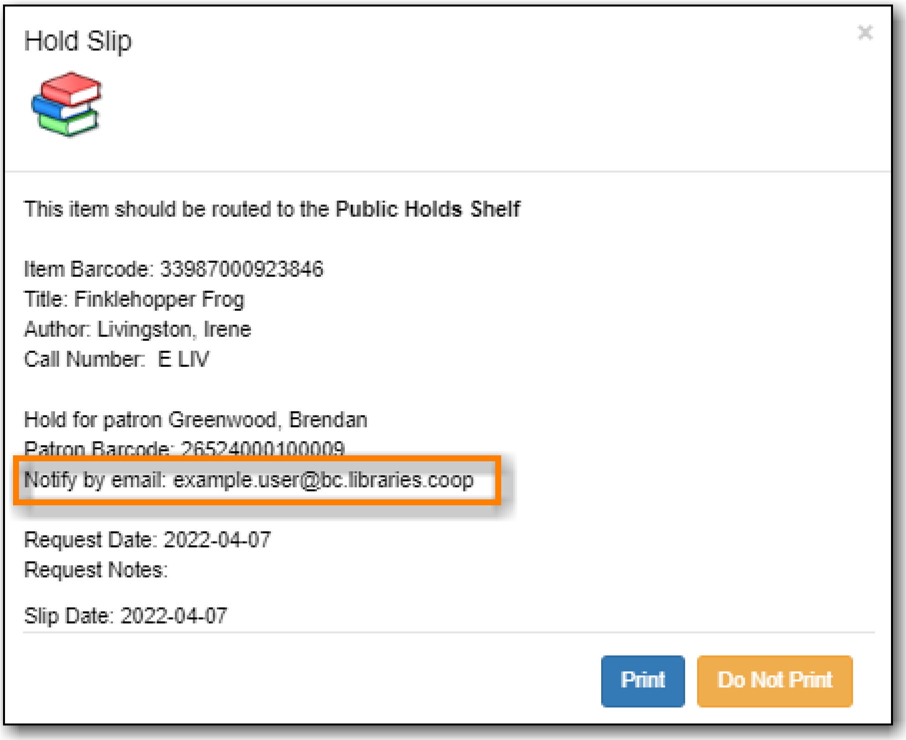
Items are captured for holds at check in either opportunistically when an item is returned by a patron or deliberately when items on the *Pull List for Hold Requests* are pulled and checked in.

Multi-branch libraries and libraries participating in reciprocal borrowing will see both holds and hold transits captured at check in.

NOTE	When the Checkin Modifer *Auto-Print Hold and Transit Slips* is enabled hold and hold transit slips will print automatically without displaying a slip pop up within Evergreen.

10.7.1. Capturing Holds

1. When a hold is captured at check in a hold slip pop-up will appear, unless auto-printing is enabled.
2. Staff can click **Print** or **Do Not Print** depending on their needs.
3. The item is checked in and the item status is updated to *On Holds Shelf*.
4. The patron will be notified automatically by Evergreen or by library staff depending on the method chosen for notification when the hold was placed. The chosen method will display on the hold slip and is included on the printed slip by default.



CAUTION

Do NOT check out the item to the patron until after the notification processing delay has passed or Evergreen will NOT send the automatic notification. For information on hold notification processing delays see Hold Ready For Pickup.

5. The item is placed on the library's hold shelf.

NOTE

Libraries with self pickup hold shelfs can customize the hold slip to limit the amount of patron personal information that is printed.

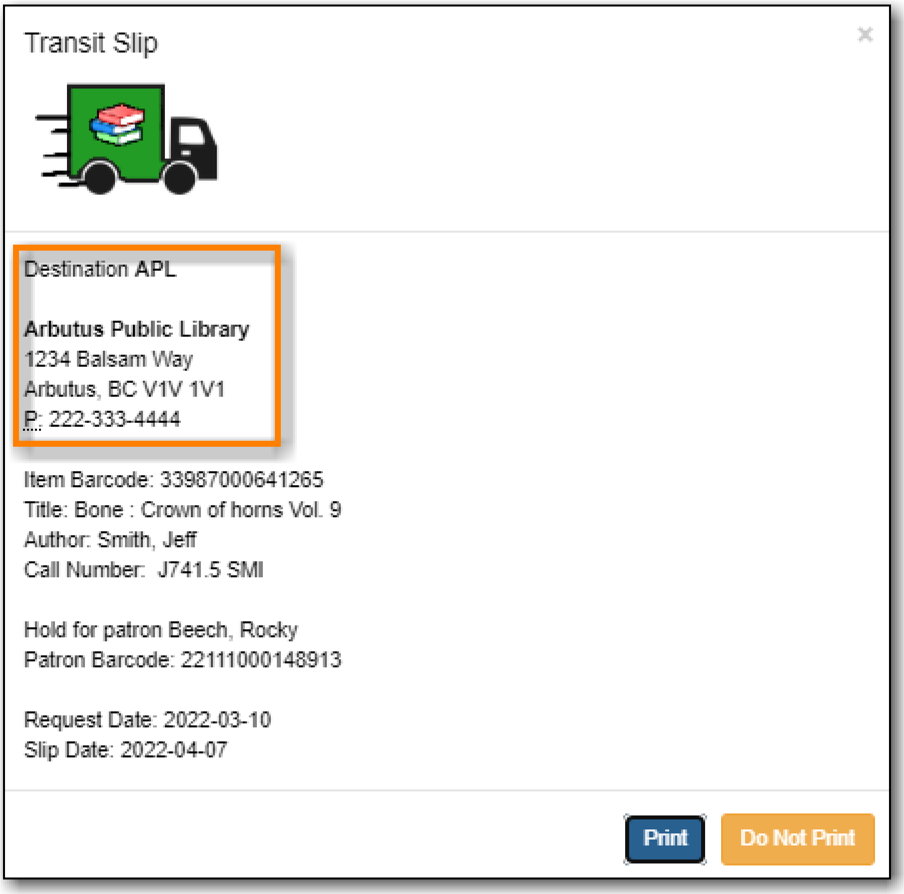
A patron's contact information on the hold slip may differ from what is in their patron account. Patrons have the option to enter different notification information when placing a hold. Evergreen will use the information saved in the hold record when notifying patrons.

10.7.2. Capturing Hold Transits

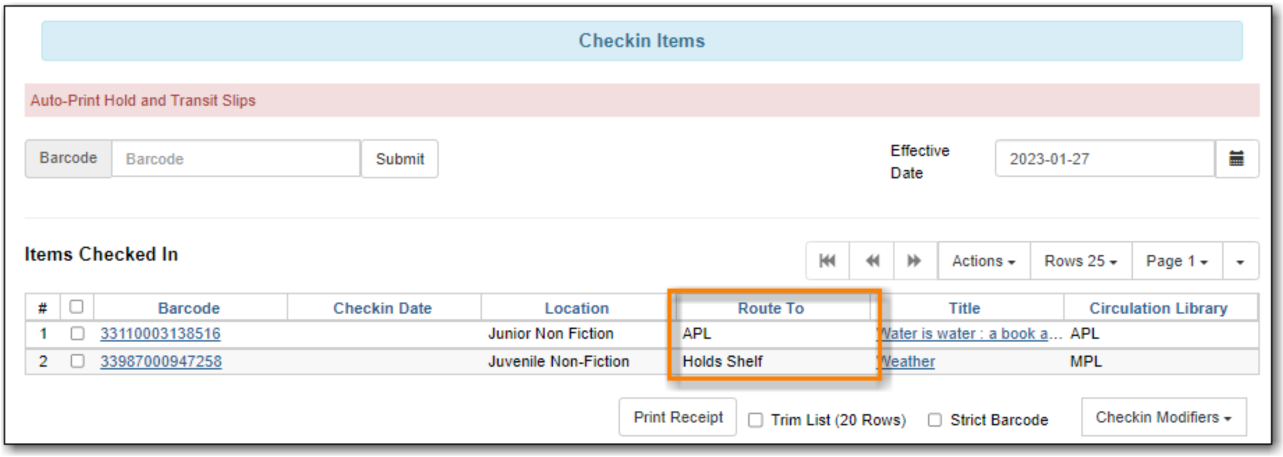
1. When a hold transit is captured at check in a hold transit slip pop-up will appear, unless auto-

printing is enabled.

2. The pop up will indicate what location the item needs to be sent to. This information is also available on the printed slip by default.



3. The *Route To* column on the Check In screen will also show the library code of the library the item is to be sent to.



4. The item is shipped it to the destination library.

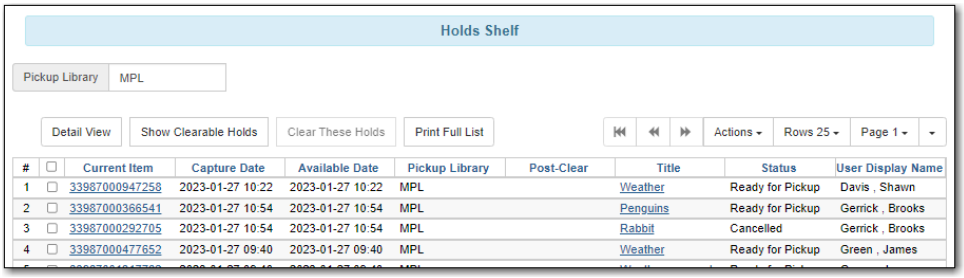
5. When the destination library checks the item they will capture the hold.

10.8. Holds Shelf

Sitka Training Video - Holds Shelf (1:12)

Items that have been captured for a hold and are waiting to be picked up by the patron will display on your Hold Shelf.

1. Go to **Circulation** → **Holds Shelf**.
2. The holds shelf will display.



3. Holds on the hold shelf will have a hold status of *Ready for Pickup* or *Cancelled* or *Wrong Shelf*.

Items remain on your hold shelf until they are checked out to the patron or cleared by library staff.

See Managing Holds for more information.

10.8.1. Clearing Holds

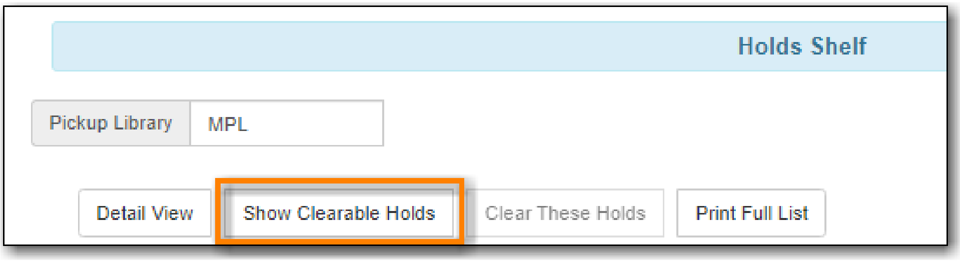
There are two types of clearable holds:

- *Cancelled Holds* - holds that patrons or library staff have cancelled after they were already on the holds shelf.
- *Expired Holds* - holds have been on the holds shelf past your library's hold shelf expire interval.

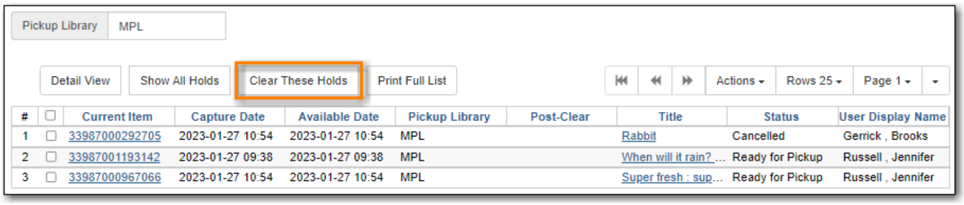
NOTE Evergreen calculates a hold's expire time based on the value entered for the library setting *Default hold shelf expire interval*.

To clear these holds:

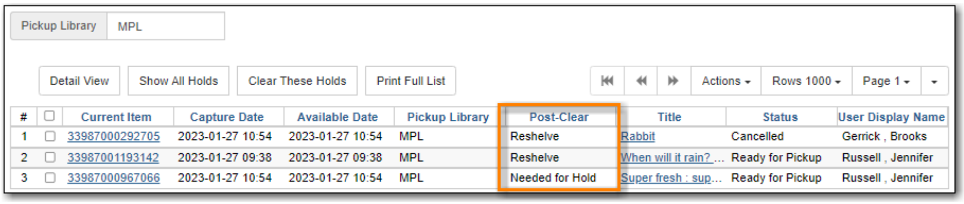
1. On the holds shelf, click the **Show Clearable Holds** button.



2. Only holds that have been cancelled or are expired will now display.
3. Click **Clear These Holds**. This will cancel the expired holds.



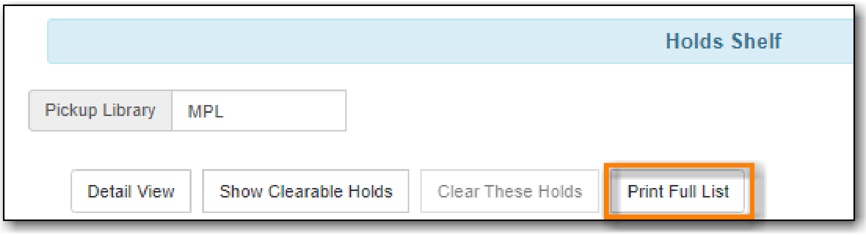
4. The **Post-Clear** column will indicate what will happen when the item is checked in.



5. Pull all the cleared items from the holds shelf.
6. Go to **Circulation** → **Check In**.
7. Check in all the items. The items will either go into reshelving or generate a hold notification if there is another patron on hold.

TIP

The **Print Full List** button will give you a list of the holds that needs to been pulled from the holds shelf for check in.



10.9. Managing Hold Groups

Sitka Snippet Video - Hold Groups (2:45)

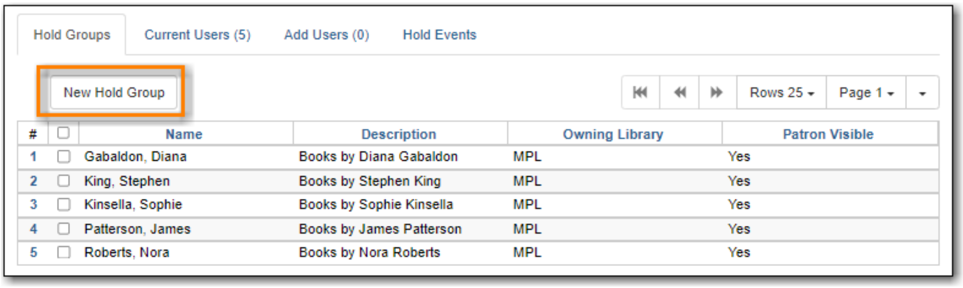
Hold groups allow library staff to create lists of patrons that can then be used to place multiple title level holds on the same bibliographic record. This is useful for book clubs, new or on-order items, and/or high demand items.

TIP

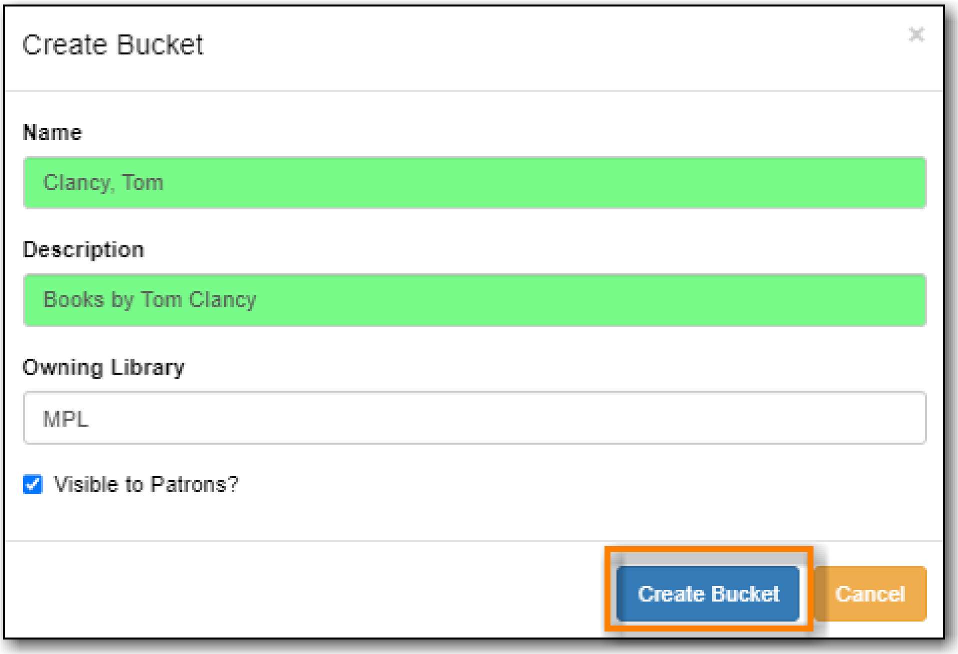
Libraries may wish to set up a mechanism by which patrons can subscribe to be added to a hold group. For example, a library may set up a form on their website with a list of authors to select from that is sent to library staff so they can add the patron to the selected author hold groups.

10.9.1. Creating a Hold Group

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

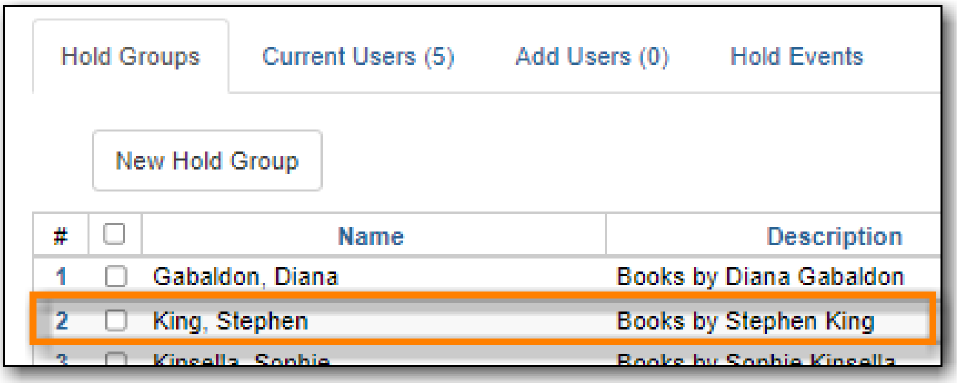


3. Enter a name for the hold group.
4. Enter a description (optional).
5. Choose the owning library from the drop down (defaults to the workstation library).
6. If you want the hold group to be visible to the patrons on the list, check the *Visible to Patrons?* checkbox.
7. Click **Create Bucket**.

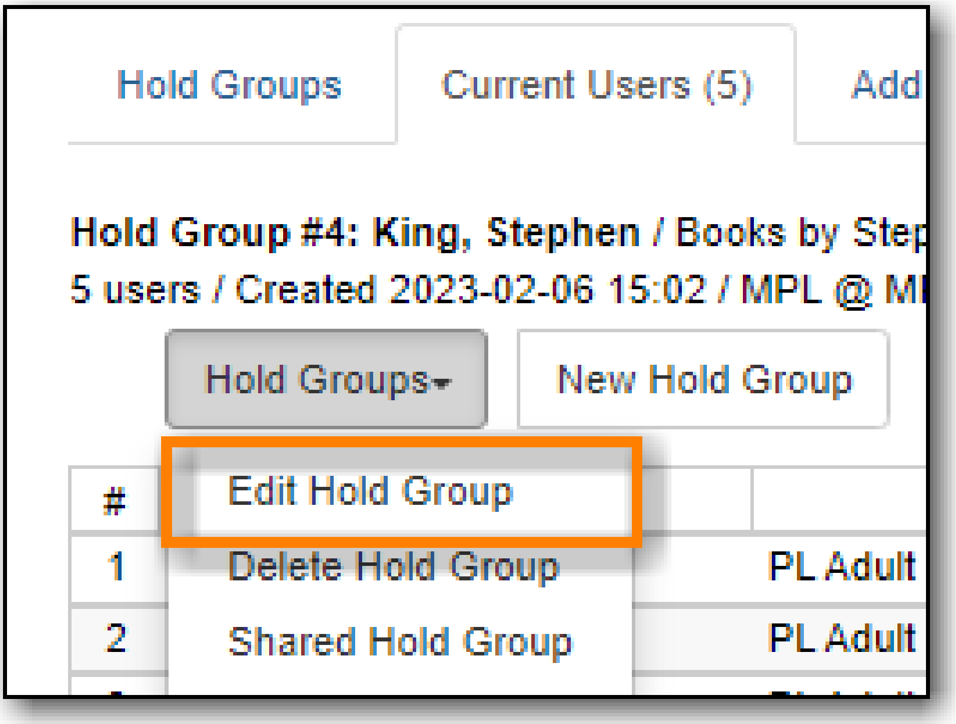


10.9.2. Editing A Hold Group

1. Go to **Circulation** → **Hold Groups**.
2. From the **Hold Groups** tab, double-click the hold group you wish to open.



3. The group will be opened on the **Current Users** tab. Click on the **Hold Groups** button.
4. From the drop down select **Edit Hold Group**.

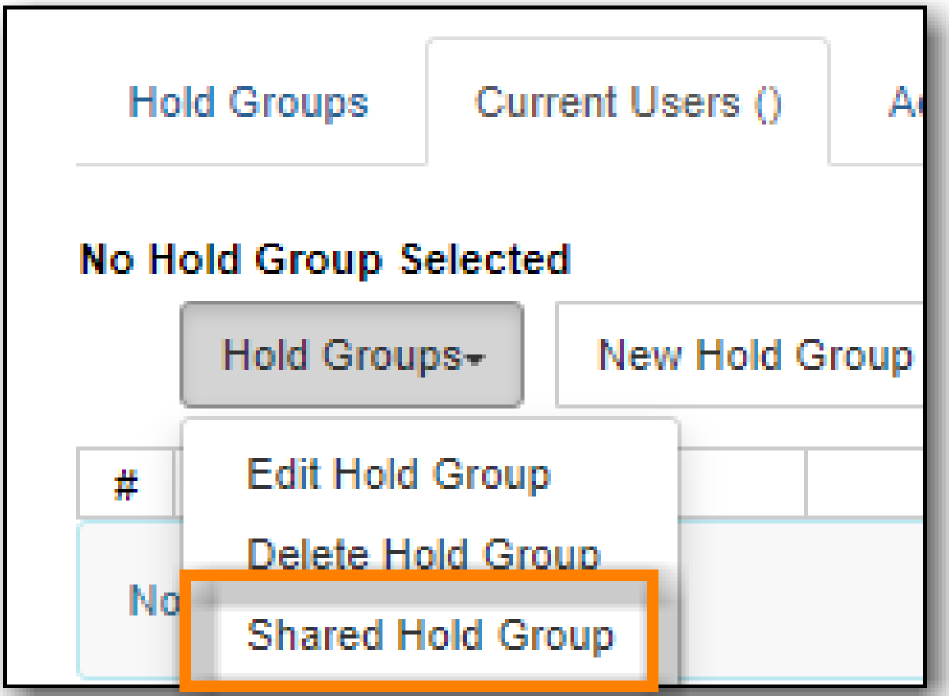


5. In the pop-up that appears you can edit the name, description, owning library, or visibility.
6. Click **Apply Changes**.
7. The hold group is updated with your changes.

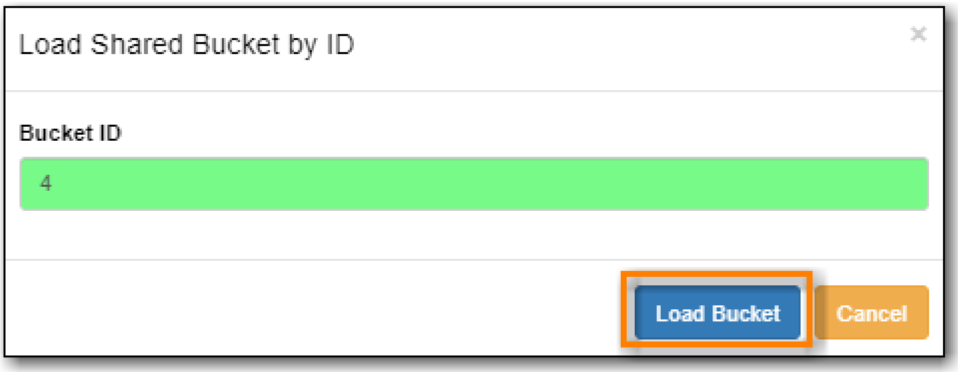
10.9.3. Sharing a Hold Group

By default, hold groups are only visible to the staff member who created them but they can be shared.

1. Go to **Circulation** → **Hold Groups**.
2. Go to the *Current Users* tab.
3. Click on the **Hold Groups** button.
4. From the drop down select **Shared Hold Group**.



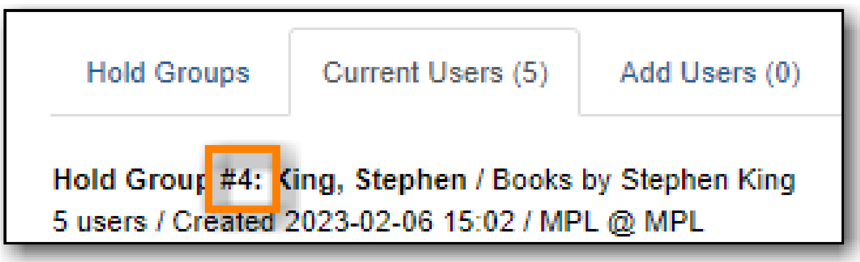
5. Enter the hold group ID and click **Load Bucket**.



6. The shared bucket will display.

TIP

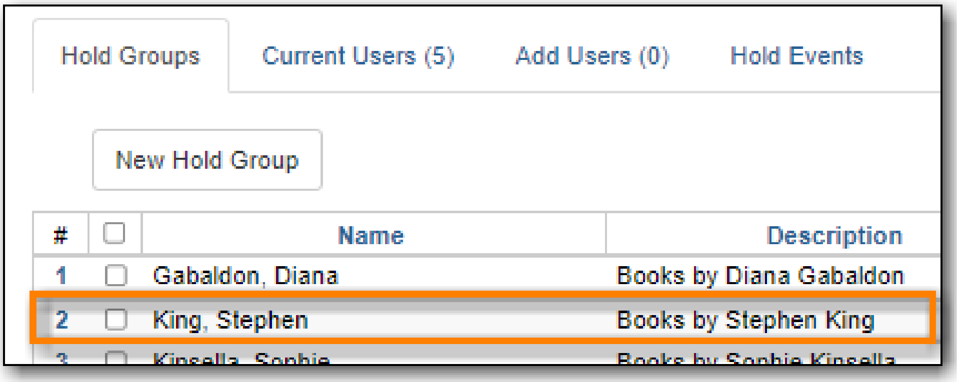
The hold group ID can be found beside the hold group name.



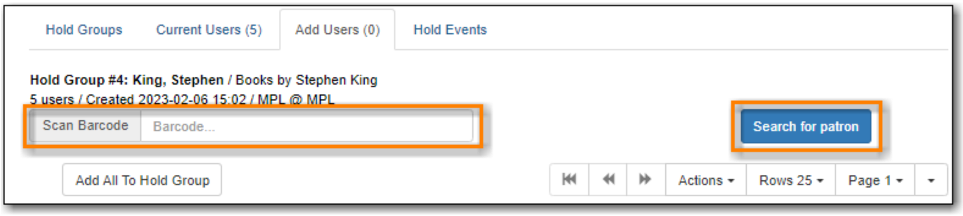
10.9.4. Adding Users to a Hold Group

Patrons can be added to a hold group through the Hold Group interface by barcode or search.

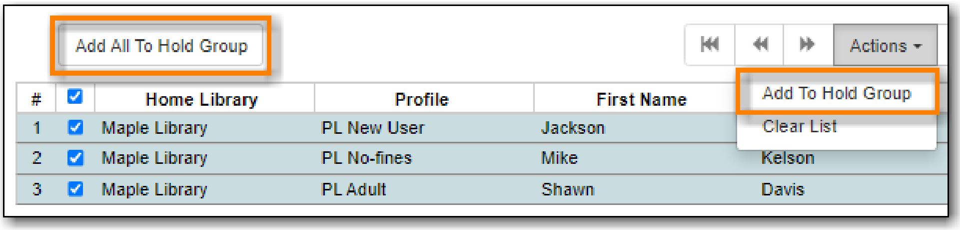
1. Go to **Circulation** → **Hold Groups**.
2. From the **Hold Groups** tab, double-click the hold group you wish to open.



3. The group will be opened on the **Current Users** tab. Click on the *Add Users* tab.
4. Enter the patron barcode into the *Scan Barcode* field or click **Search for Patron**.



5. Added patrons will be listed in the grid. Continue adding patrons as needed.
6. Select the patrons you would like to add to the group and Click **Actions** → **Add to Hold Group** or use the **Add All To Hold Group** to add all patrons at once.



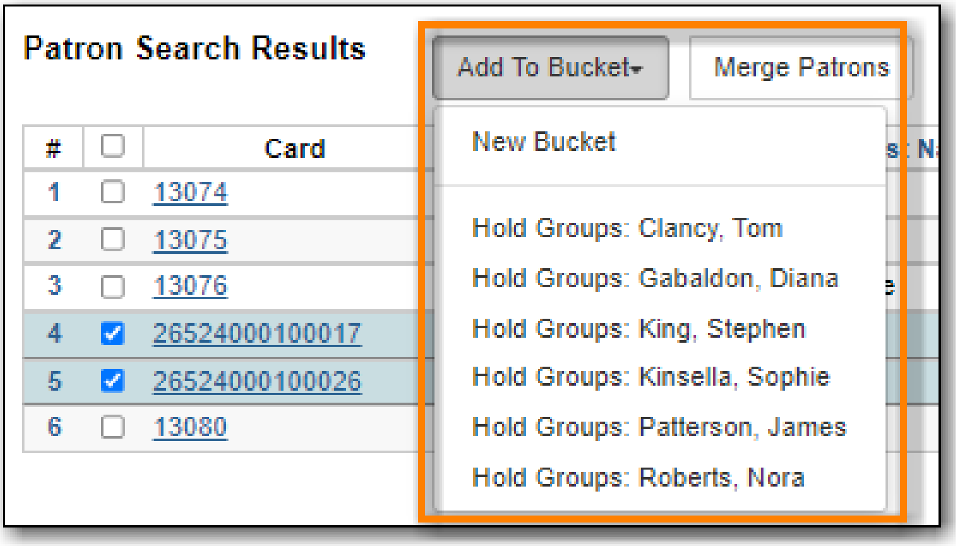
7. The patrons will now appear on the *Current Users* tab as part of the hold group.

NOTE	You can add some or all of the patrons in the add users list to different hold groups. 1. Go to the *Hold Groups* tab and double-click to select another hold group from the list. 2. Return to the *Add Users* tab and select the patrons you wish to add to the new hold group. 3. Use the actions menu to add them to the newly select hold group.

Patrons can also be added to a hold group via the main patron search.

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

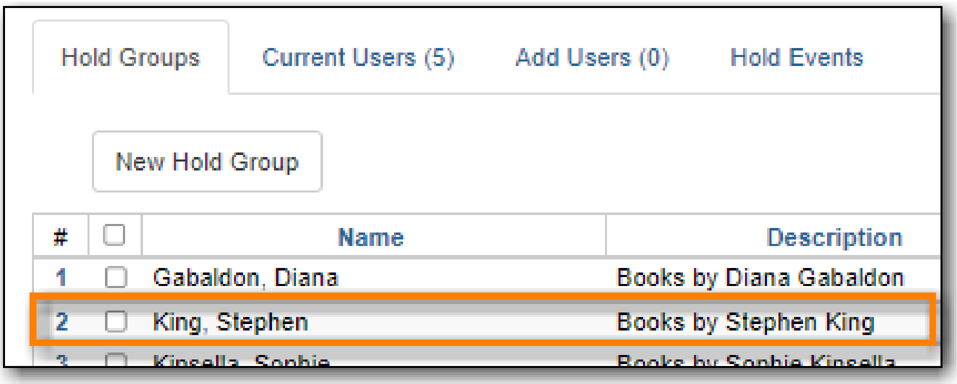
5. Choose the hold group to which you want to add the patron(s). Only hold groups created by the logged in staff member display.



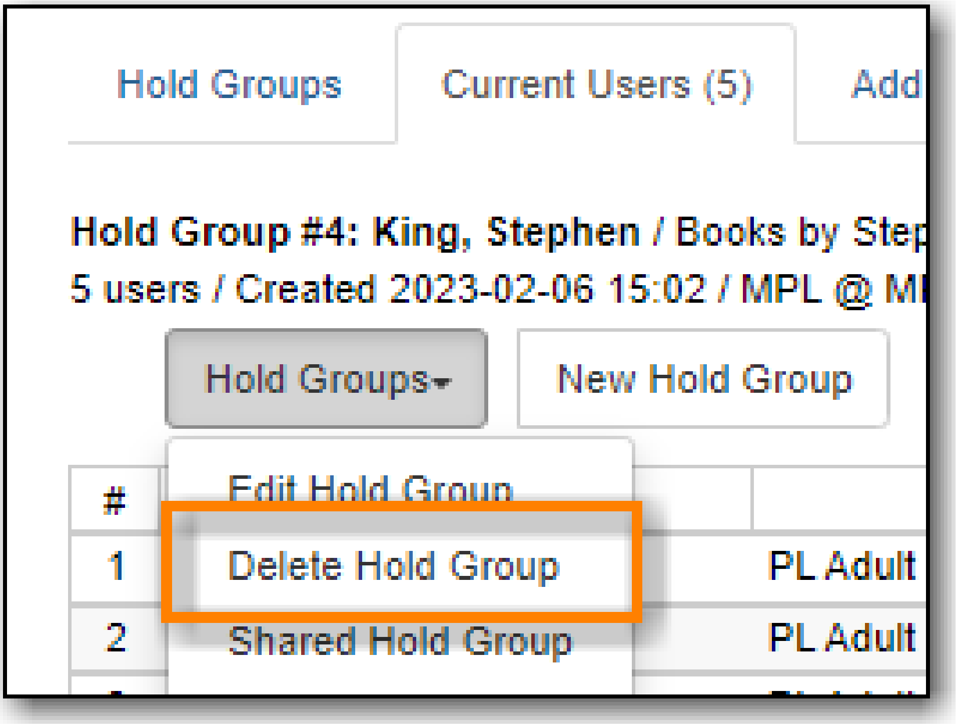
6. A message displays on the bottom right corner of the screen to confirm whether or not the patrons were added successfully to the hold group.

10.9.5. Deleting a Hold Group

1. Go to **Circulation** → **Hold Groups**.
2. From the **Hold Groups** tab, double-click the hold group you wish to open.



3. The group will be opened on the **Current Users** tab. Click on the **Hold Groups** button.
4. From the drop down select **Delete Hold Group**.



5. Click **Delete Bucket**.

6. The hold group is deleted and will no longer show in the list.

NOTE Deleting a hold group does not cancel any holds placed through the hold group.

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

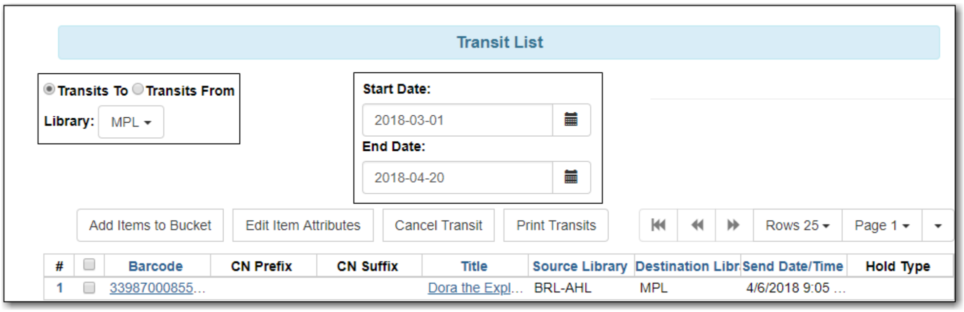
to load item in **Item Status** screen.

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.

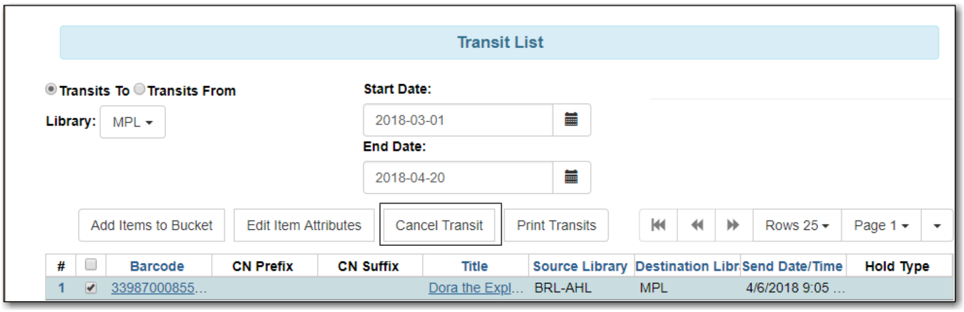
11.5. Cancel Transits

NOTE

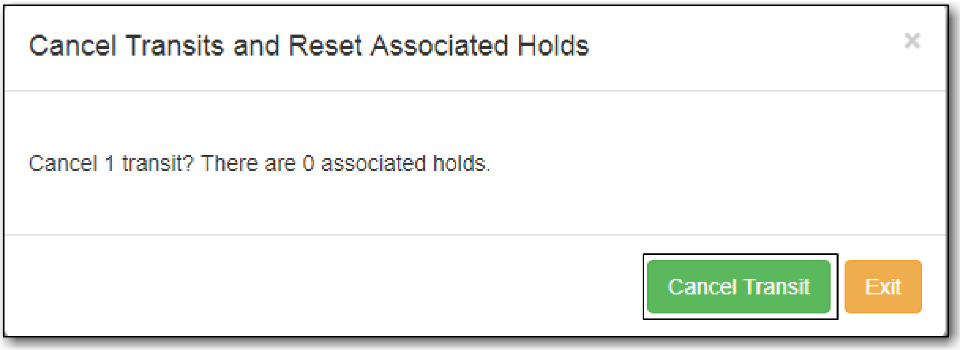
Under certain circumstances cancelling a transit may be required, but it effectively cancels the previous check in. Cancelling a transit affects data integrity and the accuracy of circulation statistics. Co-op Support strongly recommends that only sending libraries ever cancel a transit, and only before 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.

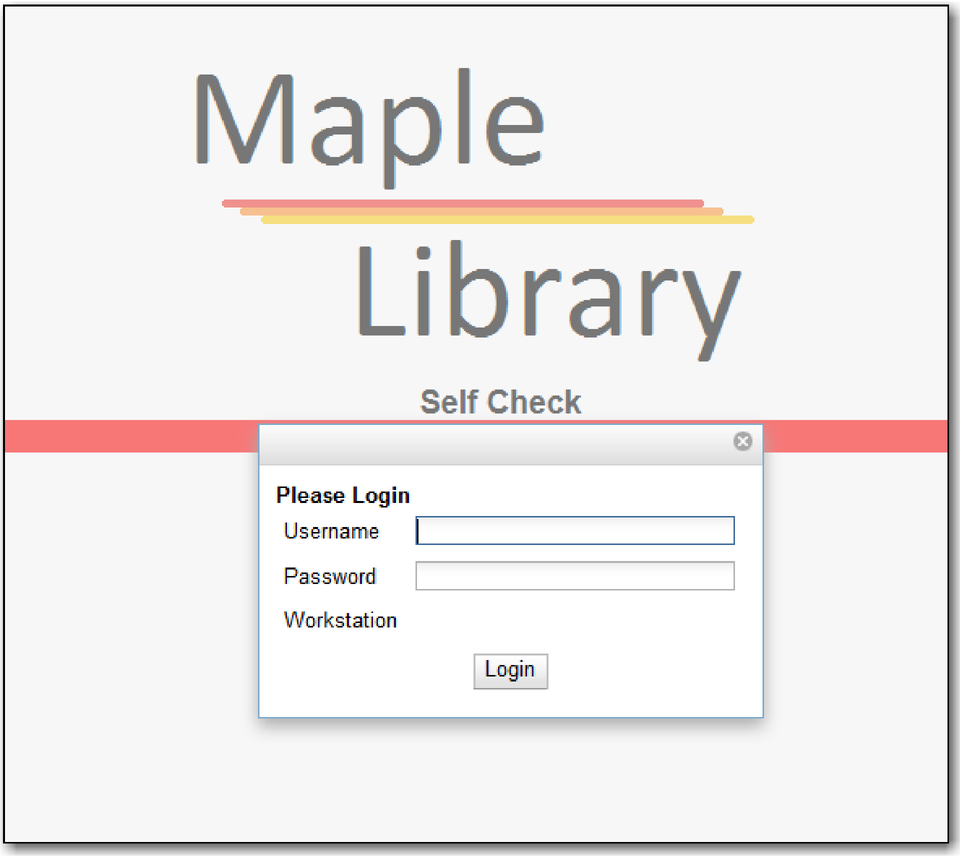
Chapter 12. Self Check

12.1. Staff Functions in the Evergreen Self Check

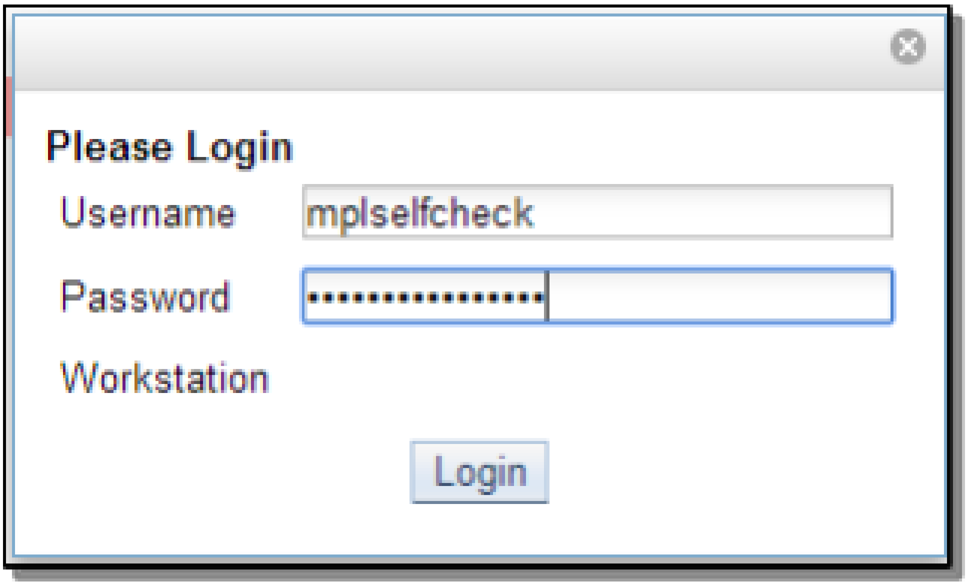
NOTE	These instructions are specific to the native Evergreen Self Check. For instructions on using third party self check systems, libraries should refer to the instructions provided by the third party vendors.

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**.



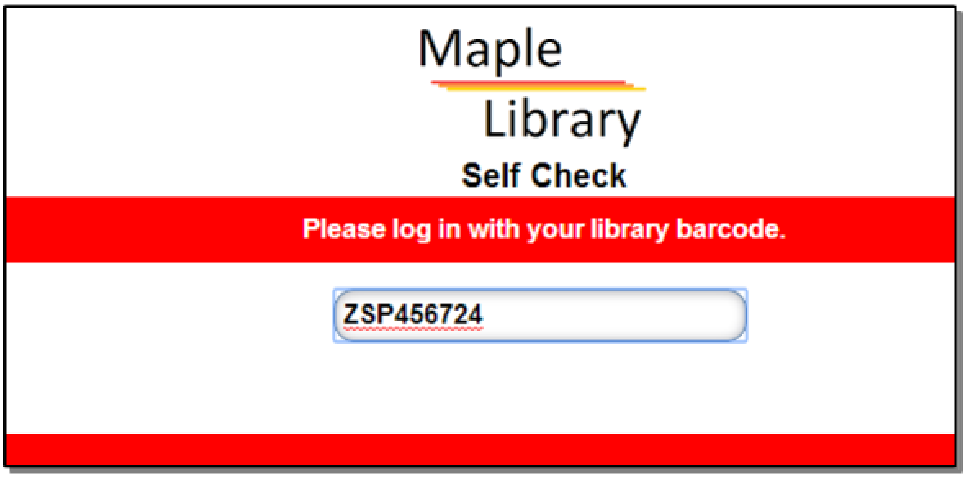
12.1.2. Turn off the Self Check

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

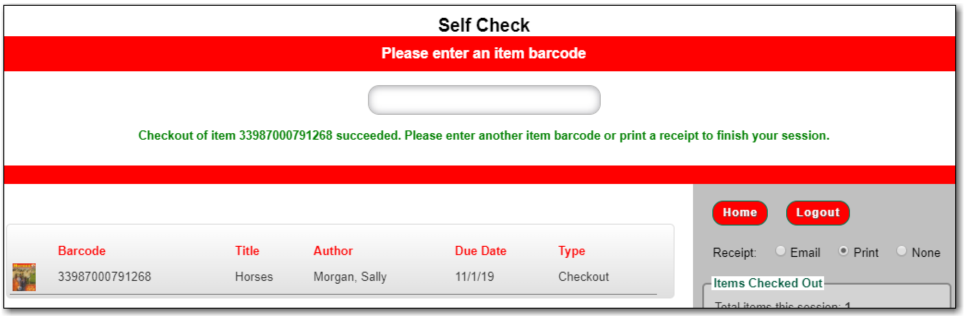
1. Close the browser
2. Turn off the computer.

12.2. Basic Check Out

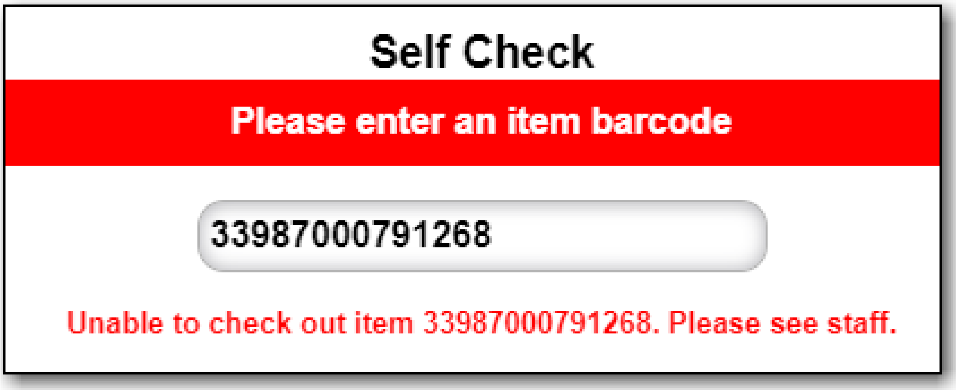
1. Scan a library card.



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.



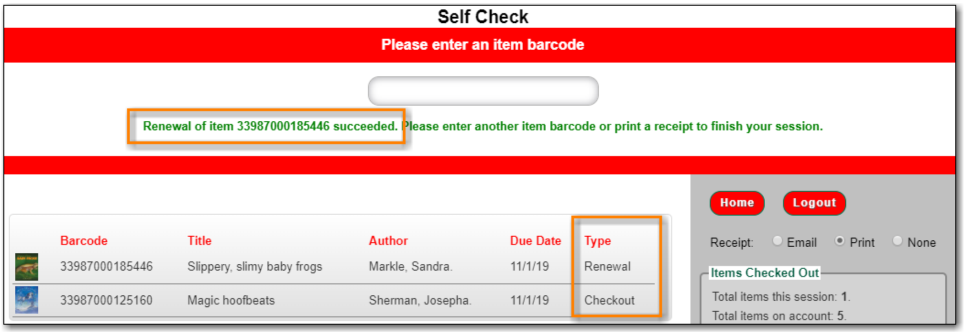
5. Select **Email**, **Print**, or **None**, for a receipt. Email only appears if patron has an email address in their account.
6. Click **Logout**

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.

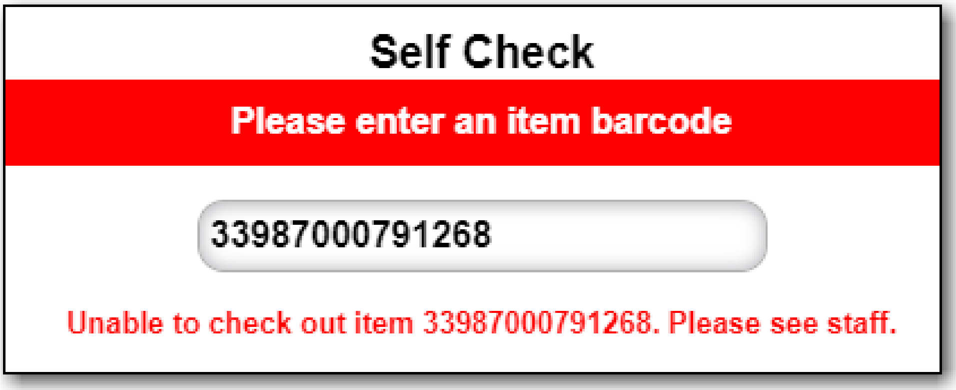
12.3. Renew Items

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**.

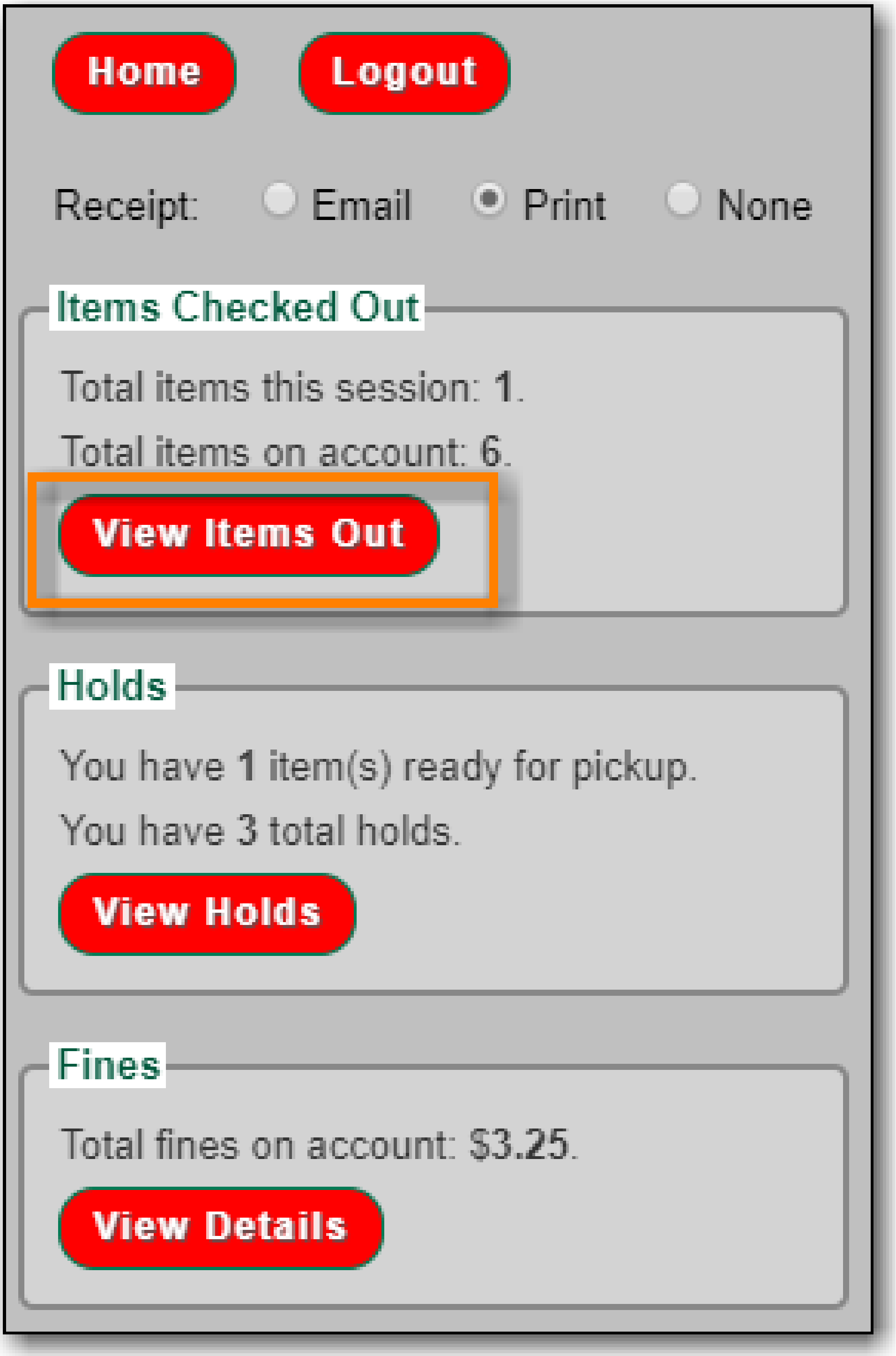


3. If the renewal fails, a message advises patron to speak to staff.

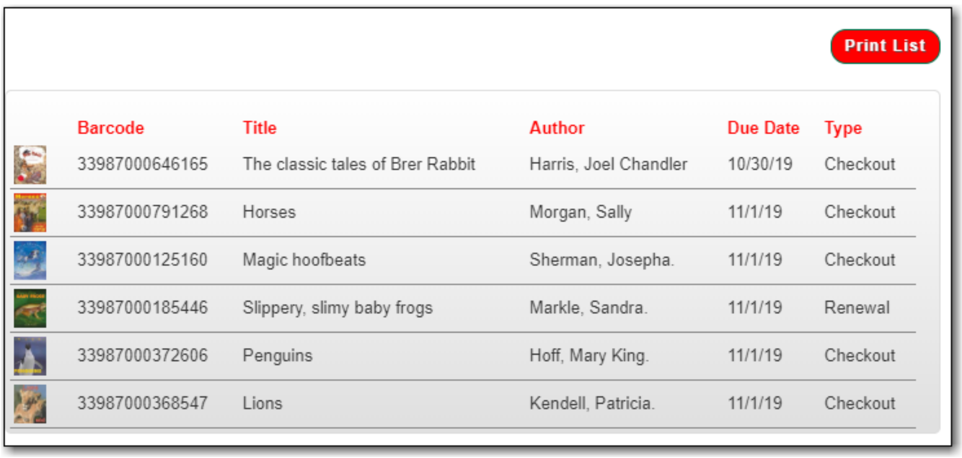


12.4. View Items Out

1. Click **View Items Out**.



2. Items out list displays.

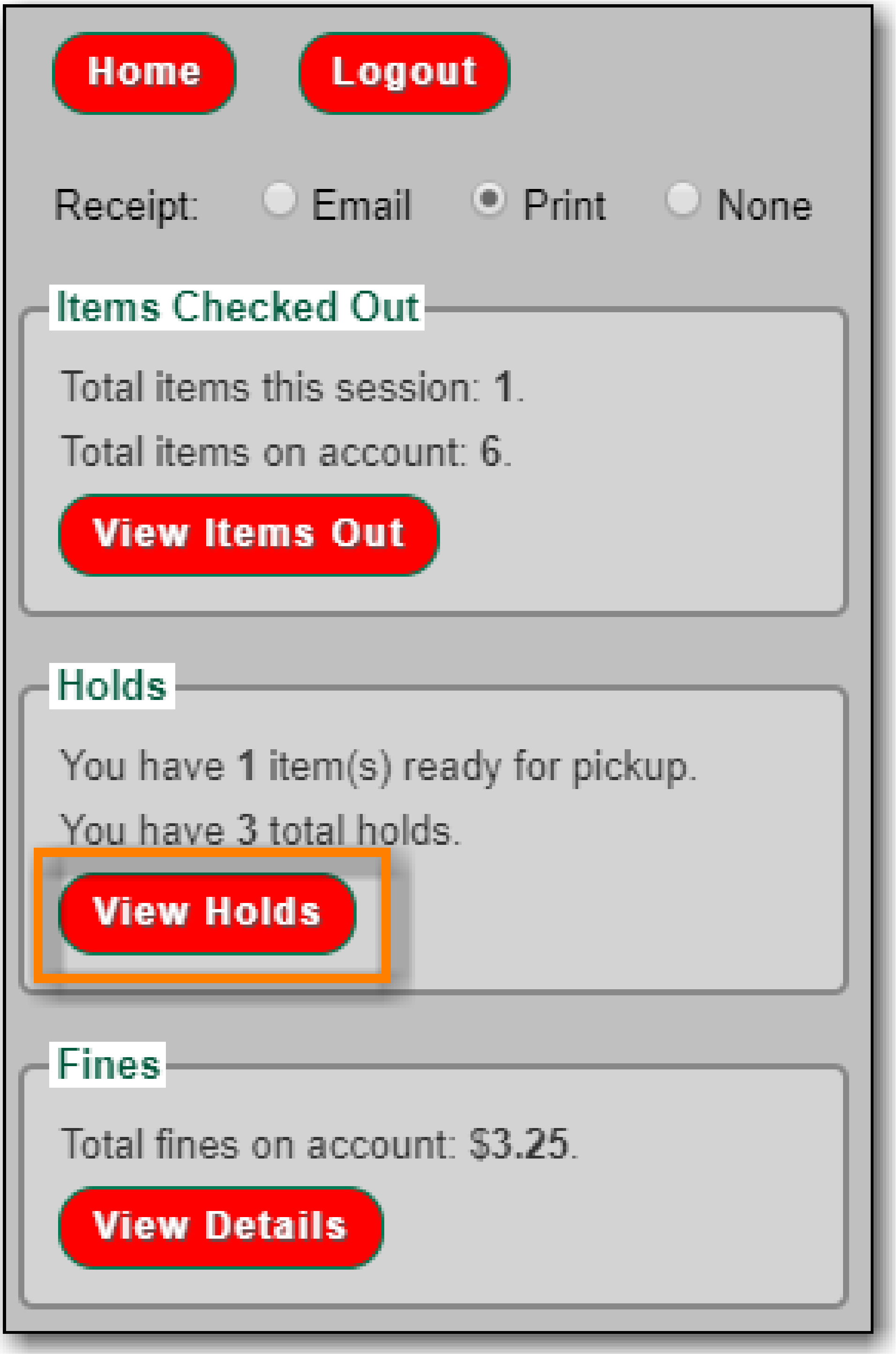

Print List

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**.

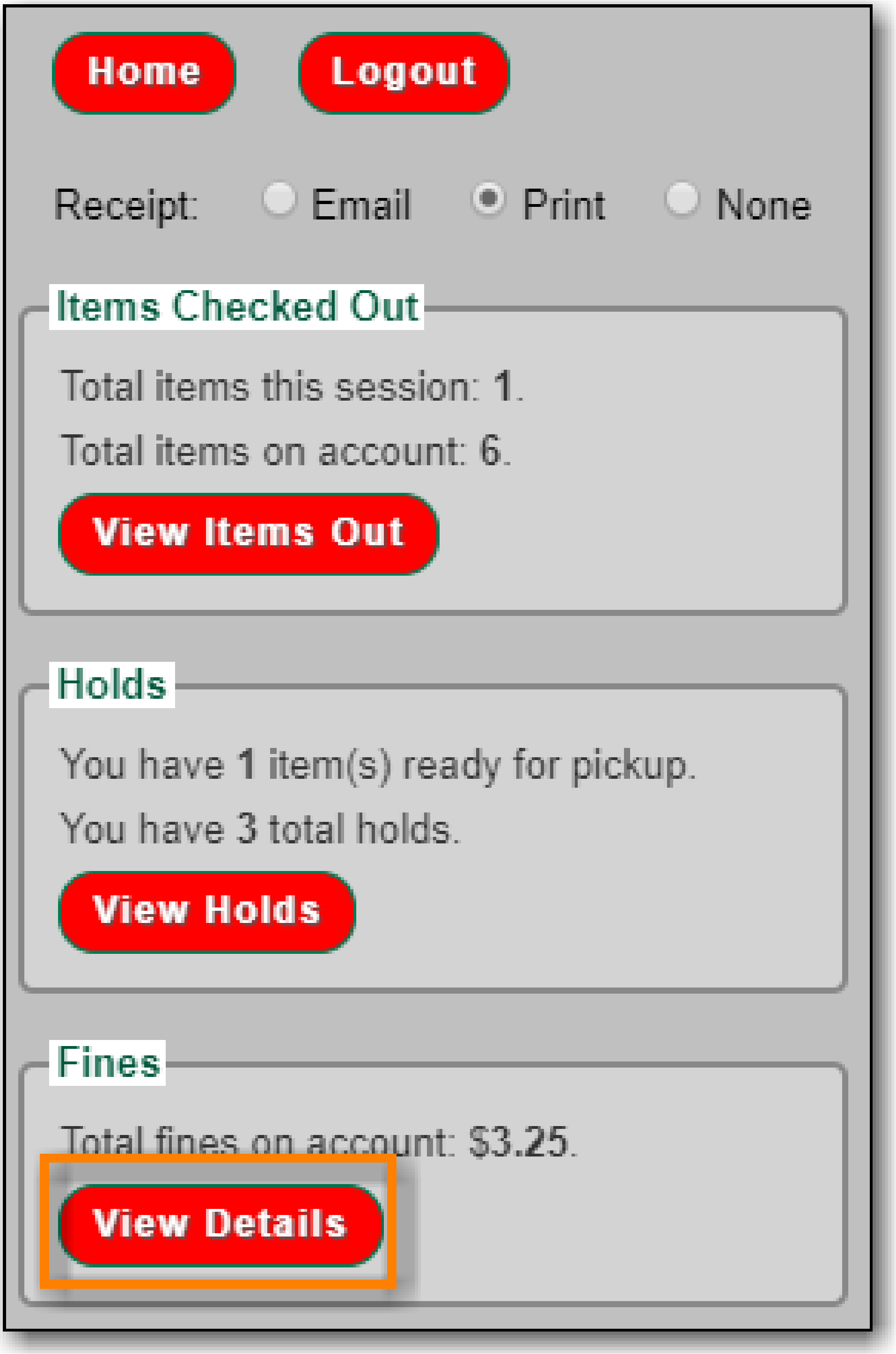


2. Items on hold list displays.

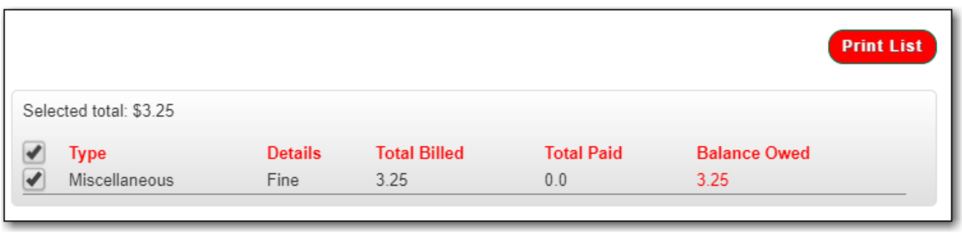
NOTE The Print List button can be enabled and disabled through the Library Settings Editor.

12.6. View Fines

1. Click **View Details**.



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



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.

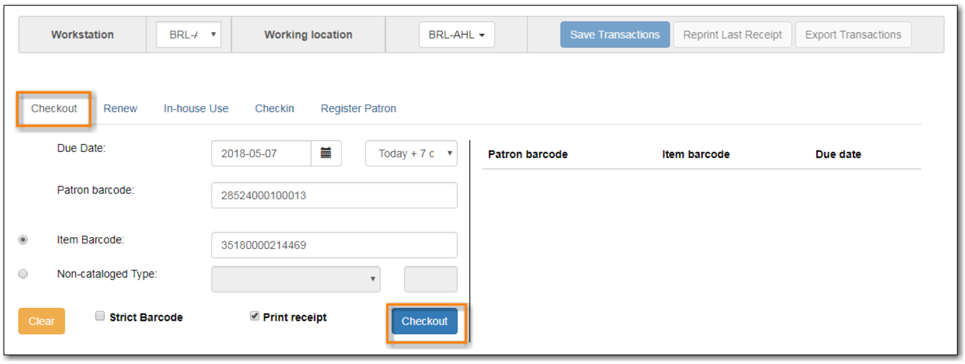
CAUTION

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

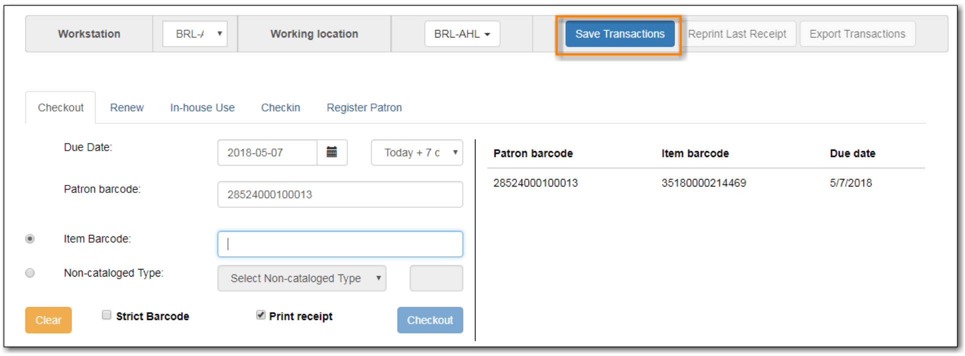
13.2.1. Check Out

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.

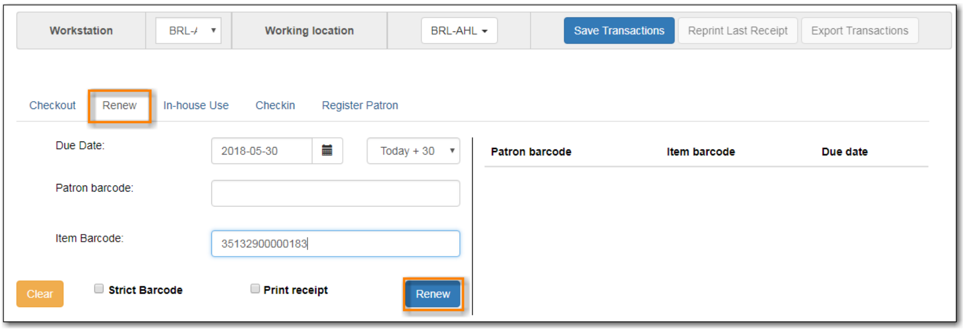
13.2.2. Renew

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

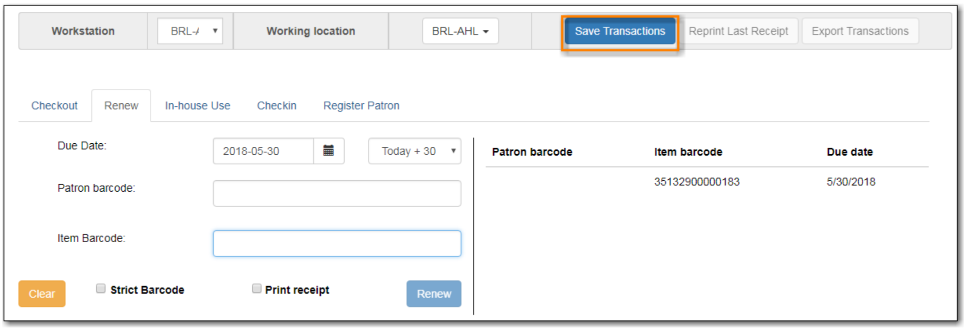
To renew items in Offline Circulation:

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.

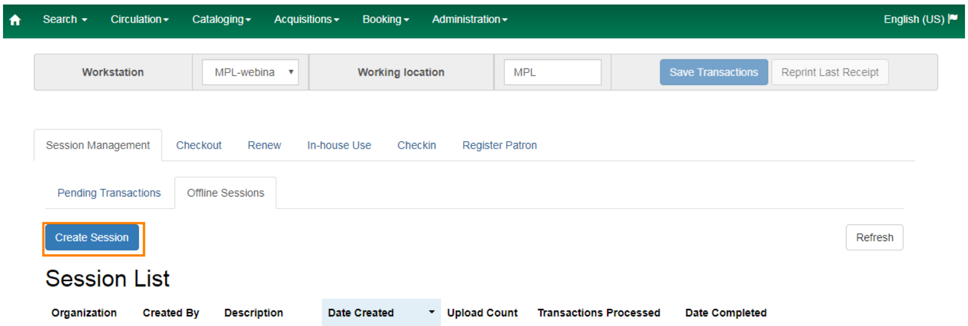
NOTE	Besides the above regular steps, you may need to handle exceptions if some of your transactions can not be processed.

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

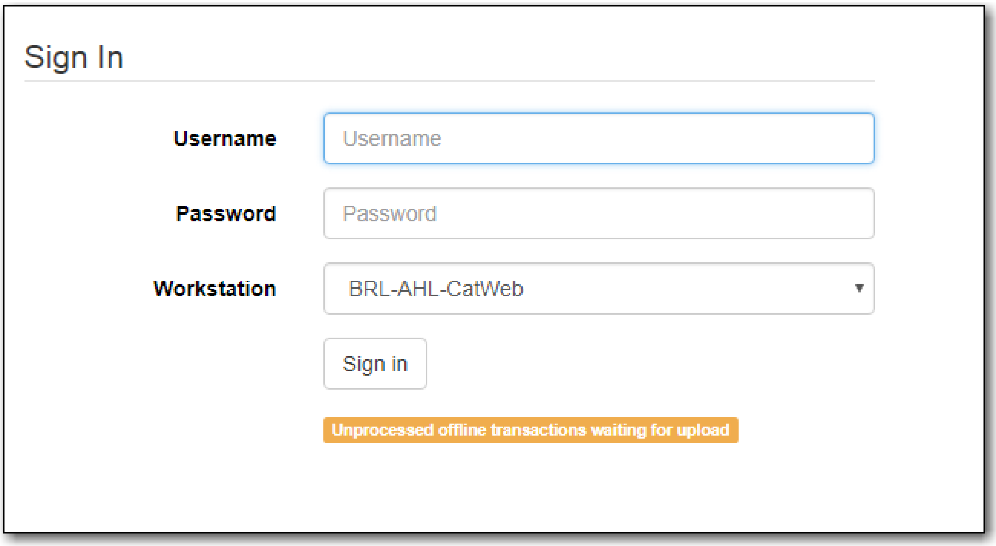
1. Log into Evergreen with a local system administrator account.
2. Go to **Circulation** → **Offline Circulation**.
3. On Session Management tab, click **Offline Sessions**.
4. Click **Create Session**.



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

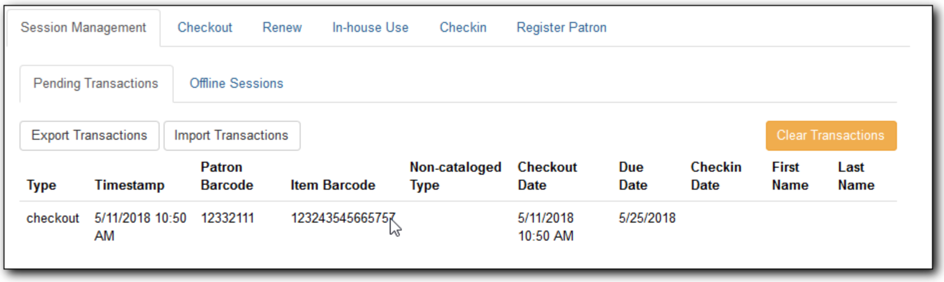
13.3.2. Upload transactions to a session

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

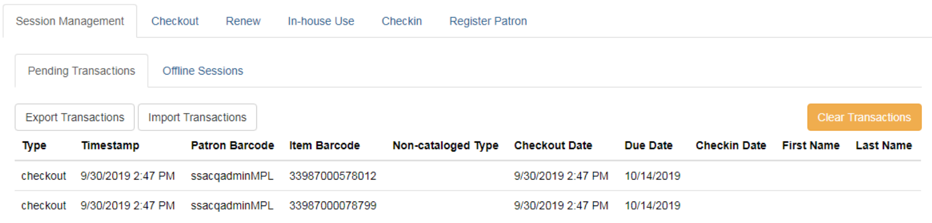


You need to upload the transactions to the session just created on each workstation used for offline circulation.

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**.

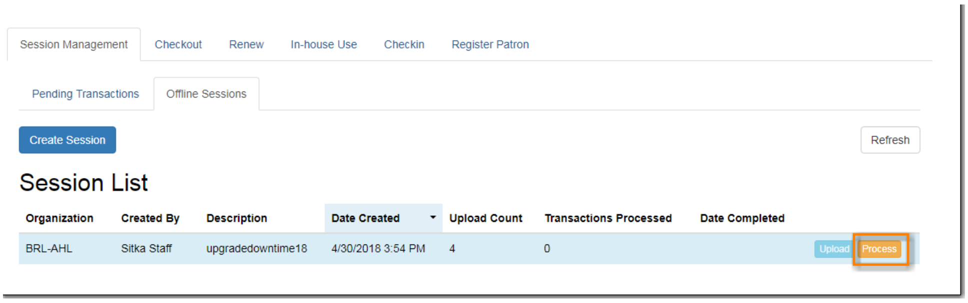


5. Repeat the above process on each workstation used for offline circulation. Once done, local system administrators may process the session.

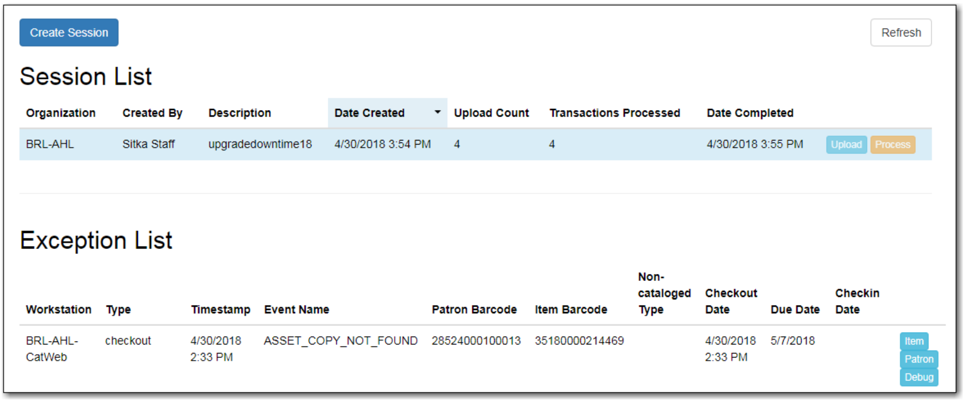
13.3.3. Process the uploaded transactions

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

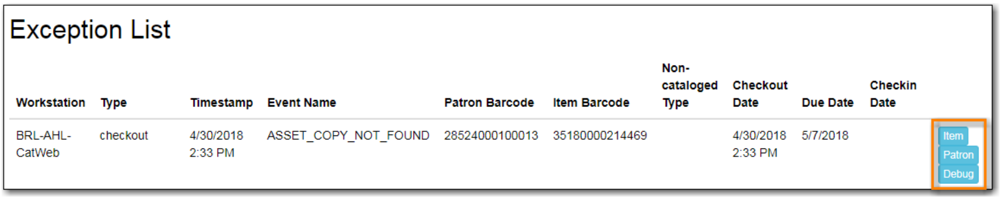
Exceptions are problems that were encountered during processing. For example, a mis-scanned patron barcode, or an item that was not checked in before it was checked out to another patron would all be listed as exceptions. Those transactions causing exceptions might not be loaded into Evergreen database.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

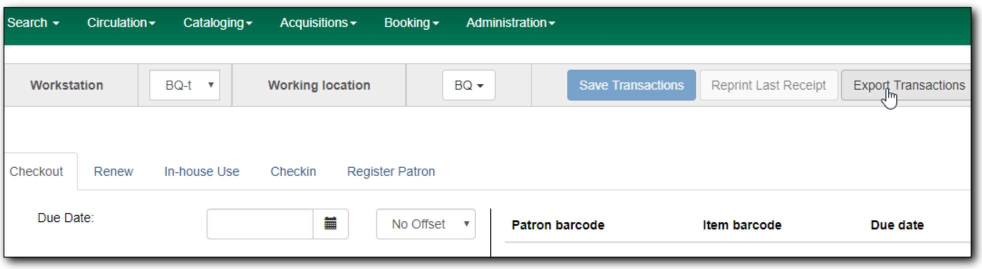
- `ROUTE-ITEM` - Indicates the book should be routed to another branch or library system. You'll need to find the book and re-check it in while online to get the Transit Slip to print.
- `COPY_STATUS_LOST` - Indicates a book previously marked as lost was found and checked in. You will need to find the 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

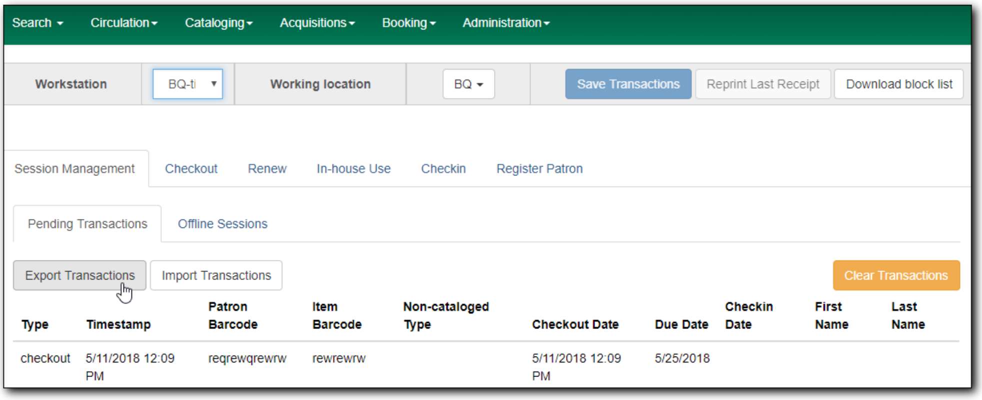
To export transactions while you are offline, navigate to **Circulation** → **Offline Circulation** and click **Export Transactions** in the top-right of the screen. This will save a file entitled pending.xacts to your browser's default download location. If you will be processing these transactions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

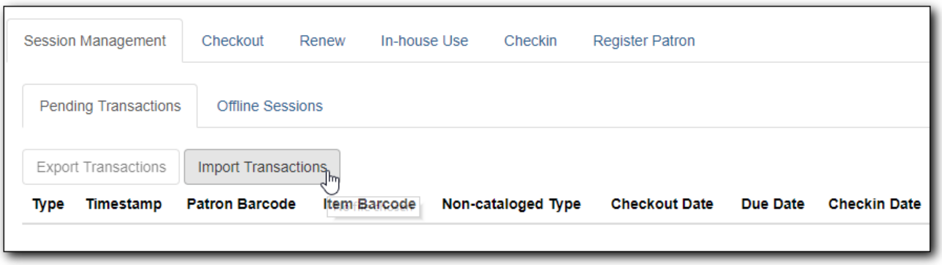


CAUTION	If you do not clear transactions after exporting, next time when you do offline circulation, your records will be appended to these transactions.

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 (5:56)

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 Search Preferences you set Sitka as your Default Search Library.

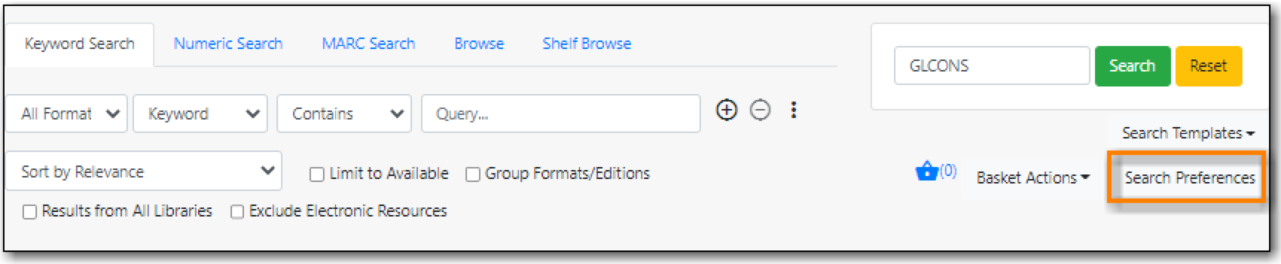
14.1. Search Preferences

Sitka Snippet Video - Search Preferences (1:48)

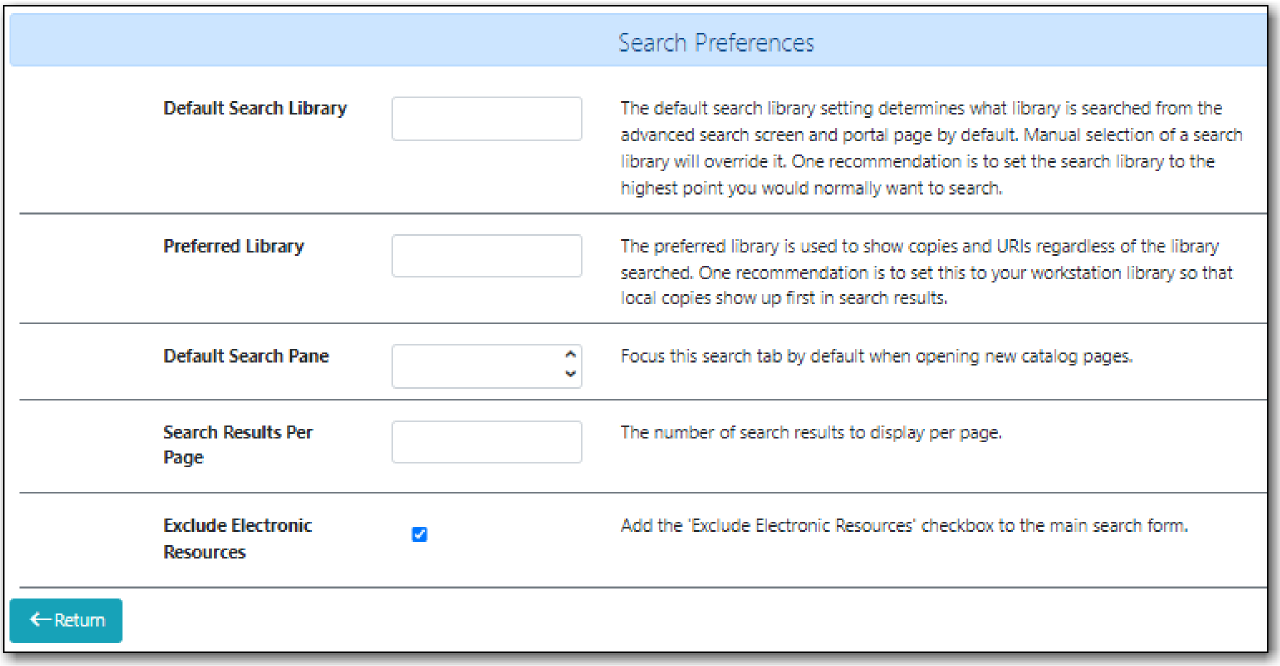
Catalogue searching related preferences can be set directly in the staff catalogue.

To set your preferences:

1. In the staff catalogue click on **Search 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 opening a new catalogue window. Choose from Keyword Search, Numeric Search, MARC Search, Browse, and Shelf Browse.

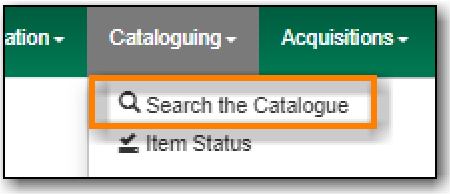
d. **Search Results Per Page** You can enter the number of search results that display per page. We recommend keeping this number under 200.

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

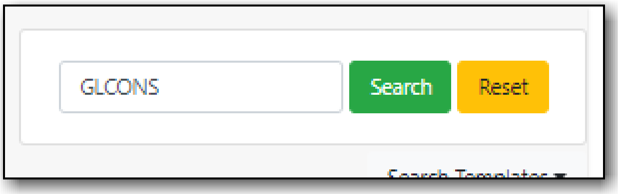
NOTE The preference set in the staff client override any preferences for the logged in account that have been set in the public catalogue via My Account.

14.2. Numeric Search

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

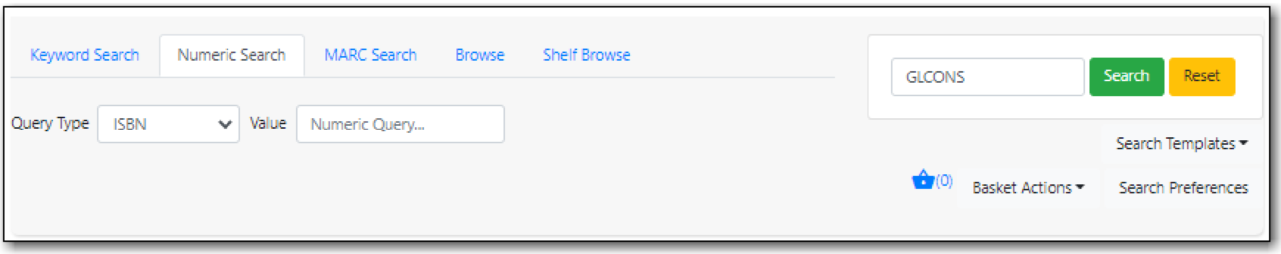


2. When searching for cataloguing purposes it is important to ensure that you search the entire consortium.

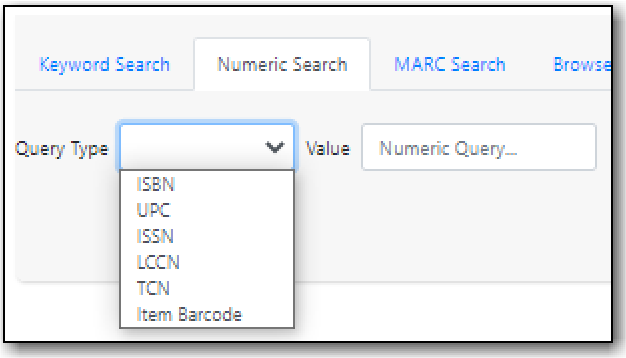


   a. (GLCONS is the Green Land Consortium on Sitka's training server.)

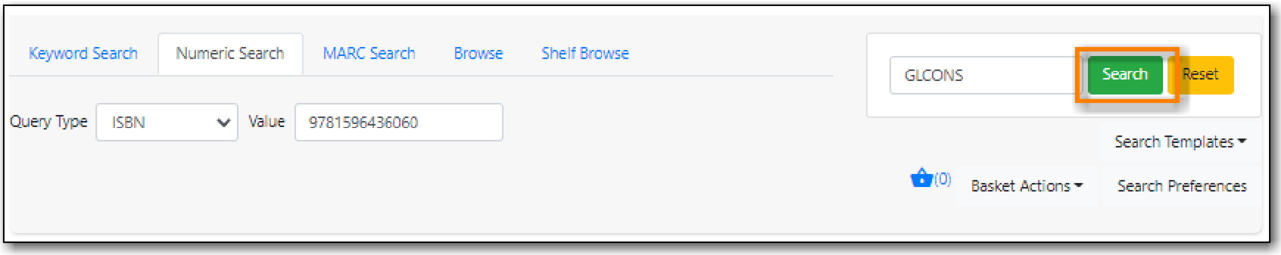
3. Select the **Numeric Search** tab. It will be open by default if it's set as your Default Search Pane.



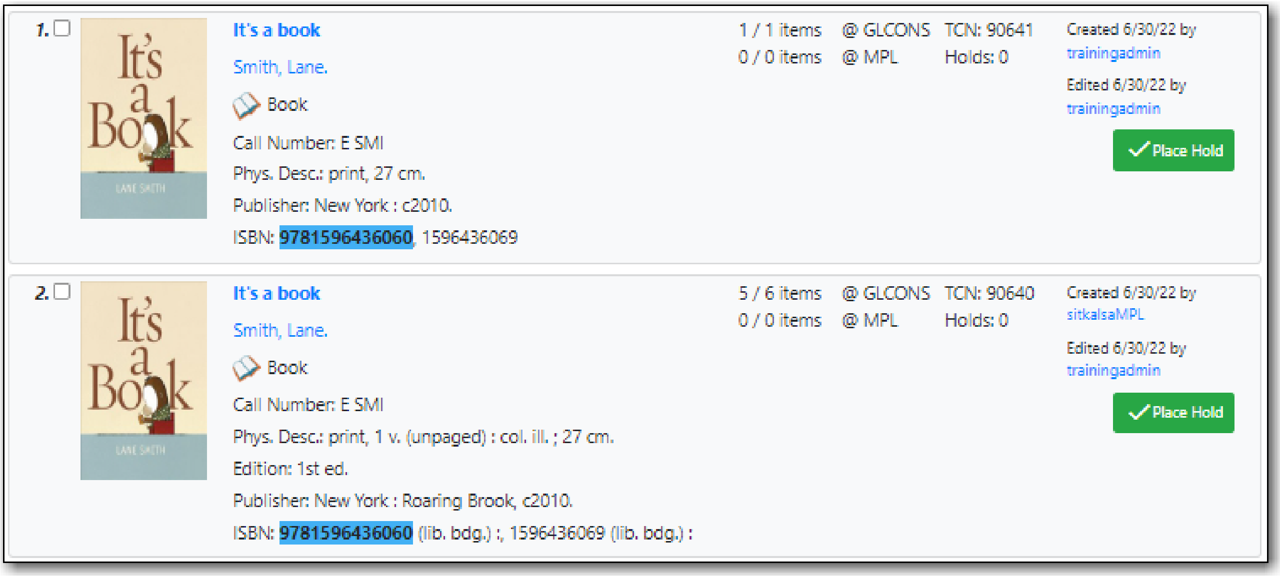
4. You can search by ISBN, UPC, ISSN, LCCN, TCN, or Item Barcode.



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.



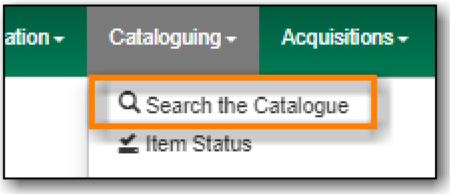
TIP

- 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.

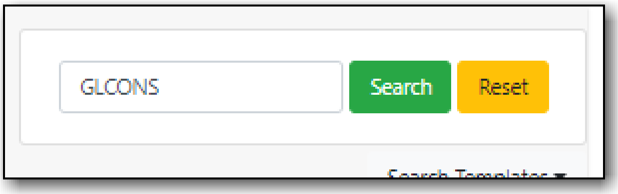
14.3. Keyword Search

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**.

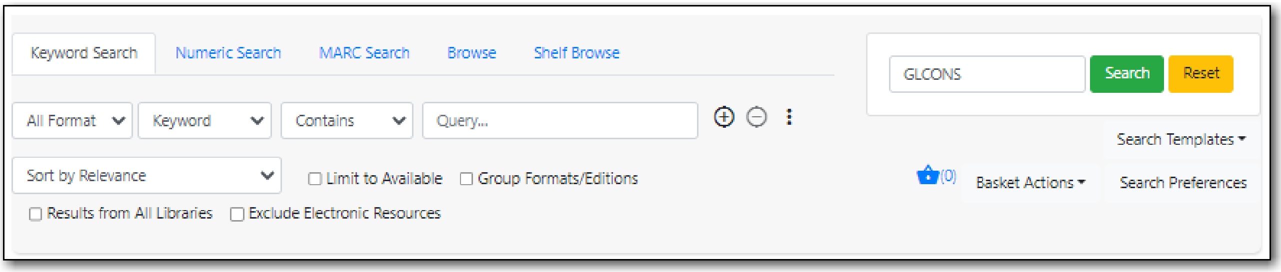


2. When searching for cataloguing purposes it is important to ensure that you search the entire consortium.

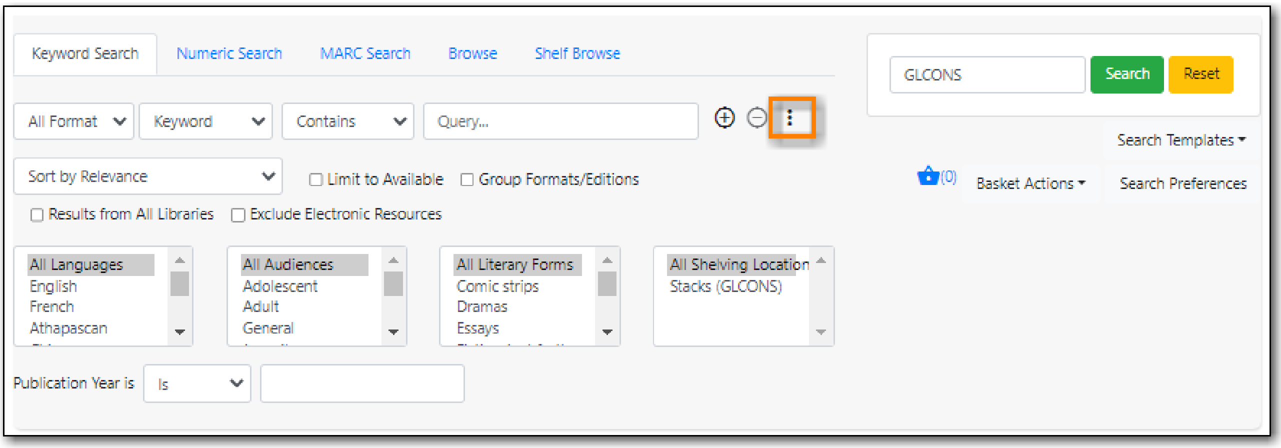


   a. (GLCONS is the Green Land Consortium on Sitka's training server.)

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

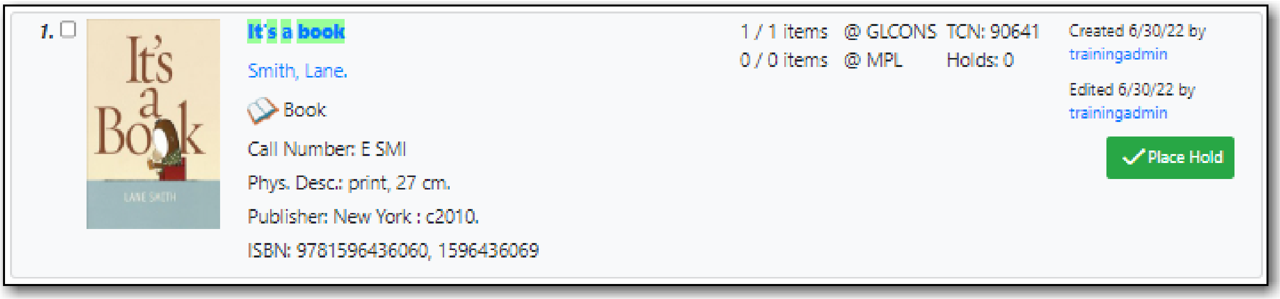


4. Use the three dots to expand the search form for more filtering options.



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.

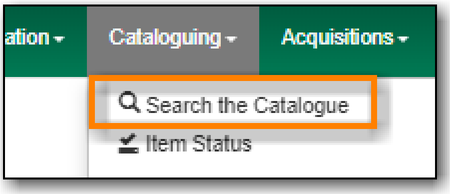
5. Enter your search criteria and click **Search**.
6. Your results are displayed. Refer to Viewing Search Results for Cataloguing Purposes for information on determining which result to add your holding to.



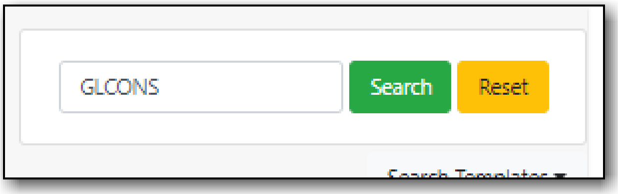
TIP It is possible to search ISBNs by Keyword, but results may not be exhaustive. We recommend using **Numeric Search** when searching for ISBN or other standard identifiers. Refer to Numeric Search.

14.4. MARC Search

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

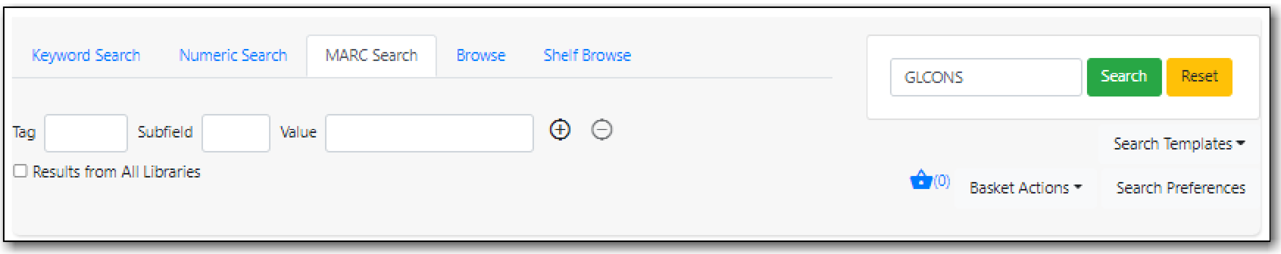


2. When searching for cataloguing purposes it is important to ensure that you search the entire consortium.

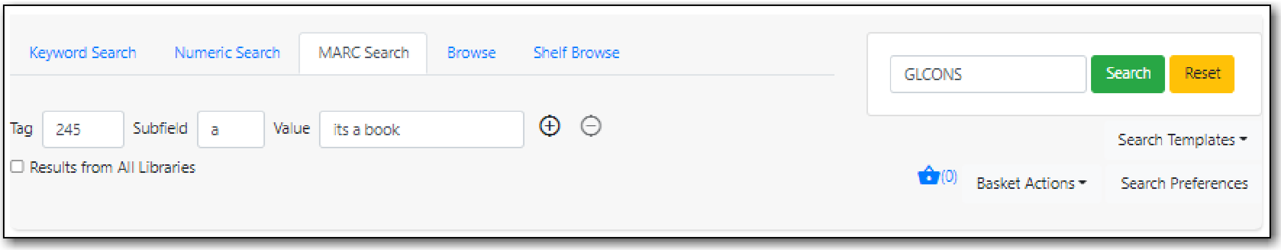


   a. (GLCONS is the Green Land Consortium on Sitka's training server.)

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

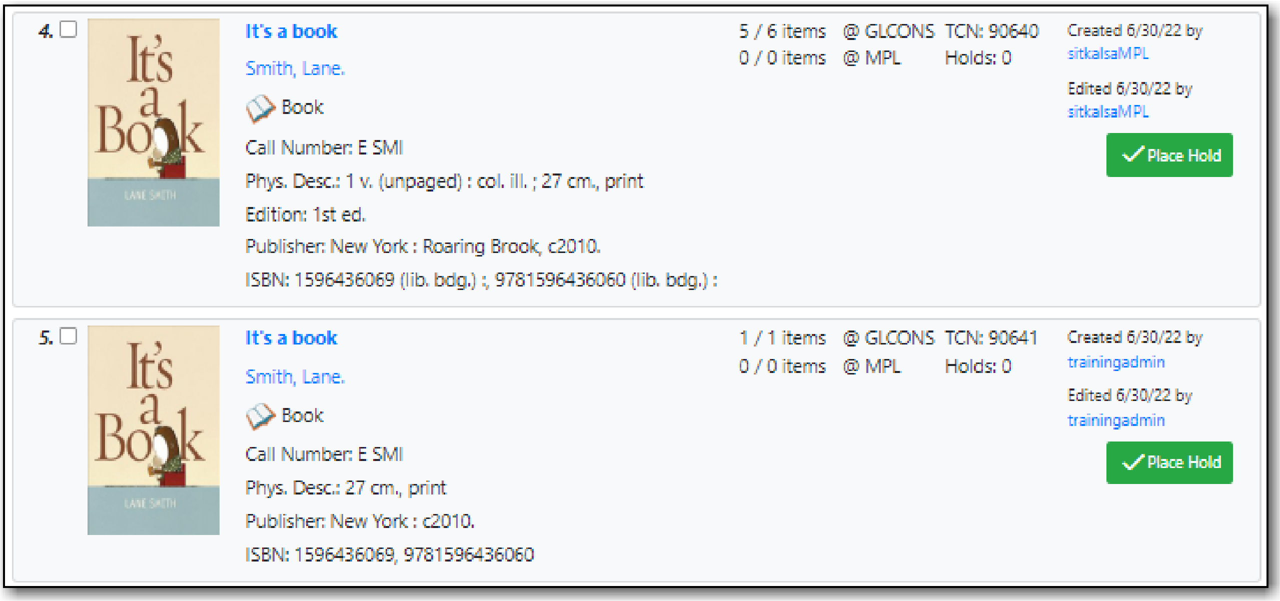


4. Enter the tag, subfield, and value and click **Search**.



TIP	Remove any apostrophes from your search valyue. No results will be returned when apostrophes are included.

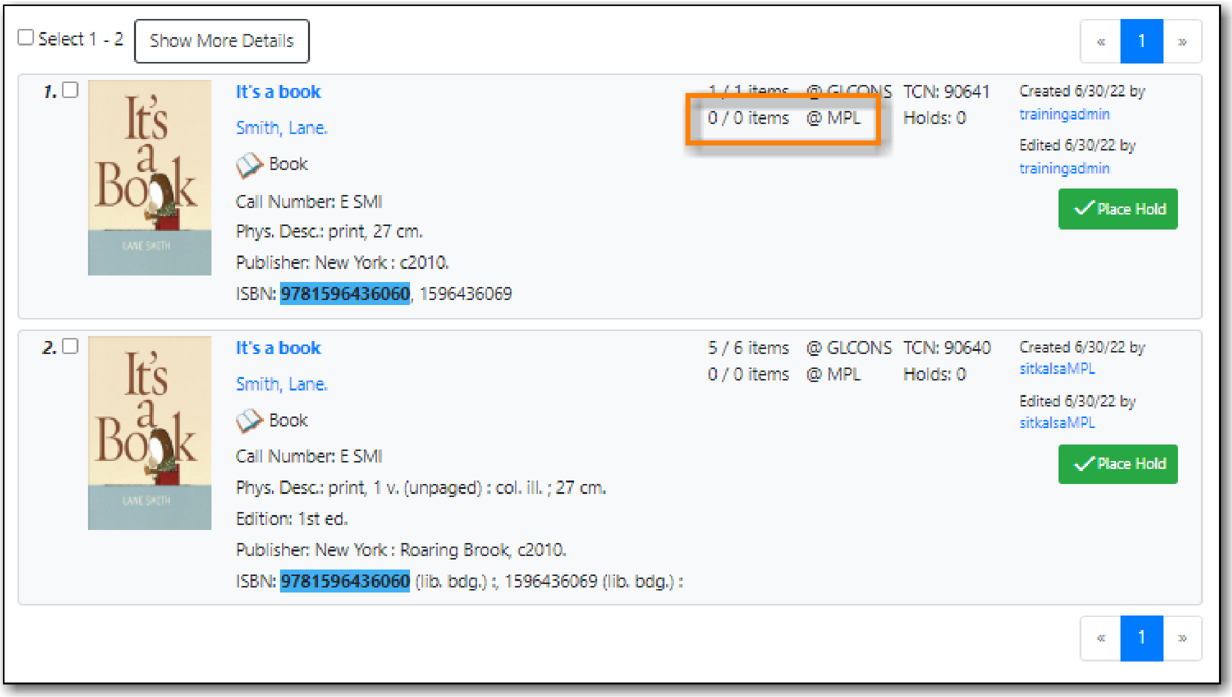
5. Your results are displayed. Refer to Viewing Search Results for Cataloguing Purposes for information on determining which result to add your holding to.



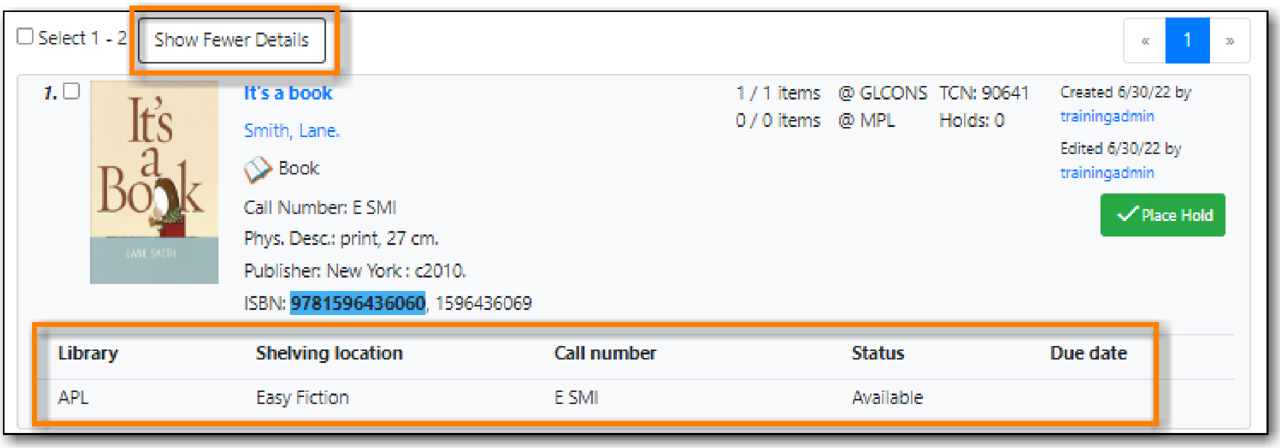
14.5. Viewing Search Results for Cataloguing Purposes

When you retrieve results it’s important to look at the results to decide which is the best match for your item. Refer to the section Is it a Match? in Sitka’s Evergreen Policy & Best Practices Manual.

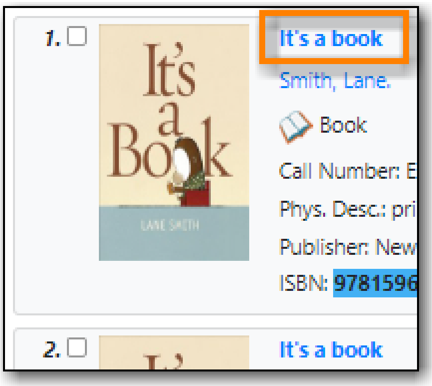
1. The results for your search will display.
   a. Brief bibliographic details display for each search result.
   b. Regardless of the search library, holdings counts for your preferred library will display.



2. The **Show More Details/Show Fewer Details** button will toggle grid with item information on and off. Items belonging to the preferred library will display first in the grid.

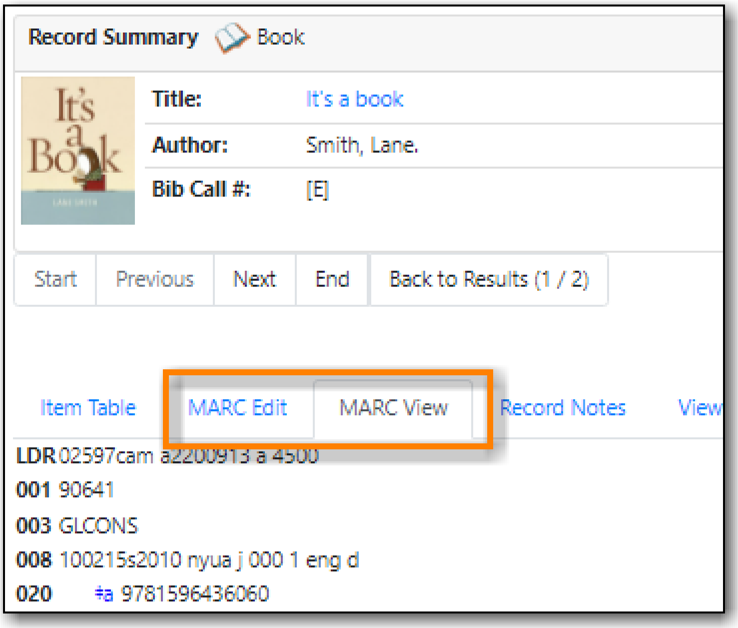


3. To view the record details, click on the title link.



TIP If there is only one result and the library setting *Jump to details on 1 hit (staff client)* is set to TRUE you will taken directly into the record, bypassing the search results screen.

4. 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 section Is it a Match? in Sitka's Evergreen Policy & Best Practices Manual for information on how to determine a match.



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

Chapter 15. Adding Holdings

15.1. Adding Holdings to Bibliographic Records

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

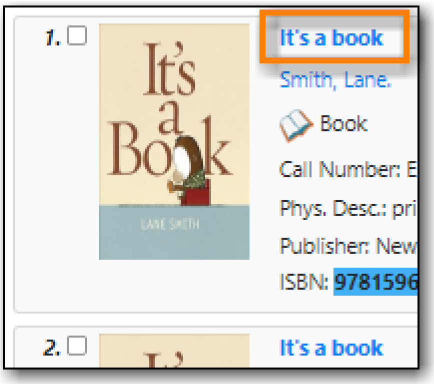
Co-op Support recommends all cataloguers adjust their Holdings Editor Preferences and set up holdings templates before starting to add holdings.

Detailed information on the Holdings Editor can be found in Holdings Editor.

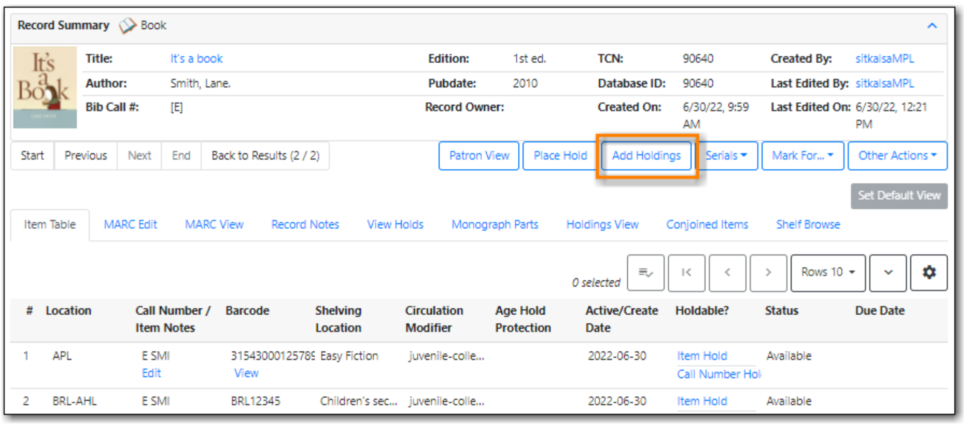
15.1.1. Adding Holdings

Sitka Training Video - Adding Holdings (2:05)

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 section The Cataloguing Workflow in Sitka's Evergreen Policy & Best Practices Manual for next steps.
2. Click on the title link to open the record.

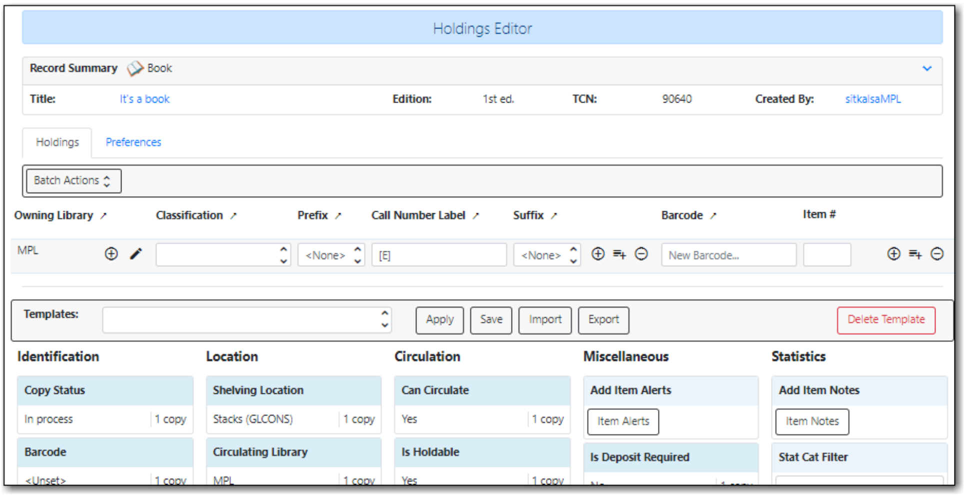


3. Click **Add Holdings**.



4. The Holdings Editor will open up in a new tab. Depending on your saved preferences you will see either the *Unified Holdings and Item Attributes Display* or separate tabs for *Holdings* and

Item Attributes.



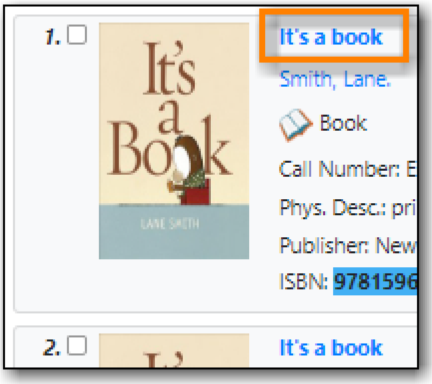
5. Complete the required fields for both the call number and item records.
   a. By default, a new item has **In Process** status, unless you choose a different one when creating it. Item must be checked in to become **Available** and to create item's **Active Date**.
   b. Refer to Item Attributes for information about individual attributes in an item record.
   c. 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. If you would like to print a spine or pocket label for the item, check the box for **Print Labels?**.

7. Once done, click on **Apply All, Save & Exit**. If printing labels the Item Label interface will open otherwise the pop-up tab is closed.
8. Your item will now display in the catalogue.

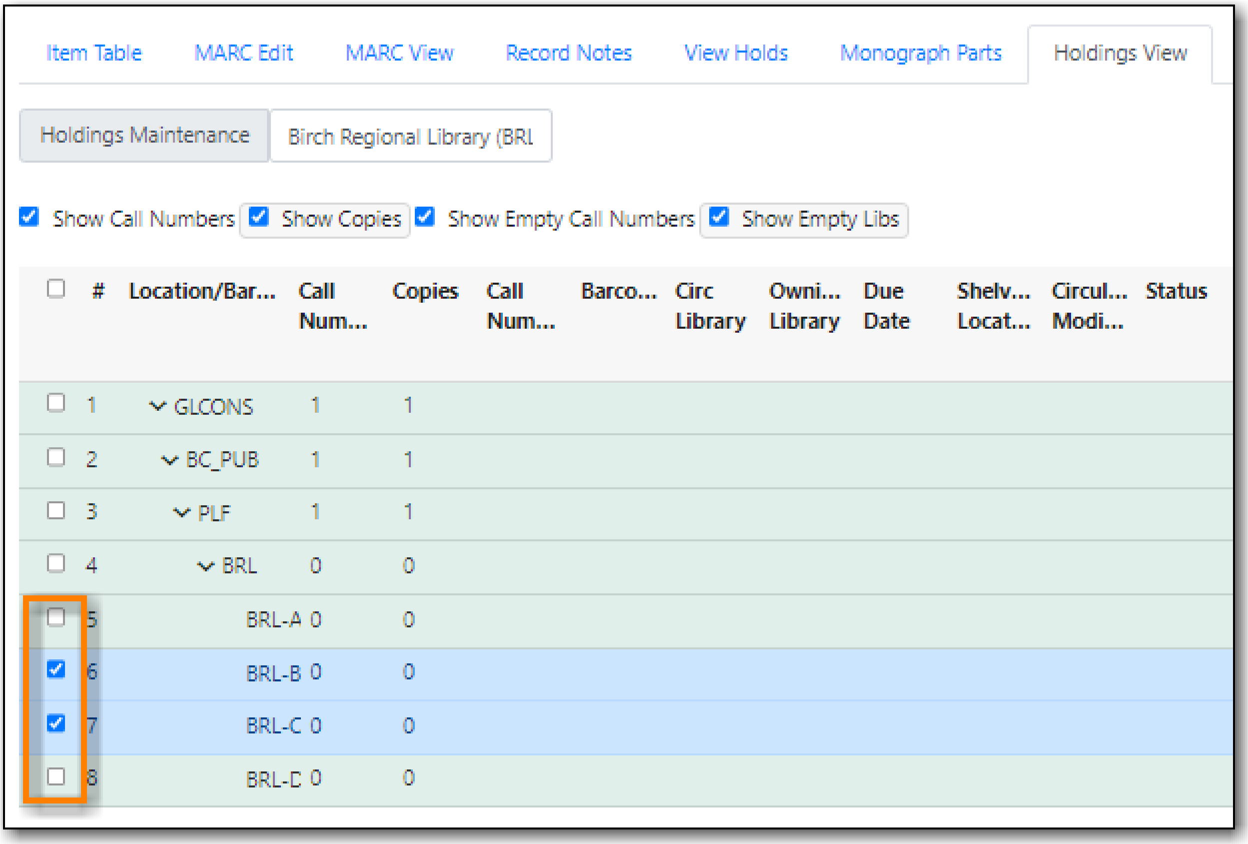
15.1.2. Adding Holdings to Multiple Branches

TIP Items that need different item attributes should be created separately.

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 section The Cataloguing Workflow in Sitka's Evergreen Policy & Best Practices Manual for next steps.
2. Click on the title link to open the record.



3. Go to the **Holdings View** tab and select the branches you'd like to add items to.

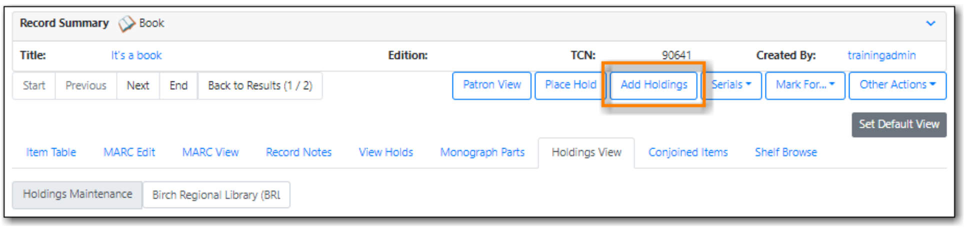


TIP

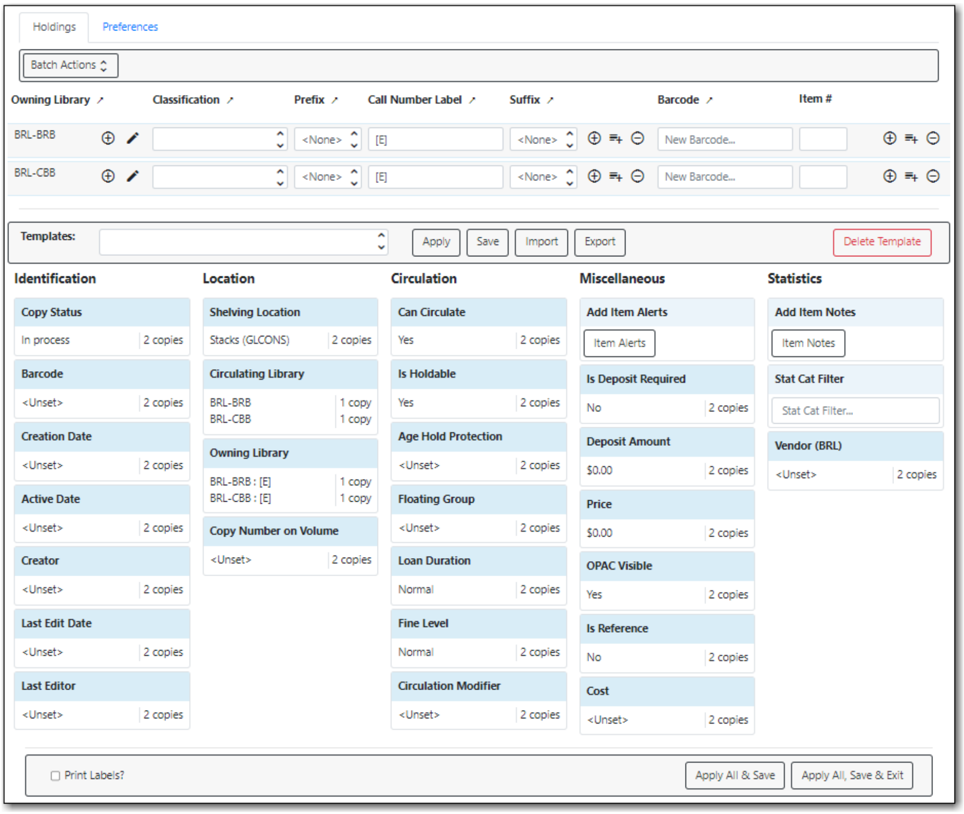
Make sure both the **Show Empty Call Numbers** and **Show Empty Libs** checkboxes are selected in order to display branches without items on the library list.

If you don't select a branch, the default owning and circulating library is set to your workstation location.

4. Click **Add Holdings**.



5. The Holdings Editor will open up in a new tab. Depending on your saved preferences you will see either the *Unified Holdings and Item Attributes Display* or separate tabs for *Holdings* and *Item Attributes*.



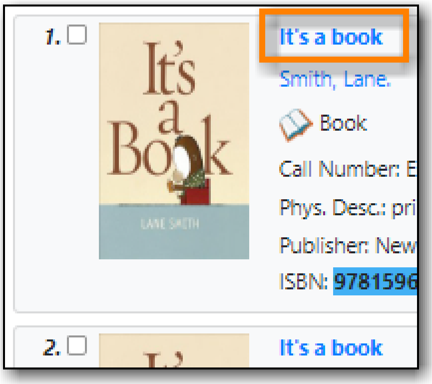
6. Complete the required fields for both the call number and item records.
    a. By default, a new item has **In Process** status, unless you choose a different one when creating it. Item must be checked in to become **Available** and to create item's **Active Date**.
    b. Refer to Item Attributes for information about individual attributes in an item record.
    c. 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.
7. If you would like to print spine or pocket labels for the items, check the box for **Print Labels?**.

8. Once done, click on **Apply All, Save & Exit**. If printing labels the Item Label interface will open otherwise the pop-up tab is closed.
9. Your items will now display in the catalogue.

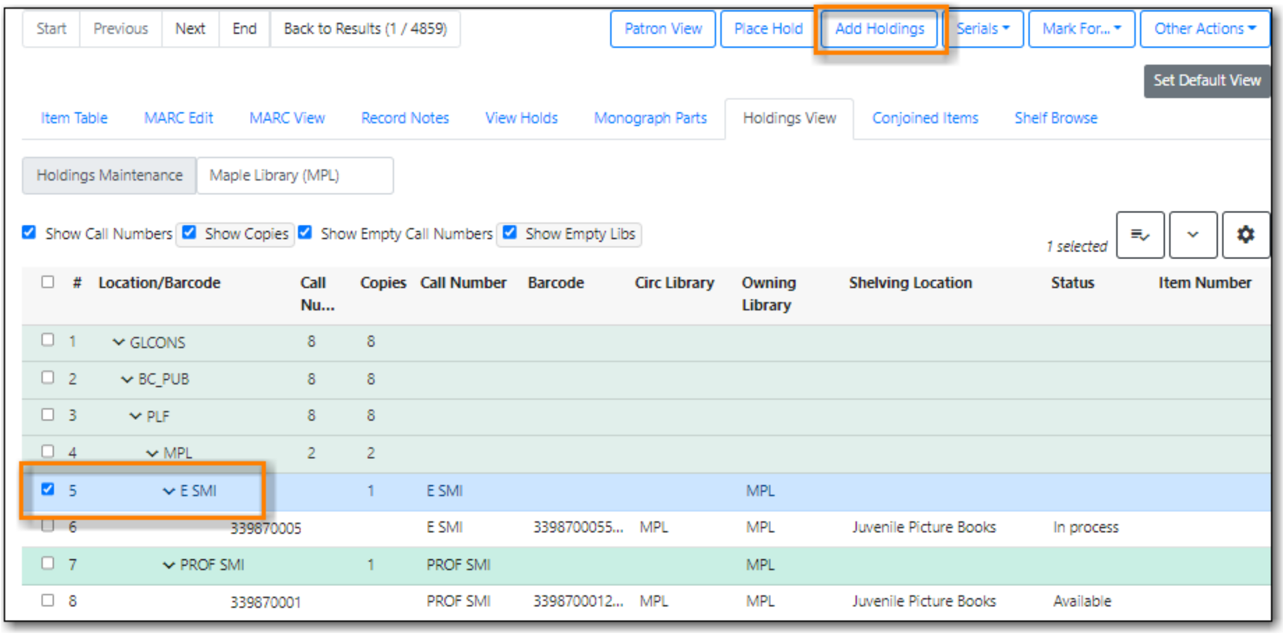
15.1.3. Adding Items to an Existing Call Number

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 section The Cataloguing Workflow in Sitka's Evergreen Policy & Best Practices Manual for next steps.

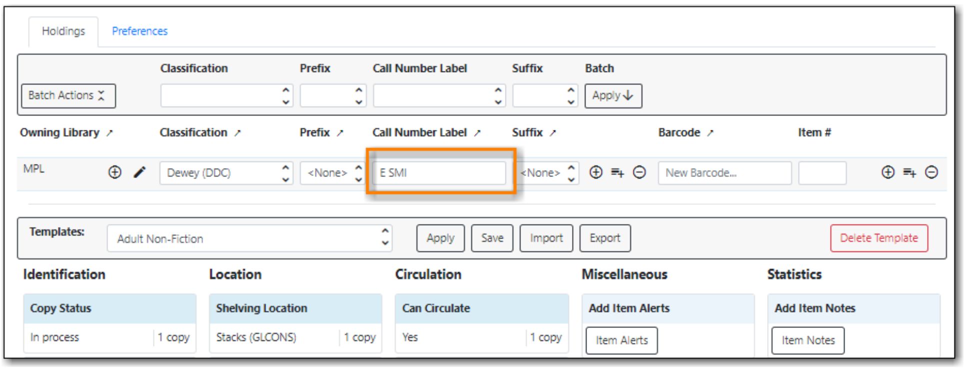
2. Click on the title link to open the record.



3. Go to the **Holdings View** tab and select the call number you'd like to add items to and click **Add Holdings**.



4. The Holdings Editor will open up in a new tab with the call number field populated with the call number you selected. Depending on your saved preferences you will see either the *Unified Holdings and Item Attributes Display* or separate tabs for *Holdings* and *Item Attributes*.



5. Complete the required fields for both the call number and item records.
   a. 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**.

b. Refer to Item Attributes for information about individual attributes in an item record.

c. 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. If you would like to print spine or pocket labels for the items, check the box for **Print Labels?**.

7. Once done, click on **Apply All, Save & Exit**. If printing labels the Item Label interface will open otherwise the pop-up tab is closed.
8. Your items will now display in the catalogue.

15.2. Item Labels

15.2.1. Printing Item Labels

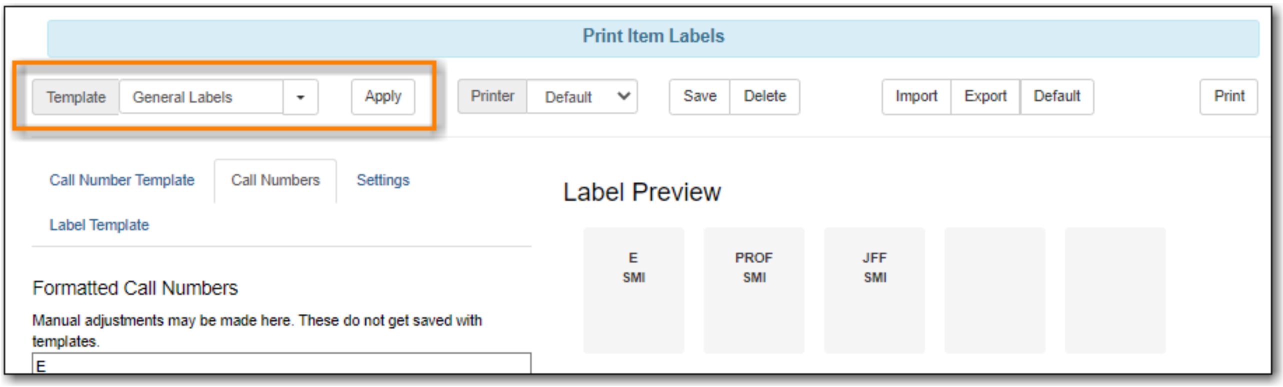
Item labels, both spine and pocket, can be printed:

- from the *Holdings Editor*
- from *Holdings View*
- from *Item Status*
- from *Item Buckets*

In each of these places you can select the items you wish to print labels for and then choose the **Print Labels** option. (This is a checkbox in the *Holdings Editor* and an option on the Actions menu in the other interfaces.) This will open the *Print Item Labels* interface.

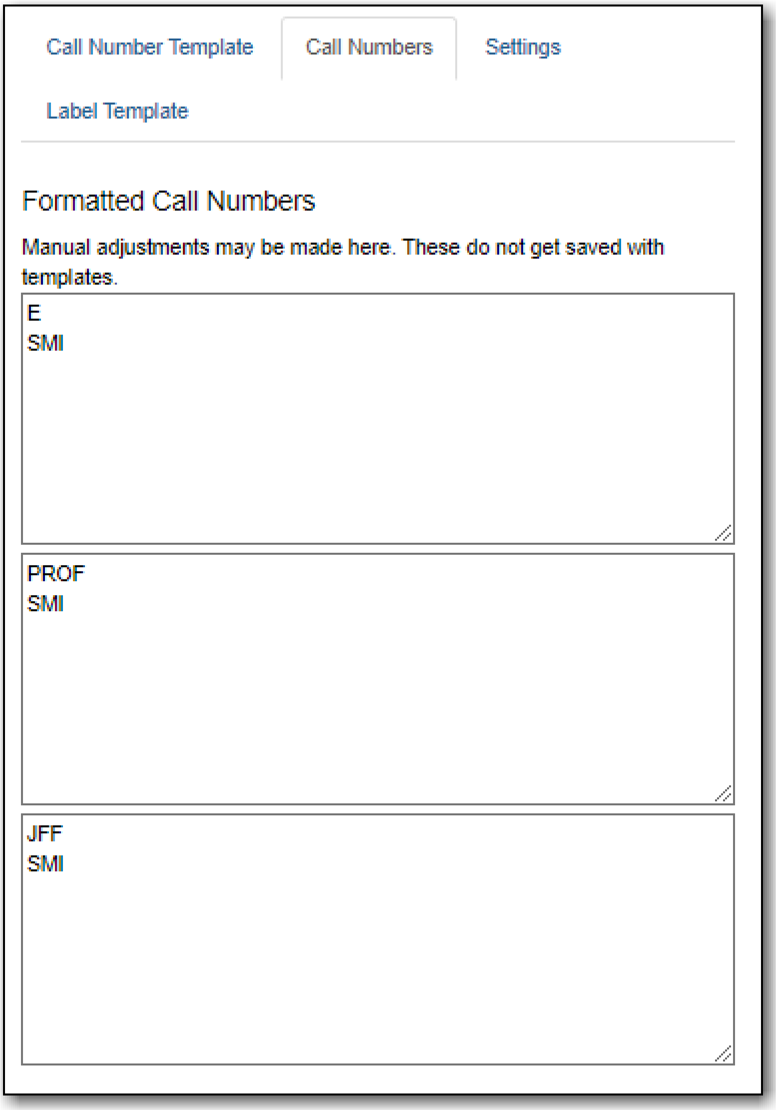
Before you start printing labels you will need to configure your labels. See Configuring Label Printing for set up information.

1. Review the label preview to make sure your labels are displaying correctly.
2. If needed, apply a template from the drop-down menu and click **Apply**.

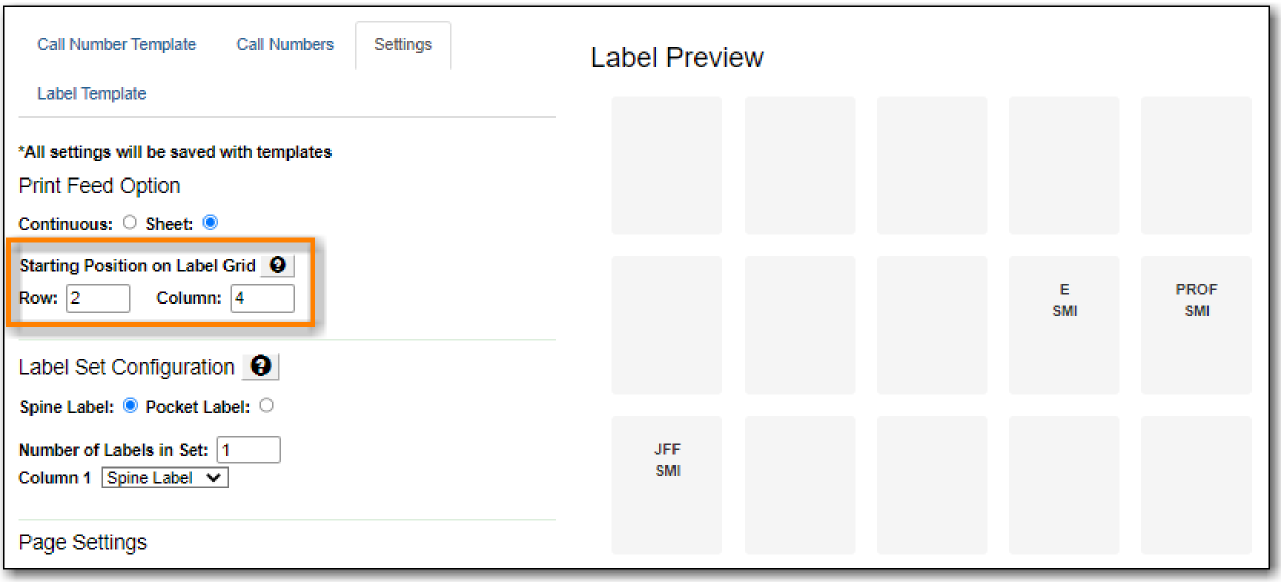


3. On the **Call Numbers** tab you can manually update call numbers for printing. For example, if

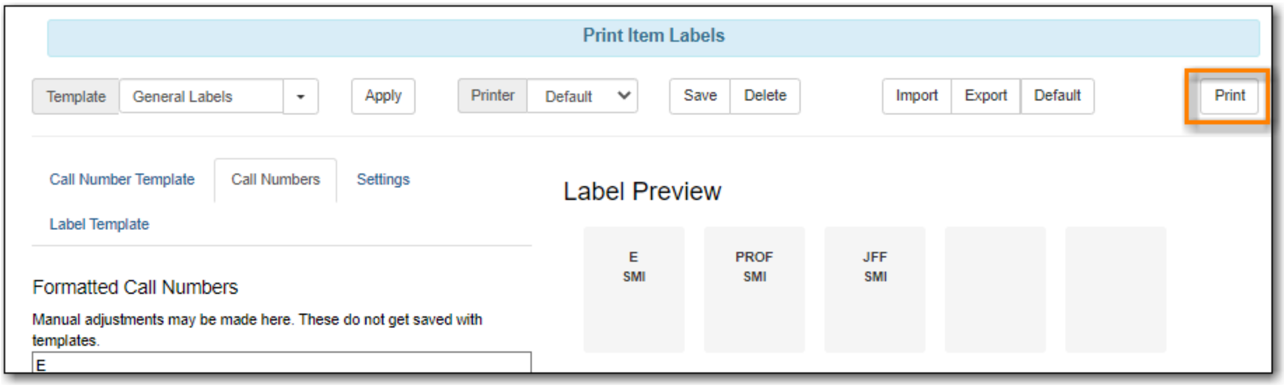
you include copy numbers on your barcode you can add it here. These changes only affect the printed call number and do not change the call number in the system.



4. If you use label sheets, go to the **Settings** tab to adjust the starting position for your labels.



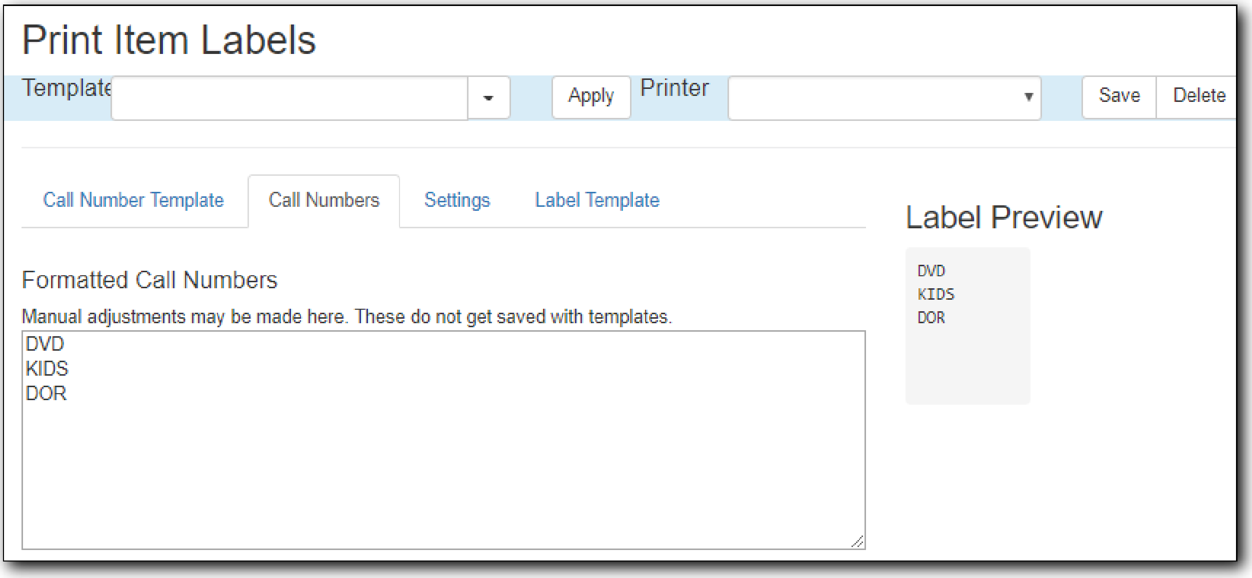
5. Click **Print** and follow any browser prompts.



15.2.2. 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.



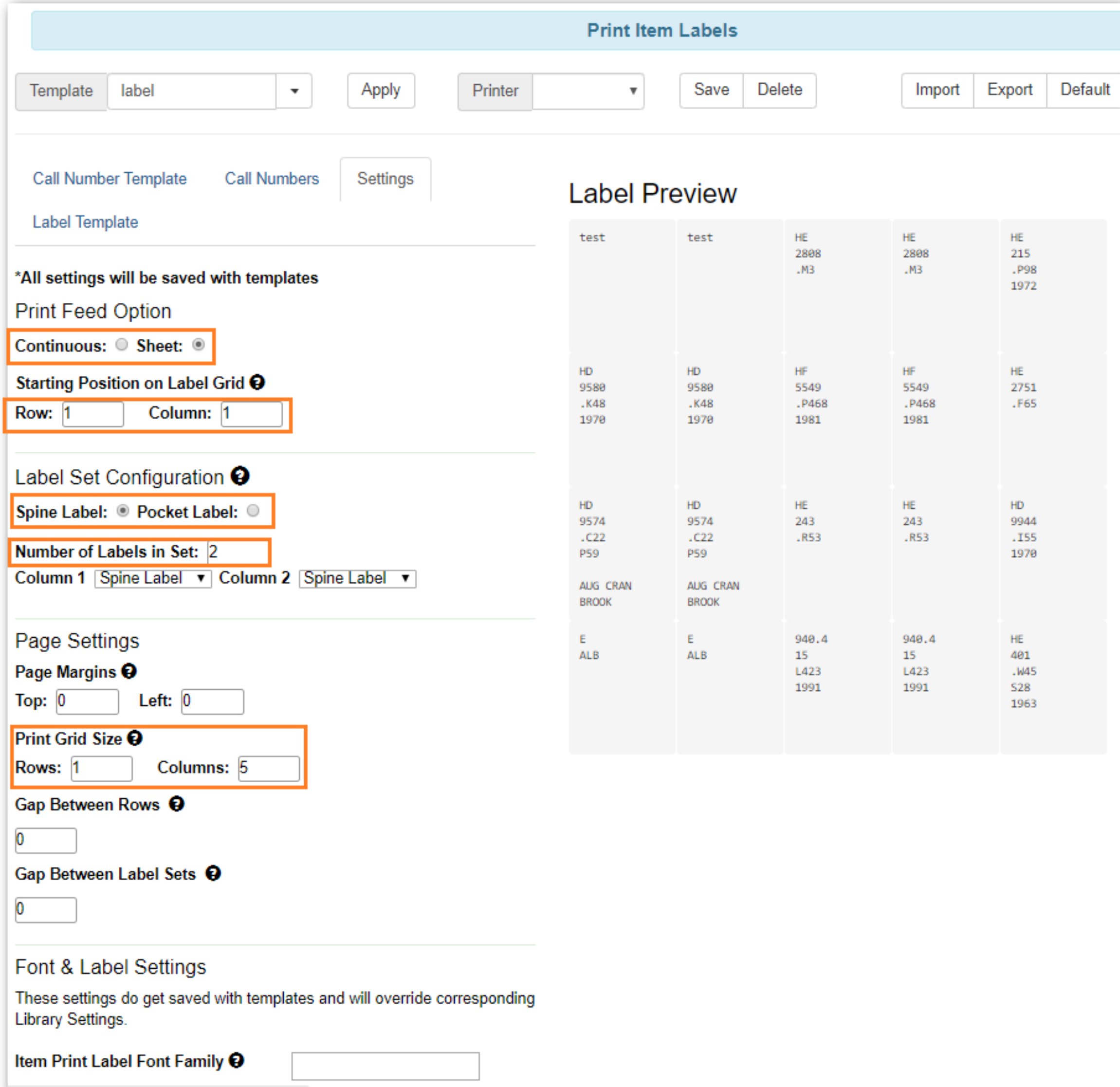
3. **Settings** is the place where you set up the format of the printing and the label. Settings here will override the group of settings under Item Print Label on Library Settings Editor. Here you may configure the following:
   a. Print Feed Option: click the radio button to choose to use sheet labels 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.

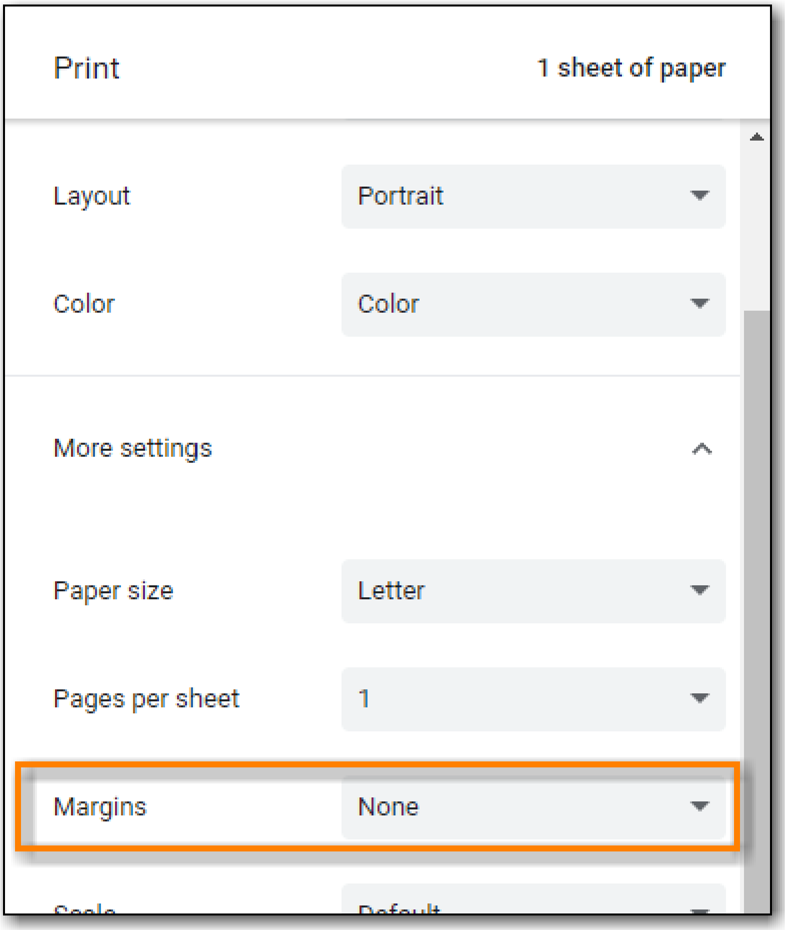
```
.spine {text-align:center; padding-top: 20px;}
```



4. **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.

TIP

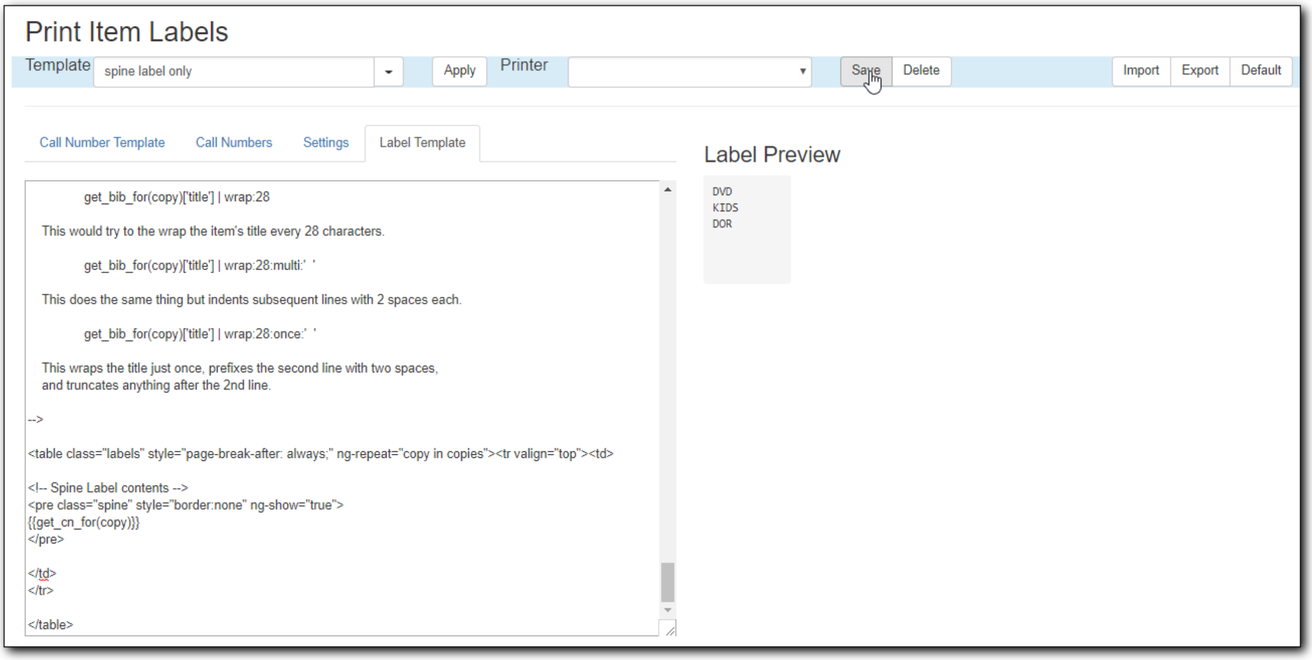
You may also need to configure your **Chrome Printer settings** to set the margins to *None*.



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**.



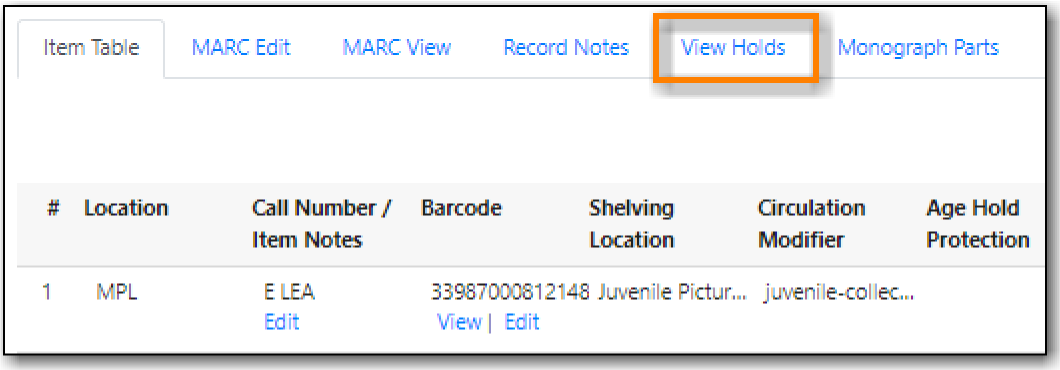
TIP	Label printing templates are linked to login accounts. To share templates, you can export them, and send them to your colleagues for them to import into their own accounts.

15.3. New Items and Holds

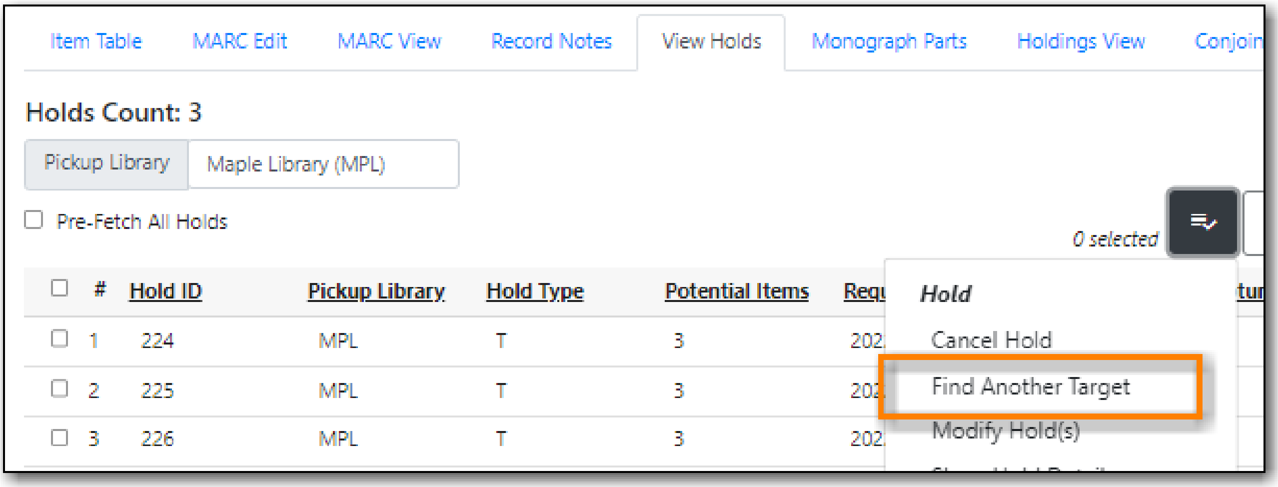
Because of the way Evergreen targets holds, new items are not guaranteed to fulfill pre-existing holds until 24 hours after cataloguing. If you are a single branch library and your cataloguing turn-around time is shorter than 24 hours you can ensure the new item is captured at check in by using the checkin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

15.4. Adding Holdings for Electronic Resources

There are two ways to catalogue electronic resources in Evergreen.

Our recommended process is to use specially coded MARC records as described in Creating New Records for Electronic 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 (14:13)

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 (3:02)

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

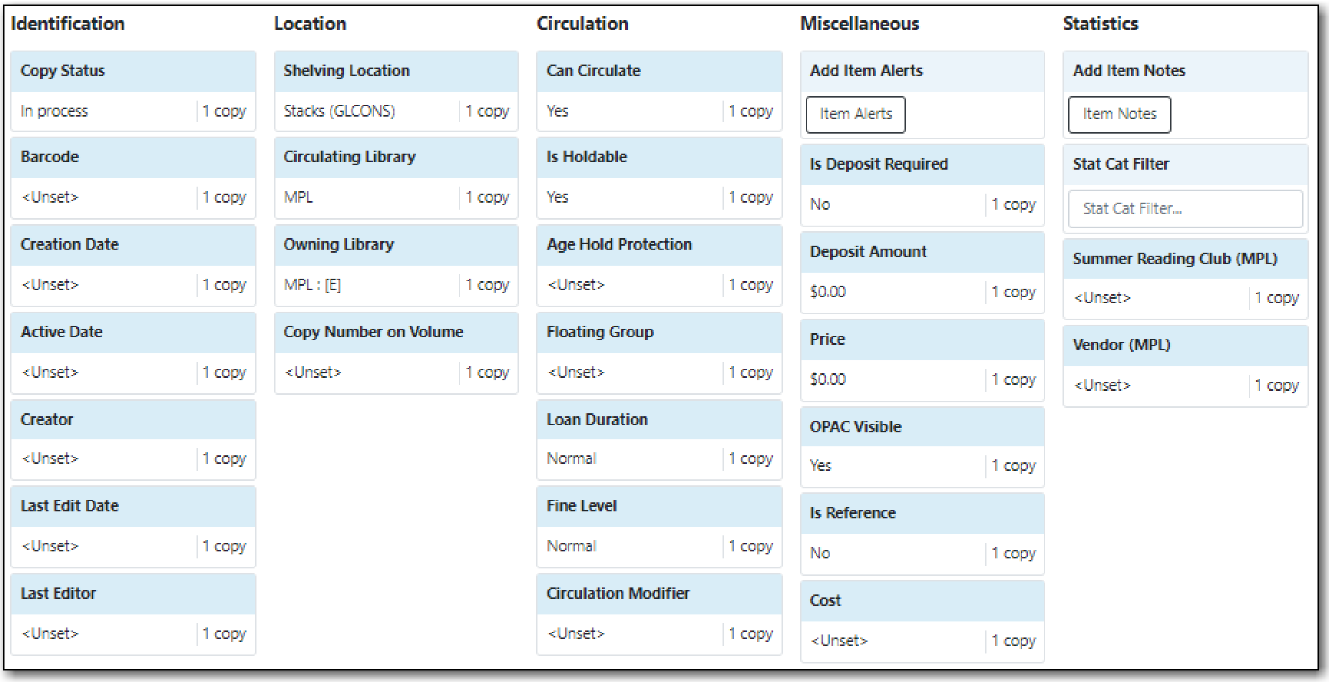
Attribute	Description	Required	Note
Owning Library	The library that owns the item.	Yes	For multi-branch libraries this will be a particular branch. Use the plus icon to add additional rows. Use the pen icon to edit the owning library.

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. Libraries that don't use this field can hide it in the Holdings Preferences.
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. Use the plus icon to add additional rows.
Suffix	Configured suffixes can be selected from the drop down menu.	No	See [_prefix_and_suffix] for more information. Libraries that don't use this field can hide it in the Holdings Preferences.
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. Libraries that don't use this field can hide it in the Holdings Preferences.
Part	The use of parts is not currently supported in Sitka's Evergreen.	No	Libraries should hide this field in the Holdings Preferences.

16.1.2. Item Attributes

Sitka Snippet Video - Item Attributes (5:35)

The Item Attributes section contains information specific to your library's items. You can customize which attributes display in the Item Attribute Settings.



The table below provides detailed descriptions of the item attribues.

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. This attribute is hidden by default.

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

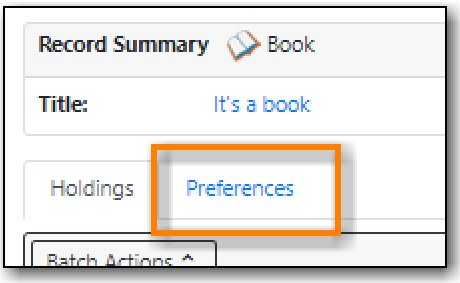
Attribute	Description	Note
Holdable?	Indicates whether the item is holdable or not	Leave it as "YES", unless the item is in a holdable shelving location, but holds should not be allowed on this particular item. If shelving location's *Holdable?* is set to "NO", this field will have no effect. The "NO" value in this field overrides the shelving location's *Holdable?* is "YES" field.
Item Alert	Used for information that should been seen when an item is checked in or out (e.g. 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. This attribute is hidden by default.
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, even 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.

Attribute	Description	Note
Quality	Indicates the quality of the item	Not currently used in Sitka's Evergreen. This attribute is hidden by default.
Reference?	Indicates whether the item is reference or not.	This flag can be used for setting up circulation policies or for statistical purposes.
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 Preferences

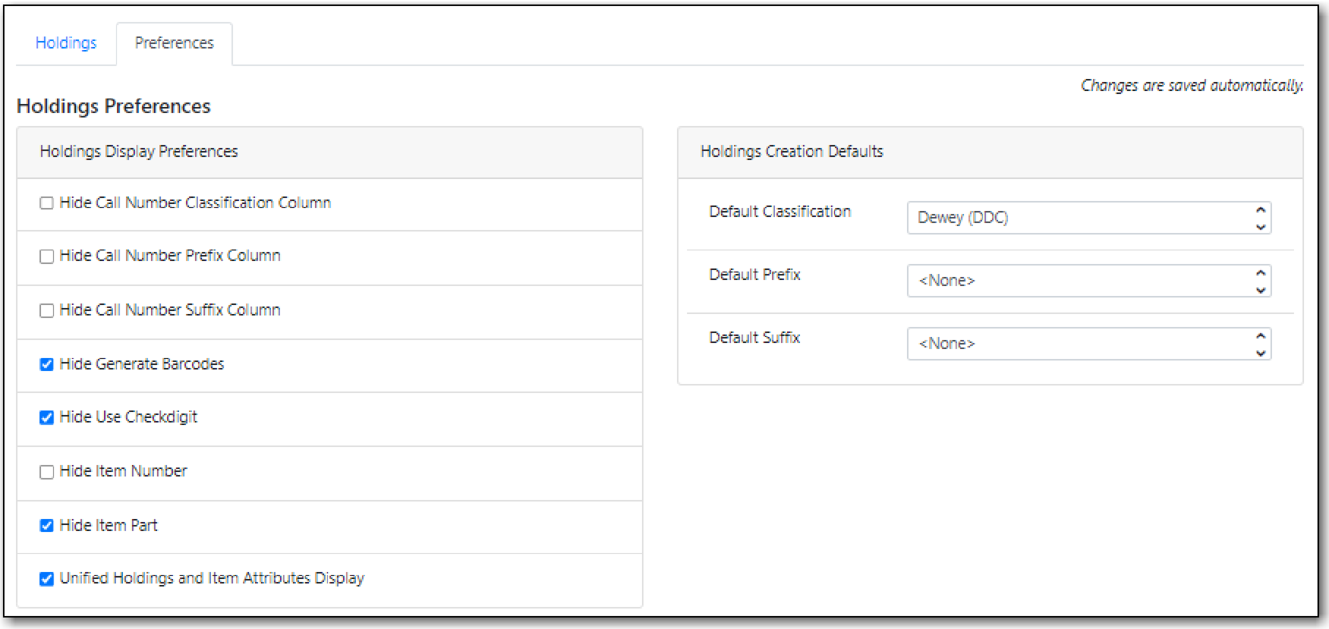
Sitka Snippet Video - Holdings Editor Preferences (2:16)

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



16.2.1. Holdings Preferences

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



Holdings Display Preferences

Setting	Description
Hide Call Number Classification Column	Check this box if you'd like to hide the classification scheme column.
Hide Call Number Prefix Column	Check this box if your library doesn't use call number prefixes.
Hide Call Number Suffix Column	Check this box if your library doesn't use call number suffixes.
Hide Generate Barcodes	This box should be checked to hide this option as barcode generation is not currently used in Sitka.
Hide Use Checkdigit	This box should be checked to hide this option as the checkdigit function is not currently functional.
Hide Item Number	Check this box if your library doesn't use item numbers.
Hide Item Part	This box should be checked to hide this option as parts are not currently used in Sitka.
Unified Holdings and Item Attributes Display	Check this box if you'd like the holdings and item attributes to display as a single tab.

Holdings Creation Defaults

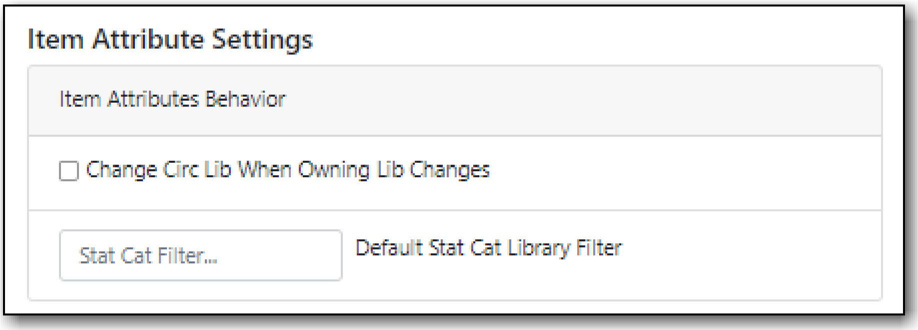
Setting	Description
Default Classification	By default Evergreen will use the classification scheme specified by the library settings *Default Classification Scheme*. Using this setting you can specify Generic, Dewey, Library of Congress.
Default Prefix	If your library uses Prefixes select the one you'd like used as a default.
Default Suffix	If your library uses Suffixes select the one you'd like used as a default.

16.2.2. Item Attribute Settings

Item Attribute Behavior

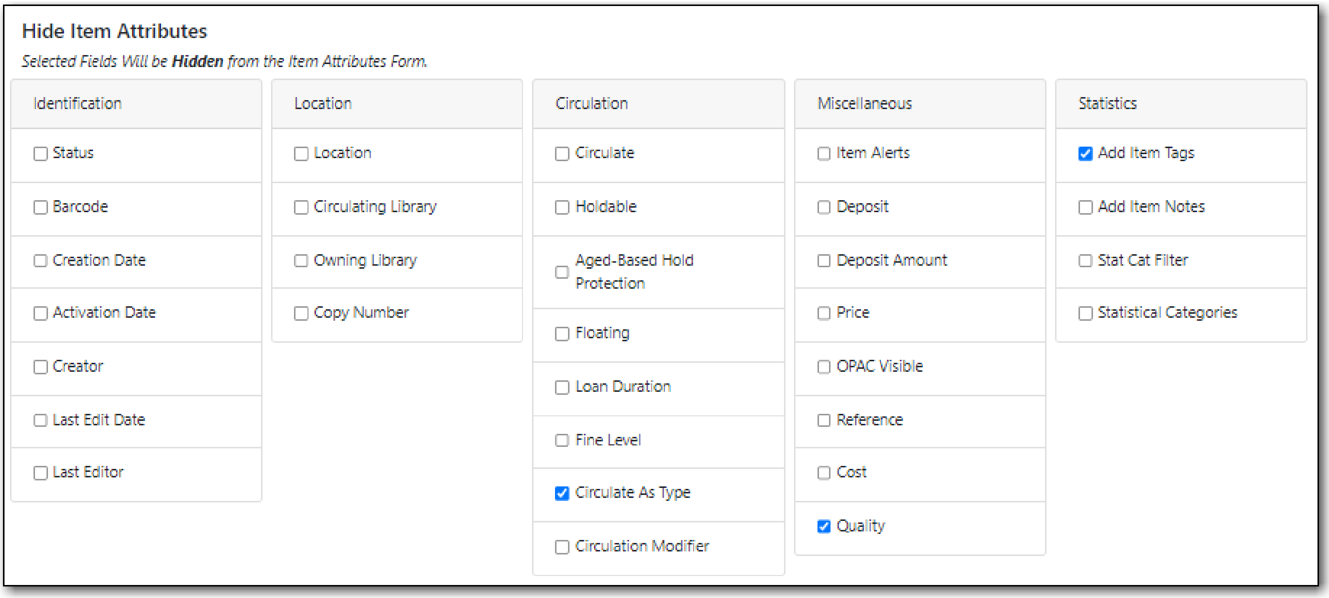
If you would like the circulation library for an item to updated when the owning library is changed check the box for *Change Circ Lib When Owning Lib Changes*.

Set the level at which you'd like to filter statistical categories in *Default Stat Cat Library Filter*. Libraries that share statistical categories across a federation or system may wish to choose the federation or system as their default filter.



Hide Item Attributes

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 are selected by default:

- Circulate as Type
- Quality
- Add Item Tags

You may also want to 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.

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

Refer to Item Attributes for information on specific item attributes.

16.3. Holdings Templates

Sitka Snippet Video - Creating and Using Holdings Templates (2:21)

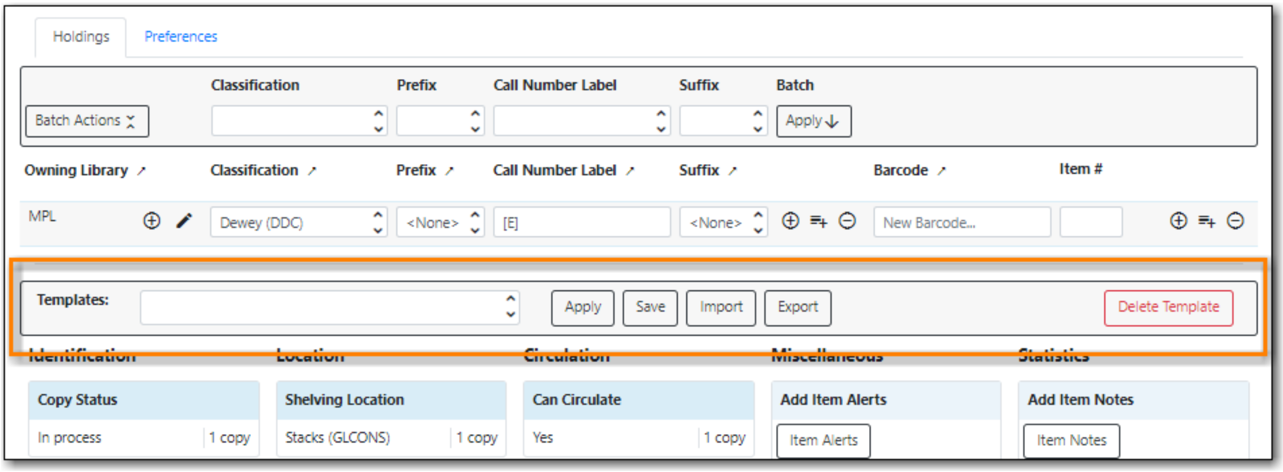
Holdings templates allow you to set up templates with pre-selected values for item attributes and help to ensure consistency in cataloguing of items.

16.3.1. Creating Holdings Templates

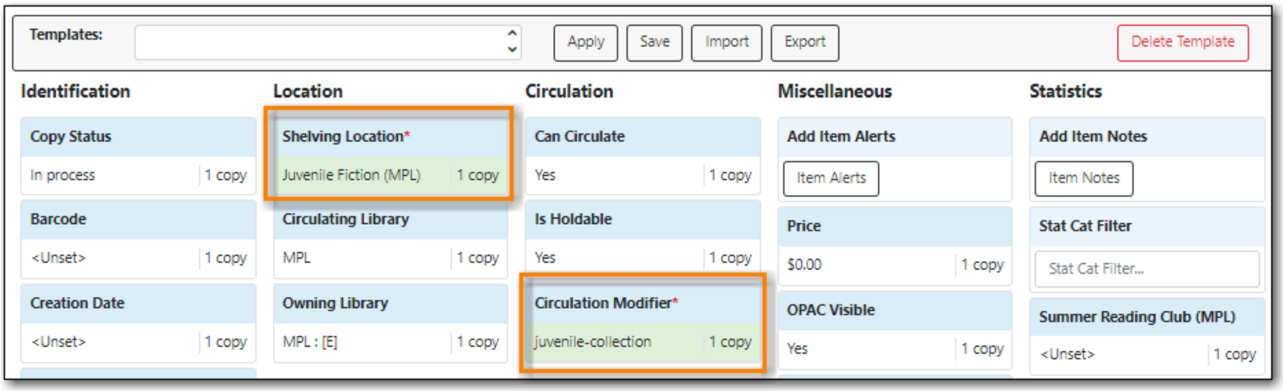
1. Go to **Administration** → **Local Administration** → **Holdings Template Editor**.

OR

Open the Holdings Editor through any bibliographic record and go to the **Holdings** tab if you are using the unified editor or the **Item Attributes** tab if you are not.



2. Enter the values for the item attributes needed for your template.



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

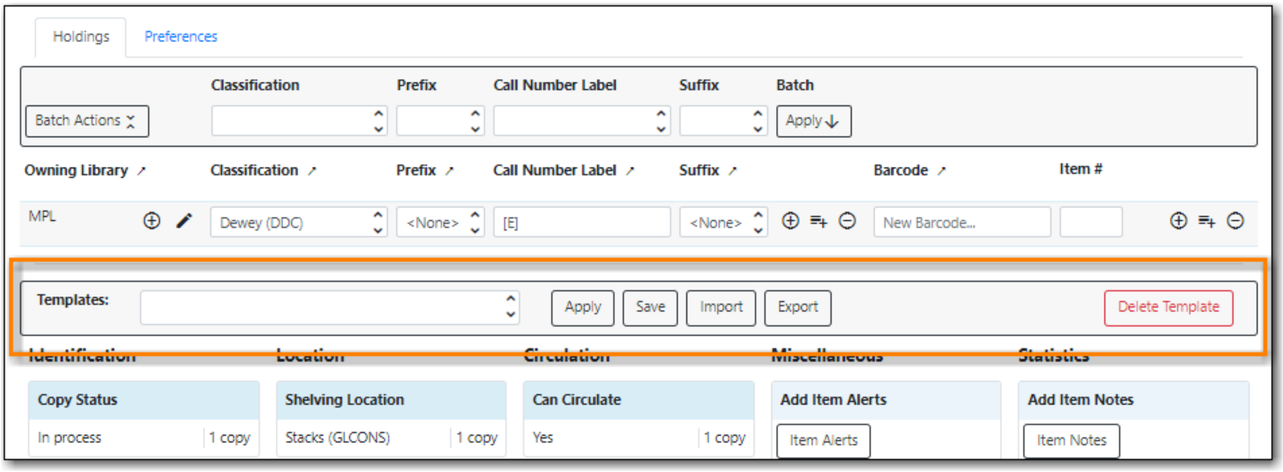
4. The template is saved.

16.3.2. Deleting Holdings Templates

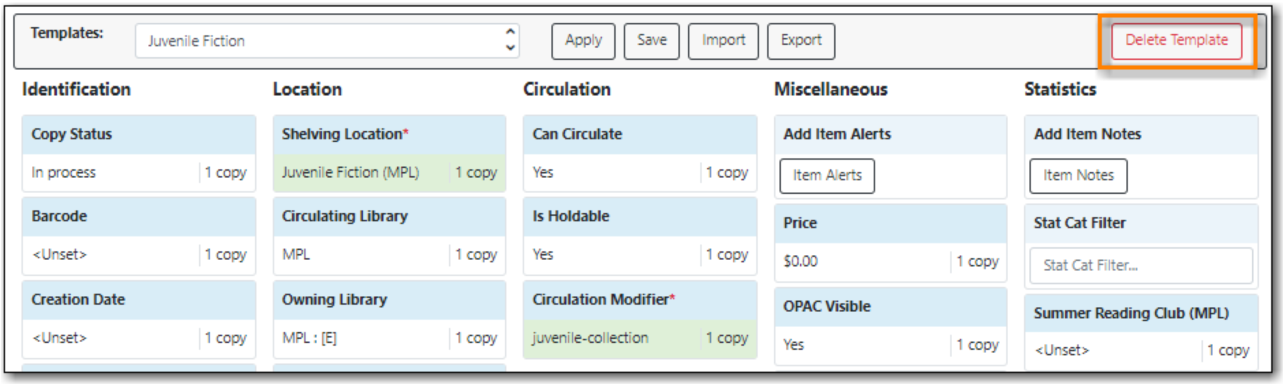
1. Go to **Administration** → **Local Administration** → **Holdings Template Editor**.

   OR

   Open the Holdings Editor through any bibliographic record and go to the **Holdings** tab if you are using the unified editor or the **Item Attributes** tab if you are not.



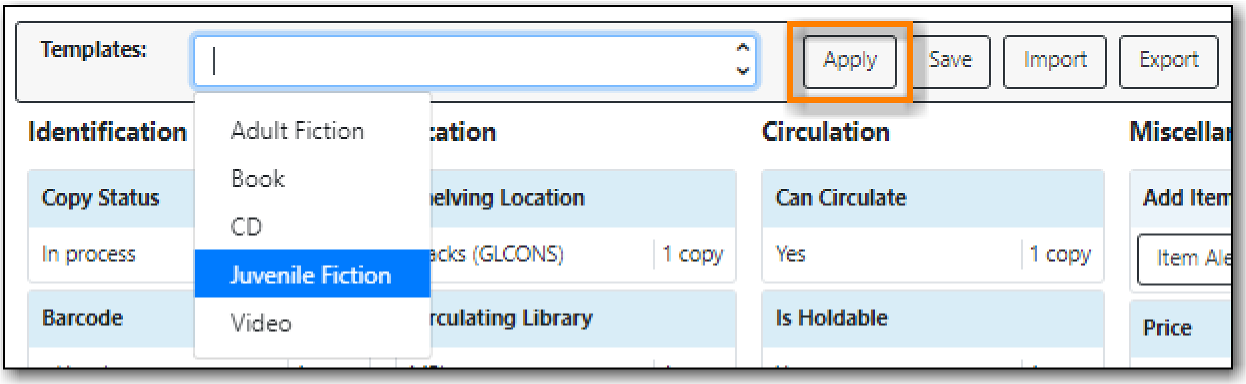
2. Select the template you would like to delete from the drop down menu.
3. Click **Delete Template**.



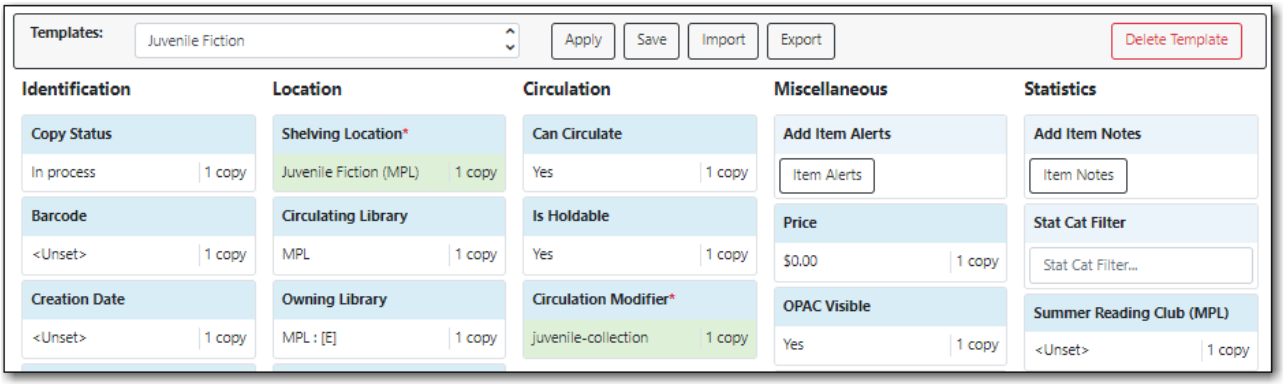
4. Your template has been deleted and will no longer appear in the list.

16.3.3. 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 highlighted in green.



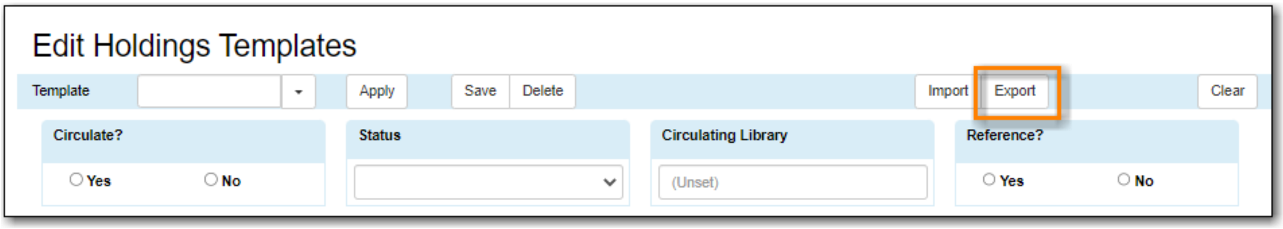
16.3.4. Sharing Holdings Template

Sitka Snippet Video - Sharing Holdings Templates (2:13)

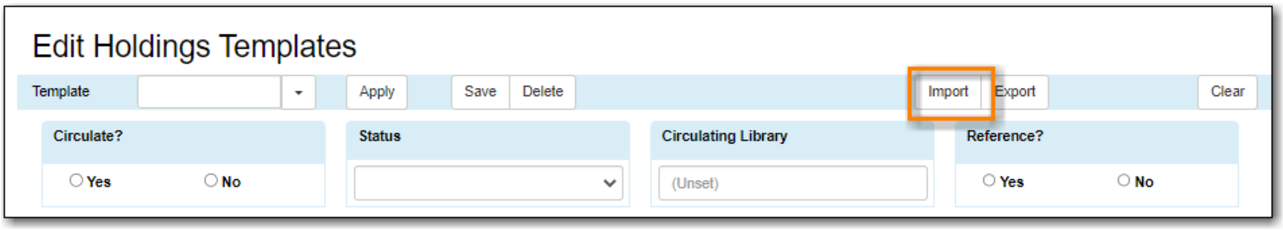
Templates are saved on the Evergreen server, but only viewable by the staff account that created them. To share templates with other staff account you need to export the templates and have staff import them into their accounts.

CAUTION	A bug currently prevents holding template from being imported correctly in the new Holdings Editor. All importing of templates must be done via the *Holdings Template Editor* found in the *Local Administration* menu.

1. In Evergreen go to **Administration** → **Local Administration** → **Holdings Template Editor**.
2. In the Holdings Template Editor click **Export**.



3. You are prompted to specify where on your computer you would like to save the file. Click **Save** once done.
4. 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.
5. In the Holdings Editor click **Import**.



6. Follow the prompts to locate the templates file to be loaded. Click **Open**.
7. The templates will be imported.
8. Log out of Evergreen and back in and then the templates will appear in the template drop down

menu in the Holdings Editor.

> **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.
>
> 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.

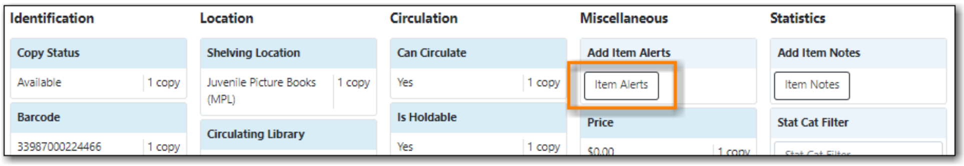
16.4. Item Alerts, Notes, Tags and Statistical Categories

16.4.1. Item Alerts

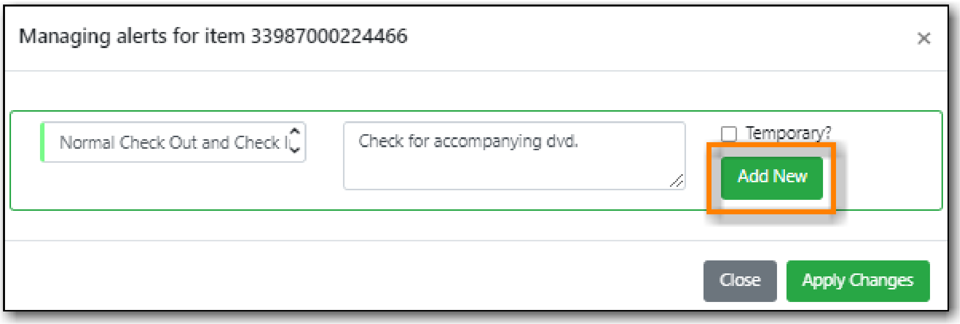
Item alerts pop up on the screen when the item is checked in and/or checked out to alert staff that something further needs to be done with or known about the item.

To add an item alert:

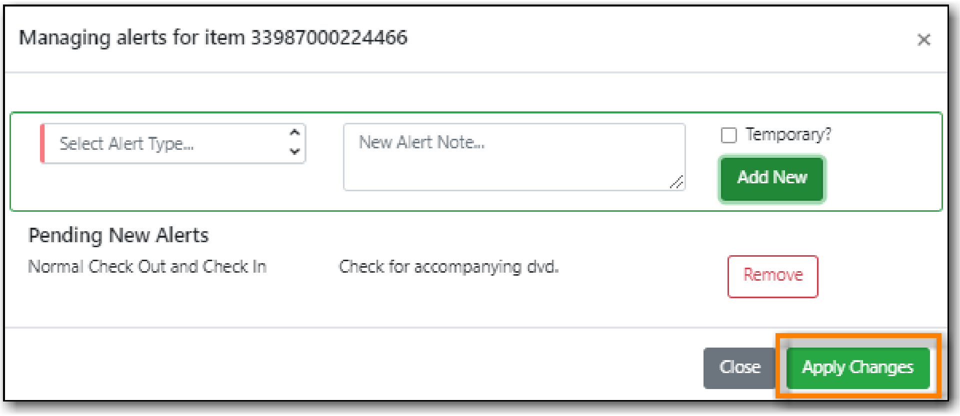
1. In the item attributes section of the Holdings Editor, click **Item Alerts**.



2. Choose a type from the dropdown list.
3. Type in the message.
4. Check the box for **Temporary?** if the alert is only needed to resolve a particular issue.
5. Click **Add New**. The alert will display as a pending new alert.



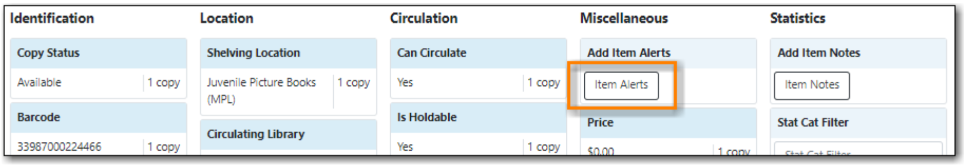
6. Click **Apply Changes**.



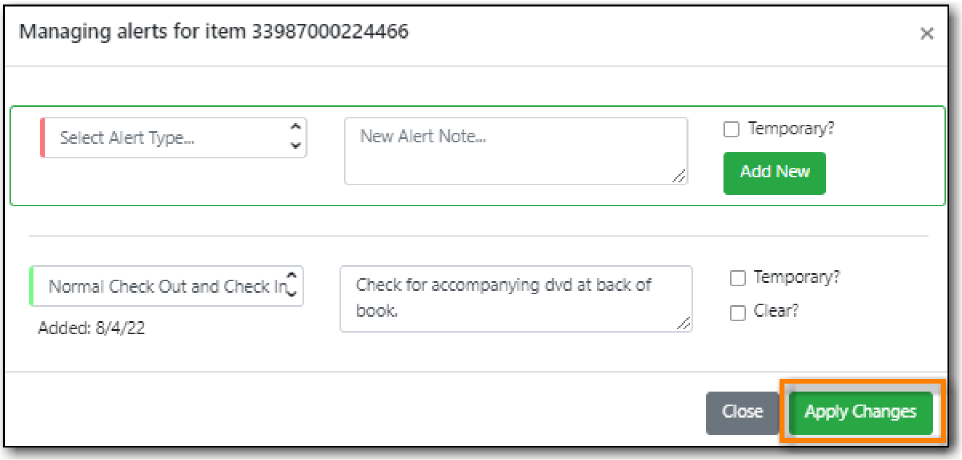
7. Back in the holdings editor, click **Apply All, Save & Exit**.
8. The alert will appear at check out and/or check in depending on the alert type choosen.

To edit an item alert:

1. In the item attributes section of the Holdings Editor, click **Item Alerts**.



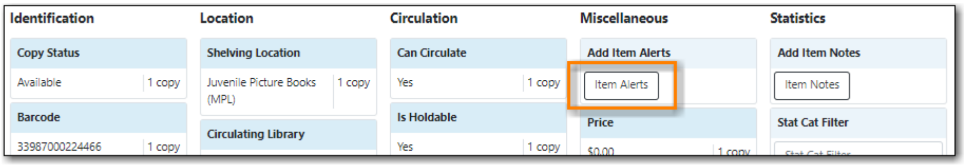
2. Make the the necessary changed and click **Apply Changes**



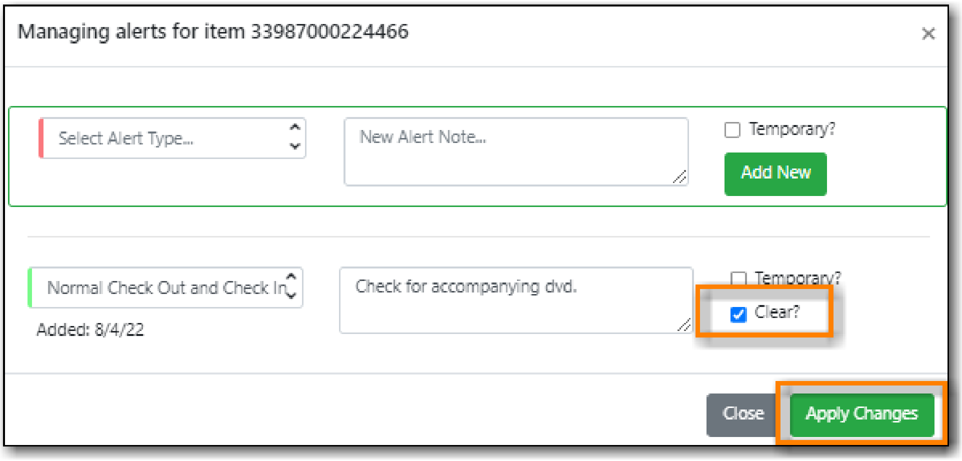
3. Back in the holdings editor, click **Apply All, Save & Exit**.
4. The updated alert will appear at check out and/or check in depending on the alert type choosen.

To delete an item alert:

1. In the item attributes section of the Holdings Editor, click **Item Alerts**.



2. Check the box for **Clear?** beside the alert you'd like to delete and click **Apply Changes**

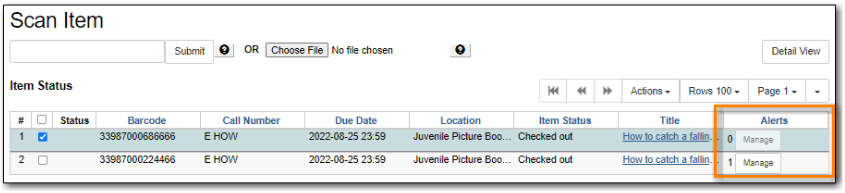


3. Back in the holdings editor, click **Apply All, Save & Exit**.
4. The alert is deleted and will no longer appear at check out and/or check in.

NOTE

You can also view, edit, and delete item alerts from *Item Status* by clicking on the **Manage** button. A count beside the button indicates how many alerts are on the item. This button opens the older version of the alerts pop-up.

Manage is greyed out if the item does not have an alert.

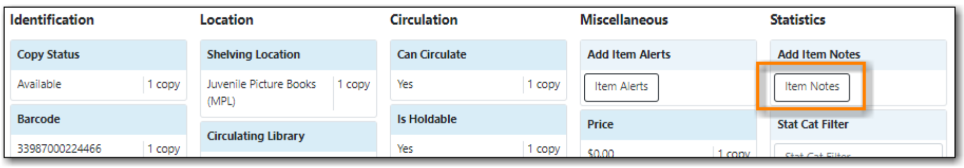


16.4.2. Item Notes

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

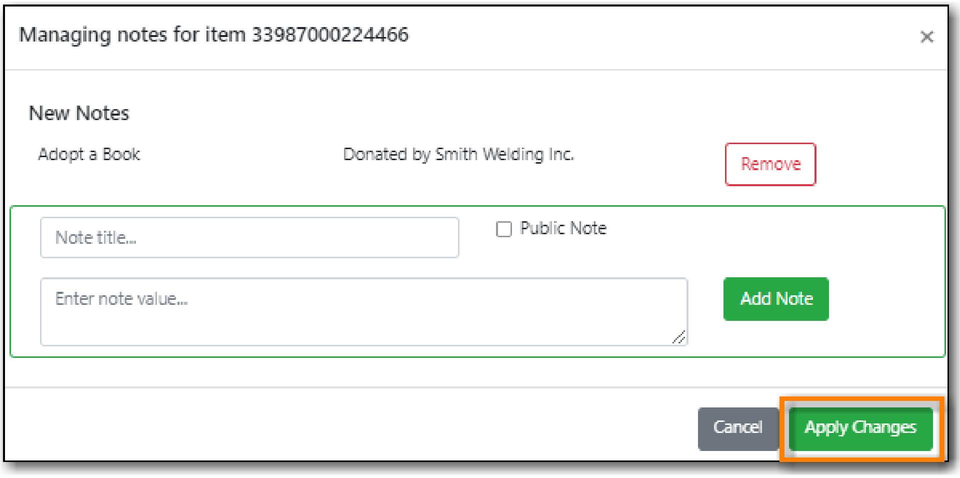
To add an item note:

1. In the item attributes section of the Holdings Editor, click **Item Notes**.

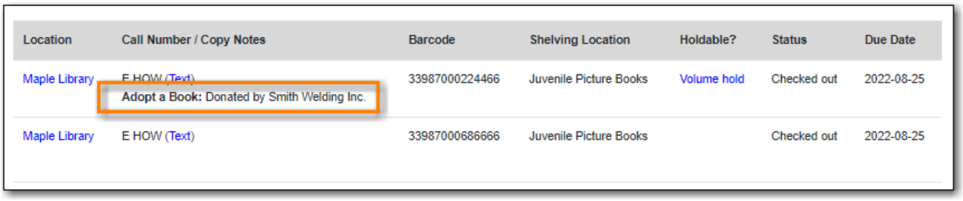


2. Enter a title for your note.
3. Enter the content of your note.
4. Check the box for **Public Note** if the note should display in the public catalogue.
5. Click **Add Note**.

6. Click **Apply Changes**.

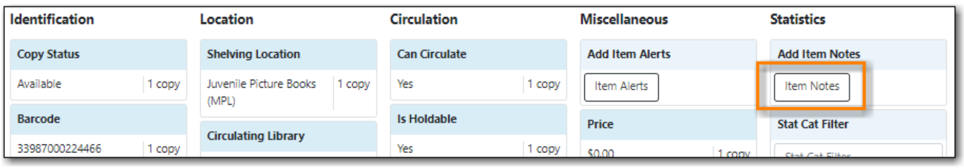


7. Back in the holdings editor, click **Apply All, Save & Exit**.
8. The note is now applied to the item and will display in the public catalogue if set to be public.

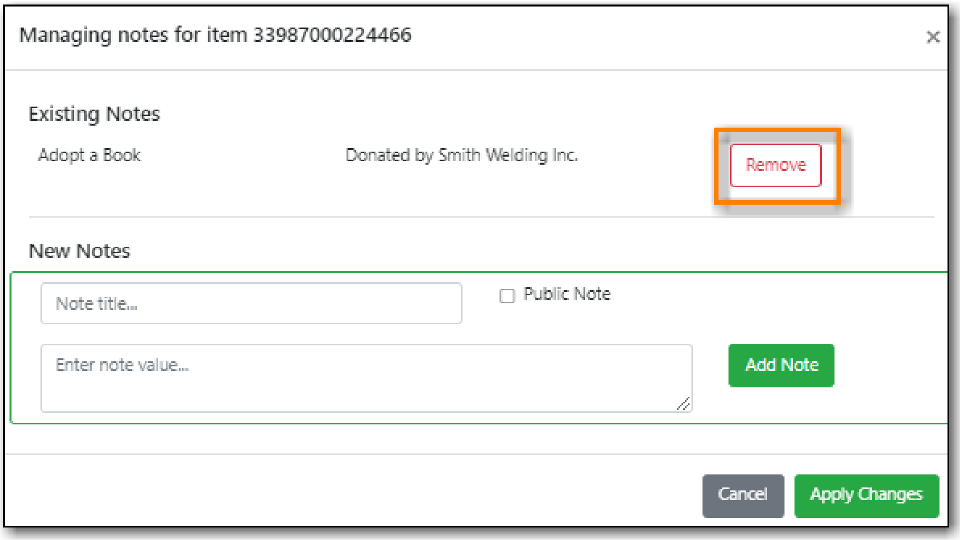


To delete an item note:

1. In the item attributes section of the Holdings Editor, click **Item Notes**.



2. Click **Remove** beside the note you would like to remove.



3. Click **Apply Changes**.

4. Back in the holdings editor, click **Apply All, Save & Exit**.
5. The note is now removed from the item.

NOTE Currently notes cannot be edited.

16.4.3. Item Tags

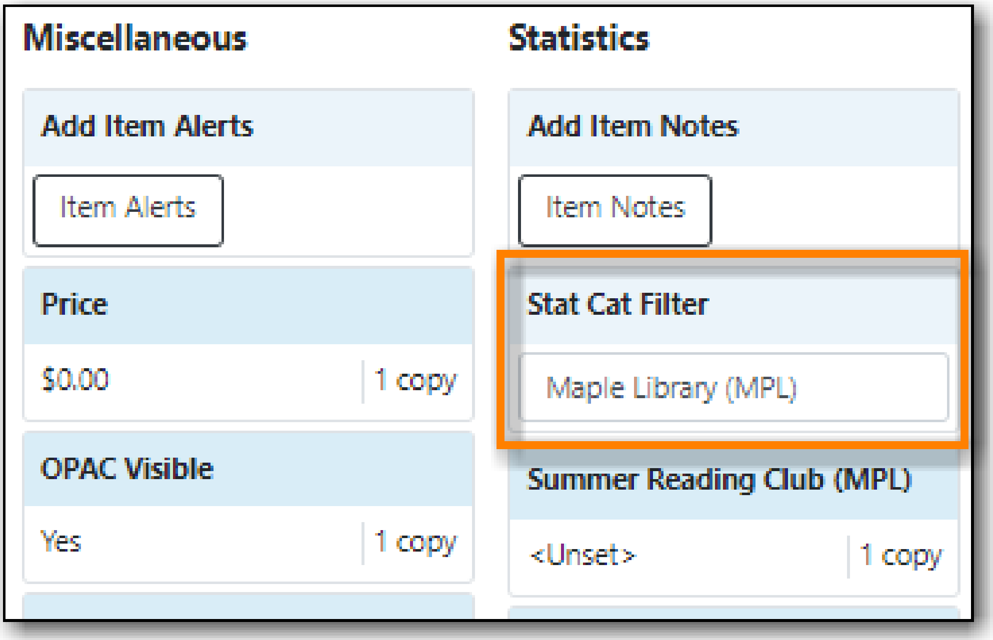
The item tag option is hidden by default in the Holdings Editor as item tags are not currently used by Sitka.

16.4.4. Item Statistical Category Values

Item Statistical Categories, also referred to as item stat cats, can be used to capture item information the library needs that isn't otherwise captured in the item record. This information can be used in reporting.

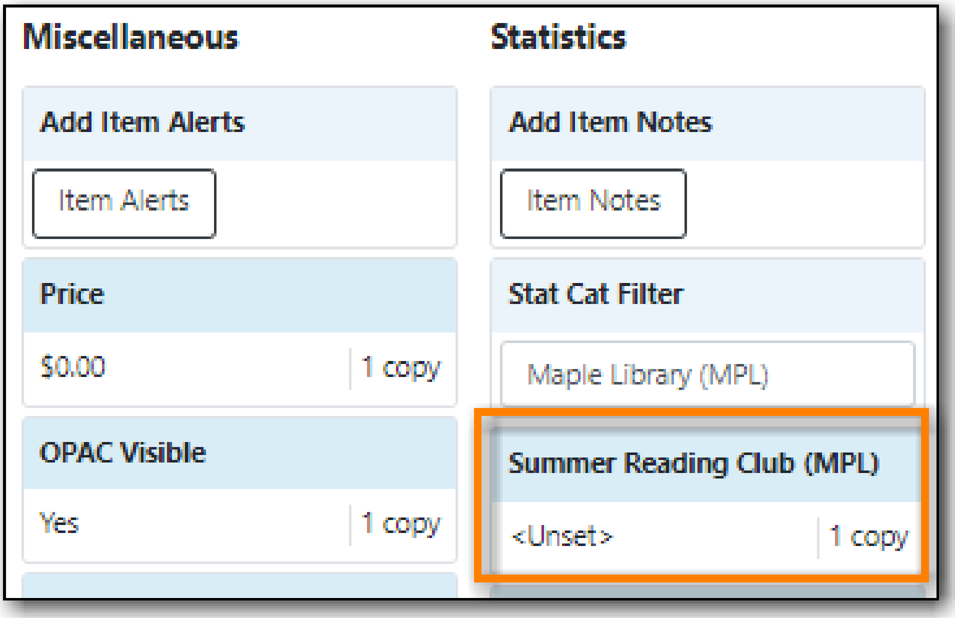
For information on creating and editing statistical categories see Statistical Category Editor.

The *Stat Cat Filter* enables you to specify the organizational level at which statistical categories display. For example, if you have federation wide stat cats as well as library specific ones you can set the filter to your federation or your library to change what stat cats display.



To apply a statistical category value:

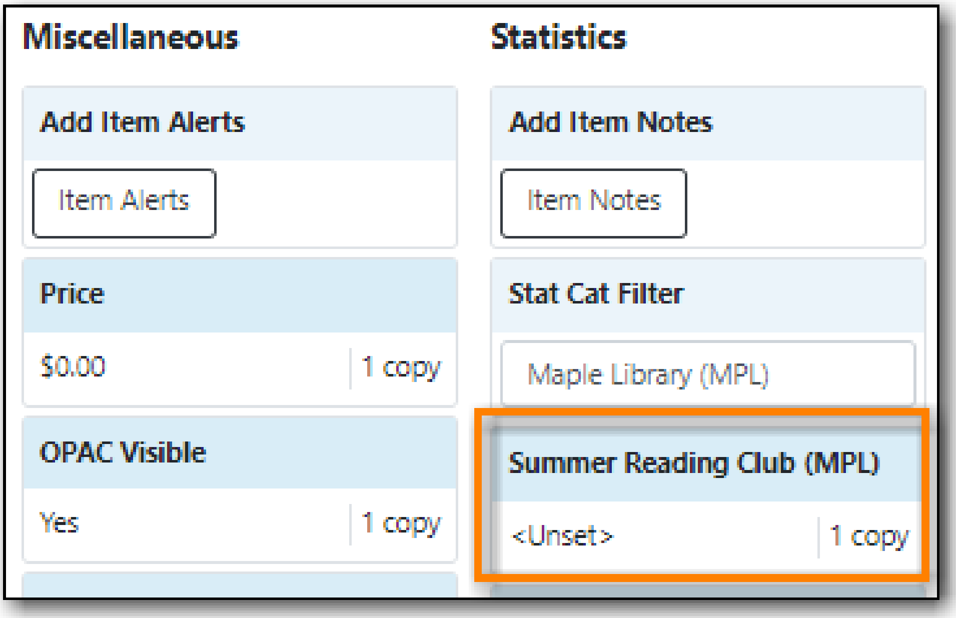
1. In the item attributes section of the Holdings Editor, click on the statistical category you would like to enter a value for.



2. From the drop down menu select the value you would like to apply to the item.
3. Click **Apply**.
4. Click **Apply All, Save & Exit**.

To clear a statistical category value:

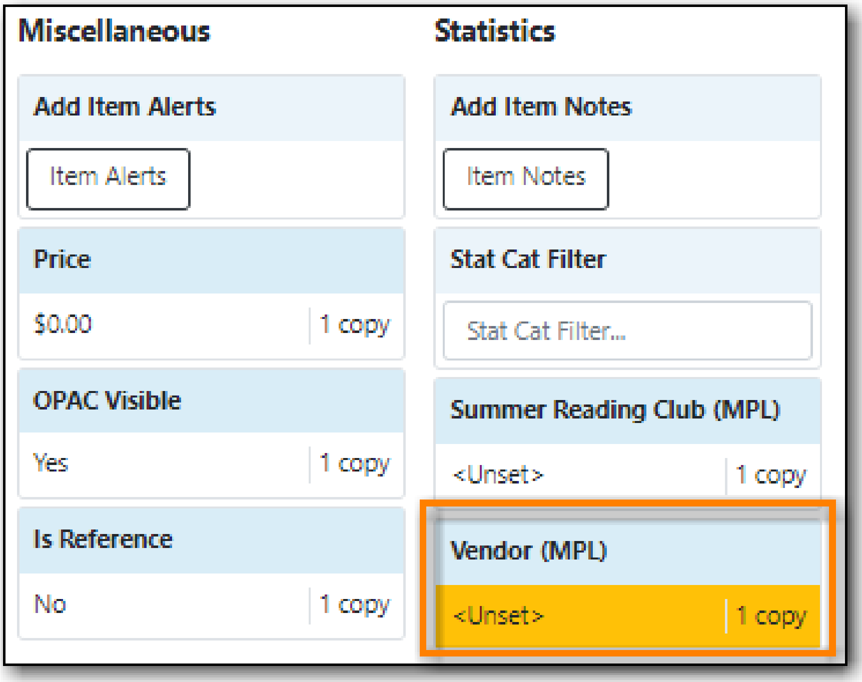
1. In the item attributes section of the Holdings Editor, click on the statistical category you would like to clear the value for.



2. Click **Clear**.
3. Click **Apply All, Save & Exit**.

TIP

Statistical categories can be set as required. When required the statistical category is highlighted in orange and the item cannot be saved until a value is entered.

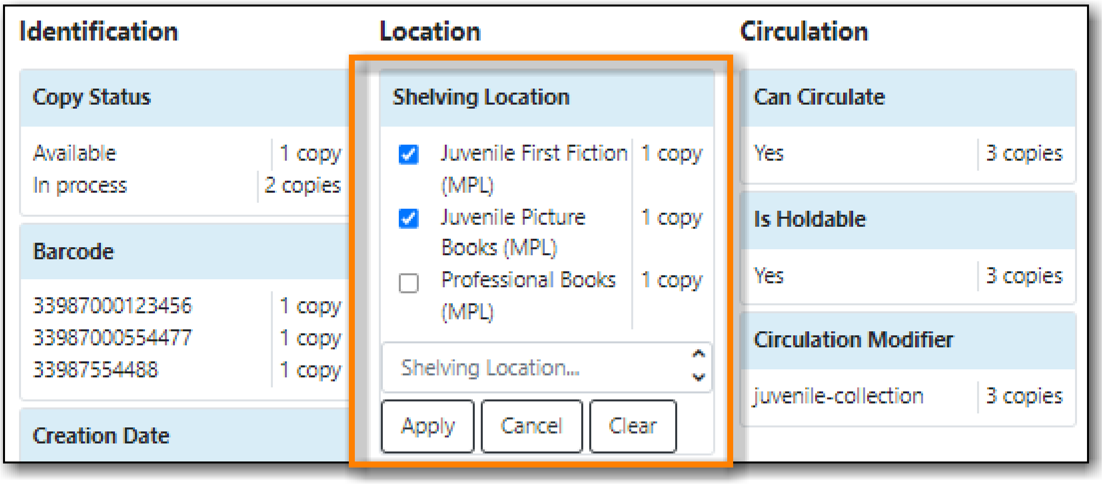


16.5. Batch Editing Items

1. Items can be edited in batch:
   - by scanning items or uploading a file of barcodes into *Item Status*, selecting the relevant items, and then selecting **Edit** → **Items** from the **Actions** menu.
   - from within an item bucket by selecting the relevant items, and then selecting **Edit Selected Items** from the **Actions** menu.

- from within a bibliographic record by going to **Holdings View**, selecting the items you wish to edit, and then selecting **Edit** → **Edit Items** from the **Actions** menu.

2. This will open the *Holdings Editor* in a new tab.
3. Make the needed changes to the call number record and/or item attributes. Information on these fields can be found in Holdings Editor.
4. If there are particular item attributes which will be different for different items, you can edit those individually. Click on the attribute, and then de-select the values you don't want to be altered before you apply the changes.



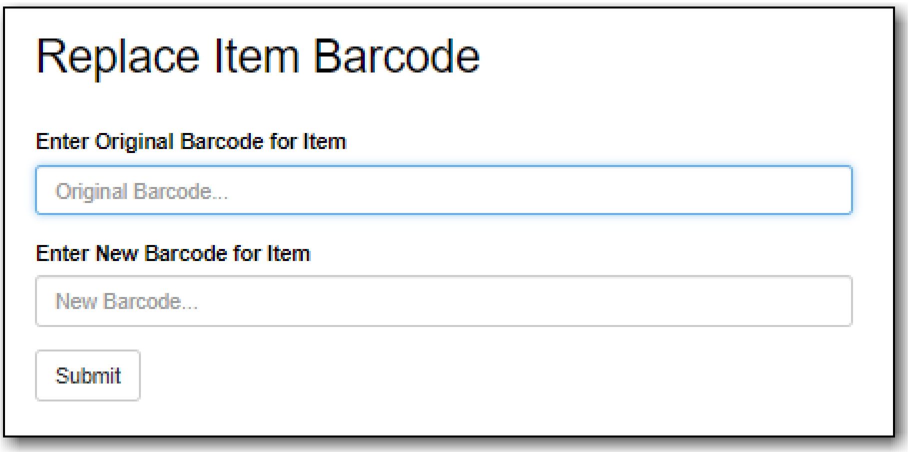
5. Click **Apply All, Save & Exit**.

16.6. Replacing a Barcode

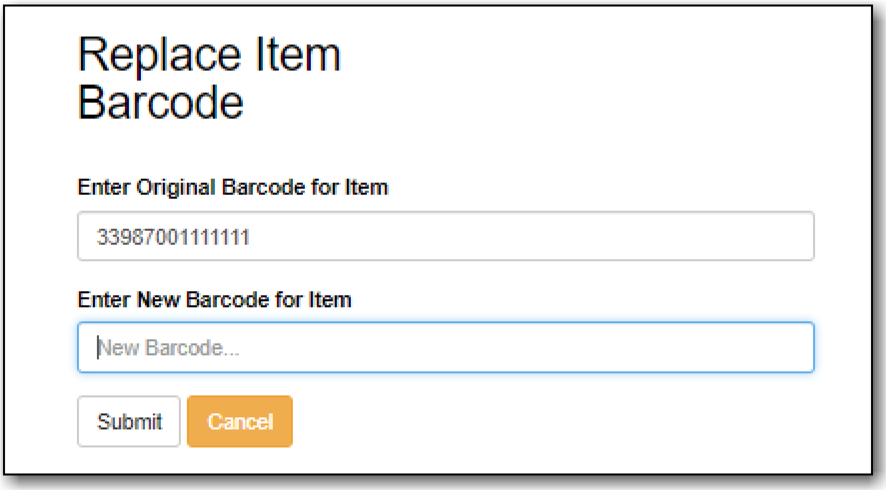
Sitka Snippet Video - Replace Barcode (1:26)

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.

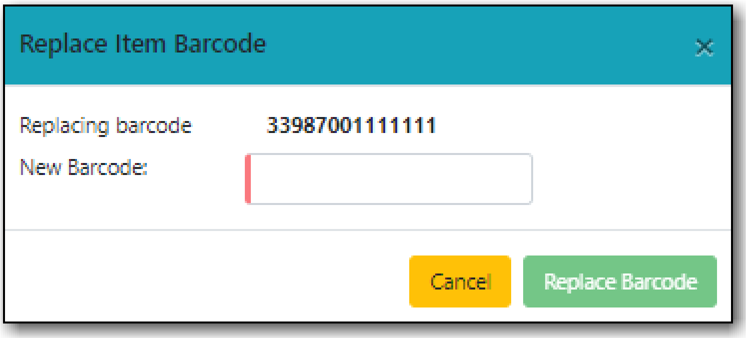
1. Select **Replace Barcode** from your preferred menu.
2. When accessed from the Circulation menu, enter the original and new barcode and click **Submit**.



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. Transferring Holdings

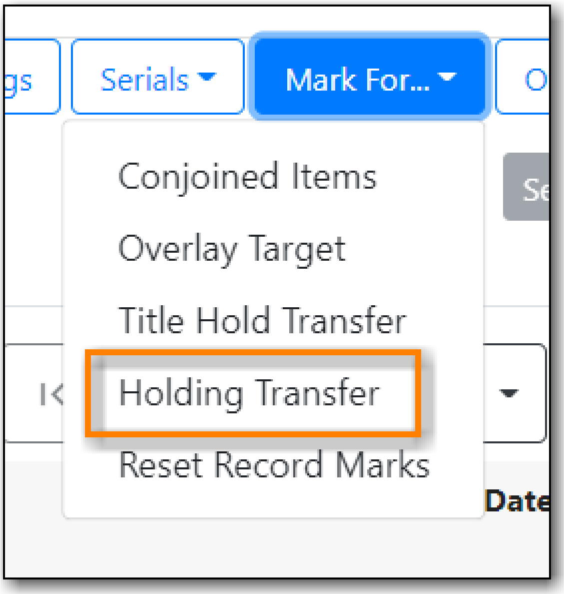
There are times when you need to move item records from one title record to another, or move items from one call number to another under the same or another title record. There are functions in Evergreen to allow you to do so. The critical step is to ensure that you first mark the destination record, 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.

16.7.1. 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

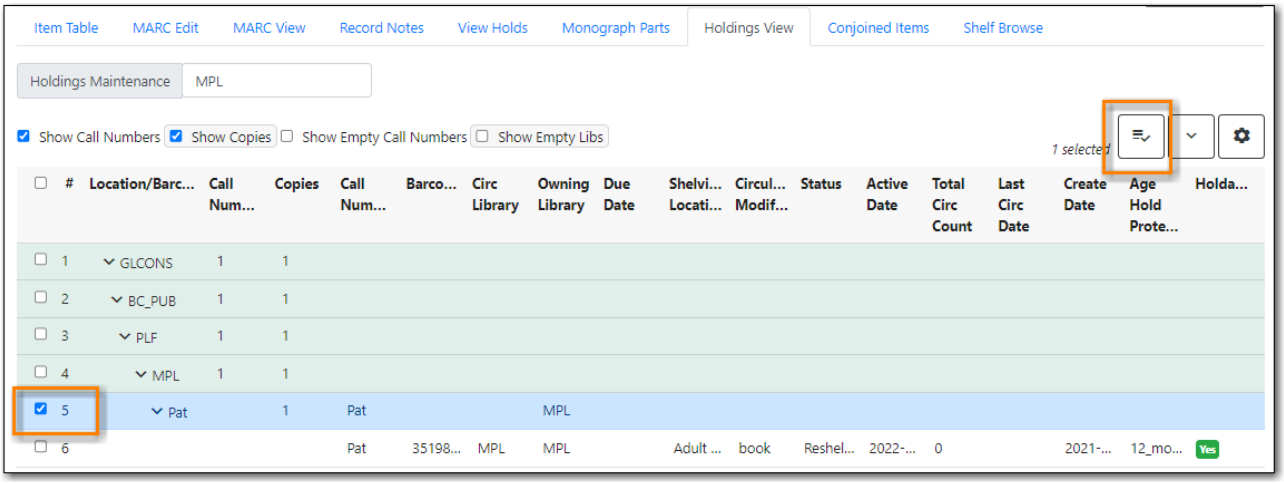
1. Find the destination or target record. On **Mark for** dropdown list, select **Holding Transfer**.



2. Confirmation appears at bottom right of the screen.

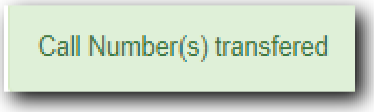
NOTE Transfer target is kept until it is reset (via **Reset Record Marks** on **Mark for** list) or a new target is marked.

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**.

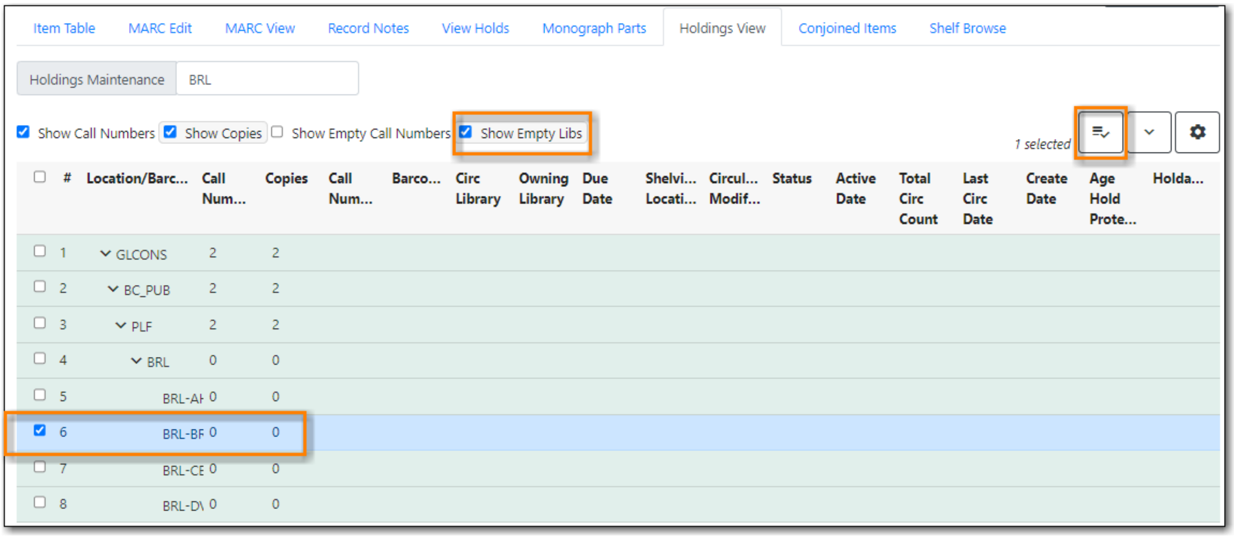
5. The confirmation pop-up appears on bottom right of the screen.



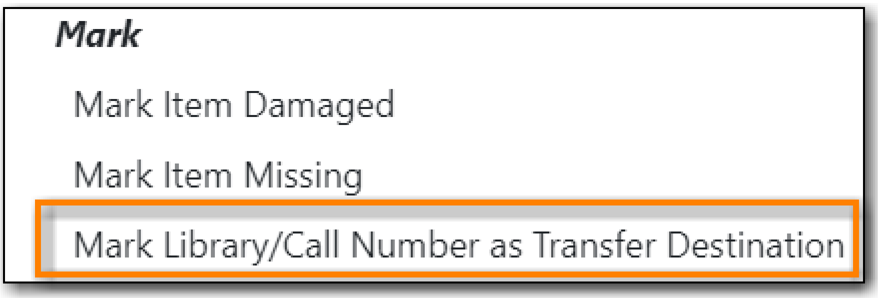
NOTE Your call number's owning library and items' circulation library will not be changed during the transfer. If you already have call numbers under the destination record and the call numbers are the same, the call numbers will be merged.

Transferring Holdings to Another Library

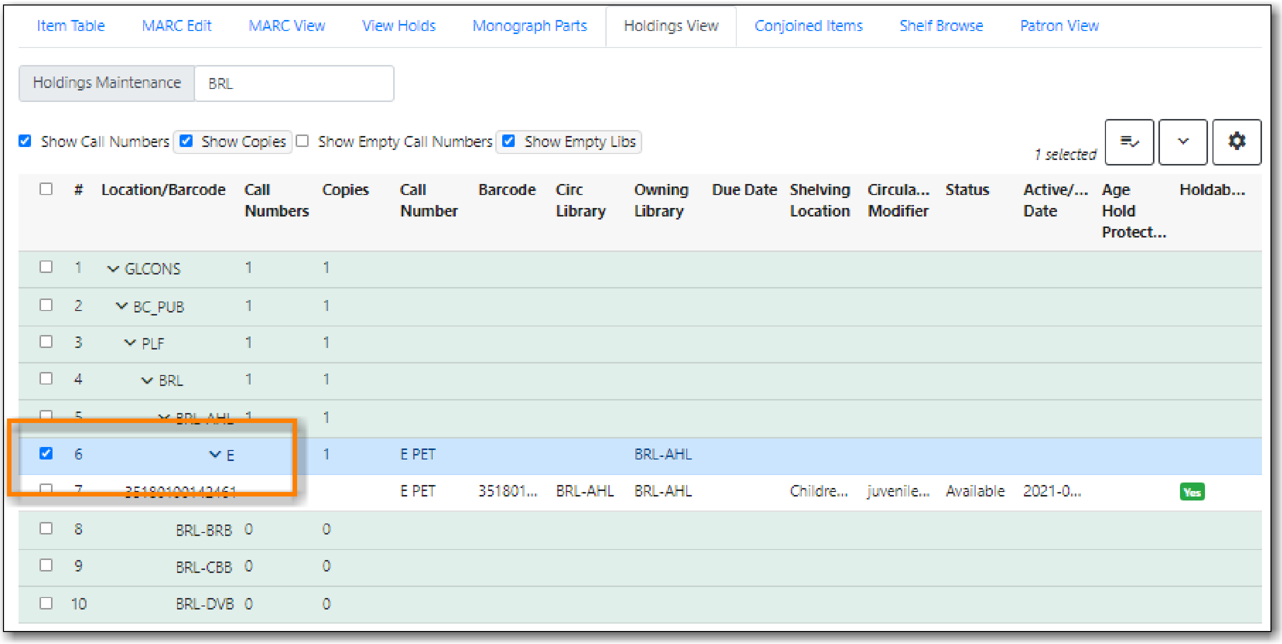
1. On **Holdings View** of the target title record, select the destination library.
   a. You may need to select **Show Empty Libs** to see your destination.



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.

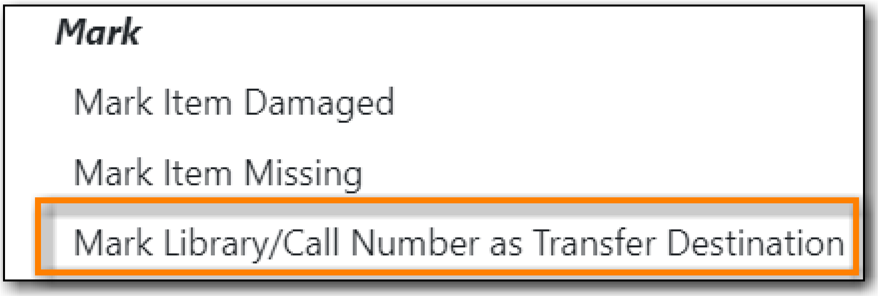
TIP If the destination library has a call number with the same call number, the call numbers will be merged during the transfer.

16.7.2. Transferring Items

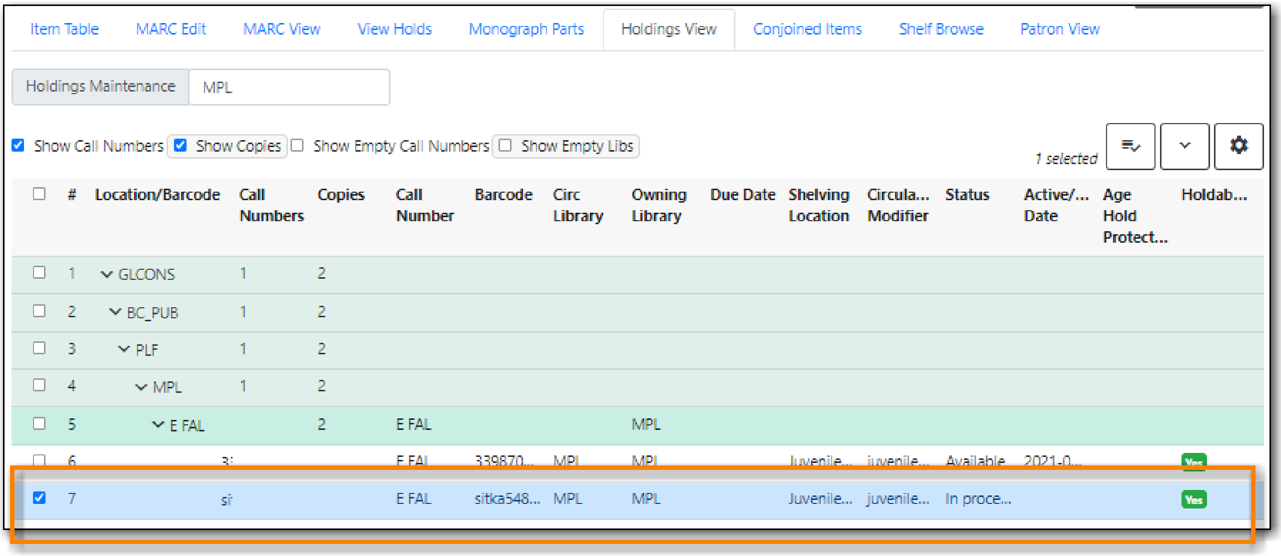
You may want to transfer some of the items under one call number to another call number or transfer all items under one call number to another with a different call number. You use the **Transfer Items** function.

Transferring Items to Another Call Number/Library

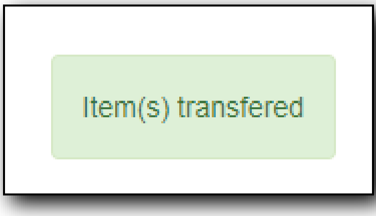
1. Find the destination title record. On **Holdings View**, select the destination call number/library. Click **Actions** dropdown. Go to **Mark** to select **Library/Call Number as Transfer Destination**.



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 **Transfer Items to Marked Destination**.



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



NOTE The option to **Transfer Items to Marked Destination** may be cut-off. If you right-click on the item, the option to **Transfer Items to Marked Destination** is visible.

16.8. Deleting Holdings

Library staff can delete both regular items and pre-catalogued items from Evergreen.

Items can be deleted via:

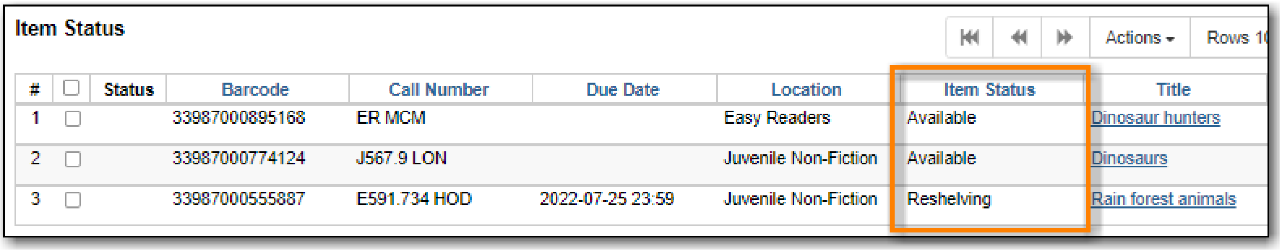
- Item Status
- Item Buckets

• the Holdings View tab in a bibliographic record.

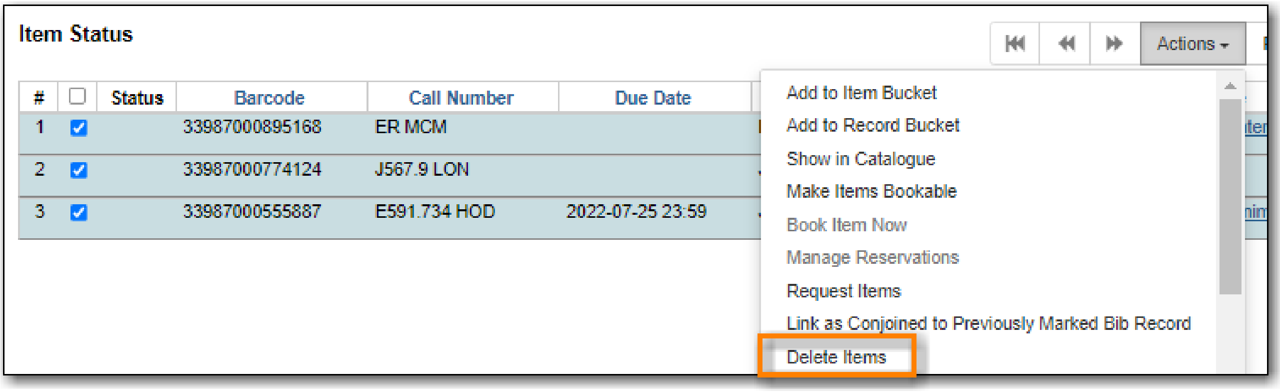
CAUTION	When deleting items in Evergreen it is important to always check the item's status first. Checked out items should be checked in to remove them from the patron's account before an item is deleted. Deleted items cannot be un-deleted in the staff client.

16.8.1. Deleting Items via Item Status

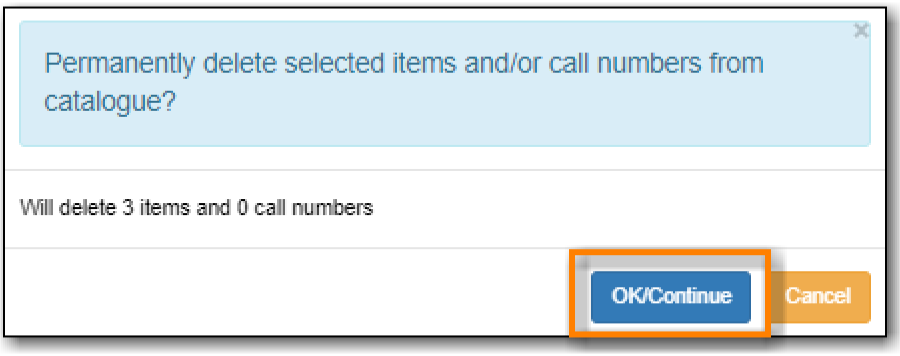
1. In the *Item Status* interface, scan the items you wish to delete or upload a file of the barcodes you wish to delete.
2. Check the status of the items to ensure none have the status of *Checked Out*.



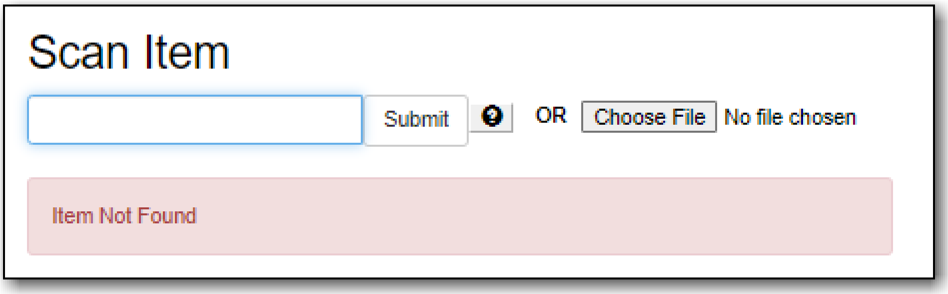
3. Select the items you wish to delete and from the **Actions** menu choose **Delete Items**.



4. A pop up will display the count of items and call numbers to be deleted. Click **OK/Continue** to delete the items.

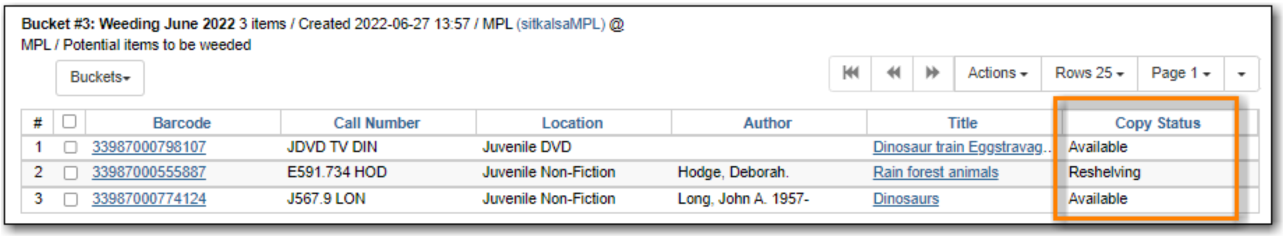


5. The items are deleted and the *Item Status* screen displays the message *Item Not Found* as the items are no longer retrievable through the staff client.

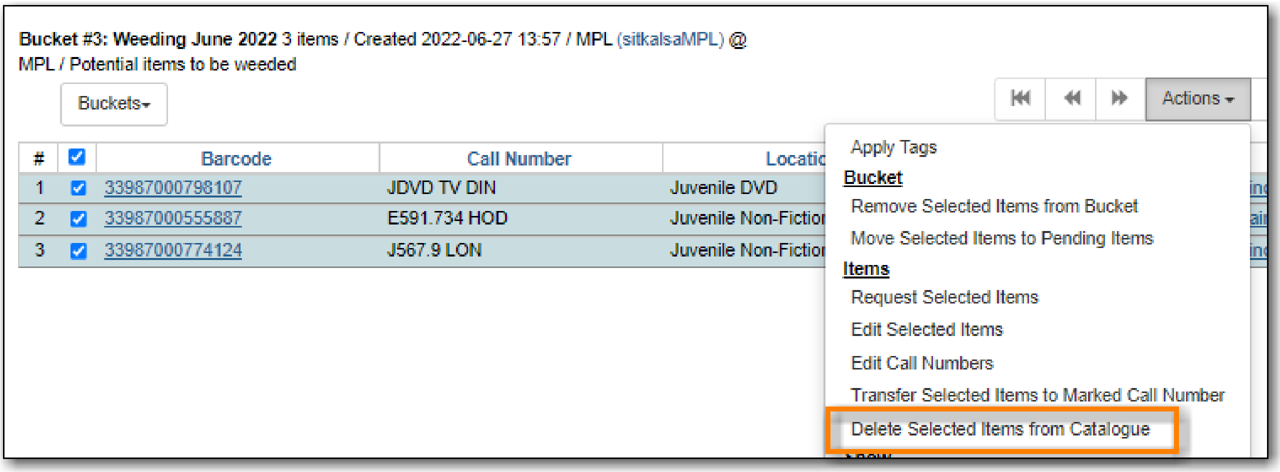


16.8.2. Deleting Items via Item Buckets

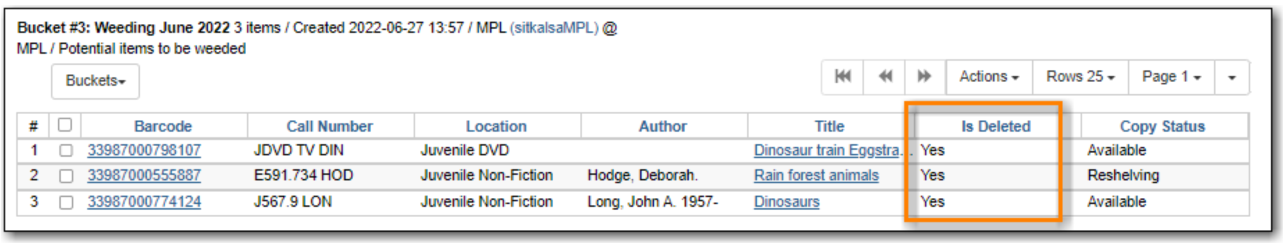
1. Retrieve the item bucket that contains the items you wish to delete. For more information on retrieving and using item buckets see Item Buckets.
2. Check the status of the items to ensure none have the status of *Checked Out*.



3. Select the items you wish to delete and from the **Actions** menu choose **Delete Select Items from Catalogue**.

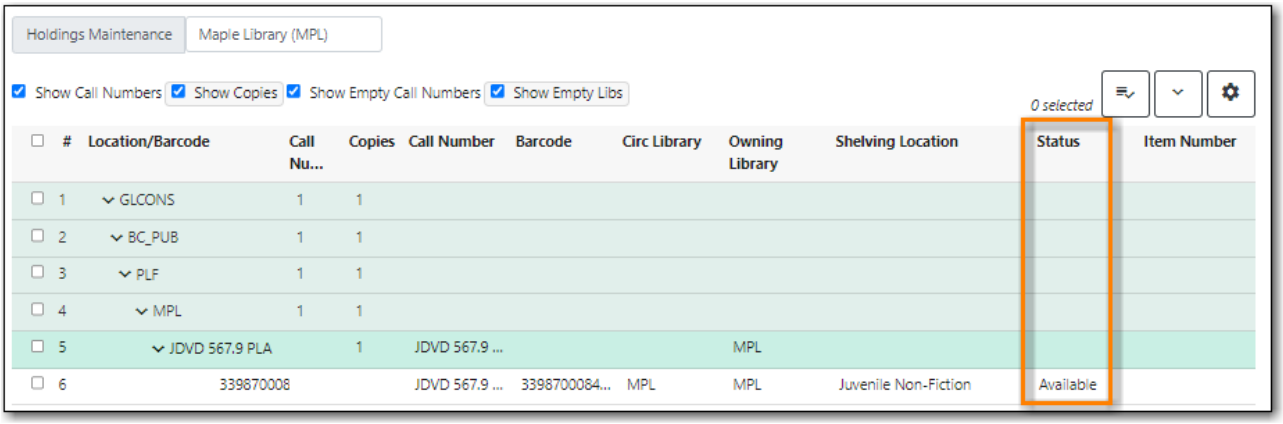


4. A pop up will appear asking you to confirm the deletion. Click **OK/Continue**.
5. The items are now deleted but are still visible in the bucket. This is the only place in Evergreen the items will display. You can use the *Is Deleted* column to determine which item are deleted.

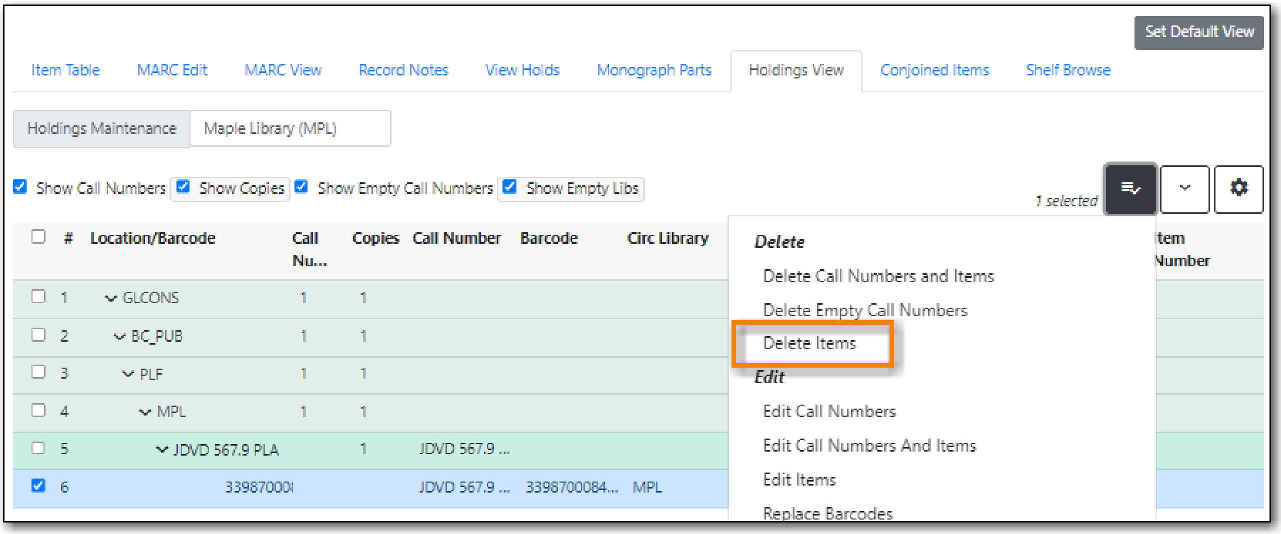


16.8.3. Deleting Items via the Holdings View Tab

1. Search the catalogue for the record of the item you wish to delete.
2. Go to the **Holdings View** tab.
3. Check the status of the item(s) to ensure none have the status of *Checked Out*.

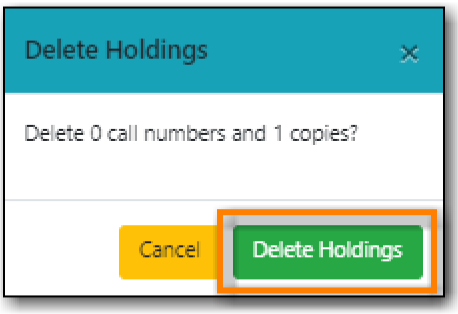


4. Select the item(s) you wish to delete and from the Actions menu choose **Delete → Delete Items**.



TIP	When an item is deleted Evergreen automatically deletes the associated call number record if it's not used by any other items so it's not necessary to manually delete call numbers.

5. On the pop up that appears click **Delete Holdings**.



6. The item(s) will be deleted. Evergreen will also automatically delete associated call number and

bibliographic records as necessary.

16.9. Deleting Holdings for Electronic Resources

1. Search the catalogue for the record with the electronic resource that you want to delete, as described in Searching the Database for Cataloguing Purposes.
2. Click on the **MARC Edit** tab.
3. Using the Enhanced MARC Editor or the Flat Text Editor find the 856 field with the subfield 9 containing your library code.
4. Delete the 856 field with the subfield 9 containing your library code.
5. Click **Save Changes**.
6. The record will no longer appear in searches in your public catalogue.

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.

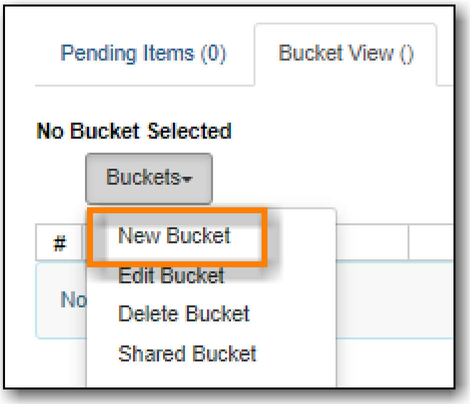
17.1. Creating/Deleting Item Buckets

17.1.1. Creating Item Buckets

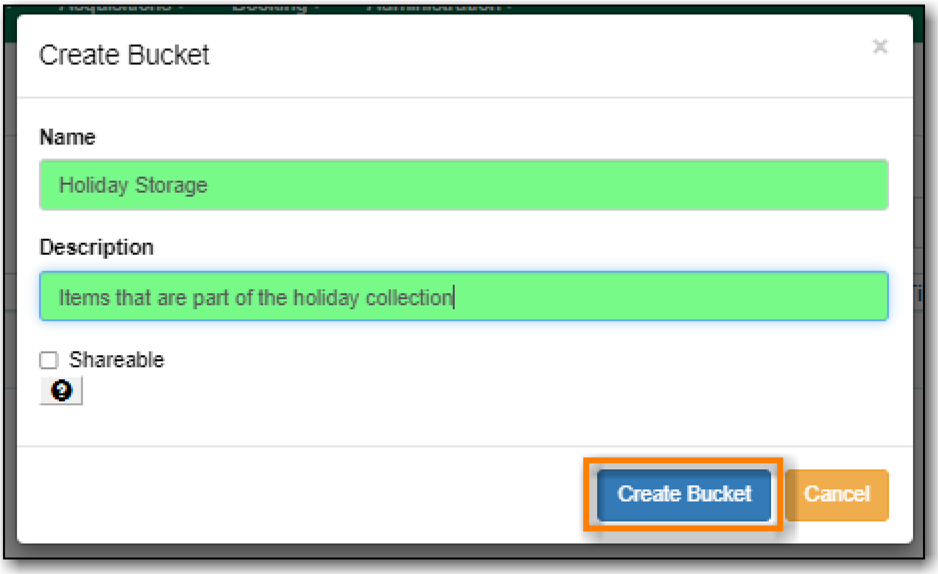
There are two ways to create an item bucket. You can either create a bucket first, without accessing any copies, or you can access an item record and choose to create the bucket from that view. We will demonstrate both methods here.

Create an Item Bucket on Item Buckets view

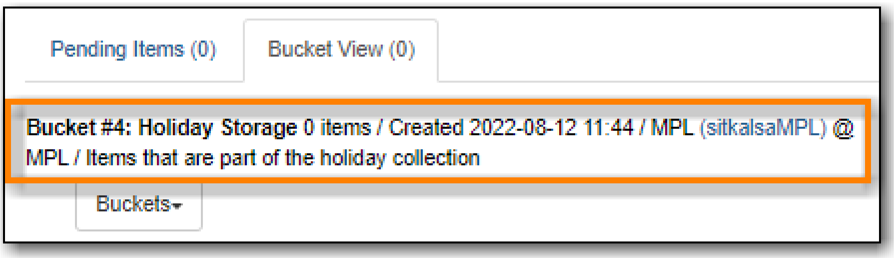
1. Select **Cataloging** → **Item Buckets** from the menu bar.
2. Select **New Bucket** from the **Buckets** dropdown list.



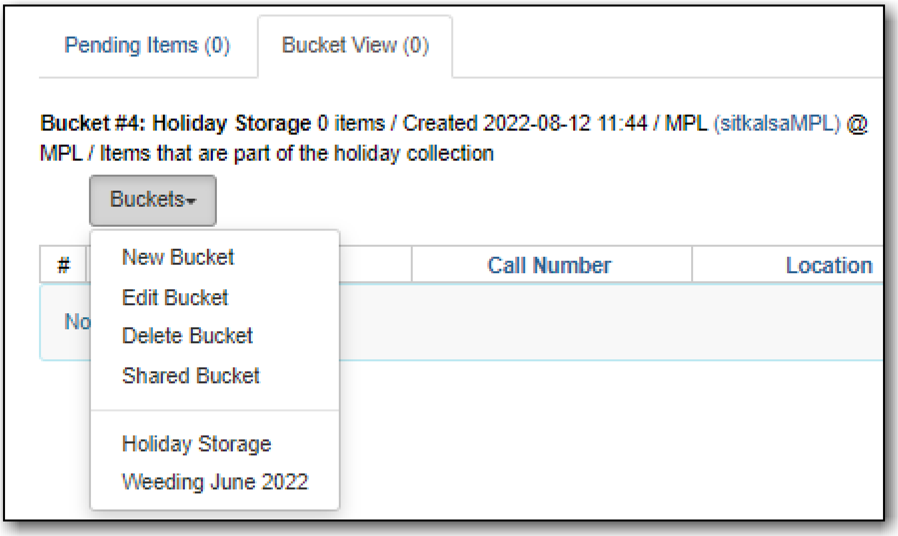
3. Type in a name and some description, if needed. Click **Create Bucket**.



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.



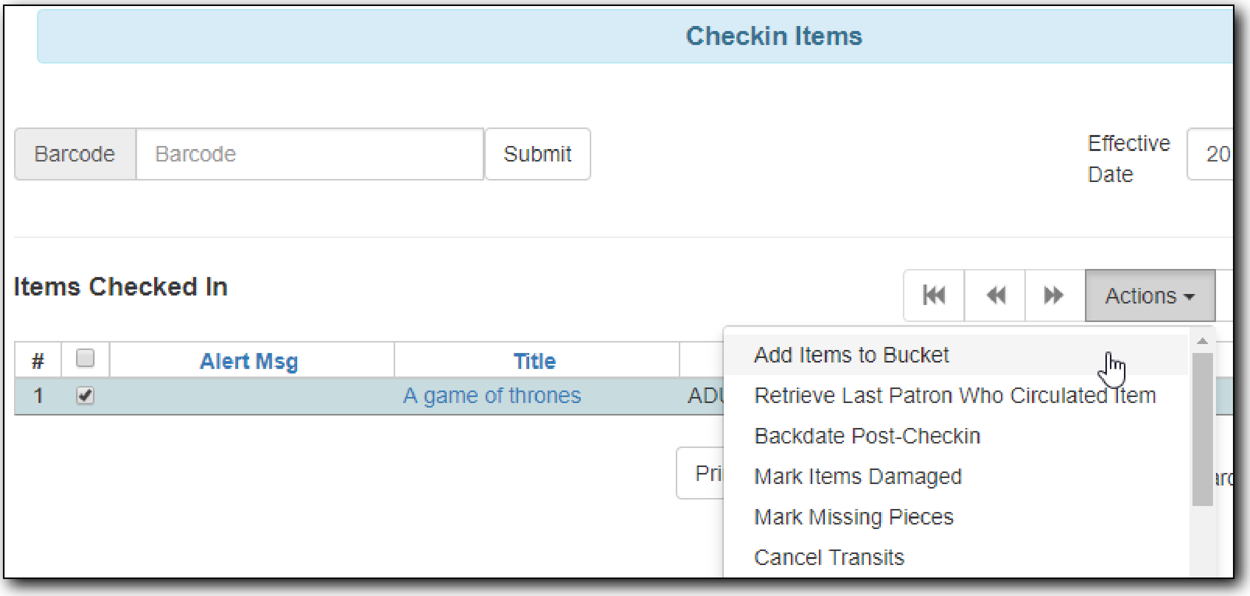
TIP

- 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 **Shareable** - this function does not work as expected.

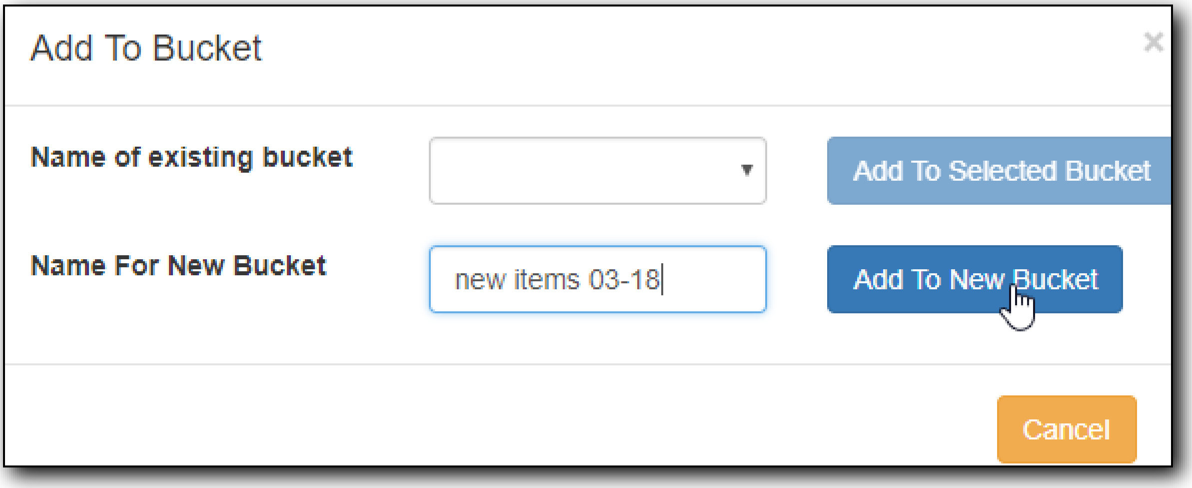
Create an Item Bucket when Adding an Item Record to a Bucket

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**.

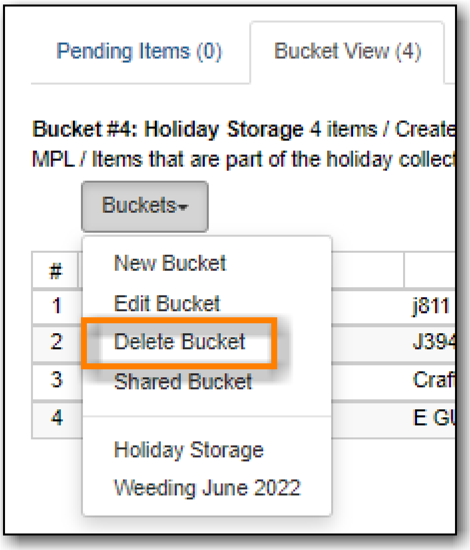


2. You are prompted to add the record to an existing bucket or a new one. To add to a new bucket, type in a name in **Name For New Bucket** box, then click **Add to New Bucket**.



17.1.2. Deleting Item Buckets

1. To delete an item bucket, retrieve it from the **Buckets** drop down list
2. Select **Delete Bucket**.



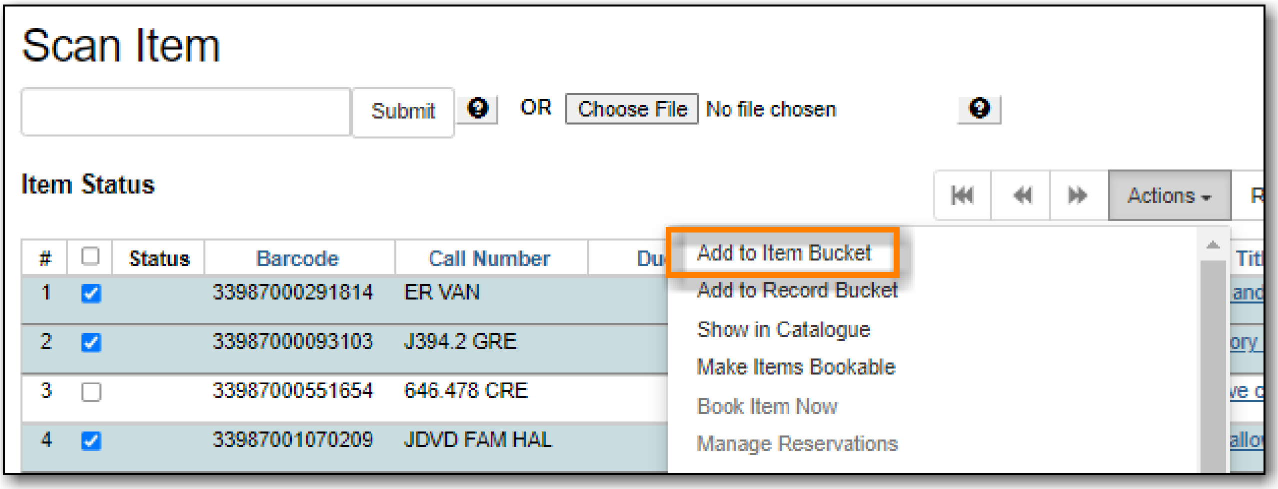
3. On the pop up that appears click **Delete Bucket**.
4. The bucket is deleted.

17.2. Adding Items to a Bucket

Add Items to a Bucket

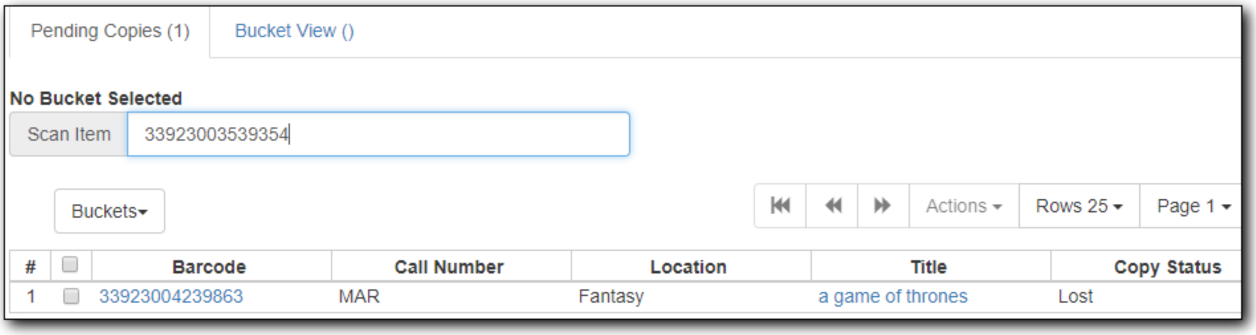
Items can be added to a bucket when they are displayed on **Checkin**, **Item Status** and **Holdings View** screen.

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

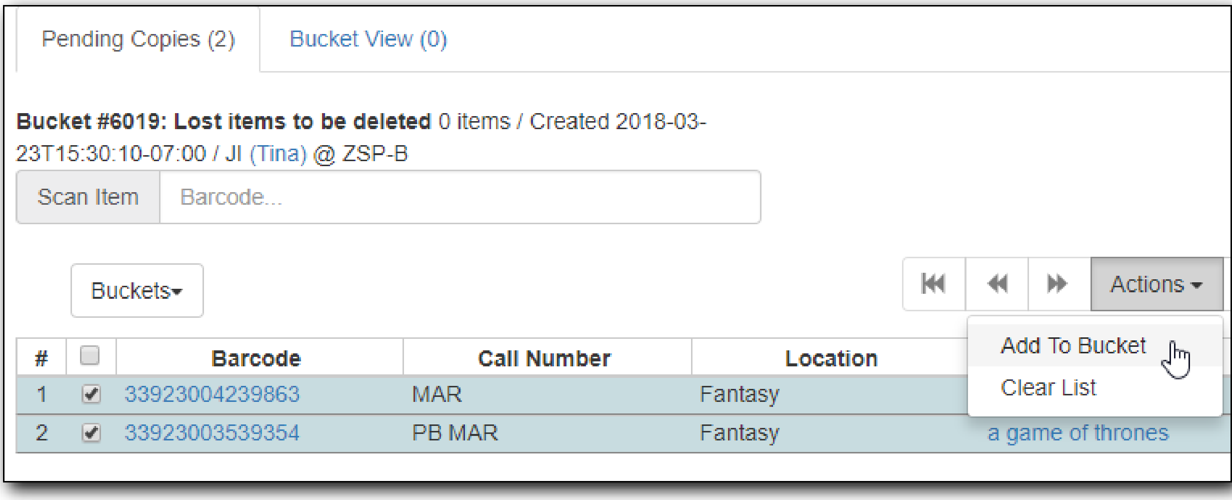


You can add items to a bucket on **Item Bucket View**.

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

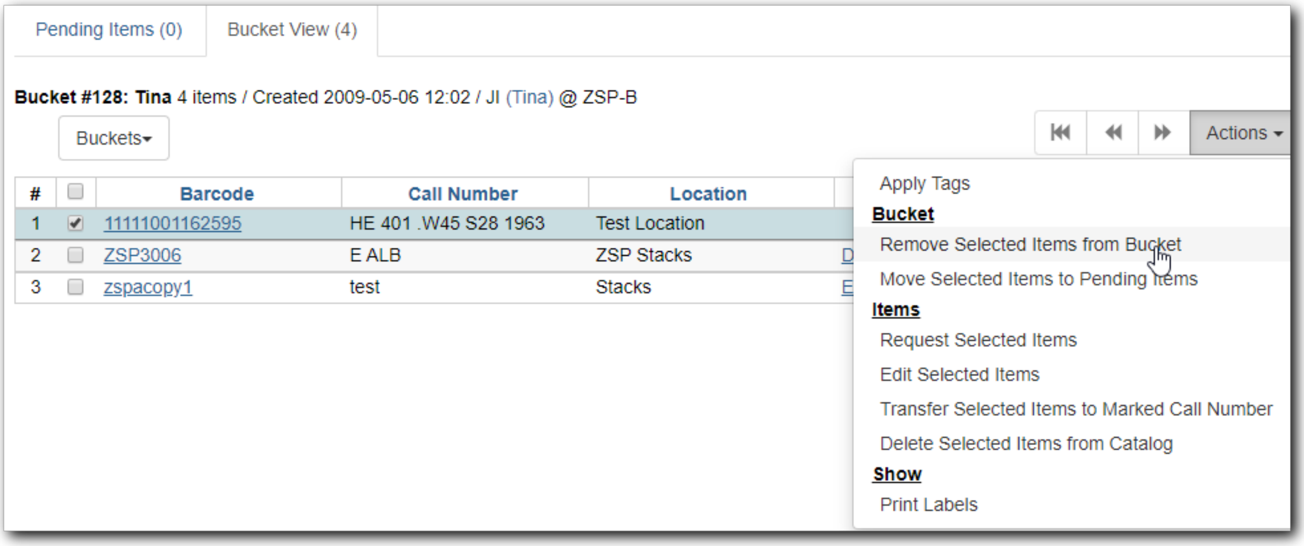


2. Click the **Buckets** dropdown list to open or create a bucket, if not done yet.
3. Select records that you want to add to the bucket.
4. Click **Actions** → **Add to Bucket**.



Remove Items from a Bucket

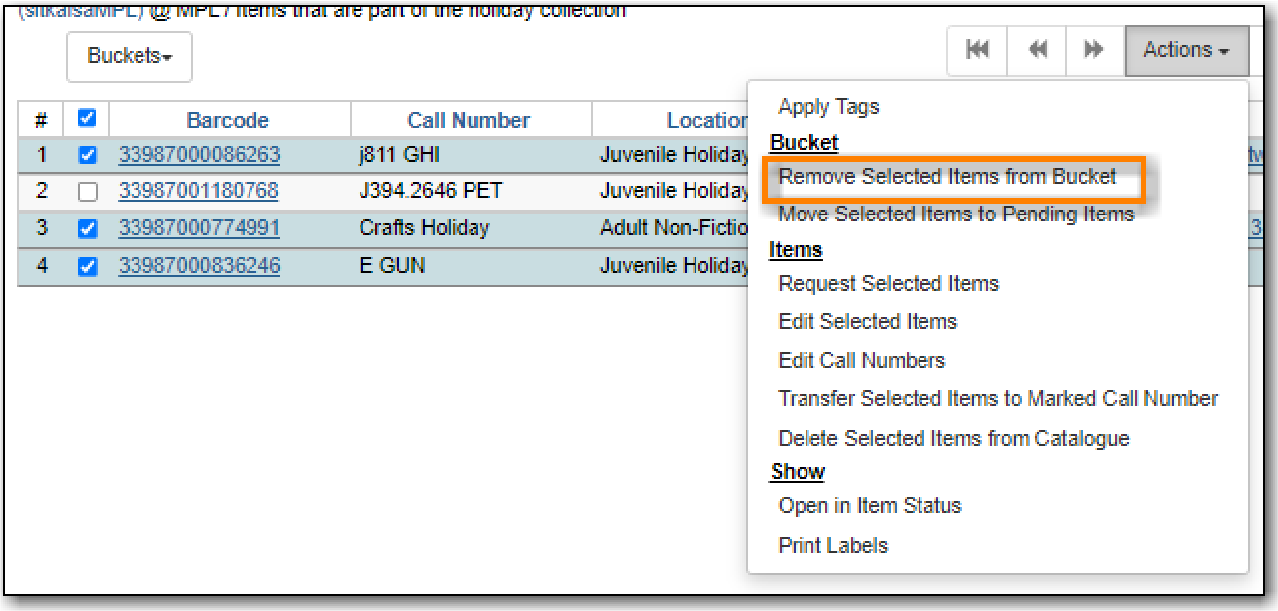
To remove items from a bucket, retrieve the bucket, select the items, choose **Actions** → **Bucket** → **Remove Selected Items from Bucket**



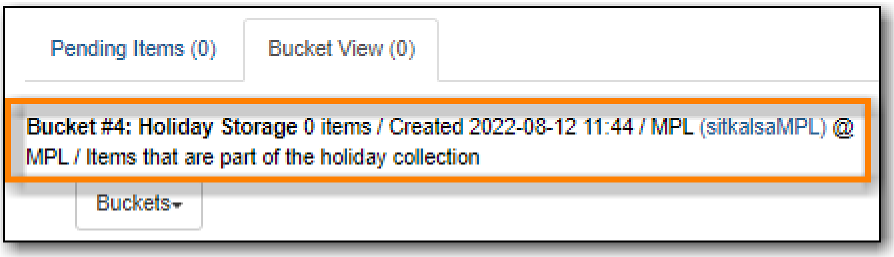
17.3. Working with Items in a Bucket

17.3.1. Removing Items from a Bucket

1. Select the items you would like to remove from the bucket.
2. From the **Actions** menu select **Remove Selected items from Bucket**.

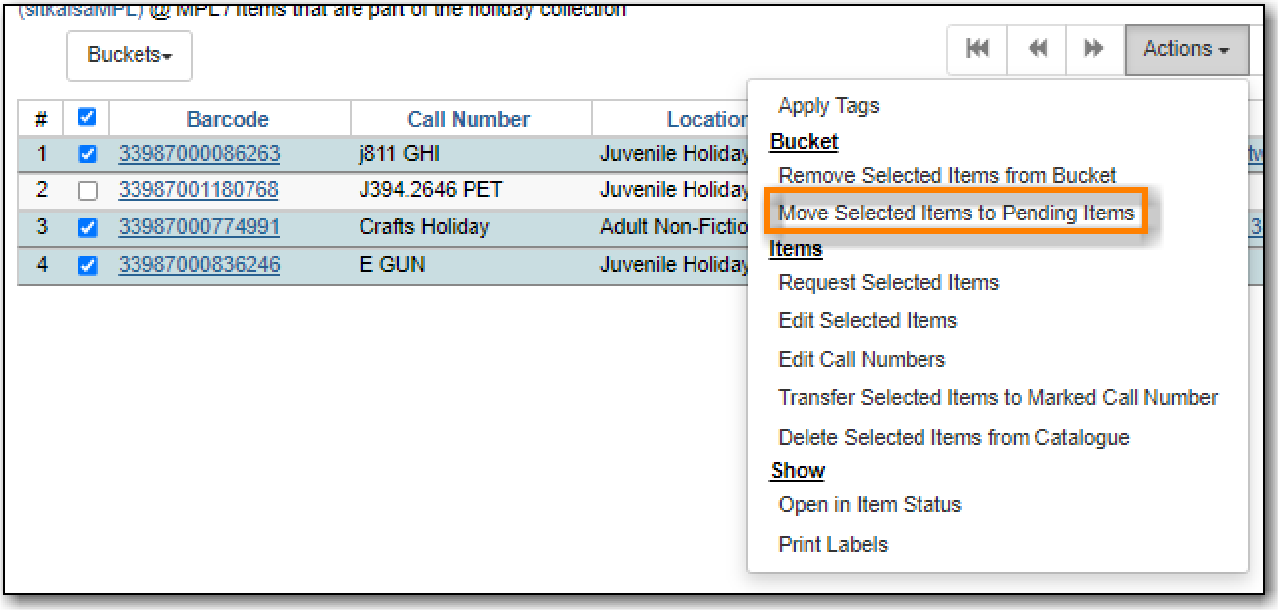


3. The items are removed from the bucket.

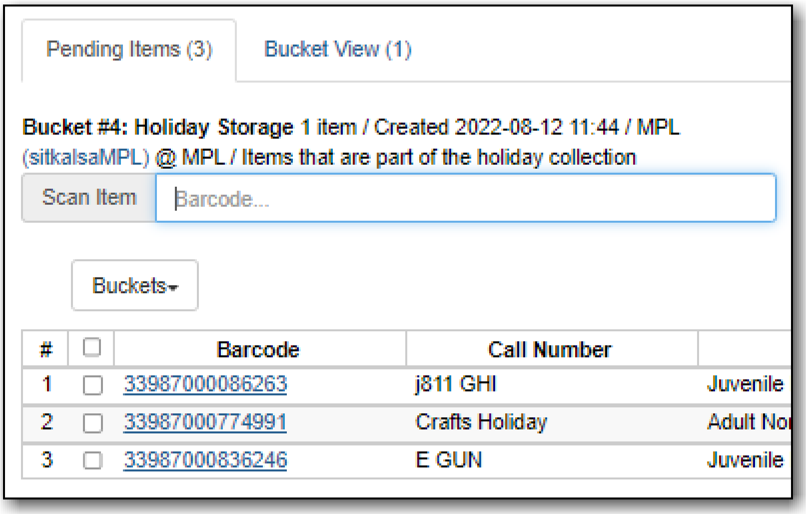


17.3.2. Moving Items to a Different Bucket

1. Select the items you would like to move to another bucket.
2. From the **Actions** menu select **Move Selected Items to Pending Items**.



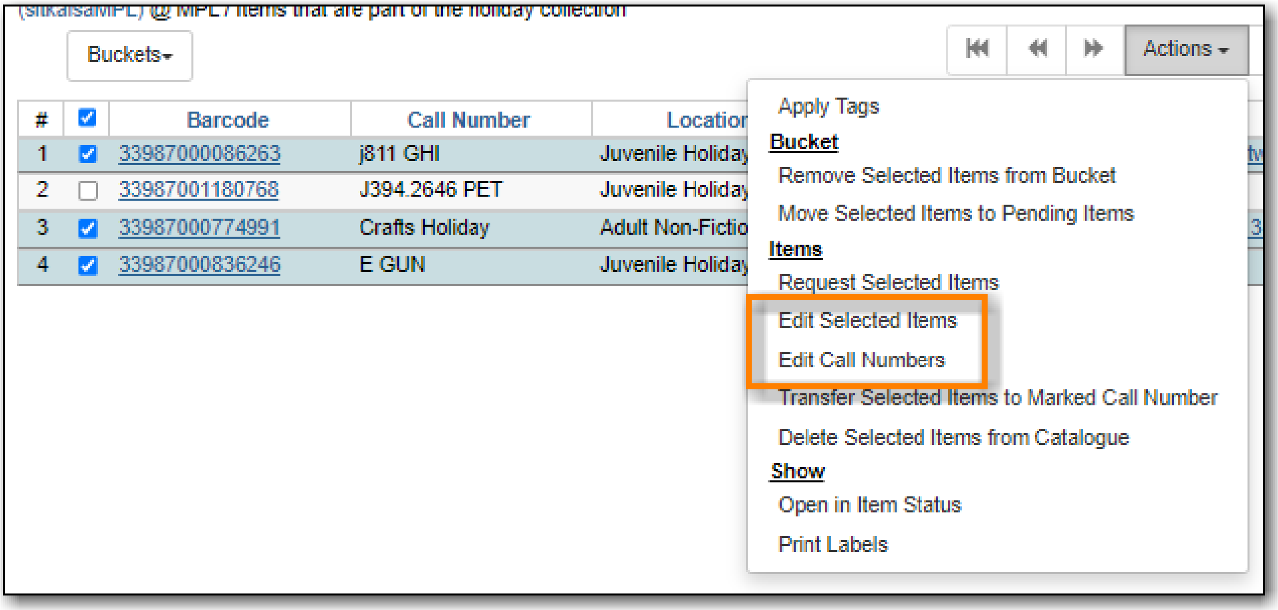
3. The items have been removed from the current bucket and moved to the **Pending Items** tab.



4. The items can now be added to a different bucket.

17.3.3. Editing Items

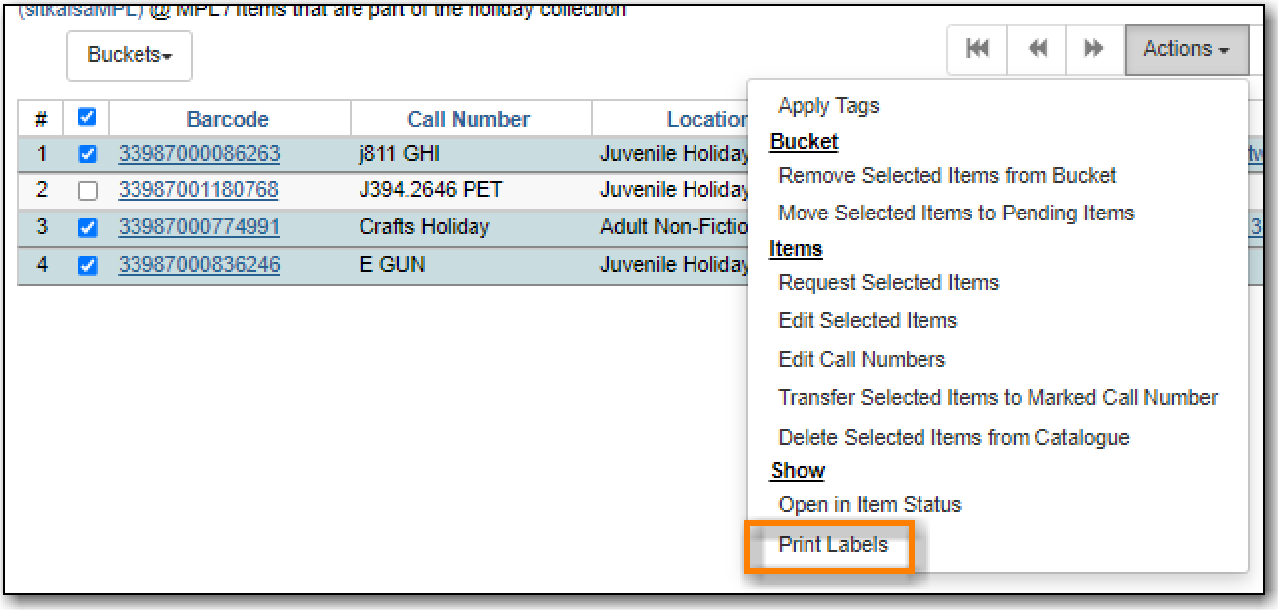
1. Select the items you would like to edit.
2. From the **Actions** menu select **Edit Selected Items** or **Edit Call Numbers**.



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

17.3.4. Printing Item Labels

1. Select the items you would like to print labels for.
2. From the **Actions** menu select **Print Labels**.



3. The Item Label interface will open in a new tab.

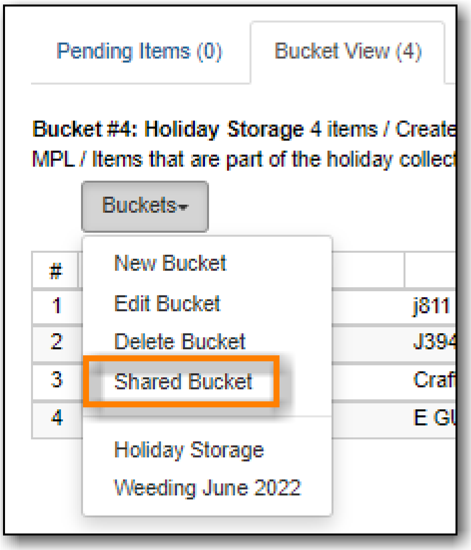
17.3.5. Deleting Items

See Deleting Items via Item Buckets.

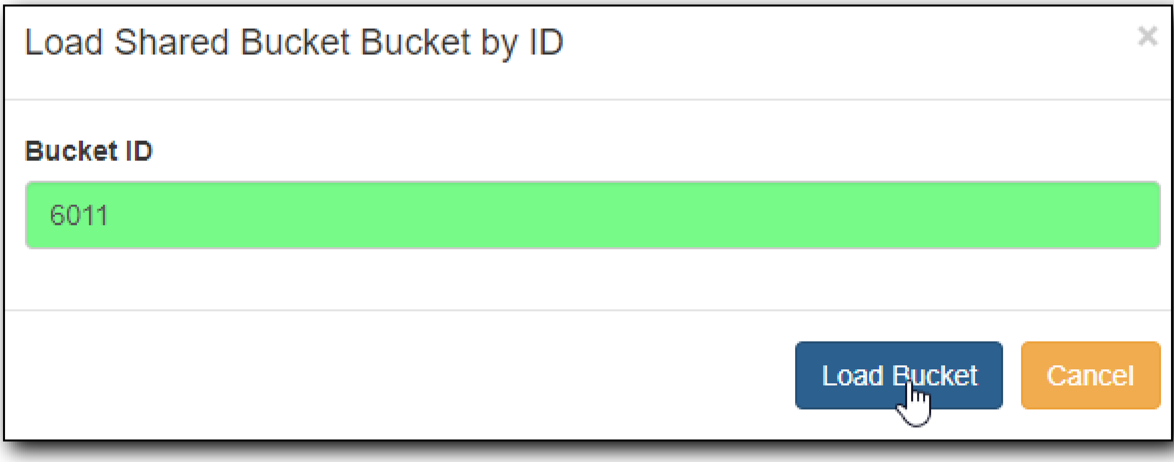
17.4. Retrieving Shared Buckets

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.

1. To retrieve a shared bucket, click **Shared Buckets** on the Buckets drop down.



2. On the pop up that appears click **Load Bucket**.



3. The bucket will load.

Chapter 18. Adding Individual Records

When there is no matching MARC record for your item in the Sitka catalogue, cataloguers can import a record via Z39.50 or create a new record.

NOTE	Before importing or creating new MARC records in the Sitka catalogue, cataloguers should always search the catalogue first to check for existing matches.

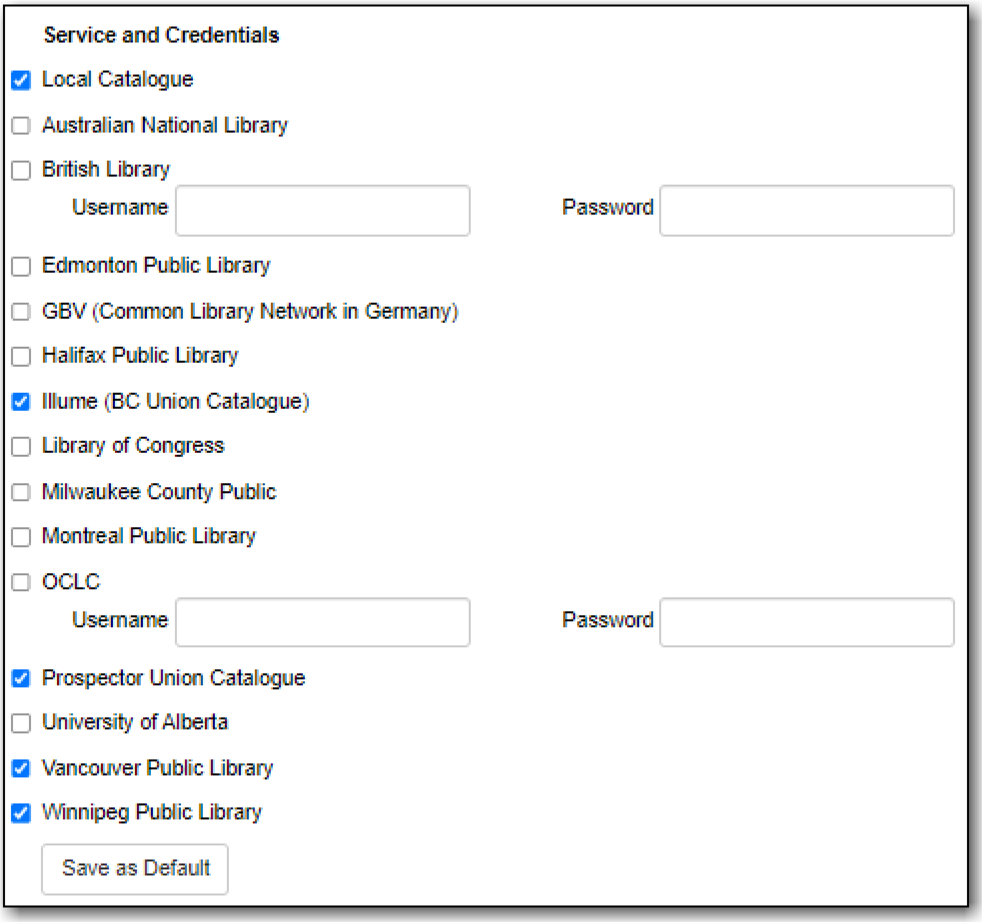
18.1. Importing Bibliographic Records via Z39.50 Interface

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.

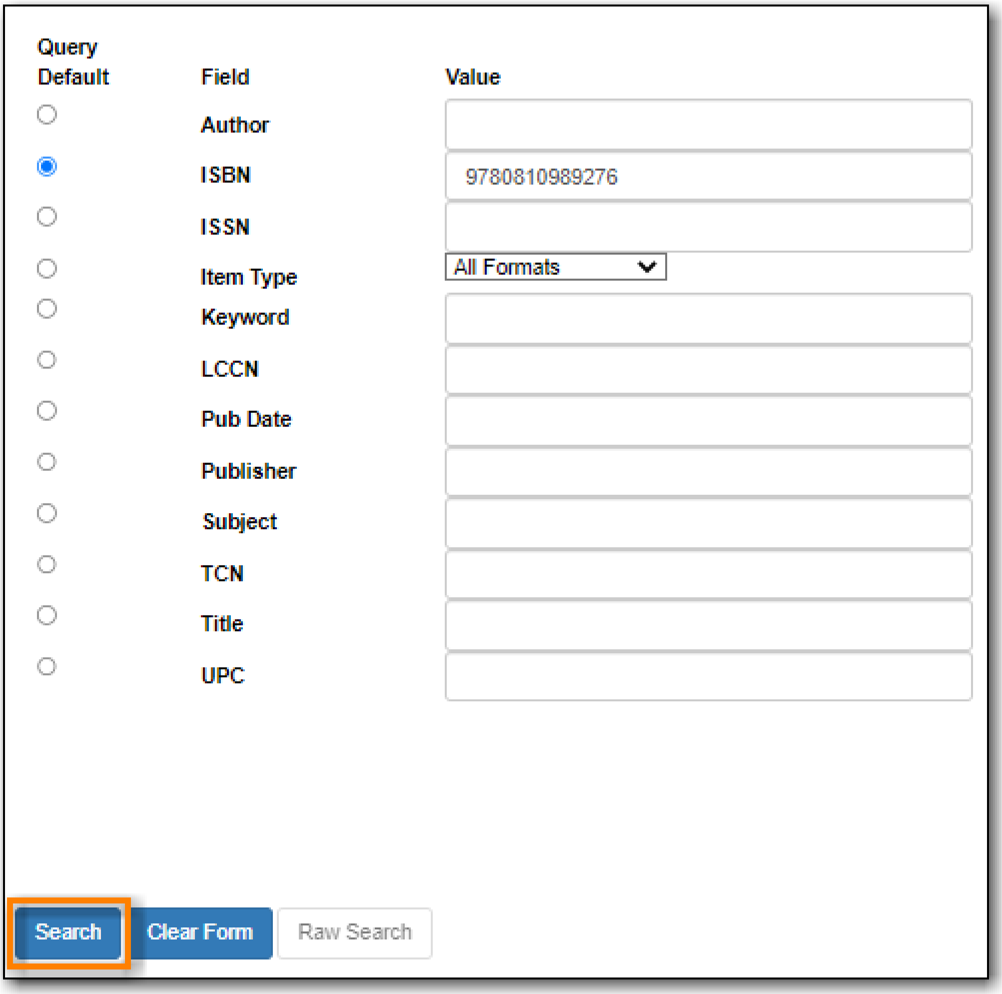
18.1.1. Searching via Z39.50

1. To access the Z39.50 interface, select **Cataloguing → Import Record from Z39.50**.
2. Select the Z39.50 services that you would like to search from the list.



TIP	Different types of libraries will see different services listed. The more services you select the longer your search will take as Evergreen has to search each Z39.50 service. Co-op Support recommends setting 3 to 5 sources as your defaults and then adding additional services to your searching as needed.

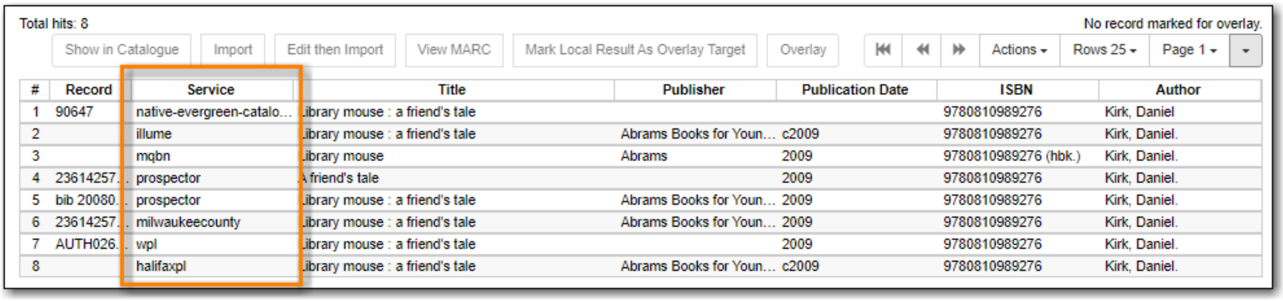
3. Fill in your search term(s) and click **Search**.



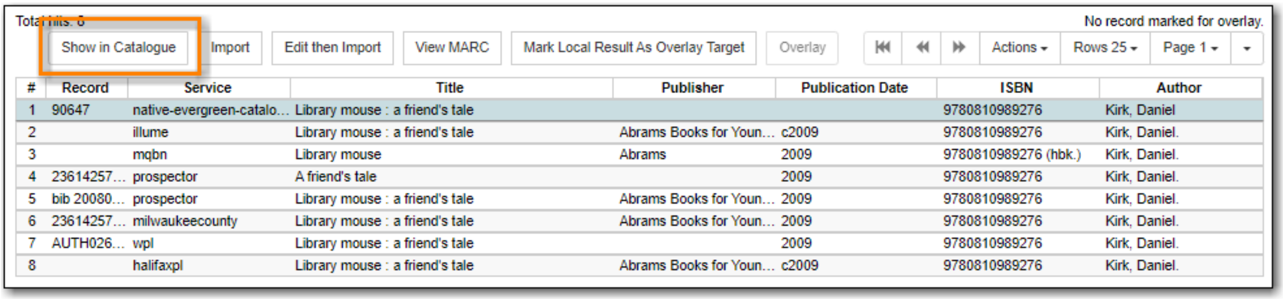
NOTE	The active search fields will change depending on the targets you select. Different targets may support different search types. For instance, Keyword and Subject will only be active if the local catalogue is selected. When you select multiple targets to search, an active box may apply to only one 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.

5. Information about each retrieved record appears on a separate summary line. The *Service* column indicates where the record was found.



6. If "native-evergreen-catalog" is listed in the *Service* column, the record is already in Sitka's database. Select the record and click **Show in Catalogue**.

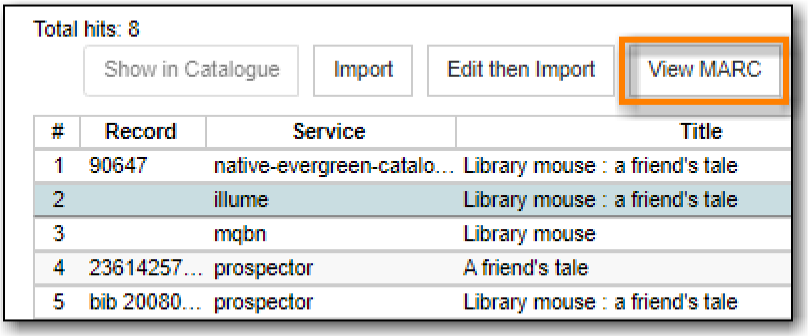


7. If the record in the catalogue matches your item add your holding, otherwise import a new record via Z39.50.

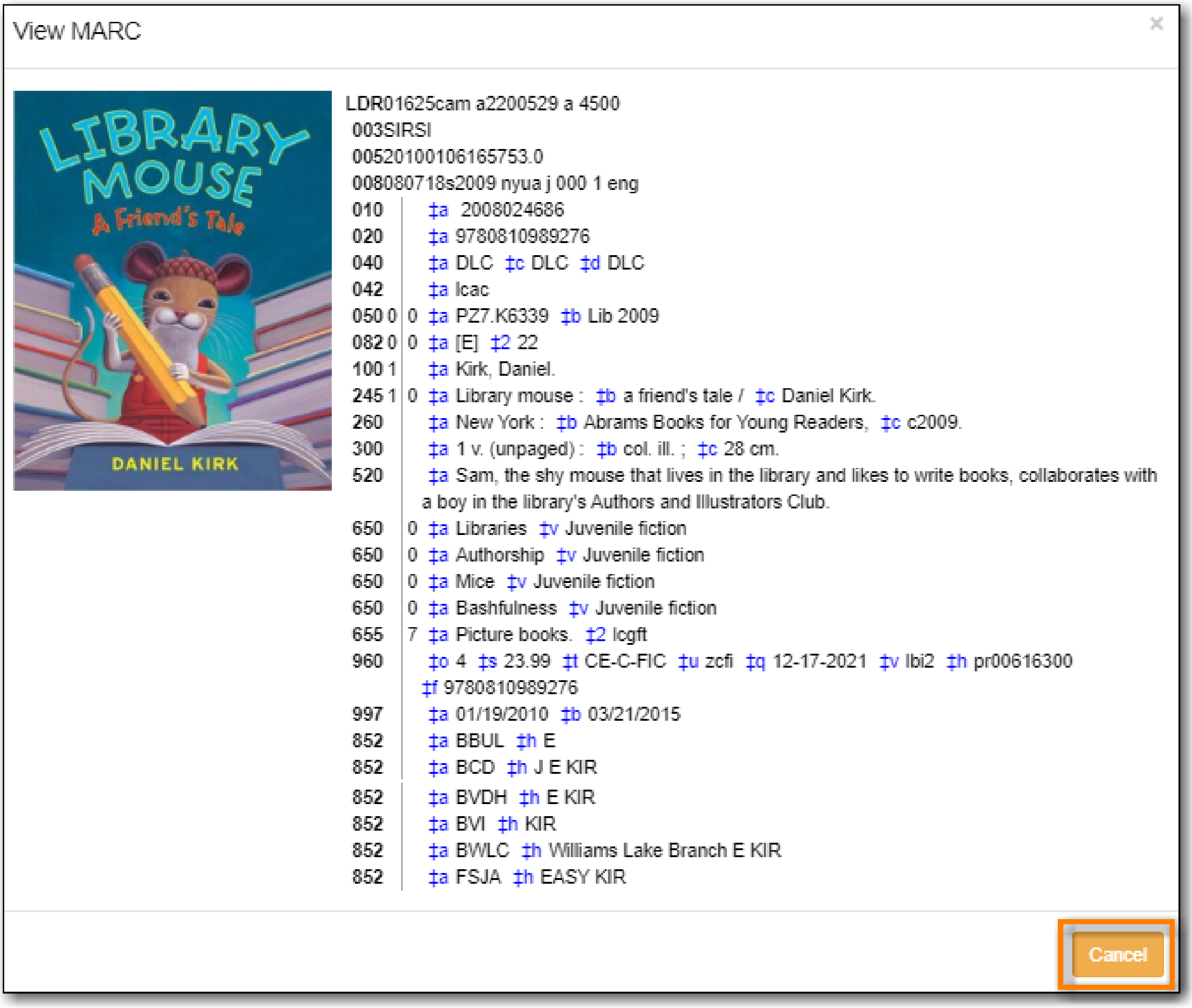
18.1.2. Importing Bibliographic Records via Z39.50

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

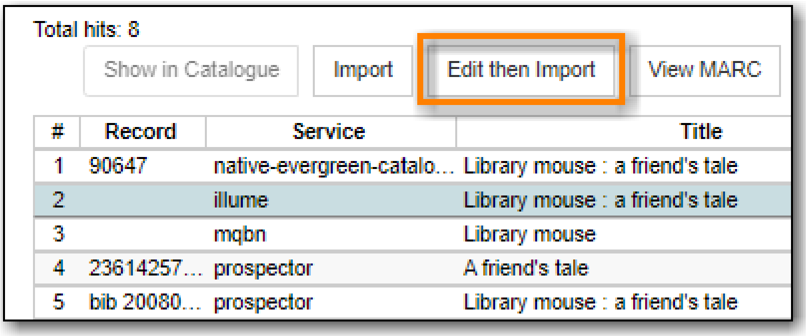
1. Search for your record via Z39.50. See Searching via Z39.50.
2. To import a record, view the MARC records for the retruned search results by selecting each record in turn and clicking **View MARC**.



3. The MARC record is displayed in a pop-up window. Click **Cancel** to go back to the results list.



4. Select the record you have determined in the best match to your item and click **Edit then Import**.



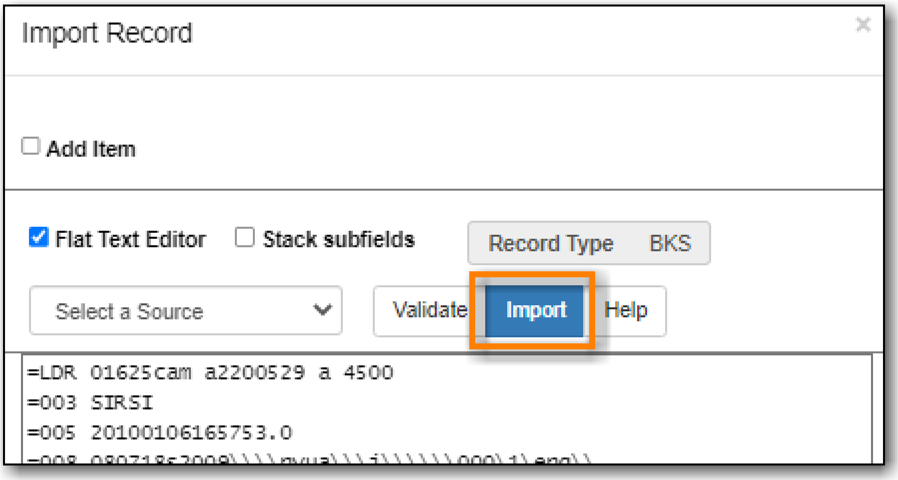
5. Make any needed edits to the record.

NOTE

As the record has not yet been added to the Sitka database and so has no items from other records attached you can edit it as needed. Co-op Support recommends removing any fields that contain local data related to items held by the service the record comes from. In general this information will be found in the 852 fields and 9xx fields.

The fields 906, 923, 925, 936, 948, 955, 959, and 963 are stripped from imported records by default.

6. Click **Import**.



7. The record is imported. On the pop-up that appears click **Go to Record**.
8. The record will open in a new tab. You can now add your holding to the record. See Adding Holdings,

18.1.3. Overlaying Records via Z39.50 Interface

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

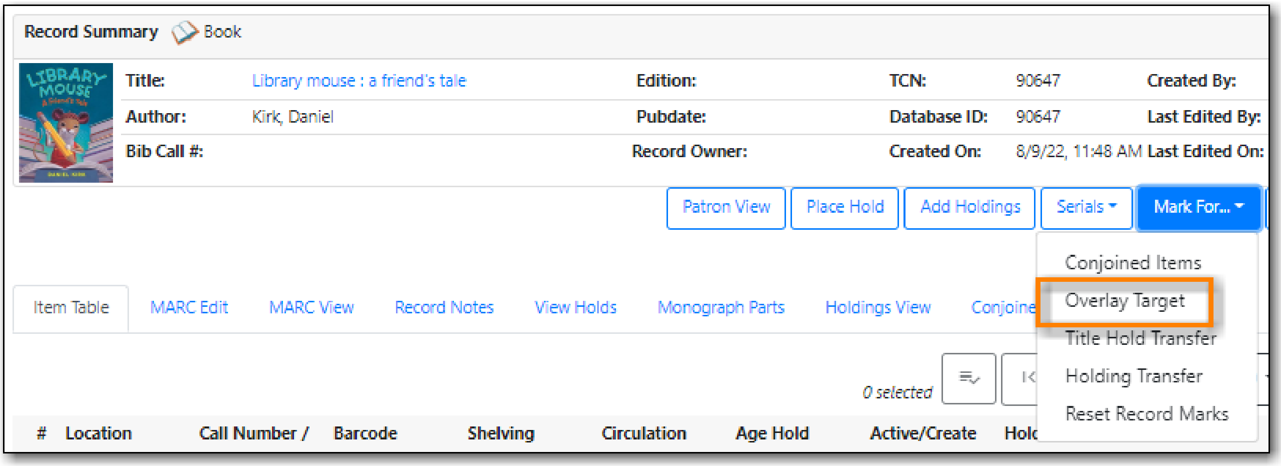
There are times when it is necessary to overlay an existing MARC record in Evergreen with a better MARC record from a Z39.50 target. Overlaying a MARC record replaces an existing MARC record and leaves all holdings, and corresponding holds, active circulations, bills, and fines intact. As overlay affects all libraries sharing a MARC record it is critical that this procedure be done judiciously and correctly. Please refer to Sitka's cataloguing policy for more information.

Marking a Record for Overlay

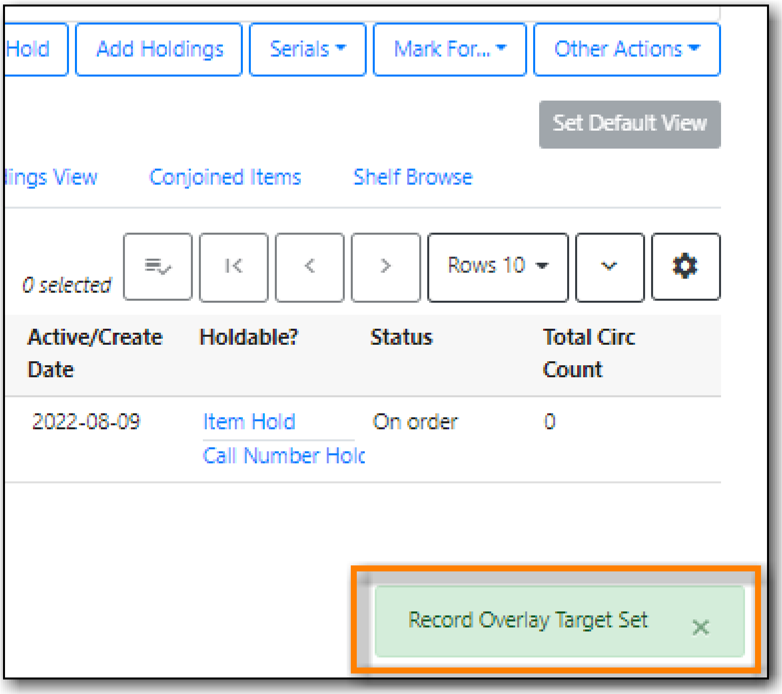
You must first identify the MARC record which you wish to overlay. You do this by "marking" it for overlay. Only one record can be marked at a time. When you mark another record, the previous record is unmarked. Once a record is marked, it stays marked until it is overlaid, or has been reset. Therefore,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

To mark a record for overlay via the catalogue:

1. Retrieve the record in the catalogue.
2. On record details screen, click **Mark for → Overlay target**.



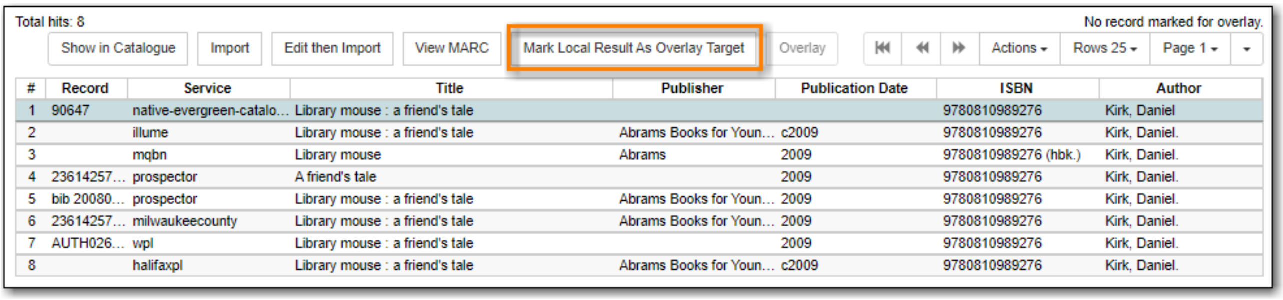
3. Confirmation appears at the right bottom corner of the screen.



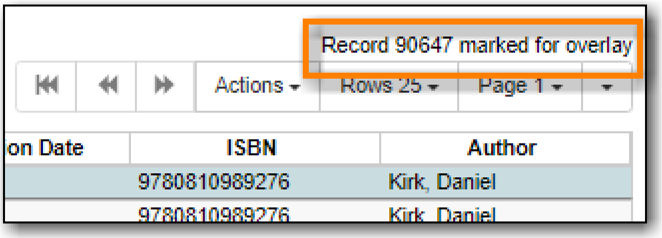
To mark a record for overlay via the Z39.50 interface.

1. In the Z29.50 interface search for your title.

2. Select the result for *native-evergreen-catalog* and click **Mark Local Results As Overlay Target**.



3. The record ID of the record to be overlaid will display on the right.



CAUTION

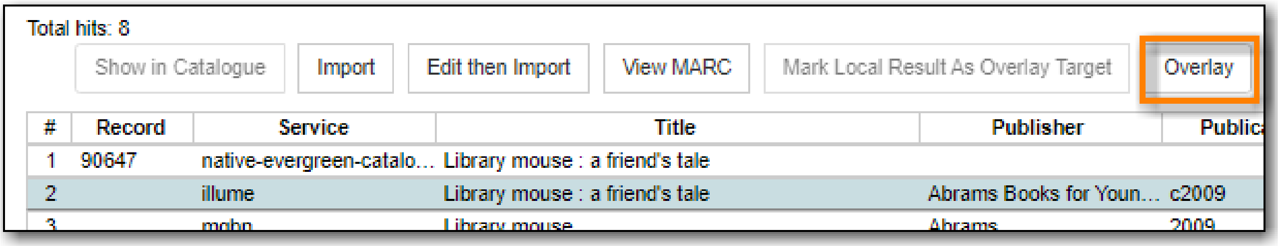
The overlay target will remain even after you log out of Evergreen. After you re-log in, the target is still in effect.

Overlaying Using Z39.50

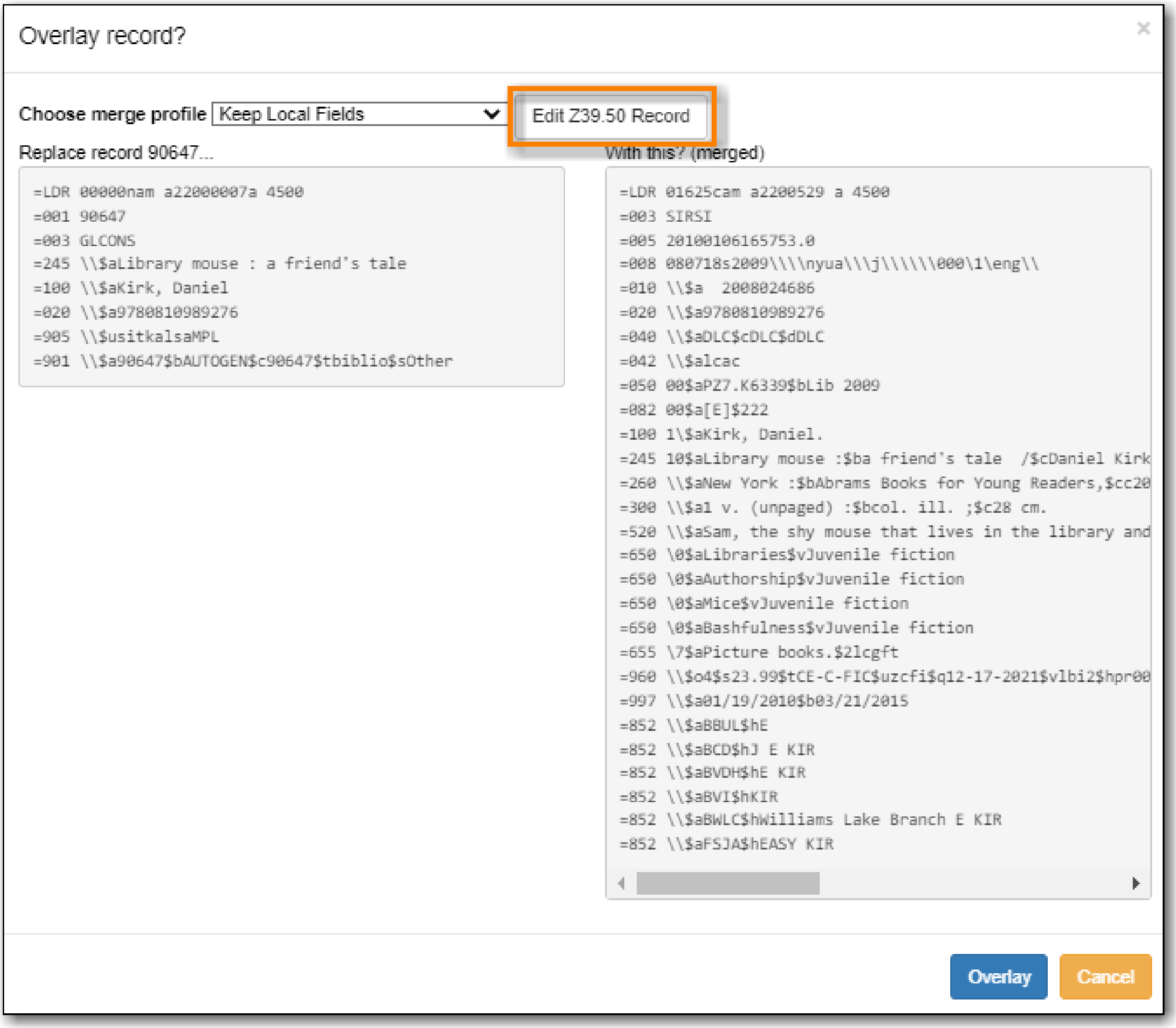
1. Search for your record via Z39.50. See Searching via Z39.50.
2. Select the record you would like to overlay over the existing record and click **Overlay**.

CAUTION

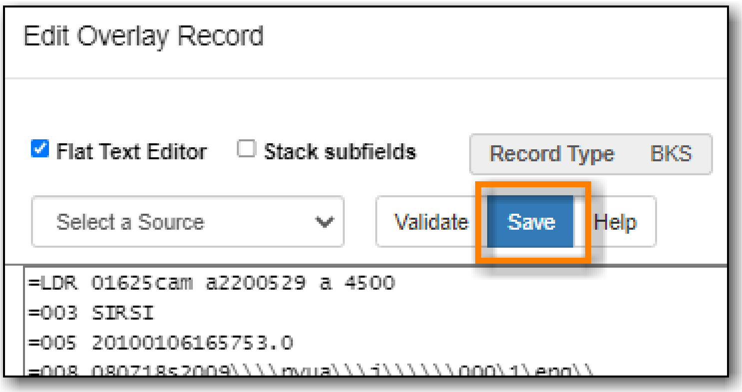
The record you overlay over the existing record should be a fuller and better record than the one it's replacing, but still describe the same title. Any changes you make when overlaying records affect all Sitka libraries with holdings attached to the record.



3. The overlay interface opens in a pop up. The default merge profile is *Keep Local Fields*; this will copy any 050, 055, 092, 590, 595, 690, 852, and 856 fields from the existing record into the new one you are bringing in.
4. Click **Edit Z39.50 Record**.



Make any needed edits to the record following Sitka's cataloguing policy and click **Save**.

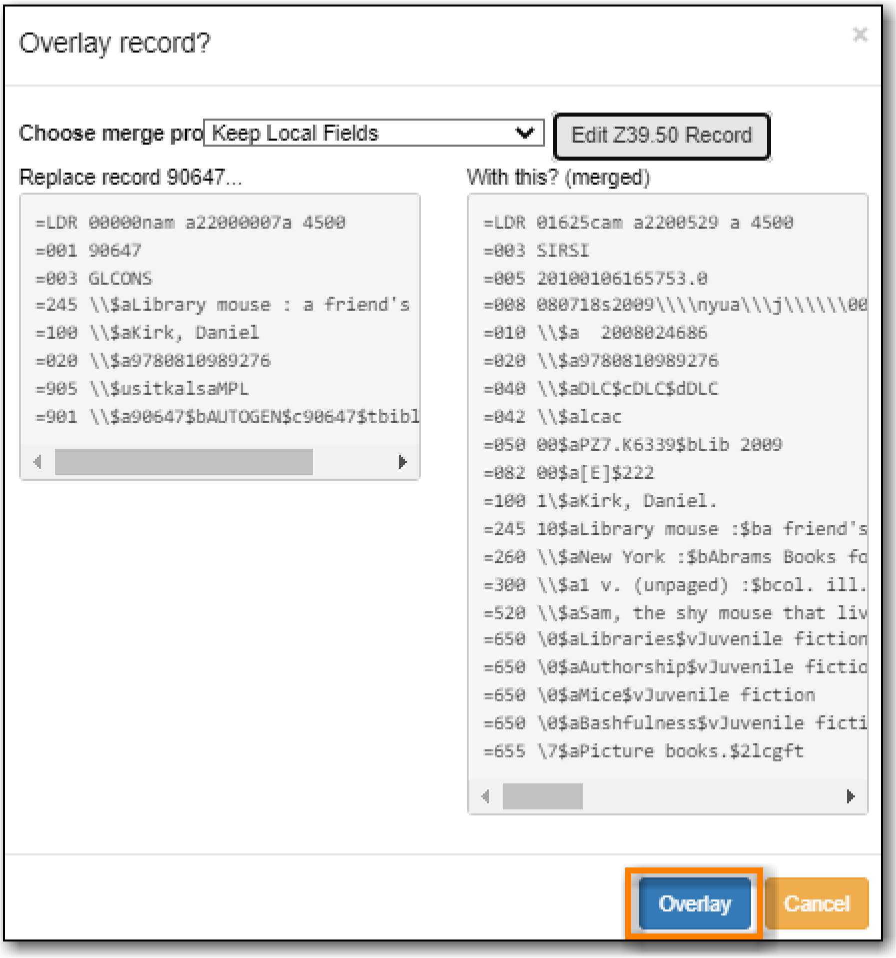


NOTE

As the record already exists in the Sitka database and has holdings for other libraries only make edits that conform with Sitka's cataloguing policy. Co-op Support does recommend removing any fields that contain local data related to items held by the service the record comes from. In general this information will be found in the 852 fields and 9xx fields.

The fields 906, 923, 925, 936, 948, 955, 959, and 963 are stripped from imported records by default.

5. Click **Overlay**.



6. The record is imported and overlaid over the existing record which opens in a new tab.

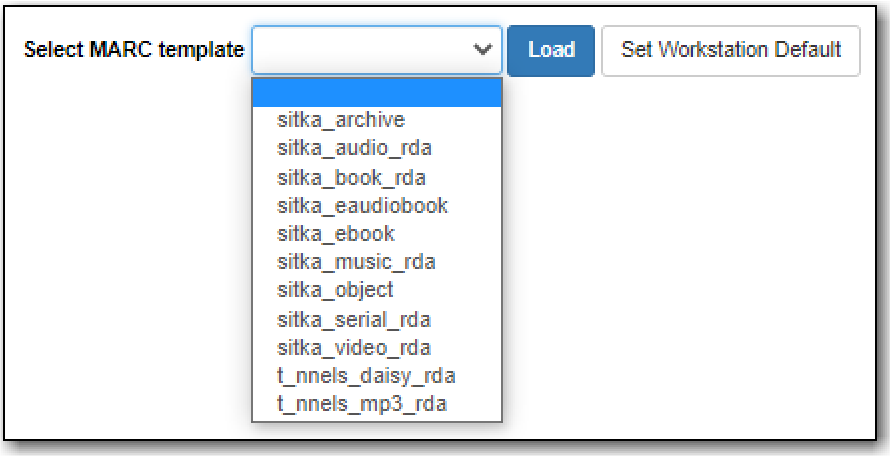
CAUTION	You must select **Keep Local Fields** as the merge profile. You may encounter an error if you choose another.

18.2. Creating New Records for Bibliographic Resources

When cataloguing bibliographic resources it’s important to follow Sitka cataloguing policy to avoid creating duplicate records in the Sitka catalogue. 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.

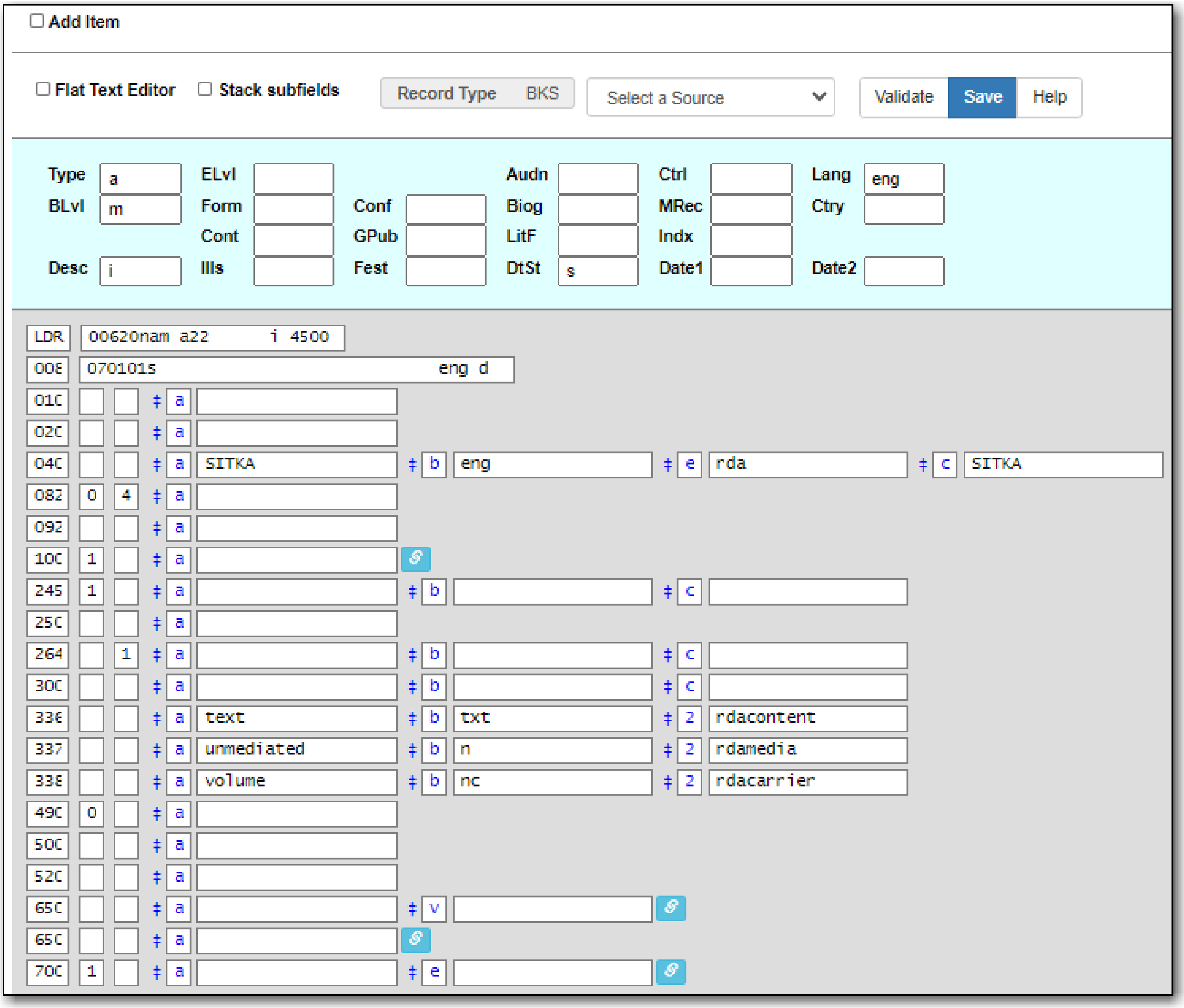
1. Go to **Cataloguing** → **Create New Marc Record**.
2. The MARC Template screen opens. Click into the drop down menu to see the available templates.



NOTE Once you select a template you can click **Set Workstation Default** to set it as your default template.

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 affects the format icon and search filters.



5. Complete the MARC record using the Enhanced MARC Editor or the Flat Text Editor.

   The MARC record must meet the minimum requirements set in Sitka's cataloguing policy and a good MARC record will exceed the mimimum requirements.

6. Click **Save**.
7. The record is created and will open up in your tab in the current default view.
8. Add your holdings to the record.

18.3. Creating New Records for Non-Bibliographic Resources

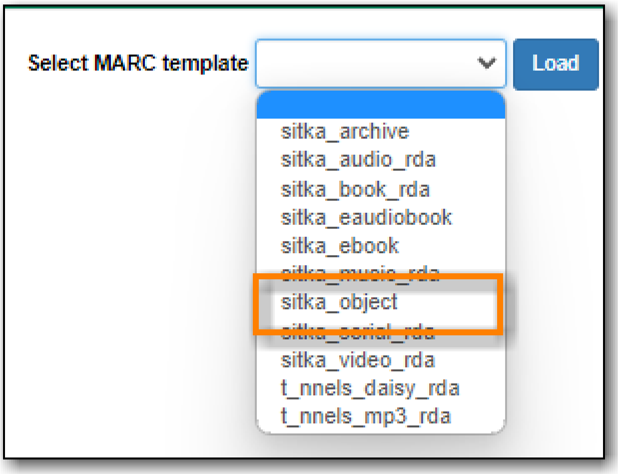
Some libraries include non-bibliographic items in their collection. Records created for these items aren't required to follow the same standards as records for bibliiographic items.

NOTE	Libraries should create their own records for non-bibliographic records rather than adding their holdings to an existing record as per Sitka's cataloguing policy for non-bibliographic records.

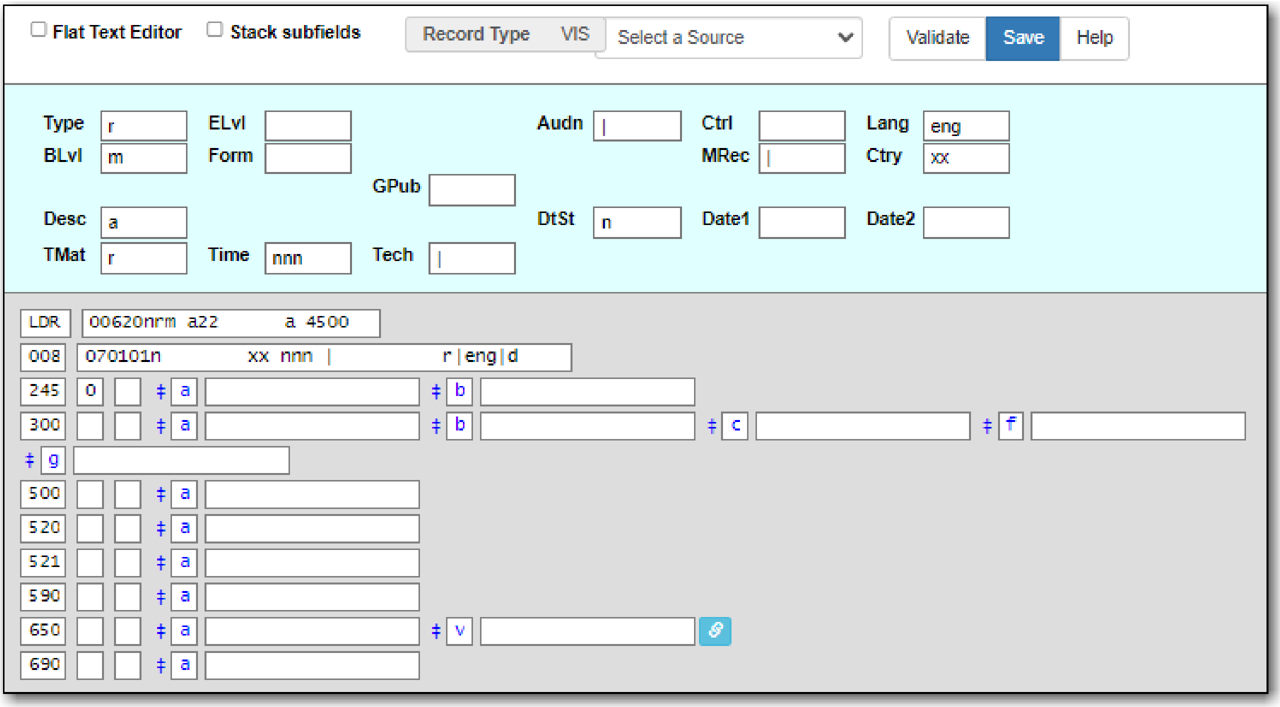
Co-op Support recommends that records for non-bibliographic resources include the following fields:

MARC Field	Name	Required Subfields	Description
Leader	Leader	N/A	Contains information required for Evergreen to process the record.
008	Fixed-Length Data Elements	N/A	Contains coding used by Evergreen for search filters and format icons.
245	Title Statement	$a	Contains the title and author.
300	Physical Description	$a, $c	Contains the physical description of the item including number of pages and dimensions.
5XX	Note Fields	$a	Contains additional information about the resource.
6XX	Subject Access Fields	$a	A variety of subject fields are available which contain subject terms to describe what the title is about.
856	Electronic Location and Access	$u, $9	Can be used to include a link to custom cover art for a non-bibliographic item. See Related Resources for information on how to code this field for a related resource.

1. Go to **Cataloguing → Create New MARC Record**.
2. From the MARC template drop down select the template **sitka_object**.



3. The MARC Editor will open and show the most common coding and fields for an object.



4. Use the Enhanced MARC Editor or the Flat Text Editor to add the information relevant to your item.
5. Click **Save**.
6. The record will open in the catalogue.
7. Add your holdings to the record.

18.4. Creating New Records for Electronic Resources

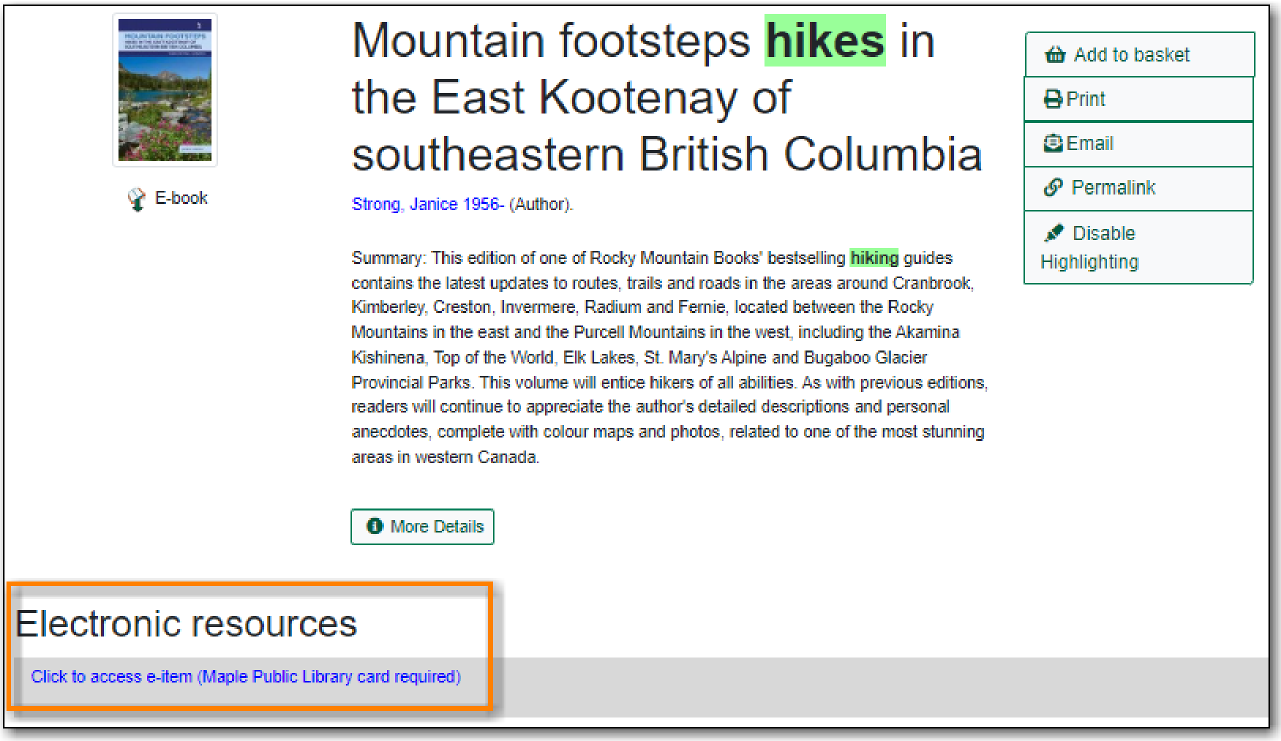
Ordinary bibliographic records are only visible in the public catalogue when holdings records are attached, but it is also possible to catalogue electronic resources such as websites, online journals, or downloadable audiobooks, etc. by adding an 856 tag with subfield $9. The steps below describe how to catalogue an electronic 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. Information related to batch loading e-records can be found in the section Batch Loading Bibliographic Records in Sitka's Evergreen Policy & Best Practices Manual.

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	MPL	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 in the public catalogue for the for the library specified in the $9. The images below shows a sample 856 tag and the corresponding public catalogue display.



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 an electronic 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.

18.4.1. 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.

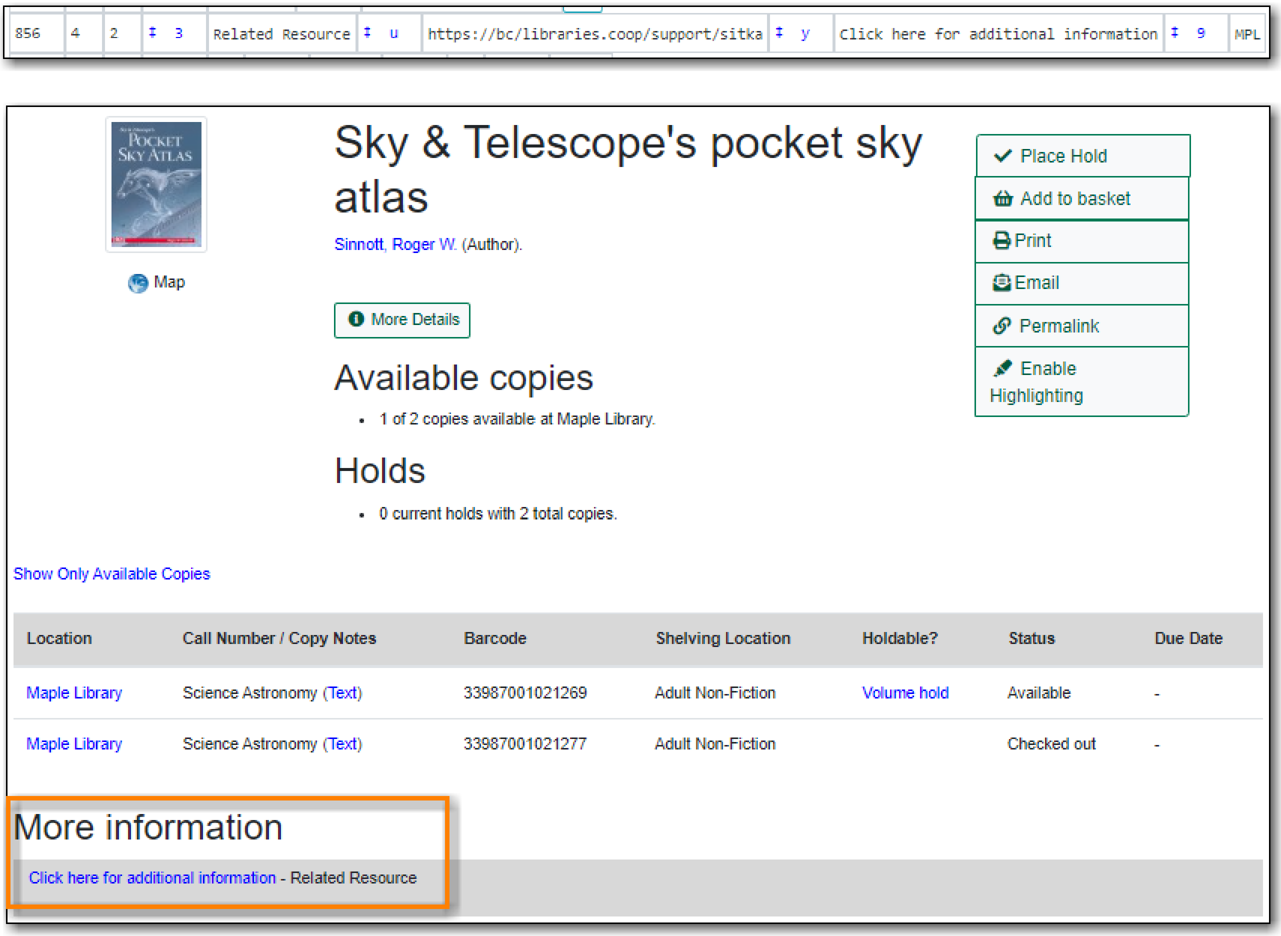
To link a related resource:

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	Related Resource	Appears as text beside the link or display label.
$9	Required; your library code	MPL	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.



18.5. Using Library Specific MARC Templates

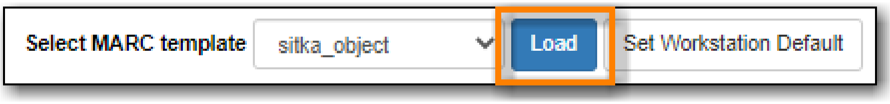
In addition to the global MARC templates Co-op Support has come up with a couple ways that libraries can create their own MARC templates which can be copied and edited.

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.

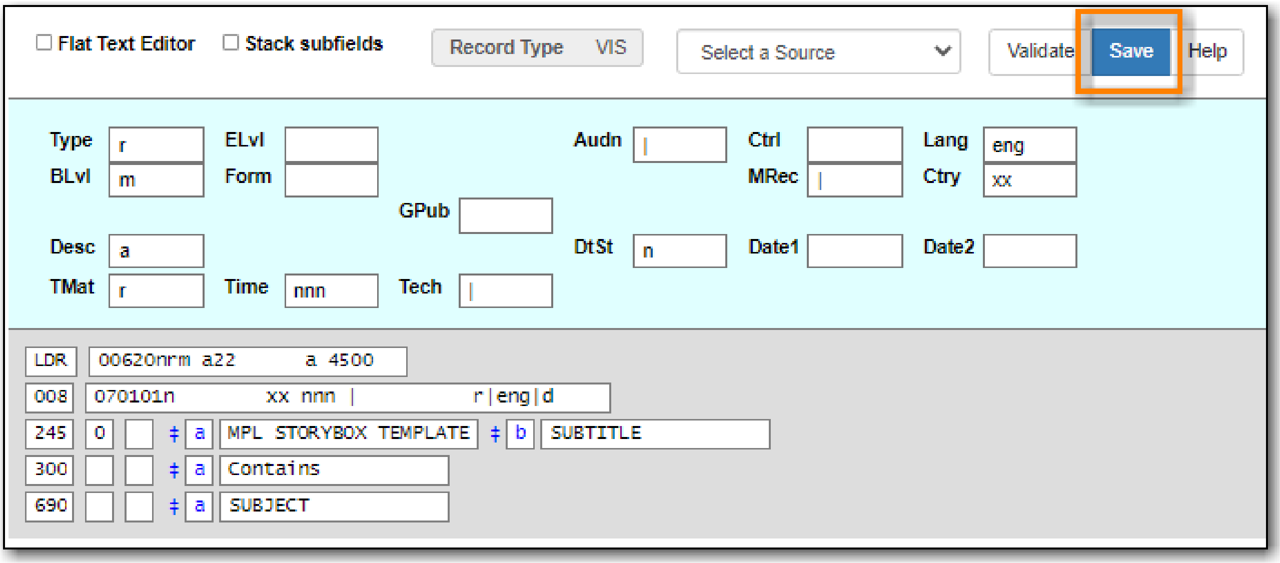
18.5.1. Template Records Saved Within Evergreen

Template Set Up

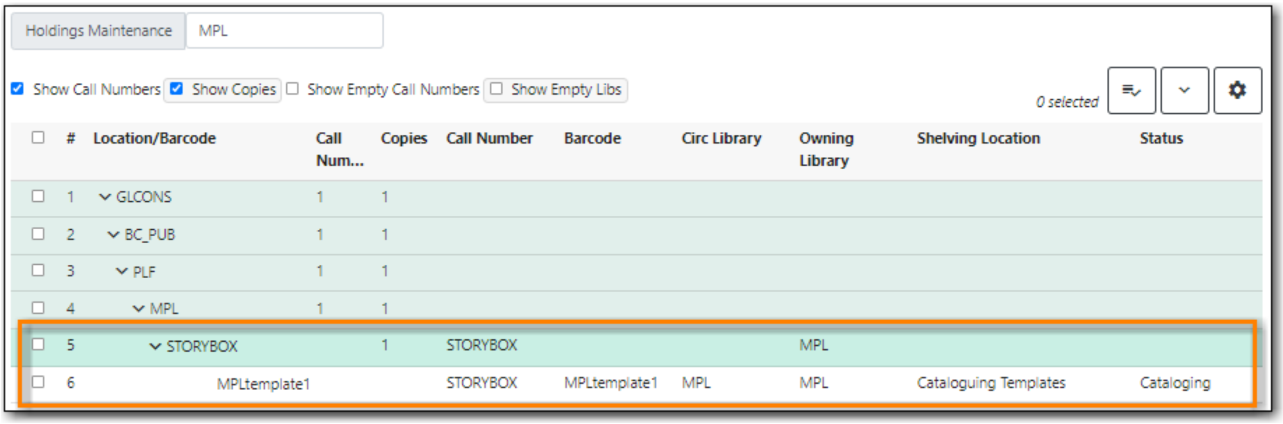
1. Go to **Cataloguing** → **Create New Marc Record**.
2. Select the appropriate template and click **Load**.



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.



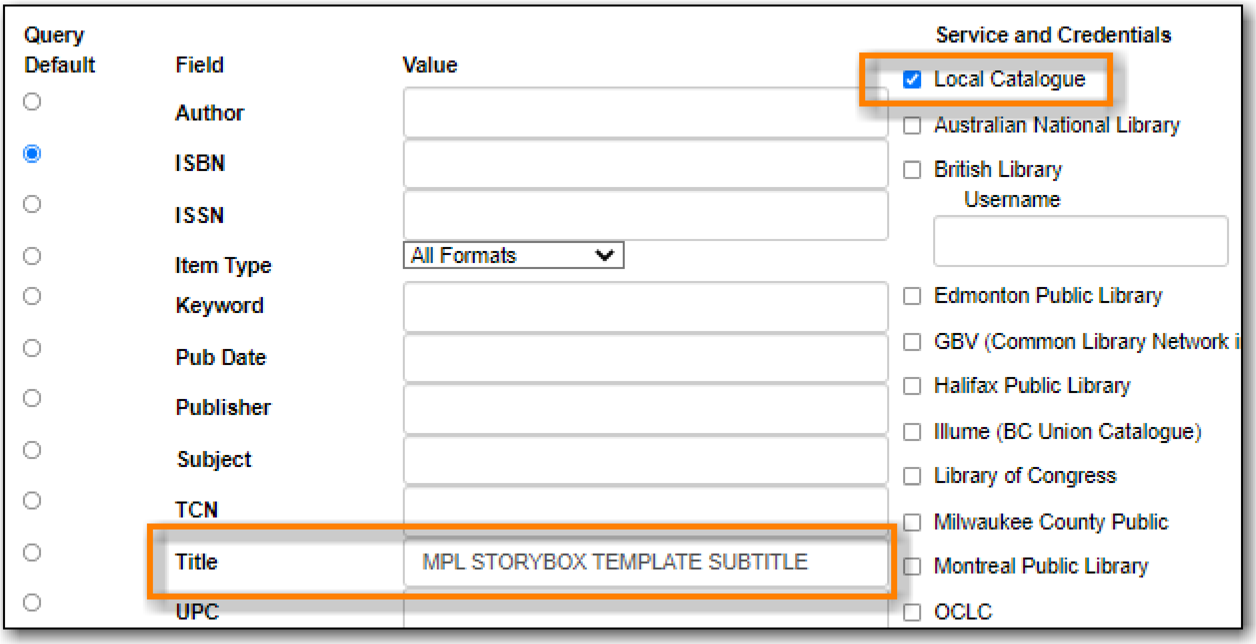
NOTE

For your fake items Co-op Support recommends:

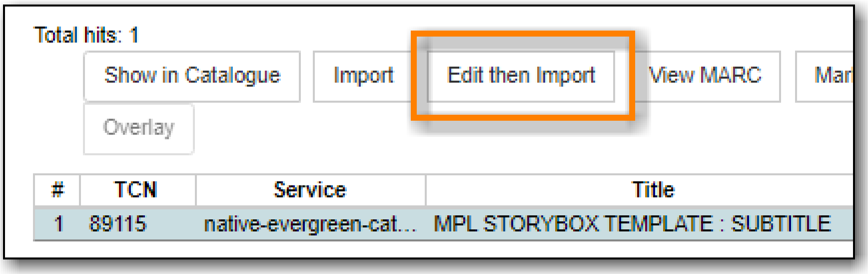
- Set up a shelving location that is OPAC invisible, not holdable, and not circulatable.
- Use the Status *Cataloging*.
- Use real barcodes from your range or use the format LIBRARYCODEtemplateNUMBER to ensure there is no conflict with other barcodes in the Sitka.

Using the Template

1. Go to **Cataloguing** → **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. You can add and delete fields and subfields as required.

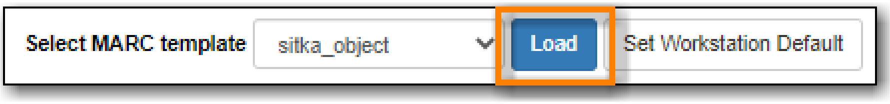
> For bibliographic items the MARC record must meet the minimum requirements set in Sitka's cataloguing policy and a good MARC record will exceed the mimimum requirements.
>
> For non-bibliographic items the MARC record should follow the recommendations in Creating New Records for Non-Bibliographic Resources.

6. Click **Go to imported record**.
7. You may now attach holdings as described in Adding Holdings to Bibliographic Records.

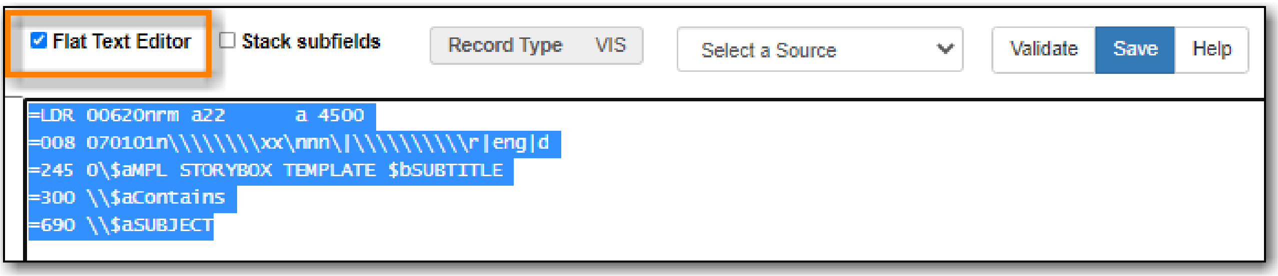
18.5.2. Template Records Saved Outside of Evergreen

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.
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.

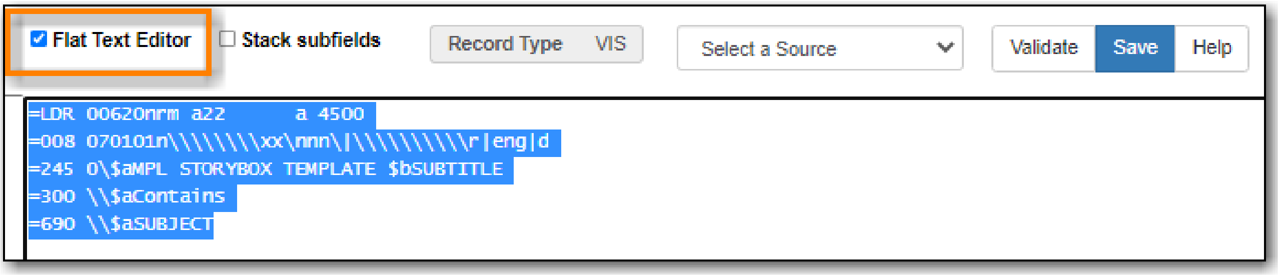


5. Close the tab in Evergreen without saving.

Using the Template

1. Open the appropriate text file with the applicable program on your computer.
2. In Evergreen, go to **Cataloguing** → **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. You can add and delete fields and subfields as required.

> For bibliographic items the MARC record must meet the minimum requirements set in Sitka's cataloguing policy and a good MARC record will exceed the mimimum requirements.
>
> For non-bibliographic items the MARC record should follow the recommendations in Creating New Records for Non-Bibliographic Resources.

5. Click **Save**.
6. You may now attach holdings as described in Adding Holdings to Bibliographic Records.

18.6. Uploading Cover Images

As of version 3.9 Evergreen has an option in the Record Summary to upload cover images.

Due to capacity limitations this feature is not available to Sitka libraries.

Libraries can host their own images and link to them as a related resource. See Related Resources for information on how to code the 856 field for related resources.

NOTE

Cover images for bibliographic items in Sitka's Evergreen are supplied by Content Cafe and depend on the records having the relevant ISBN (020 field), ISSN (022 field), or UPC (024 field).

Libraries can contact Content Cafe directly to report missing cover images for bibliographic records. Please contact Co-op Support if you need Content Cafe's email.

Chapter 19. Batch Loading Bibliographic Records

19.1. 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 EverLibrargreen. 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.

Cataloguers should follow the policy for batch loading records which can be found in the section Batch Loading Bibliographic Records in Sitka's Evergreen Policy & Best Practices Manual.

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.

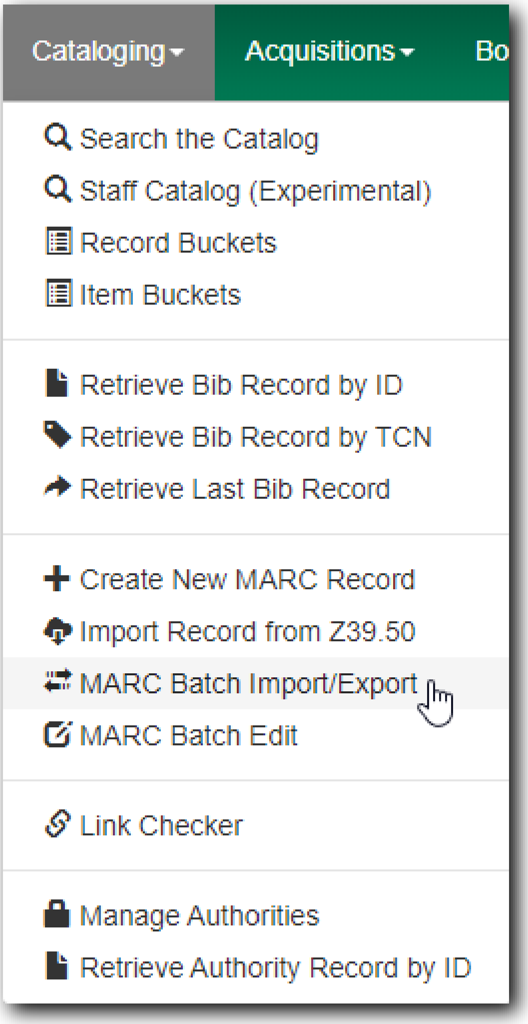
- Merge Using INCOMING Record: all tags in the INCOMING record will be brought into the final record. Tags: 050, 055, 590, 595, 690, 852 and 856 in the ORIGINAL record will be preserved in the final record. The rest will be removed.
- Merge Using EXISTING Record: all tags in the ORIGINAL record will 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.

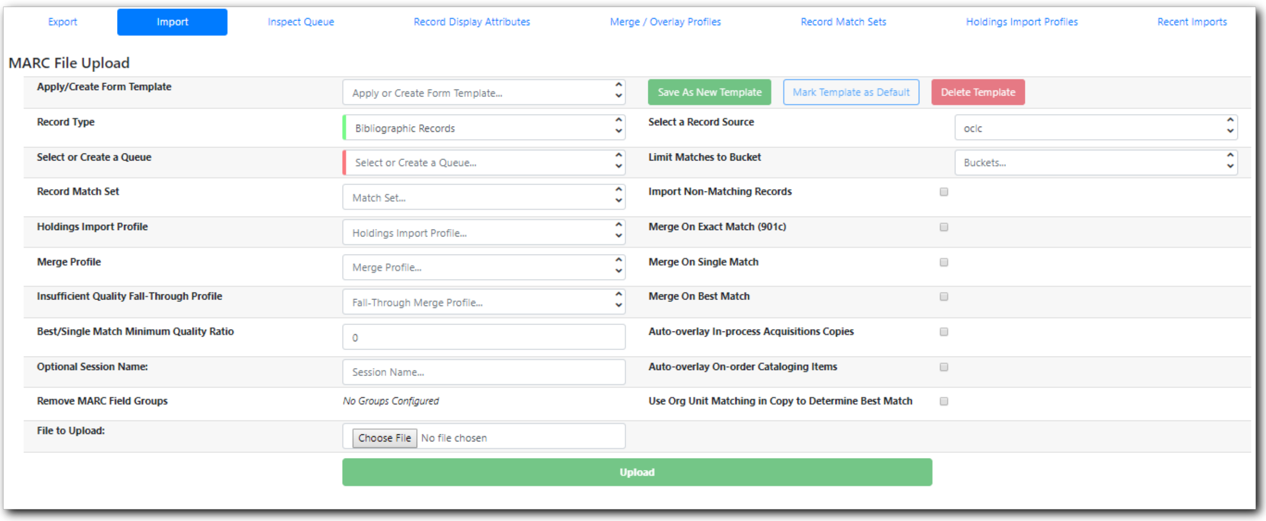
Holdings Import Profiles are profiles set up by Sitka to allow importing of item records with vendor supplied MARC records. The vendor will need to send item level information in a local MARC tag and subfields (eg. 9xx or 852), and this information can be mapped into item records when the bibliographic records are loaded. Please contact Co-op Support if you are interested in loading item records with your bibliographic records.

19.1.1. 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.

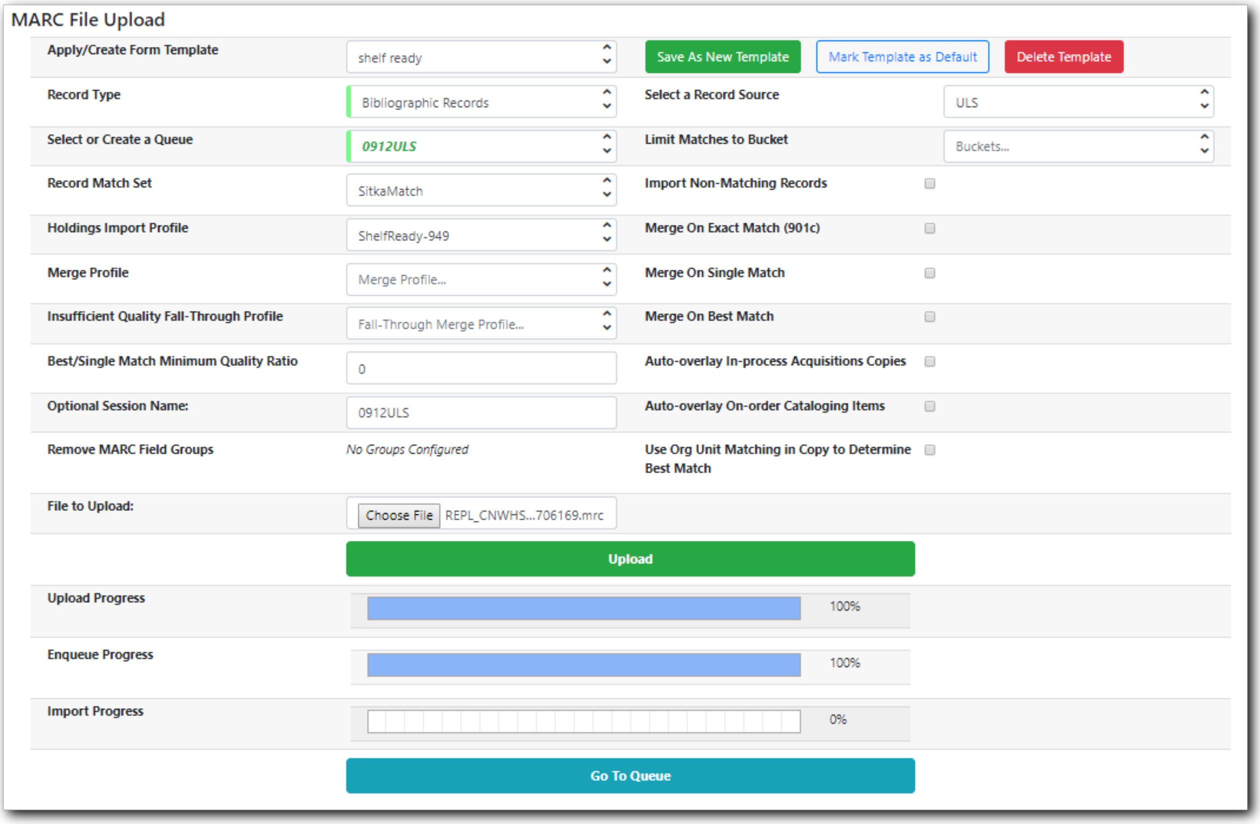
8. You do not need to choose a Merge Profile now.
9. You may type in a session name in **Optional Session Name** box if you import records. It will help you identify your import session when checking the status on Recent Imports.
10. Check **Import Non-Matching Records** box to automatically import records 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%.

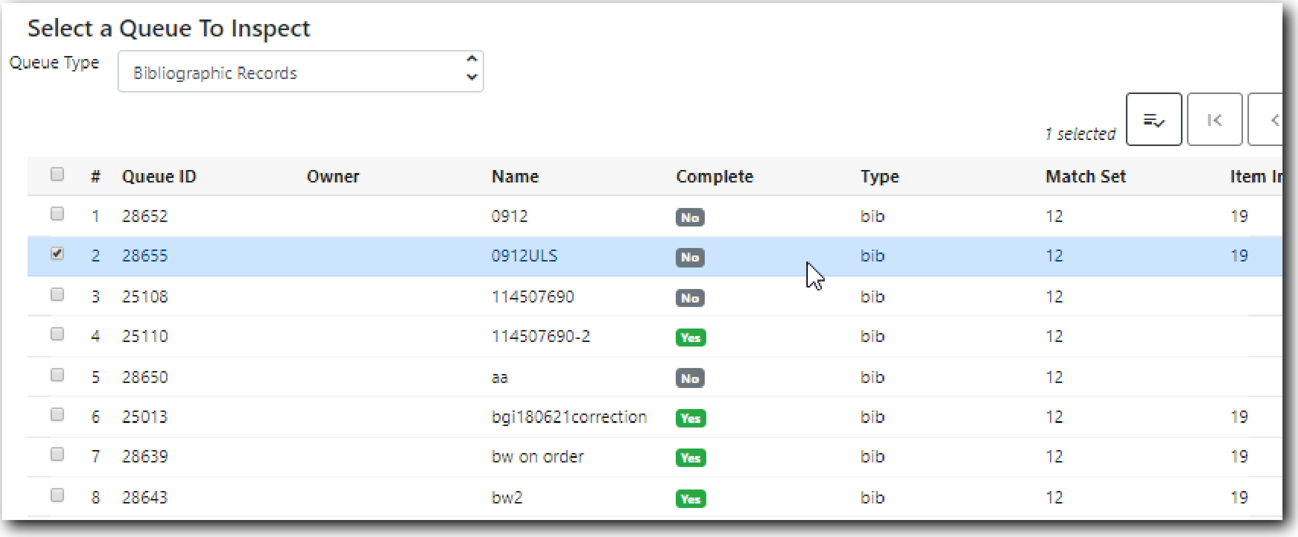


Do not load a MARC file of more than 500 records, as the importing process can time out. If you have more than 500 records, please break into multiple files.

TIP Records in a queue are saved on the server, but are outside the catalogue. By importing, you bring the records into the catalogue.

19.1.2. 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.



If you continue to import records right after uploading the MARC file, click **Go to Queue** to load the Queue Summary.

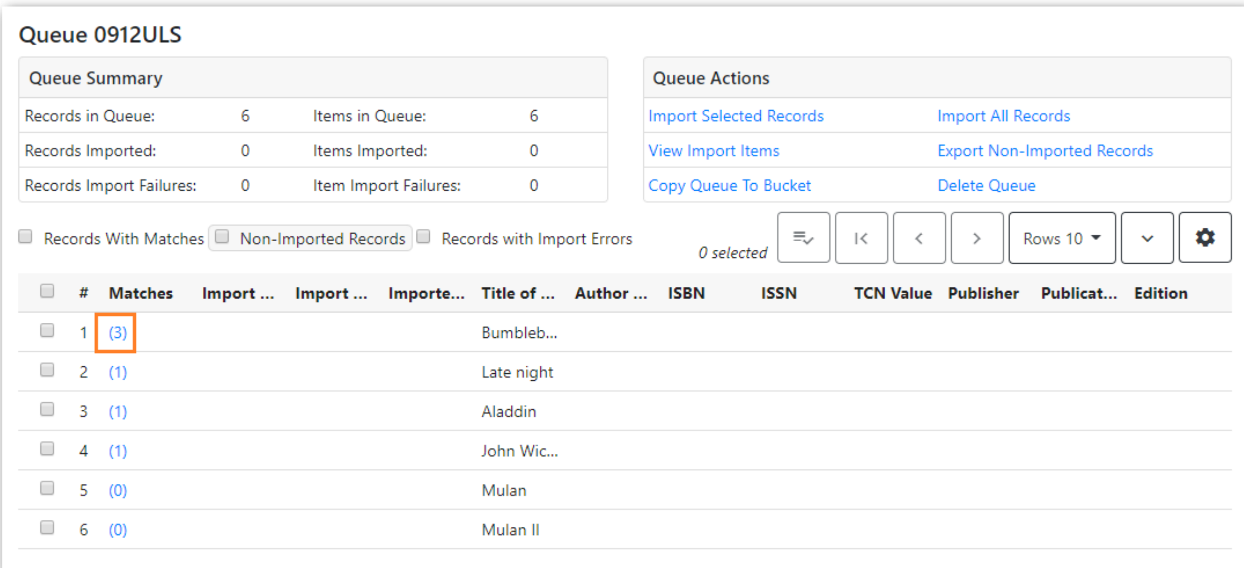
1. The **Queue Summary** shows the total number of MARC records in the queue, and items contained in these records, if any, how many of them have been imported, and how many of them encountered an error when Evergreen attempted to import them.

   The **Queue Actions** lists the actions you can take from this screen.

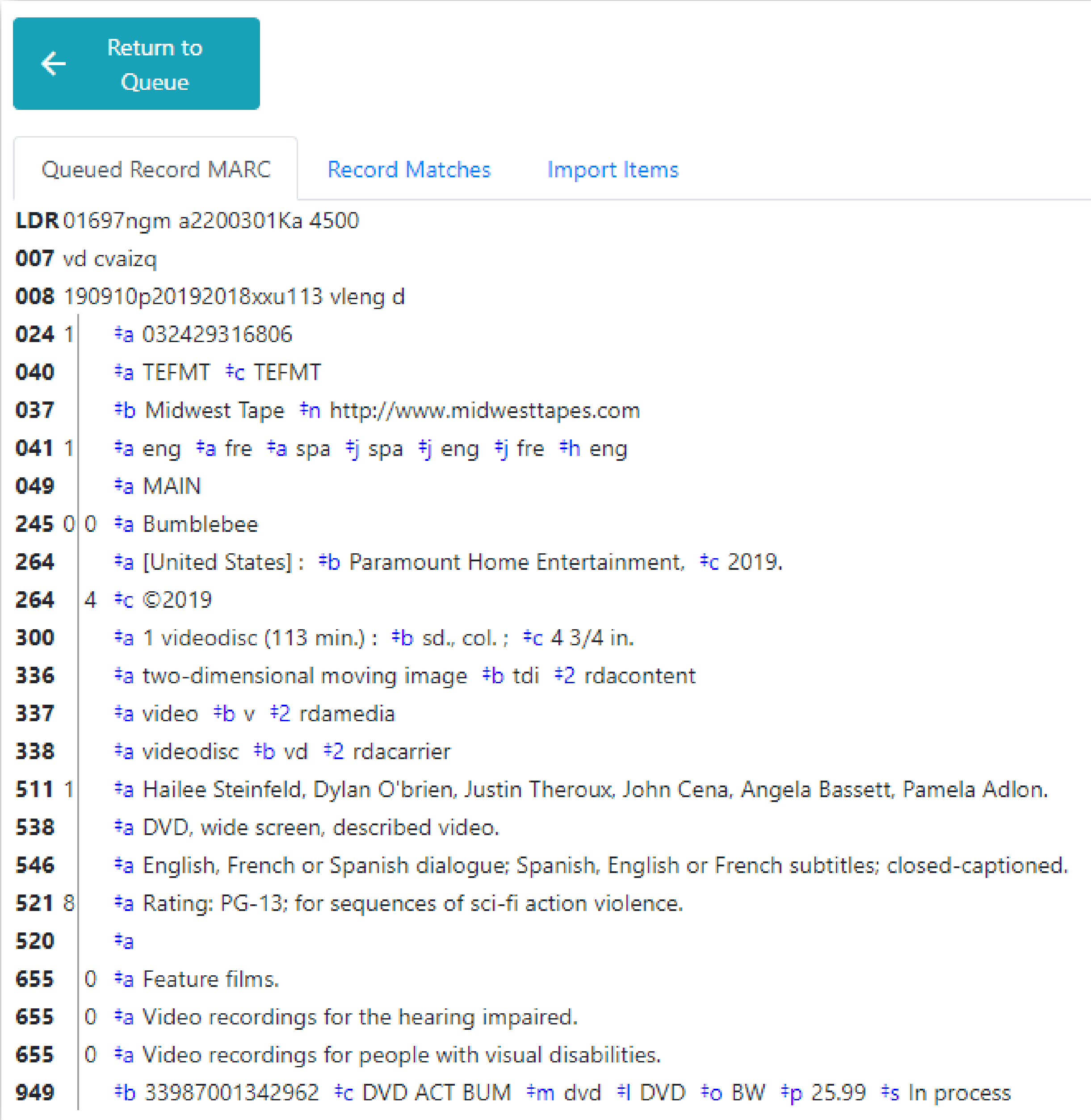
   If you imported holdings with the MARC records, you may click **View Import Items** to view them.

   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.

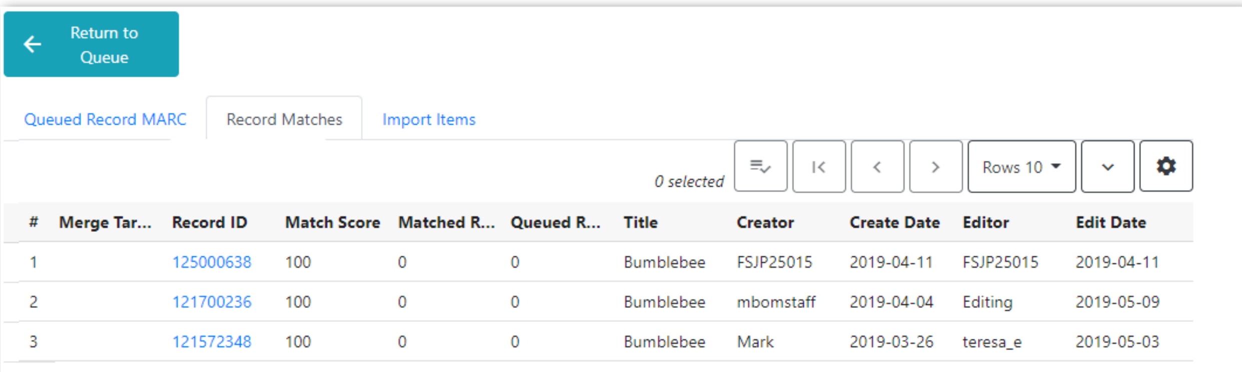
   You can add all imported MARC records in the queue to a Record Bucket by using **Copy Queue to Bucket**.

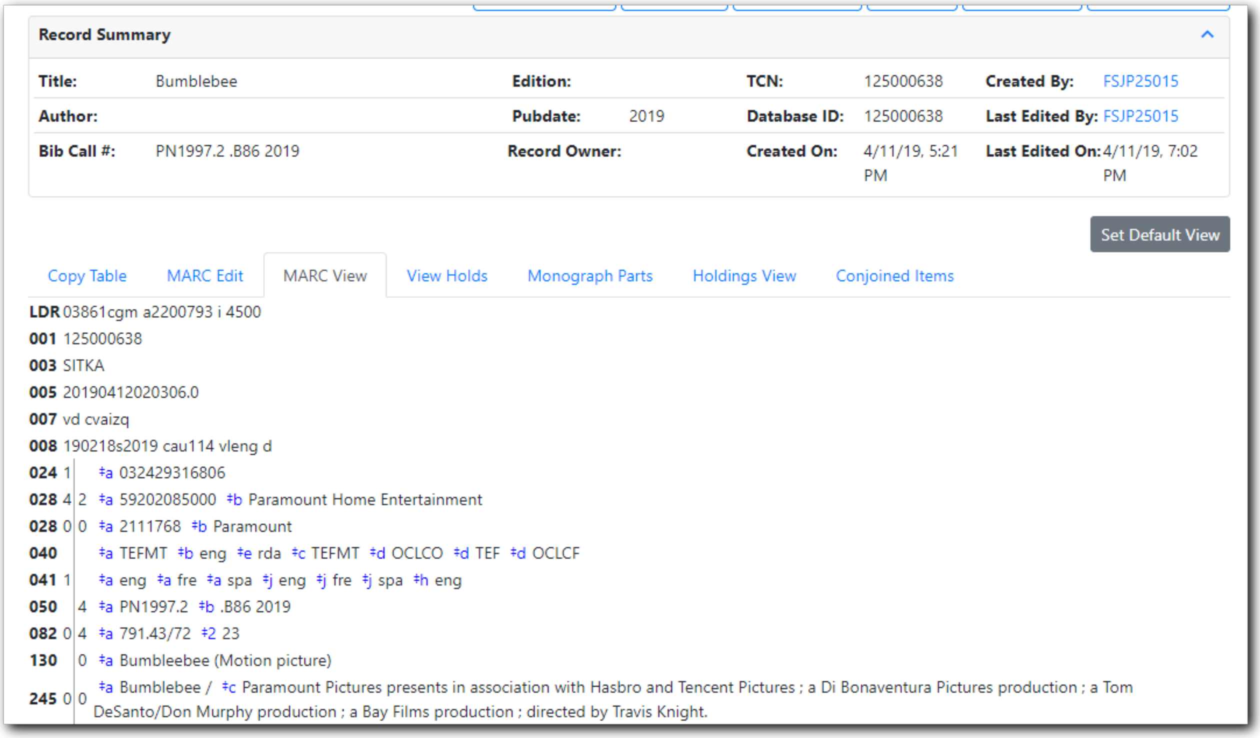
2. You should view both incoming and existing records to determine which one to use. To view the incoming record in the queue, double click a line.



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

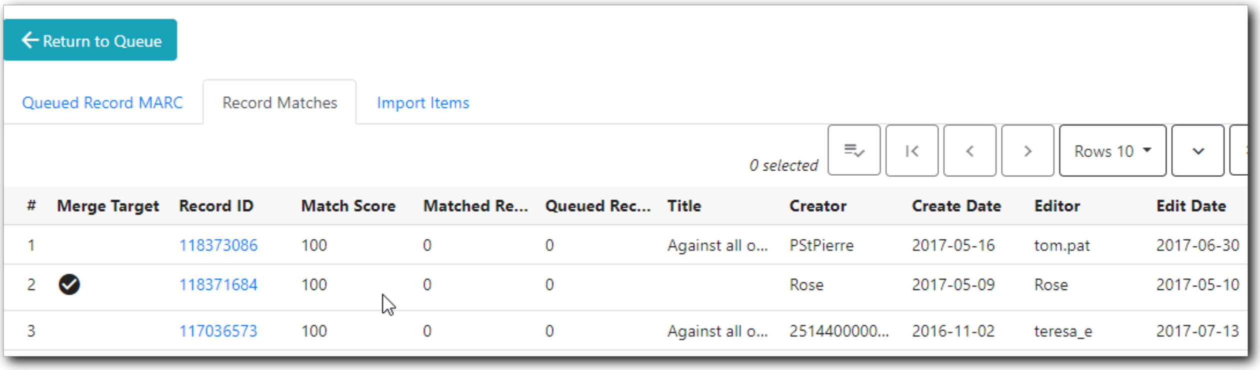
Match Score is the total score from all matched fields specified in the Record Match Set.

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.

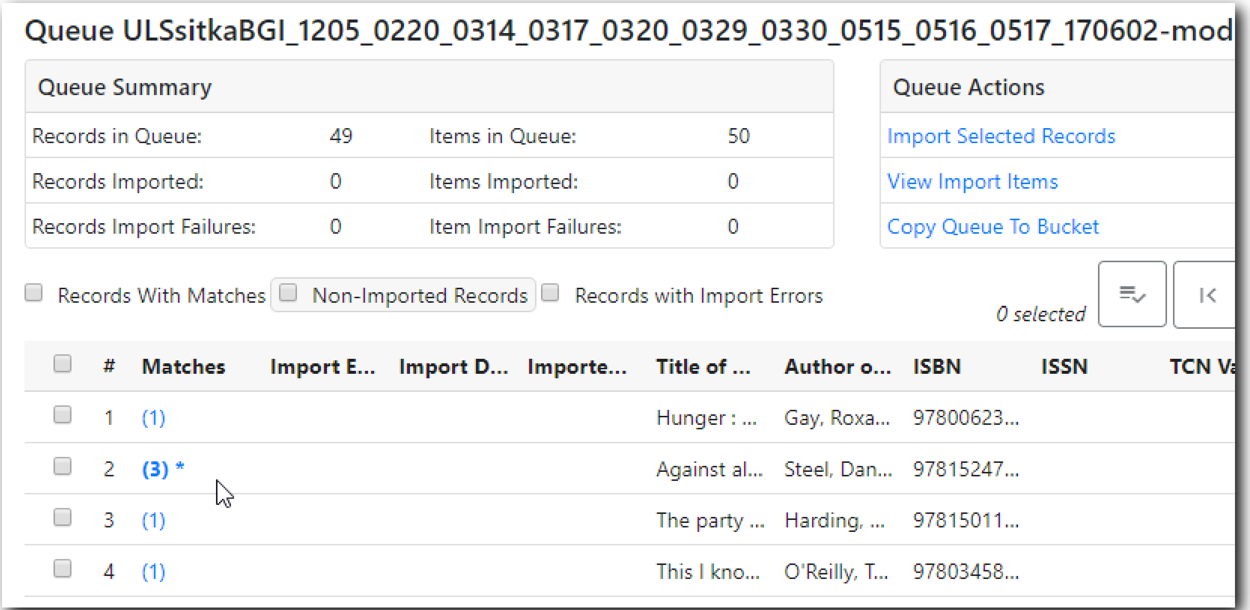
- 010$a: 500
- 020$a: 100
- 024$a: 100
- 022$a: 90
- 035$a: 25

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.

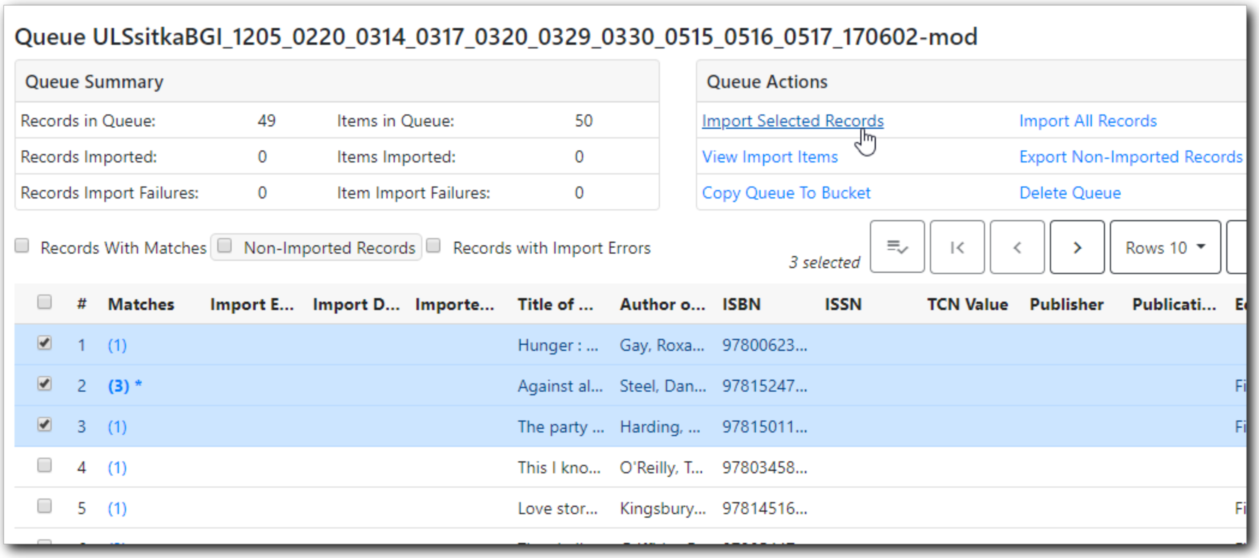


If the match record in Evergreen is a true match but a full record, Sitka policy requires you to use the existing record instead of importing another. Do not import the record.

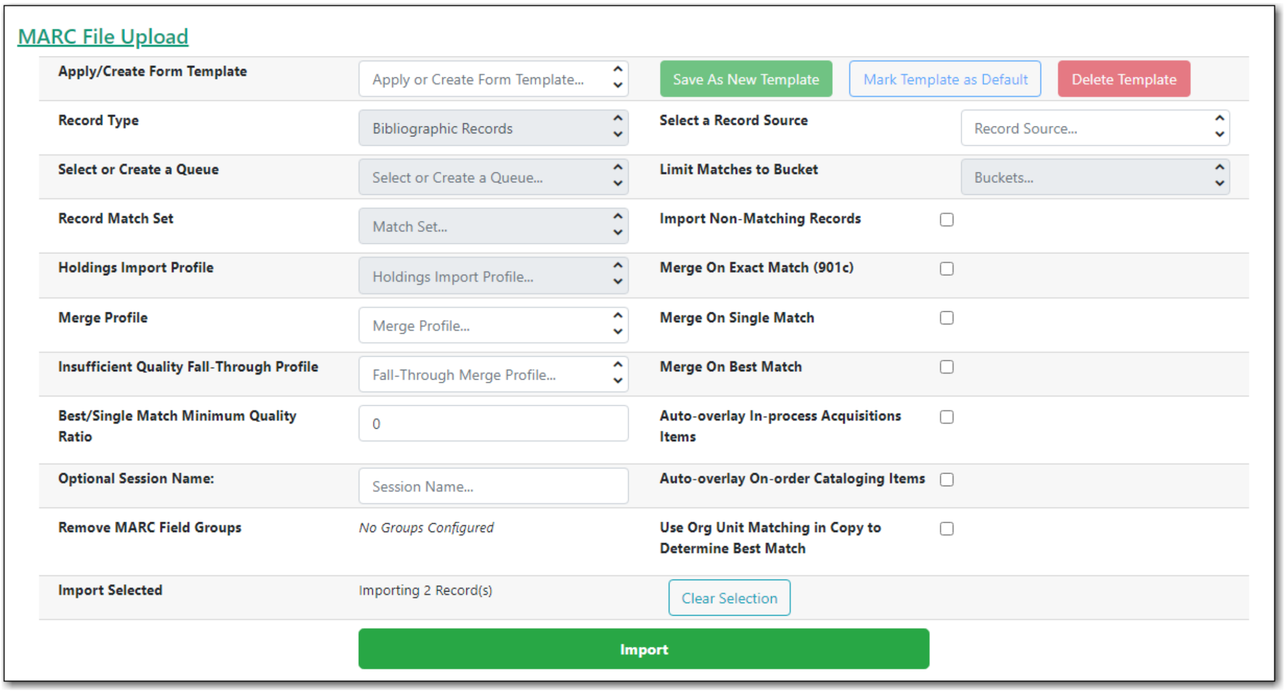
However, if the incoming record contains local information in tags 050, 055, 590, 595, 690, 852 or 856 that you want to bring into the existing record, such as loading holding records to existing MARC records, you need to mark the match record as a merge target. In this scenario you would use the **Merge 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.

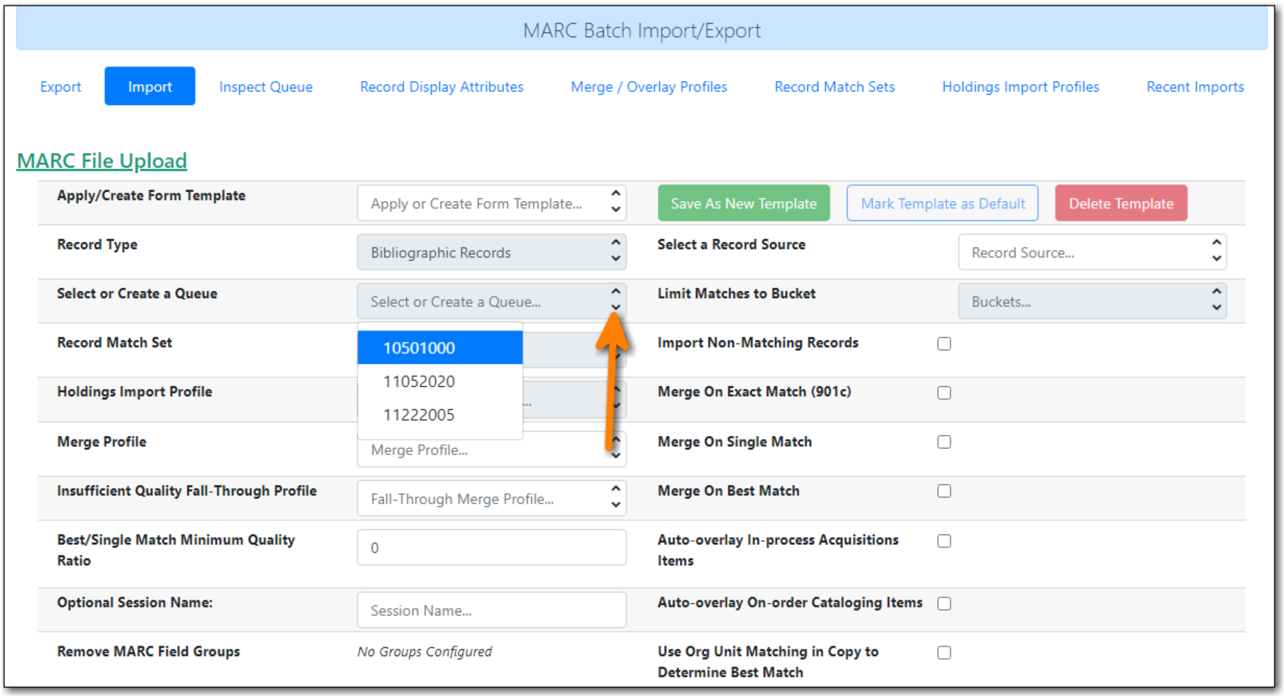
   You may inspect other records on the list. Once finished inspecting the list, click **Import Selected Records** under Queue Actions.



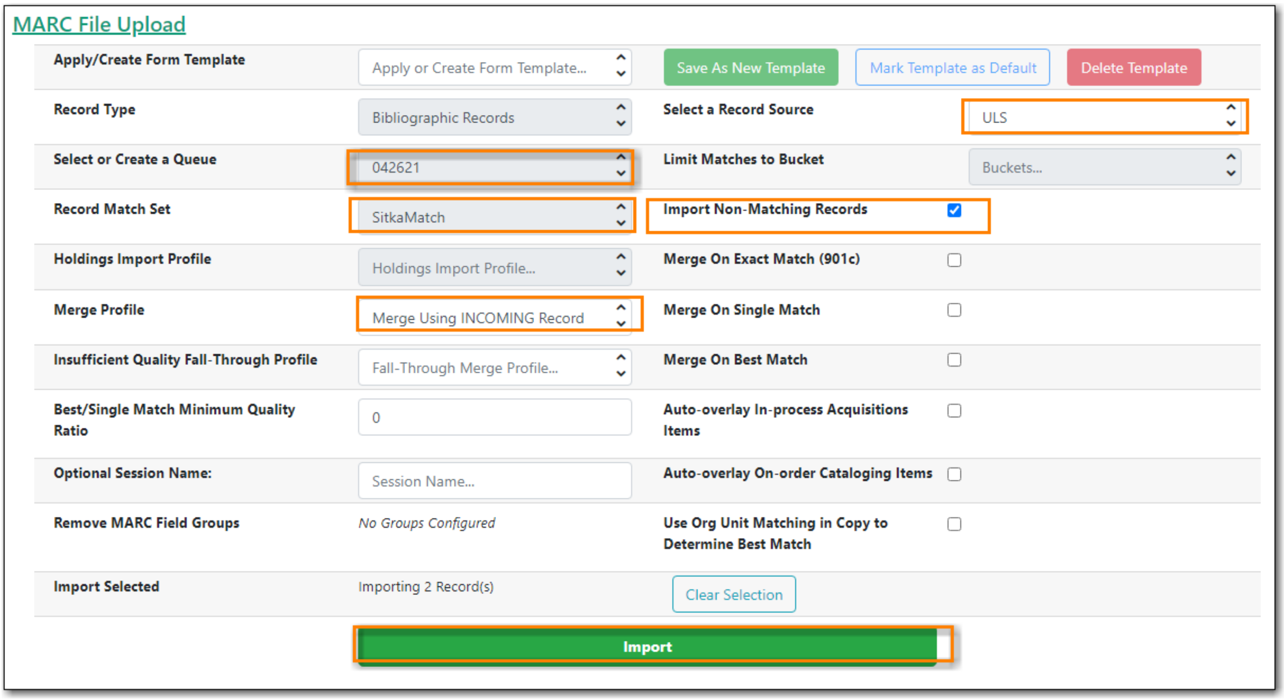
7. You are back on MARC File Upload screen.



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.

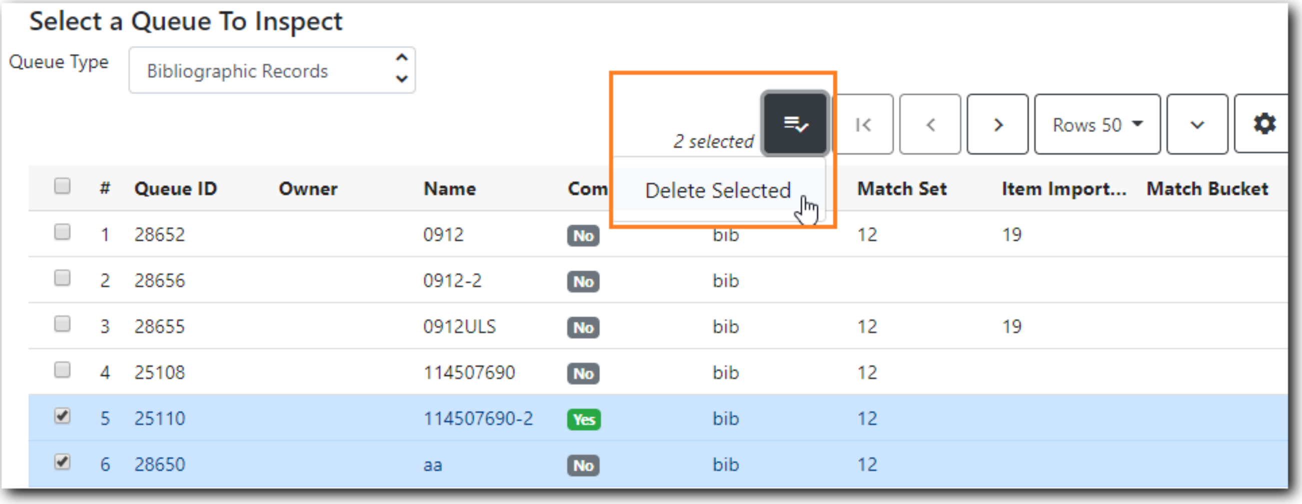
19.1.3. Managing Queues

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.

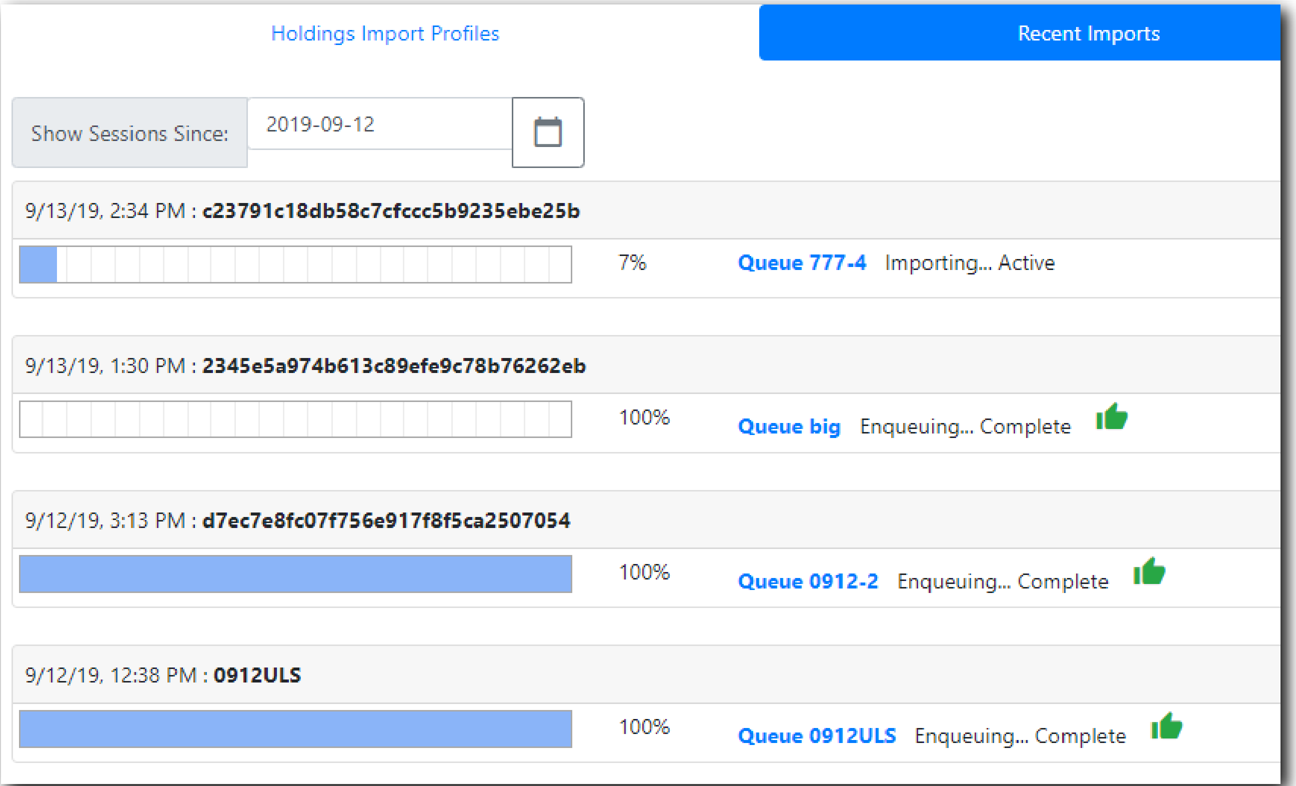
Under Inspect Queue you can click on an existing queue to view and import records that have already been queued for importing or simply view records that have already been imported.

To delete queues, select the checkbox in front of the queue name and click **Delete Selected** on the action list.



19.1.4. 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.



Chapter 20. Maintaining Bibliographic Records

The searchability of the staff and public catalogues relies on information being entered and coded correctly in the MARC records.

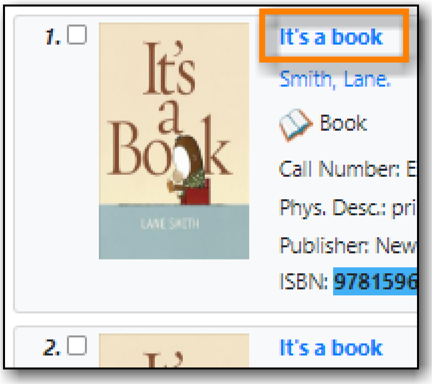
Evergreen has both the Enhanced MARC Editor and the Flat Text Editor which can be used when creating, importing, merging, editing, and deleting bibliographic records. Cataloguers can use either editor or both when working with records.

Before working with bibliographic records in Sitka's Evergreen cataloguers must be familiar with Sitka's Cataloguing Policy.

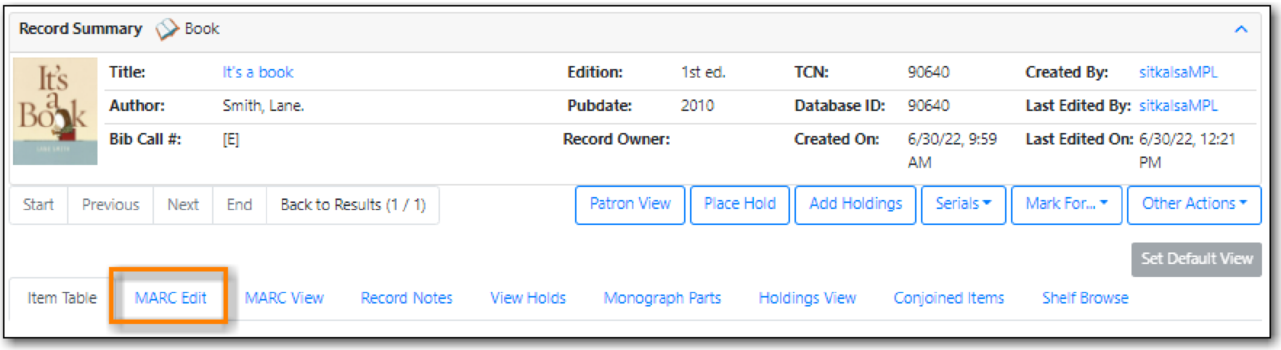
20.1. Editing MARC Records

NOTE When editing MARC Records cataloguers must follow Sitka's Cataloguing Policy for editing MARC records.

1. Search the catalogue for the record you wish to edit, as described in Searching the Database for Cataloguing Purposes.
2. Click on the title link to open the record.

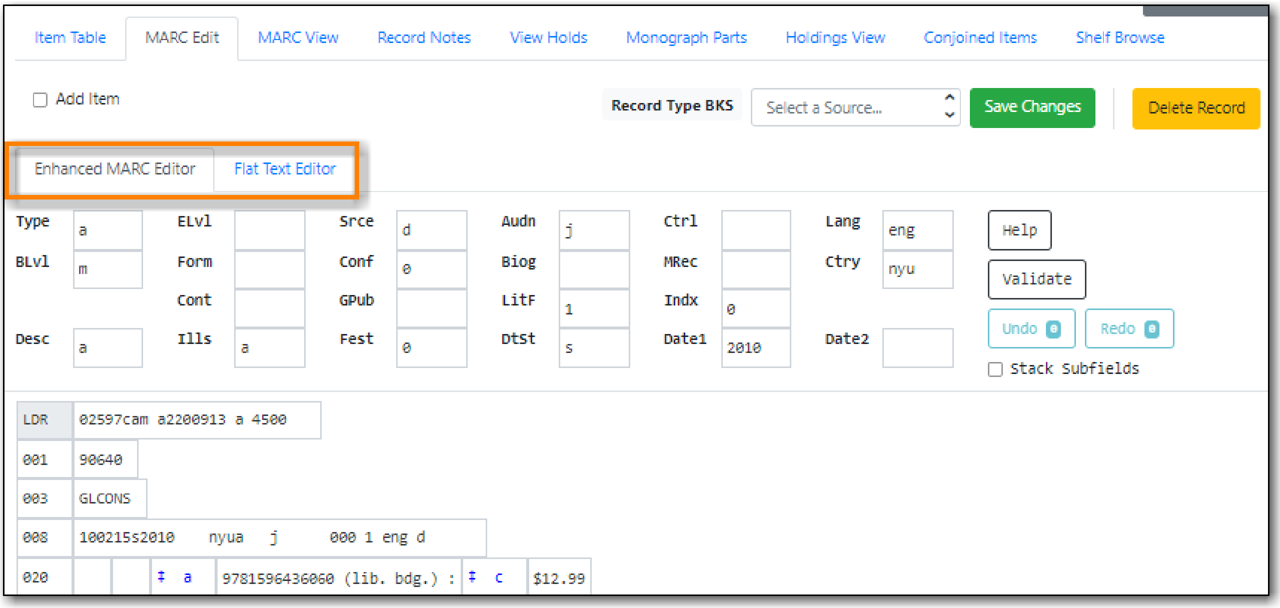


3. Click on the **MARC Edit** tab.



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.

4. The MARC record is displayed. You can use either the Enhanced MARC Editor or the Flat Text Editor to edit the record.

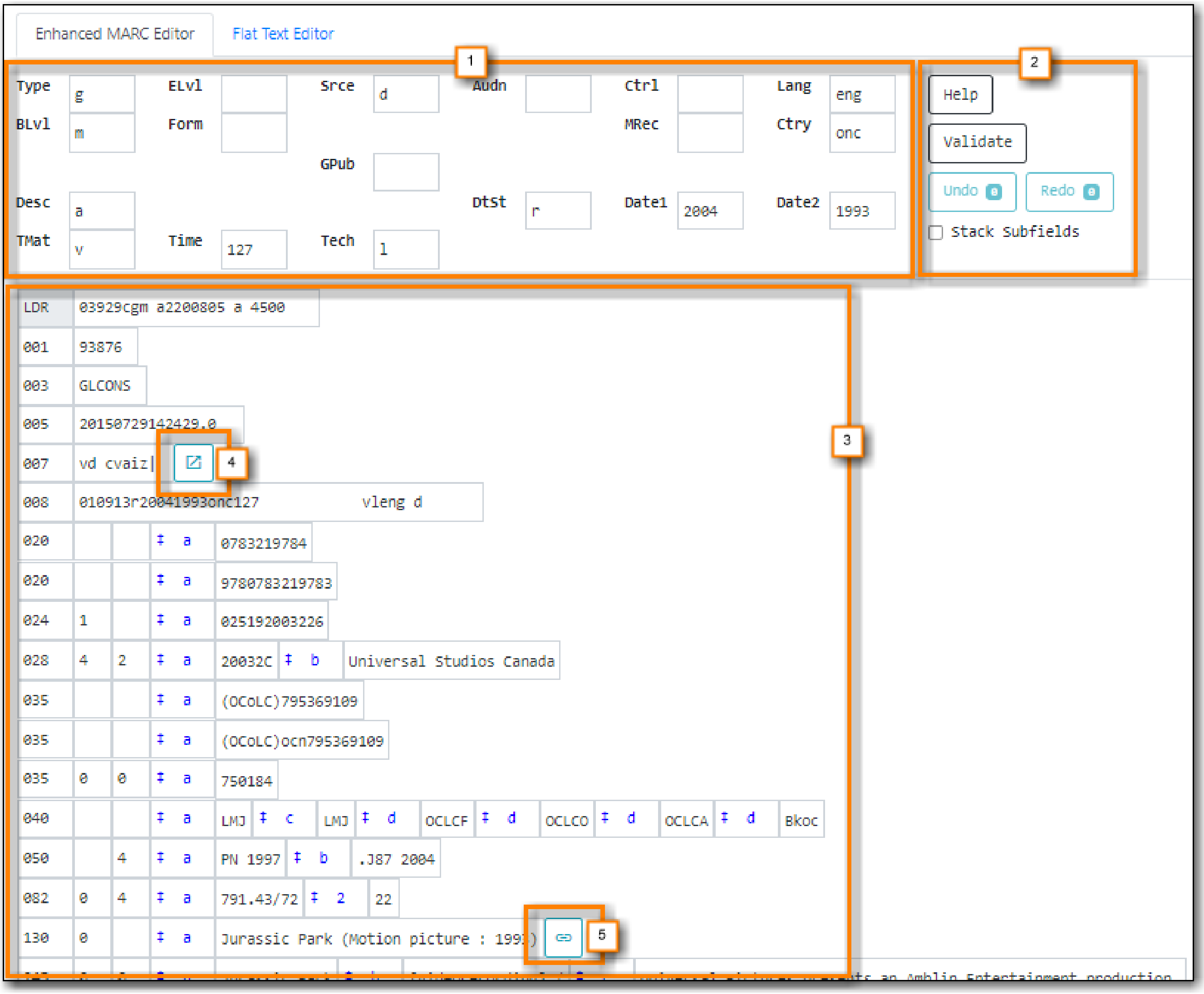


20.2. Enhanced MARC Editor

The Enhanced MARC Editor is used when working with MARC records. Information from the MARC 21 Format for Bibliographic Data has been built into the enhanced editor to assist cataloguers; however, cataloguers should refer to MARC 21 Format for Bibliographic Data/ Normes MARC 21 for more information as needed.

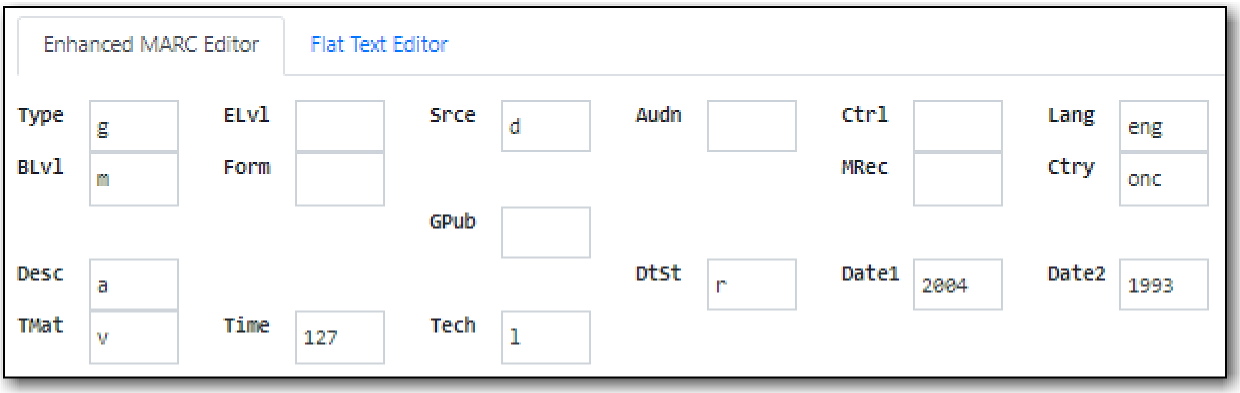
The Enhanced MARC Editor can be divided into five parts:

1. Leader and 008 Field Grid
2. Help and Additional Options
3. MARC Record
4. Physical Characteristics Wizard - only present when the record includes an 007 field
5. Authorities Linker - not currently used by Sitka



20.2.1. Leader and 008 Field Grid

Specific characters of the Leader and 008 field can be updated using the Leader and 008 Field Grid. This enables cataloguers to easily update specific values without having to count out the field characters.

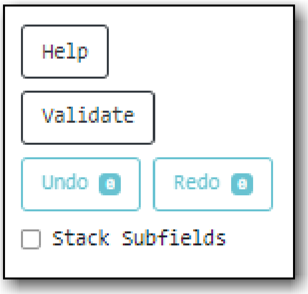


- Values can be edited directly in the grid boxes.
- Right-clicking in most boxes will display a list of the possible values as per MARC21.
- A table giving the names and character positions for the abbreviations used by Evergreen can be found in Character Codes for Leader and 008 Field Grid.

- Changing the values of certain boxes, such as Type and BLvl, changes the type of material that is being described. In some cases this means that the meaning of the characters of the 008 changes. The grid will change to display the fields relevant to the material.
  - There is currently a bug where the grid doesn't automatically update. If you change the value of the Type and/or BLvl fields you must save the MARC record and reload it in a new tab to see the updated grid.

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 for Sitka's Evergreen in Search Filters and Format Icons.

20.2.2. Help and Additional Options

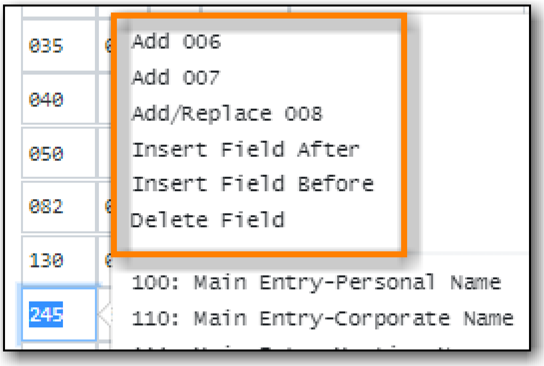


- When the **Help** button is clicked, a list of keyboard shortcuts that can be used to edit the MARC record display.
- The **Validate** button is a function of authorities which are not currently used in Sitka's Evergreen.
- The **Undo** and **Redo** buttons can be used to undo and redo changes that haven't been saved yet. The number of changes that can be undone or redone will display on the buttons.
- When the **Stack Subfields** checkbox is checked, the subfields in the MARC record display stacked vertically on separate lines from the field numbers, instead of each field displaying with all subfields horizontally.

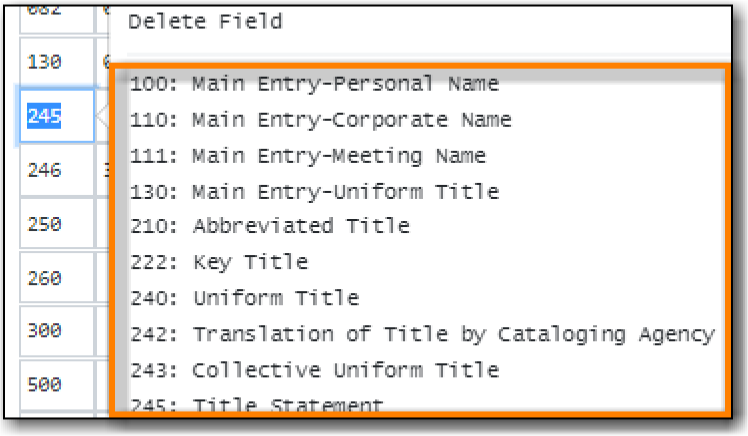
20.2.3. MARC Record

Fields in the MARC Record can be edited by clicking into the boxes you wish to edit and making your changes. A number of options are available by right-clicking into boxes which will aid cataloguers in entering correct MARC coding.

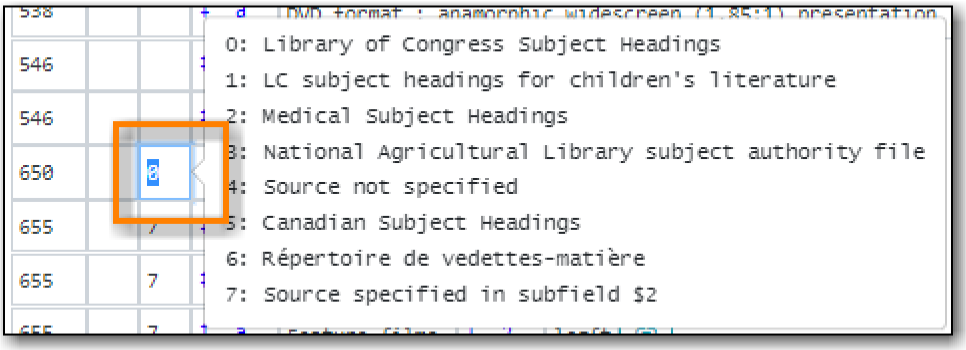
- Right-clicking in the MARC tag boxes will provide options for adding and removing fields. This includes adding 006, 007, and 008 control fields.



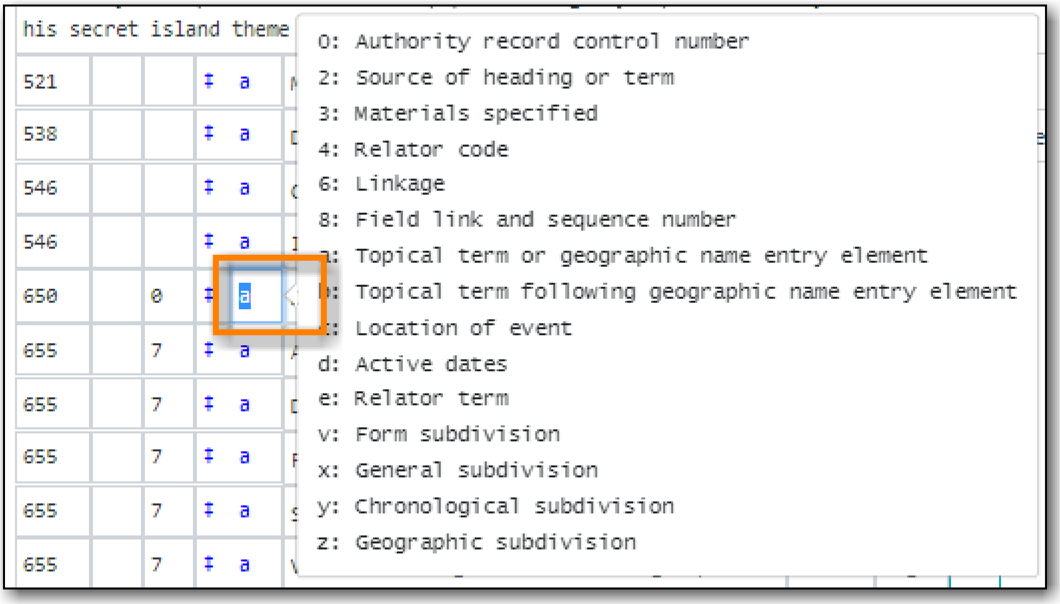
- Right-clicking in the MARC tag boxes will list potential fields that can be added. This is a partial list; cataloguers should refer to MARC 21 Format for Bibliographic Data/ Normes MARC 21 for a comprehensive list.



- Right-clicking in the first or second indicator boxes will list the possible values for the indicator as per MARC 21.



- Right-clicking in a subfield box will list the possible subfield values for the particular field as per MARC 21.



20.2.4. Physical Characteristics Wizard

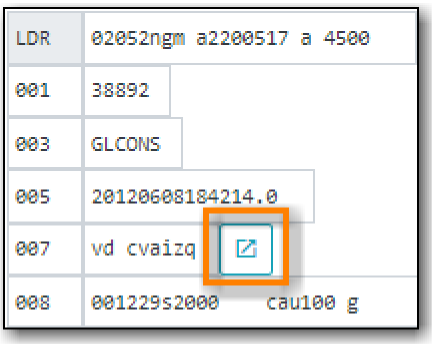
Sitka Snippet Video - Physical Characteristics Wizard (3:52)

Cataoguers can easily edit and create 007 fields using the Physical Characteristics Wizard.

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 for Sitka's Evergreen in Search Filters and Format Icons.

As a cataloguer 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 cataloguer makes a selection from the drop down options, the value for that position will also change. Cataloguers should refer to MARC 21 Format for Bibliographic Data/ Normes MARC 21 for more information as needed.

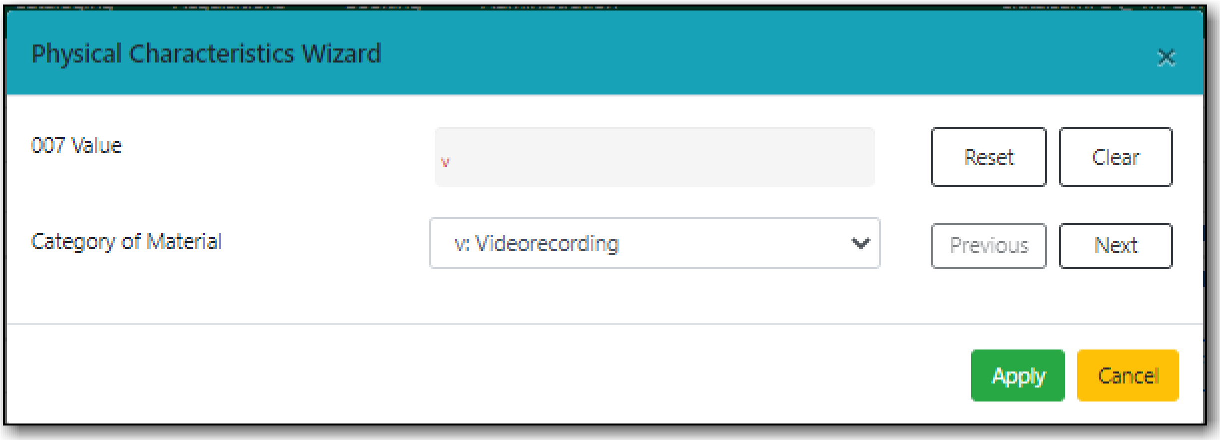
1. In the Enhanced MARC Edtor, click the blue icon to the right of the 007 field. See MARC Record if the record doesn't already have a 007 field.



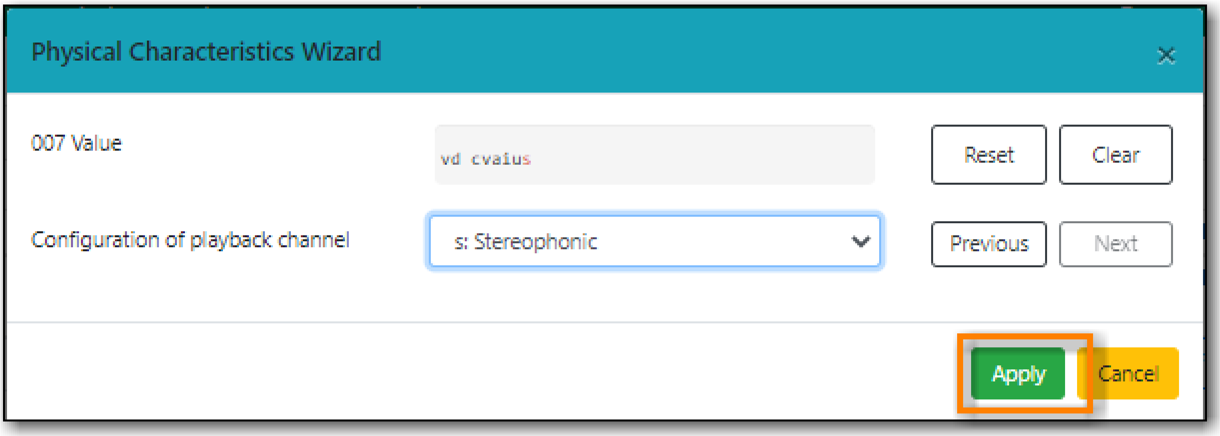
2. The **Physical Characteristics Wizard** will open.

NOTE	The first value defines the **Category of Material**. The choices within the remaining character positions will be appropriate for the Category of Material selected.

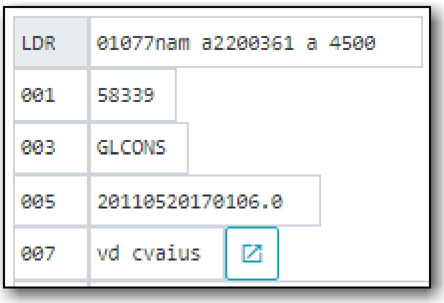
3. Select the Category of Material for the given record by choosing an option from the **Category of Material** drop down menu.
4. Once the Category of Material is selected, click **Next**.
5. Evergreen will display the result of each selection in the preview above. The character of your current position will be in red.



6. Use the **Previous** or **Next** buttons, navigate through the various positions in the 007 field.
7. Once the you have entered all of the applicable values click **Apply**.



8. All of the values selected will be stored and displayed within the 007 field of the bibliographic record.



9. Continue editing the MARC record, as needed. When finished, click **Save Changes**.

20.2.5. Authorities Linker

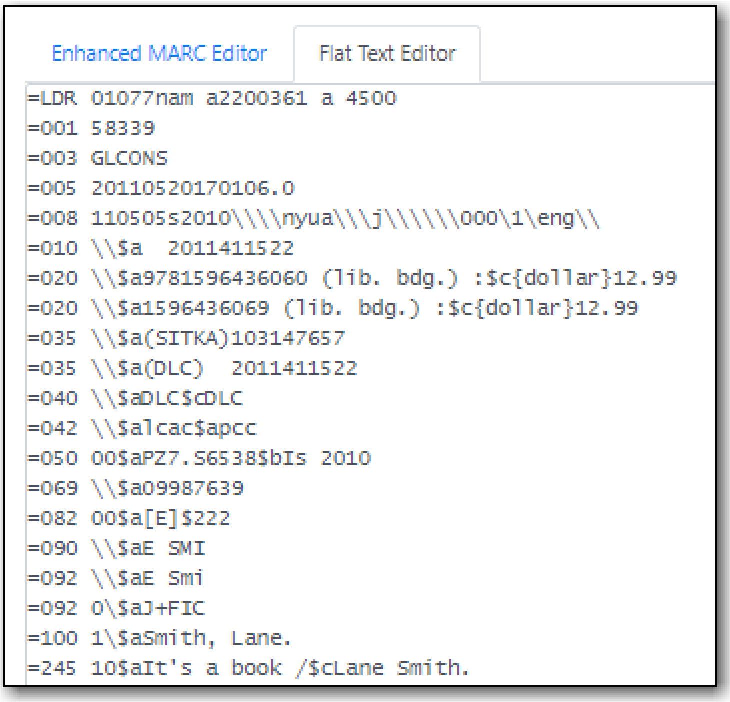
Name and subject fields include a link button for authorities. This functionality is not currently used in Sitka’s Evergreen and so this button should not be used.

20.3. Flat Text Editor

The Flat Text Editor is used when working with MARC records.

CAUTION	Cataloguers should be cautious when using the Flat Text Editor and always double check any changes before saving. It is very easy to make significant changes to multiple fields while using the Flat Text Editor.

The text of the MARC record can be edited directly in the Flat Text Editor.



- An equals sign "=" indicates the start of a MARC field
- The leader and control fields contain the 3-digit MARC tag followed by the field values.
  - A backslash "\" is used in the leader and control fields for characters where no value is specified.
  - Cataloguers need to ensure that they count the characters in the fields and add the values in the correct positions.
- All other MARC fields contain the 3-digit MARC tag, followed by the indicators, and then the appropriate subfield
- If there is no value for an indicator a backslash "\" is used to fill the space.
- A dollar sign "$" is used for the subfield delimiter

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 for Sitka's Evergreen in Search Filters and Format Icons.

20.4. 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 as per MARC 21 Format for Bibliographic Data/ Normes MARC 21 so the correct format icons display and the expected records are included in search results. See Leader and 008 Field Grid and Physical Characteristics Wizard for instructions on how to edit these fields in Evergreen.

The terminology used in the Search Filter and Format Icon tables to indicate characters of the leader and control fields are:

- **Type** is Leader position 06 - Type of record
- **Bib Level** is Leader position 07 - Bibliographic level
- **Form** is 008 position 23 - Form of item , except when Type = e, f, or g then it's position 29
- **Speed** is 007 position 03 - Speed
- **Video Format** is 007 position 04 - Videorecording Format

20.4.1. Search Filters

- **Language** - relies on characters 35-37 of the 008 field.
- **Audience** - relies on character 22 of the 008 field (for the relevant material configurations).
- **Literary Form** - relies on character 33 of the 008 field (only applicable to books).
- **Shelving Location** - will display a list of the search library's shelving locations
- **Publication Year** - relies on characters 07-10 of the 008 field.
- **Exclude Electronic Resources checkbox** - relies on character 23 of the 008 field. Records with a value of "s" or "o" are excluded.
- **Format** - relies on the leader and control field values shown in the table below.

Search Filter Label	Leader and Control Field Values
All Audiobooks	Type = i
All Books	Type = a or t **AND** Bib Level = a, c, d, or m **but NOT** Form = a, b, c, or f
All Electronic Resources	Form = o or s
All Videos	Type = g
Audiobooks (electronic)	Type = i **AND** Form = o or s
Audiobooks (physical)	Type = i **AND** Speed = l or f
Books (electronic)	Type = a or t **AND** Bib Level = a, c, d, or m **AND** Form = o, q, or s

Search Filter Label	Leader and Control Field Values
Books (large print)	Type = a or t **AND** Bib Level = a, c, d, or m **AND** Form = d
Books (physical)	Type = a or t **AND** Bib Level = a, c, d, or m **but NOT** Form = a, b, c, f, o, q, or s
Braille	Type = a **AND** Form = f
Kits and Mixed Materials	Type = o, p, or k
Maps	Type = e or f
Music (CD, cassette)	Type = j
Music Scores	Type = c or d
Pictures	Type = k
Preloaded Audio	Type = i **AND** Form = q
Serials and Magazines	Bib Level = b or s
Serials and Magazines (electronic)	Bib Level = s **AND** Form = q, o, or s
Software and Video Games	Type = m
Toys, Puzzles and Equipment	Type = r
Videos (electronic)	Type = g **AND** Form = o, q, or s
Videos (physical)	Type = g **but NOT** Form = o, q, or s

20.4.2. Format Icons

The format icons show in the search results and record display in the catalogue. The following table shows the leader and control field values associated with each format icon.

Format Icon Label	Leader and Control Field Values
Video (shown if format, eg. vhs, dvd, is unknown)	Type = g **but NOT** Video Format = v, s, or b
E-video	Type = g **AND** Form = o, s, or q
DVD	Video Format = v
VHS	Video Format = b
Blu-ray	Video Format = s
Audiobook (shown if format, eg. cassette, disc, is unknown)	Type = i **but NOT** Form = o, q, or s **and NOT** Speed = a, b, c, d, e, l, or f
E-audiobook	Type = i **AND** Form = o or s
CD Audiobook	Type = i **AND** Speed = f
Cassette audiobook	Type = i **AND** Speed = l
Phonograph audiobook	Type = i **AND** Speed = a, b, c, d, or e

Format Icon Label	Leader and Control Field Values
Book	Type = a or t **AND** Bib Level = a, c, d, or m **but NOT** Form = a, b, c, d, f, o, q, r, or s
E-Book	Type = a or t **AND** Bib Level = a, c, d, or m **AND** Form = o, q, or s
Large print book	Type = a or t **AND** Bib Level = a, c, d, or m **AND** Form = d
Braille	Type = a **AND** Form = f
Kit or mixed material	Type = o or p
Map	Type = e or f
Music (shown if format, eg. cassette, disc, is unknown)	Type = j **but NOT** Speed = a, b, c, d, e, f, or l
Phonograph music	Type = j **AND** Speed = a, b, c, d, or e
CD music	Type = j **AND** Speed = f
Cassette music	Type = j **AND** Speed = l
Music score	Type = c or d
Preloaded Audio	Type = i **AND** Form = q
Picture	Type = k
Serial or magazine	Bib Level = b or s **but NOT** Form = o, s, or q
E-Serial or magazine	Bib Level = b or s **AND** Form = o, s, or q
Software or video game	Type = m
Online	Bib Level = i **AND** Form = o, s, or q
Toys, puzzles or equipment	Type = r
Microform	Form = a, b, or c

20.5. Merging Bibliographic Records

Sitka Training Video - Merging Duplicate Bibliographic Records (5:10)

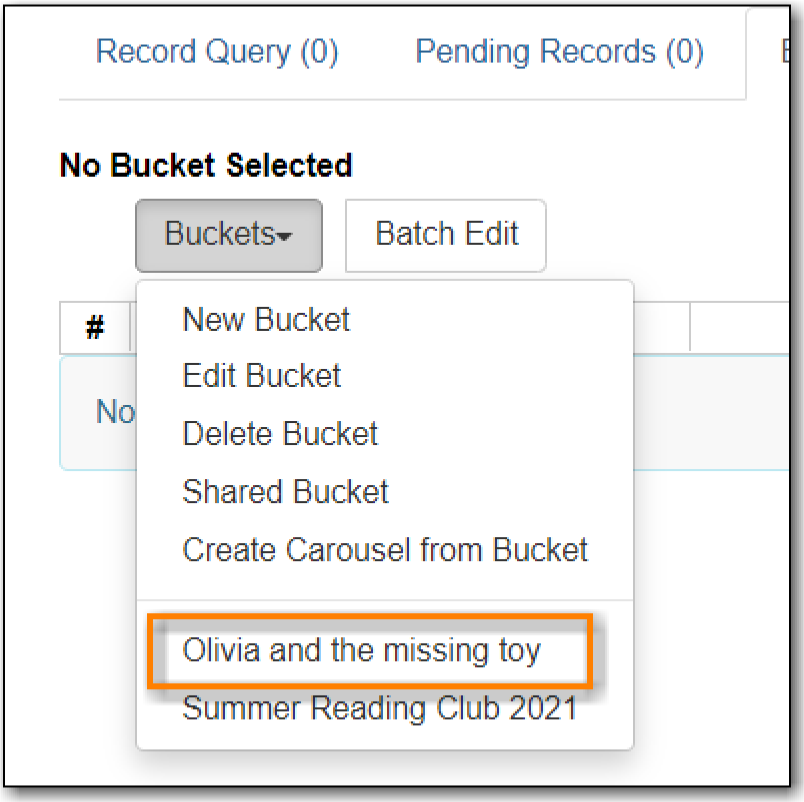
Each discrete bibliographic title in Evergreen should have a single record that all libraries attach their holdings to. When this is not the case library staff with the cataloguing knowledge to correctly identify matching MARC records can merge duplicate records together.

Any call number and item records, or holds, associated with the non-lead records will be transferred to the lead record upon merging.

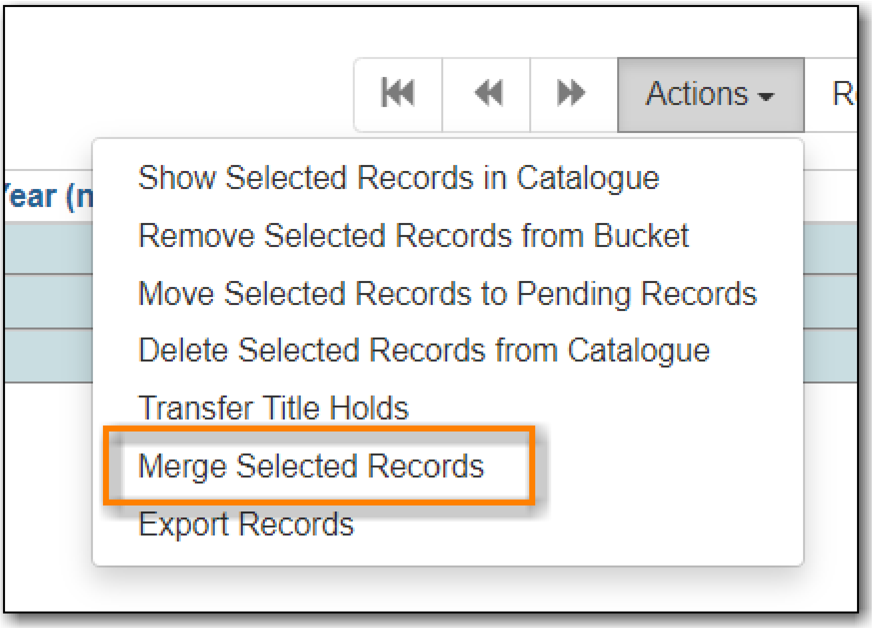
1. Add the desired records to a record bucket. See Adding Records to a Record Bucket.

NOTE	When creating your bucket Co-op Support recommends using the title of the records you are merging.

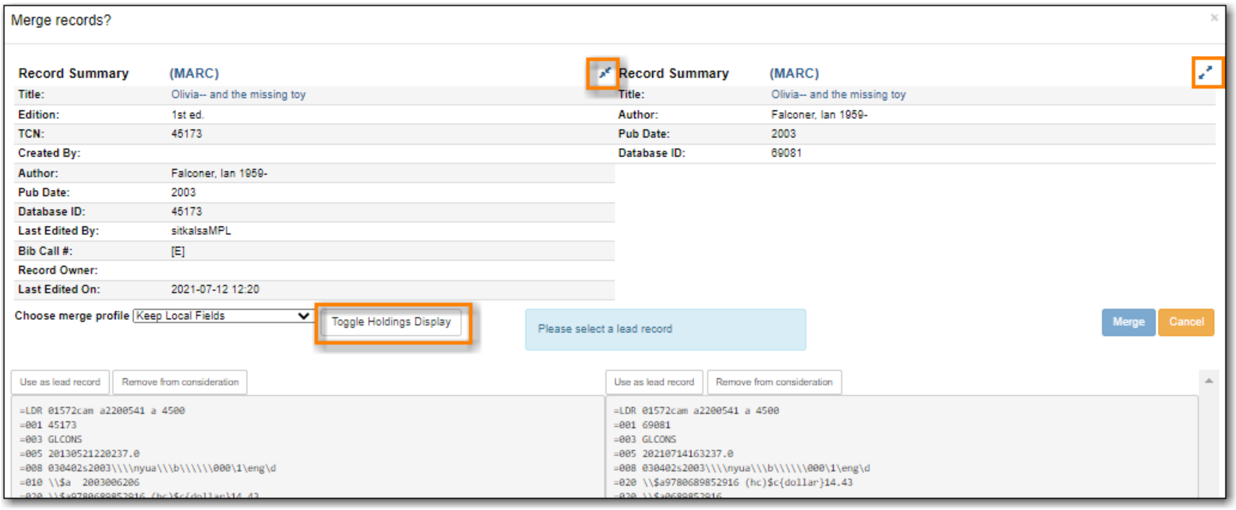
2. Retrieve the bucket by selecting **Cataloguing** → **Record Buckets** on the menu bar.
3. Click the drop down arrow beside **Buckets**, then select the bucket containing the records to be merged.



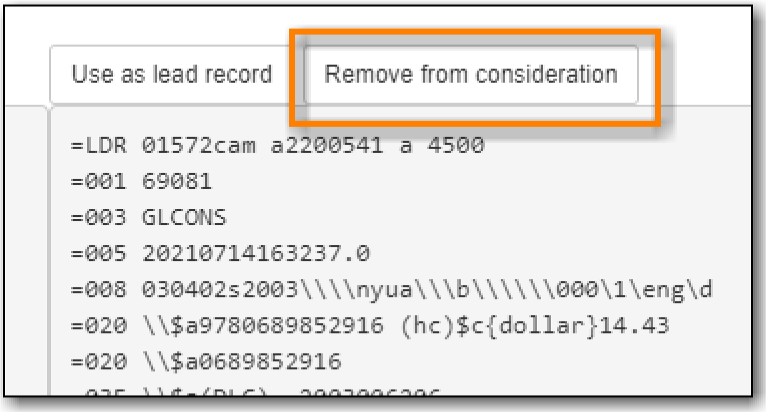
4. Select the records you wish to merge. Click **Actions** → **Merge Selected Records**.



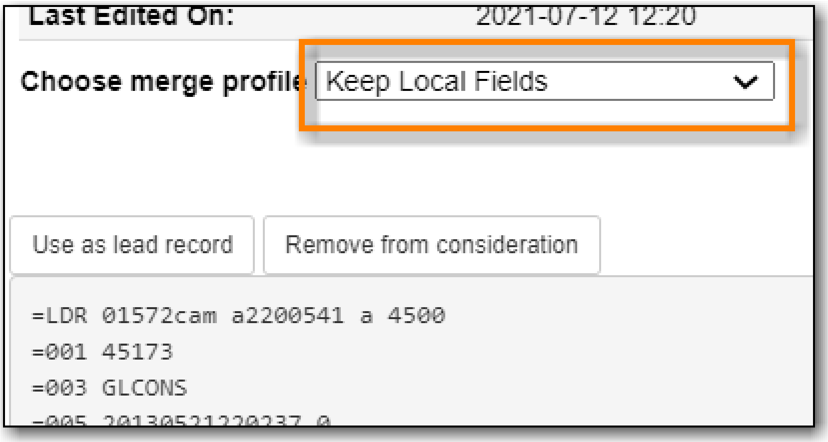
5. The merge screen opens in a pop-up window.
   a. The record summary is listed above. You may shorten it by clicking the double arrows.
   b. Clicking **Toggle Holdings Display** will display the holdings information below each MARC record.



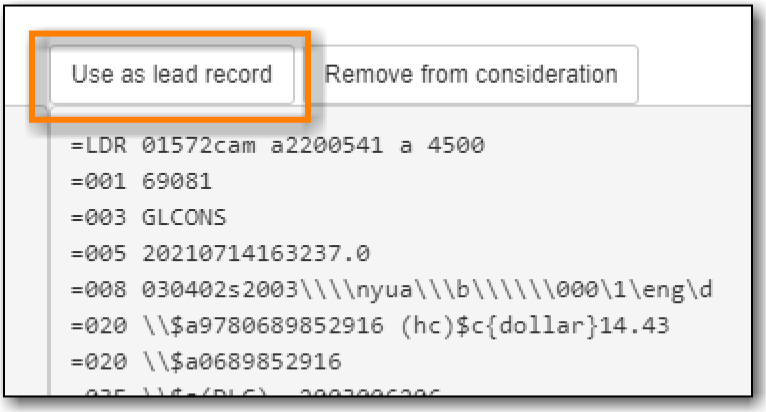
6. If after comparing the MARC records you determine that any of them are not a match for merging click **Remove from consideration**. The record will no longer be included in the merge.



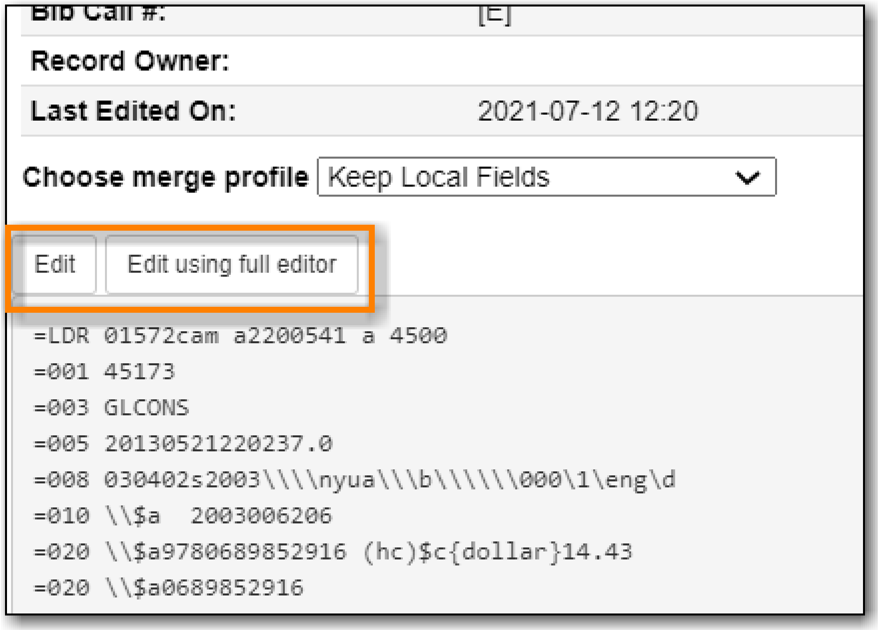
7. Leave the merge profile as "Keep Local Fields". Any 050, 055, 092, 590, 595, 690, 852, and 856 fields from non-lead records will be moved to the lead record.



8. From the remaining records determine which is the best record and click **Use as lead record**.



9. 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.



10. Click **Merge**. The lead record will open in the catalogue in a new tab.

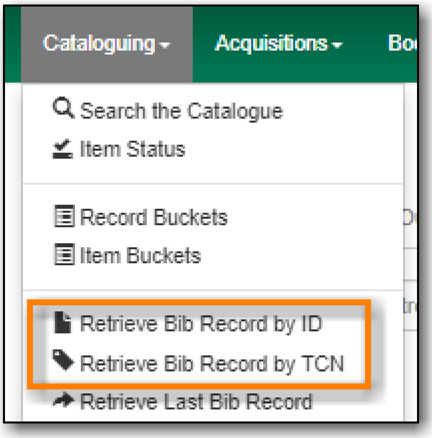
NOTE While you can edit call numbers and/or items from the merge screen, Co-op Support recommends you focus on bibliographic records here. After the merging is done, you can edit your call numbers and items through the Holdings Editor.

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.

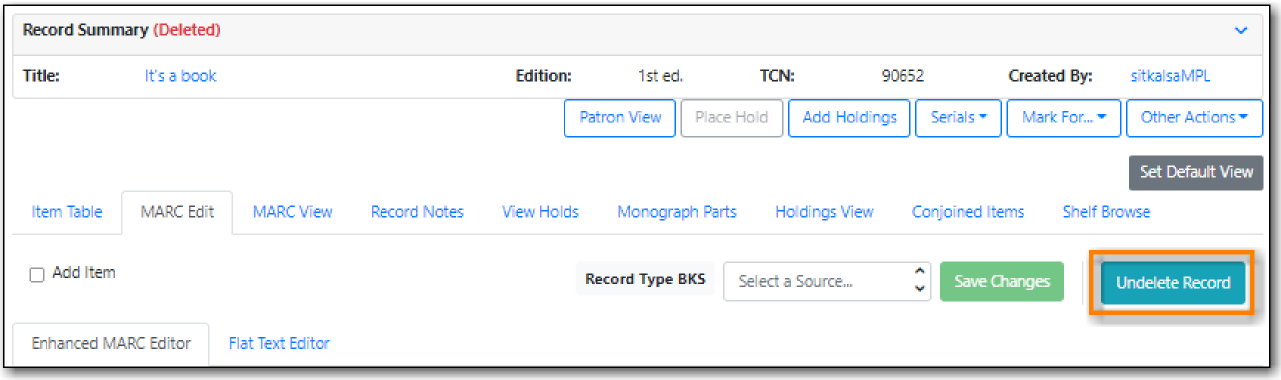
20.6. Undeleting Bibliographic Records

Deleted records can be undeleted if you know the record TCN or ID.

1. Retrieve the record by its database ID.



2. Click on the **MARC Edit** tab.
3. Click **Undelete Record**.



4. A pop up will appear. Click **Confirm**.
5. The record is undeleted and holdings or scoped 856 fields can now be added.

20.7. Deleting Bibliographic Records

Sitka's Evergreen will automatically delete records when the last item attached to the record is deleted.

Records that are imported or created in Evergreen but never have a holding attached or a scoped 856 field added are automatically deleted when they've been in the catalogue for more than 3 months.

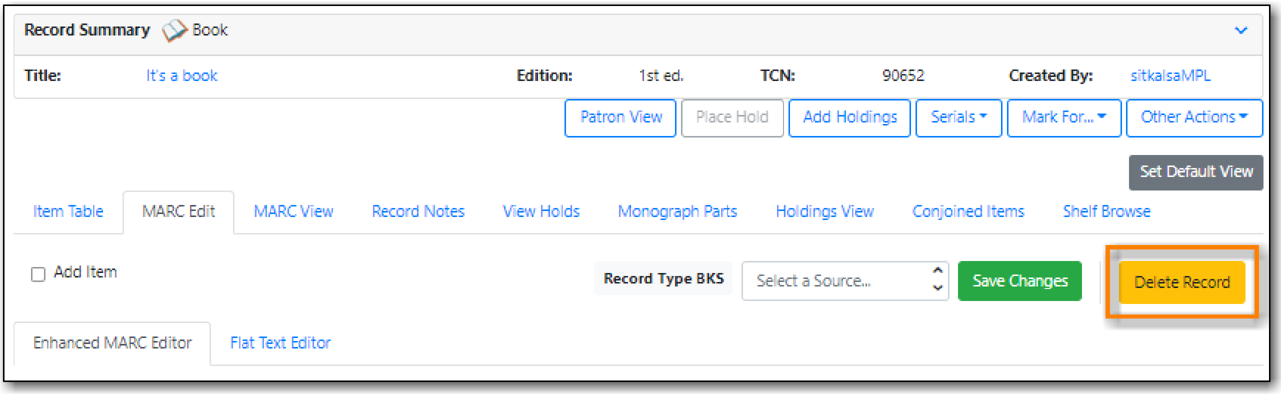
Records with holdings attached, physical or electronic, cannot be deleted.

20.7.1. Deleting Records via the Staff Catalogue

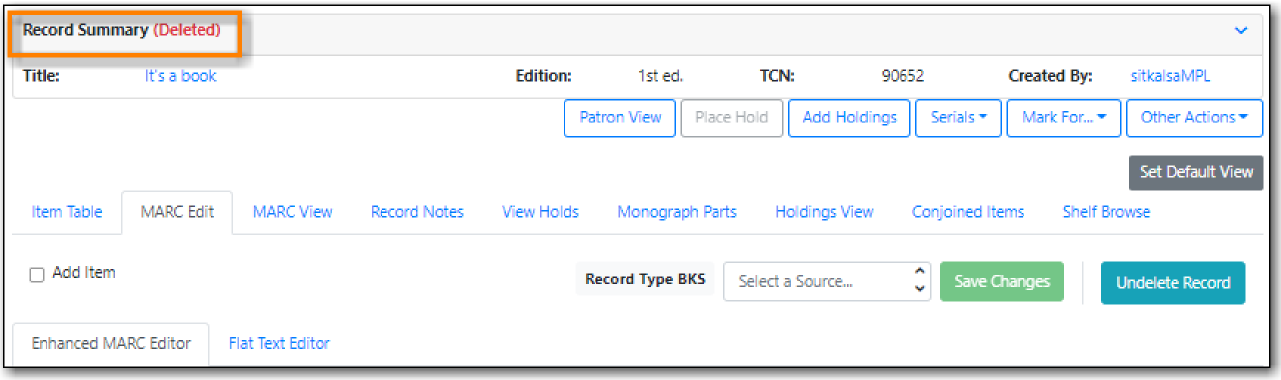
You can delete a MARC record directly from the **MARC Edit** tab in the bibliographic record.

1. Search the catalogue for a record that you need to delete, as described in Searching the Database for Cataloguing Purposes.
2. Click on the **MARC Edit** tab.

3. Click **Delete Record**.



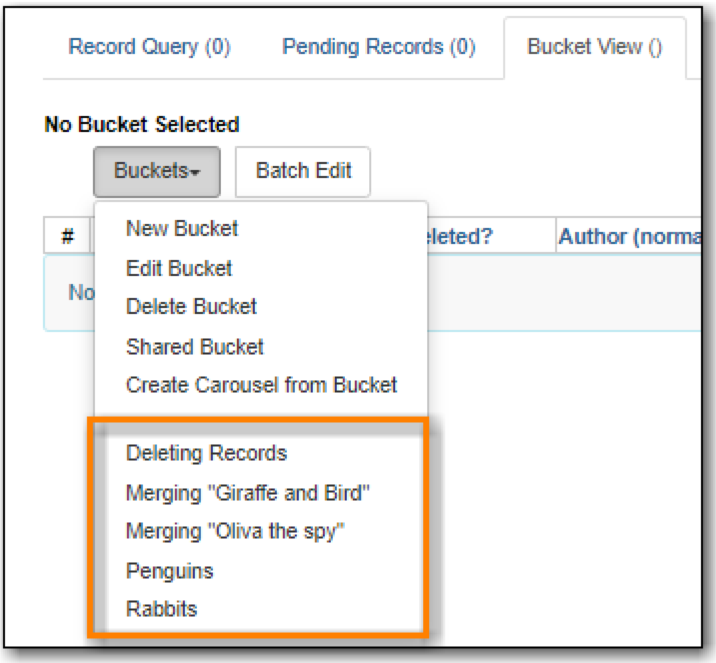
4. A pop up will appear. Click **Confirm**.
5. Record is now deleted and only retrievable by a TCN (title control number) or record ID search.



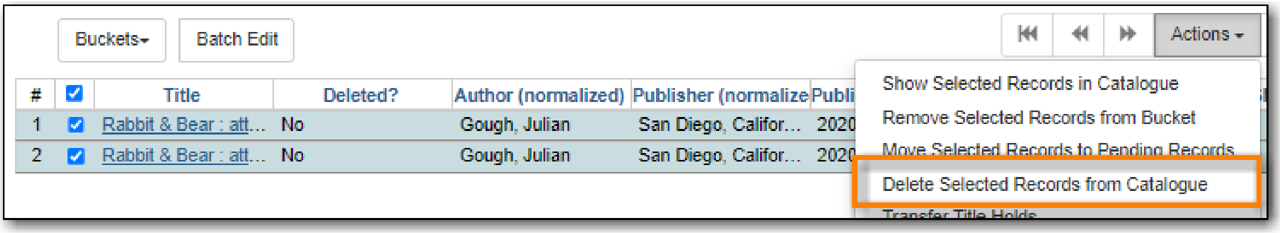
20.7.2. Deleting Records via a Record Bucket

Records can be deleted in batch from a record bucket.

1. Go to **Cataloguing** → **Record Buckets**.
2. Select the bucket containing the records you would like to delete from the drop down menu.



3. Select the records you wish to delete and from the the **Actions** menu choose **Delete Selected Records from Catalogue**.



4. Click **OK/Continue**.
5. The records are deleted. Records with holdings cannot be deleted and will return an error.

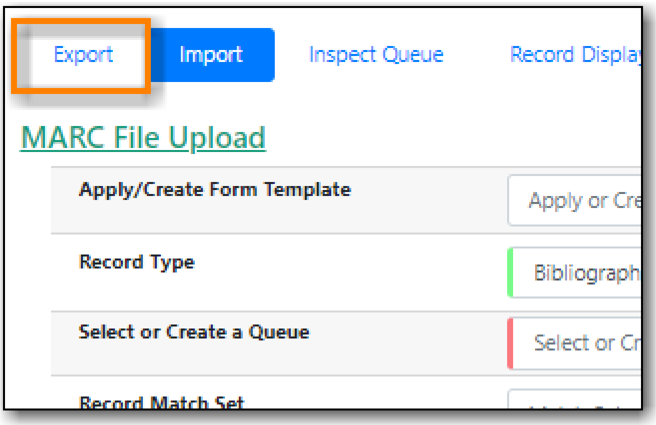
20.8. Exporting Bibliographic Records

There are times when you may want to export MARC records from Evergreen. Evergreen allows you to do so via the MARC Batch Import/Export interface, the Record Bucket, and the staff catalogue basket. 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 item's circulating library, shelving location, barcode, call number, status, and others saved in the item record.

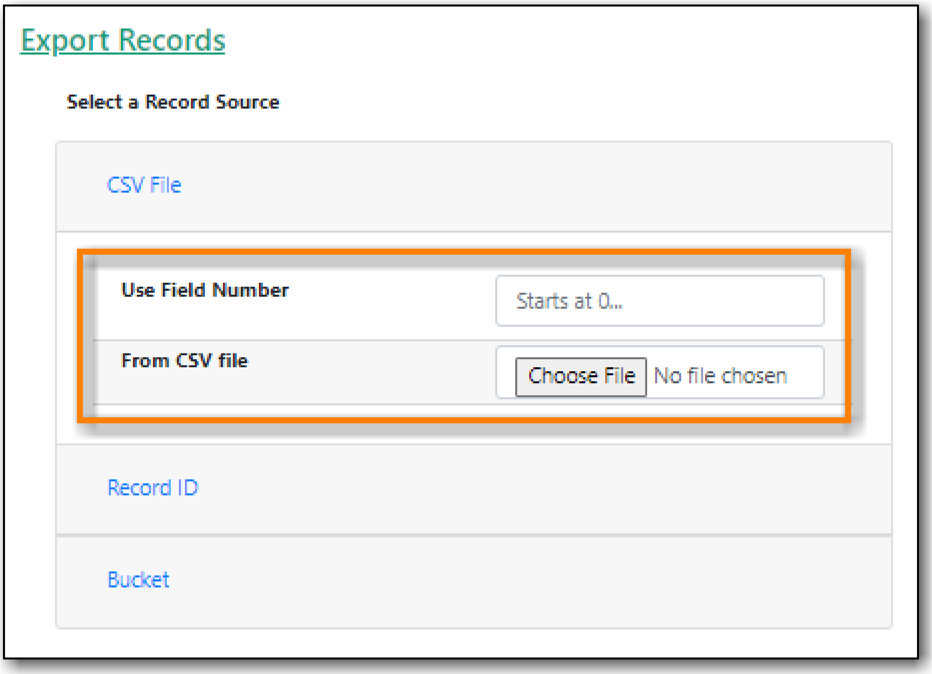
MARC records can be exported from Evergreen in MARC XML, UNIMARC, MARC21/USMARC or Evergreen Record Entry format. The exported records can be encoded in either UTF-8 or MARC8.

20.8.1. Exporting MARC Records via MARC Batch Import/Export

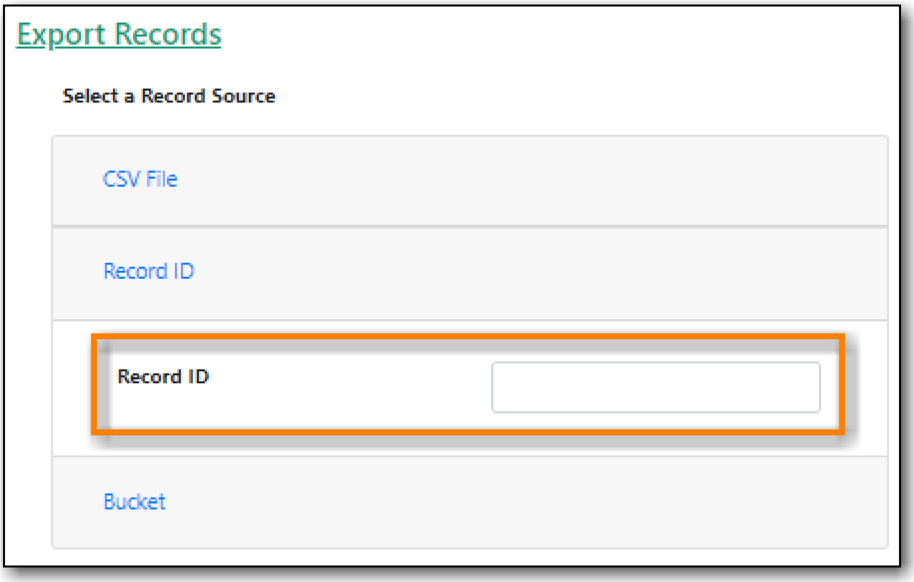
1. Go to **Cataloguing** → **MARC Batch Import/Export**.
2. The interface opens and default to the **Import** tab. Click the **Export** tab.



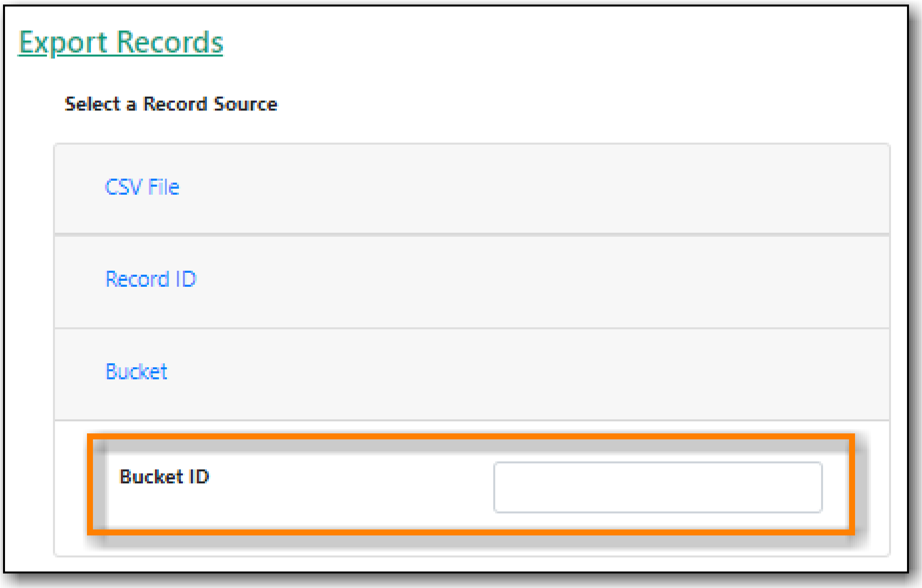
3. Select your record source
   - Load a *CSV* file containing records IDs. If the CSV file contains other information specify which column is the record ID by filling it into the *Use Field Number* field. Note that the field number starts at 0. If the second column in the CSV file is record IDs, the field number is 1.



◦ Enter a *Record ID*.



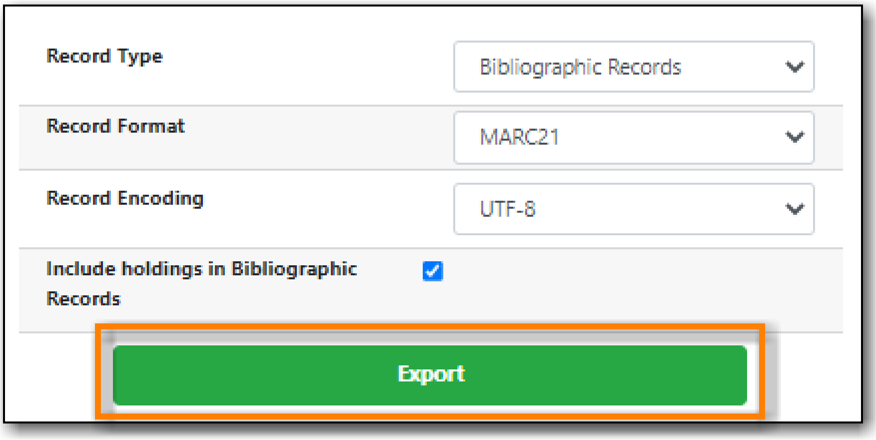
◦ Enter a record *Bucket ID*.



4. The *Record Type* should be set to Bibliographic Records.
5. Select a *Record Format* from the drop down menu.
6. Select a *Record Encoding* from the drop down menu.
7. Check the box for *Include holdings in Bibliographic Records* if you would like holdings information included.

NOTE	Holding records are exported in the 852 field and will include holdings across the Sitka consortium, not just your library's holdings.

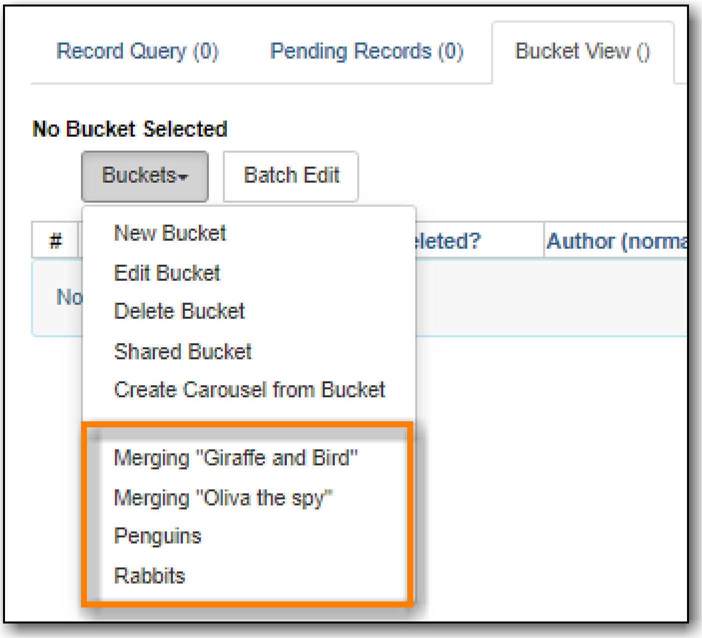
8. Click **Export**.



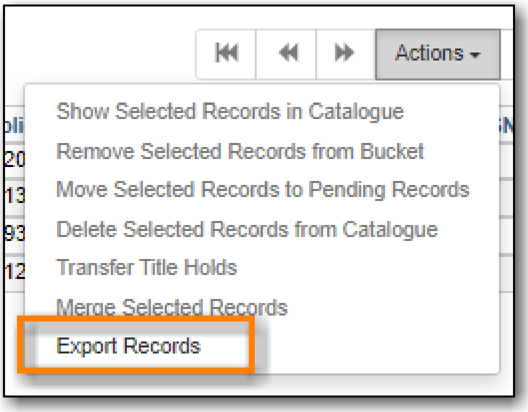
9. You will be prompted to save the file.

20.8.2. Exporting MARC Records via a Record Bucket

1. Go to **Cataloguing** → **Record Buckets**.
2. Select the bucket containing the records you would like to export from the drop down menu.



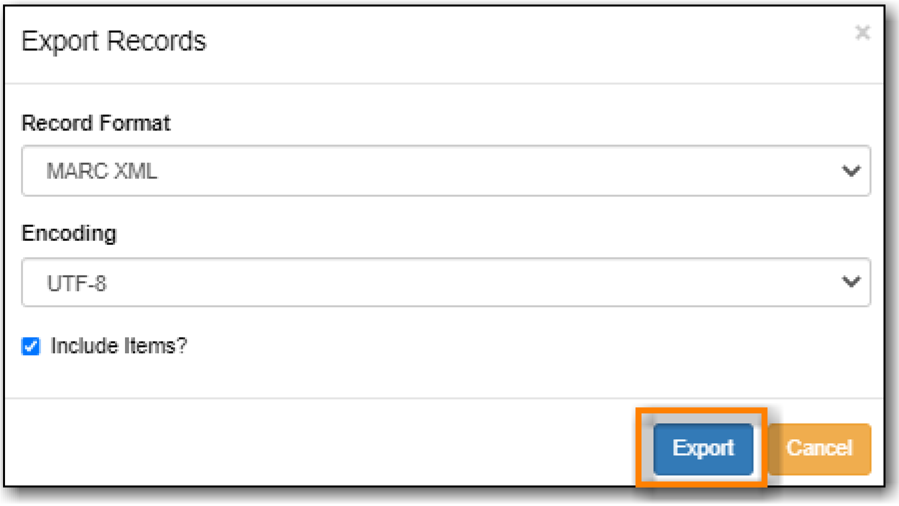
3. Remove any records from your bucket that you don't want to export; the entire contents of the bucket will be exported. See [_managing_bucket_contents].
4. From the **Actions** menu select **Export Records**.



5. Select a *Record Format* from the drop down menu.
6. Select a *Record Encoding* from the drop down menu.
7. Check the box for *Include Items?* if you would like holdings information included.

NOTE	Holding records are exported in the 852 field and will include holdings across the entire Sitka consortium, not just your library's holdings.

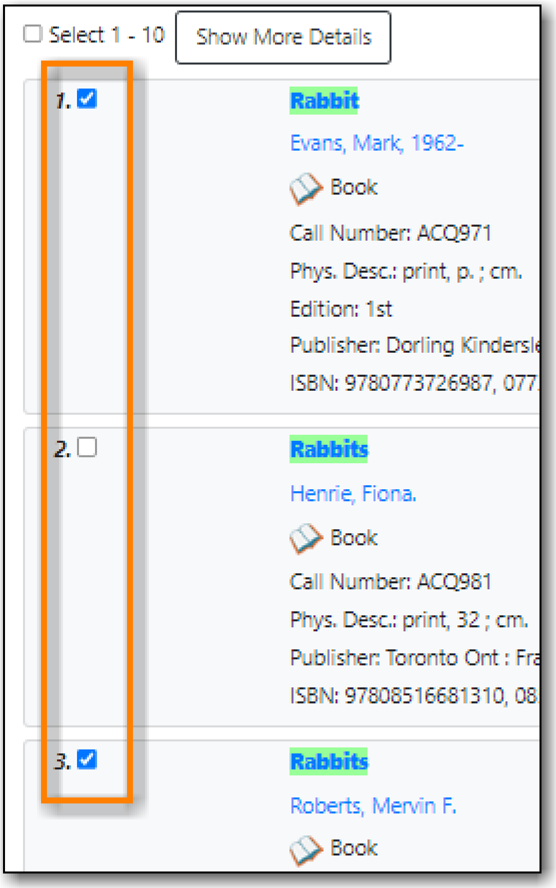
8. Click **Export**.



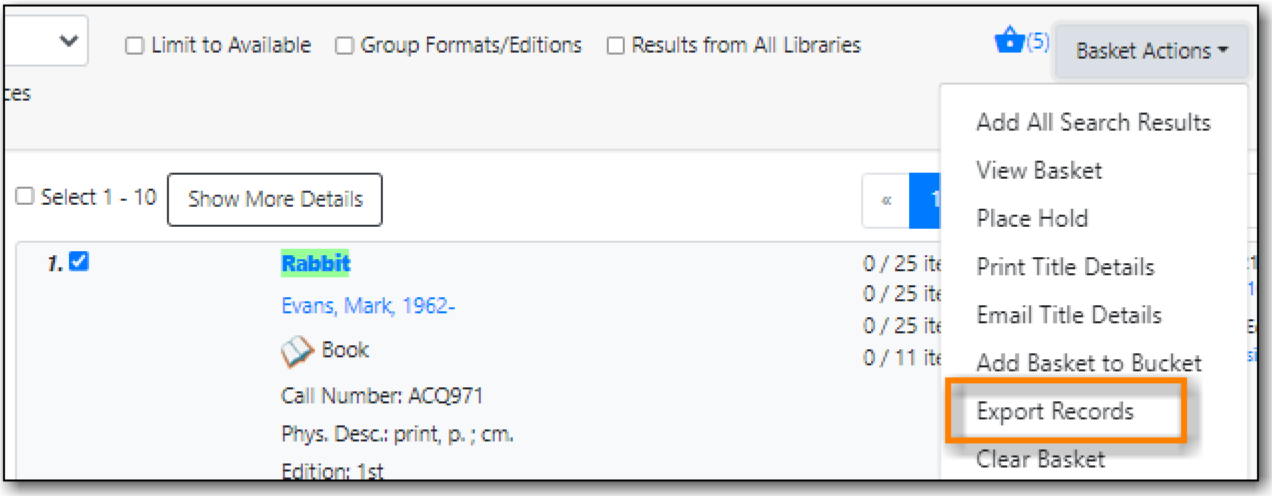
9. You will be prompted to save the file.

20.8.3. Exporting MARC Records via a Basket

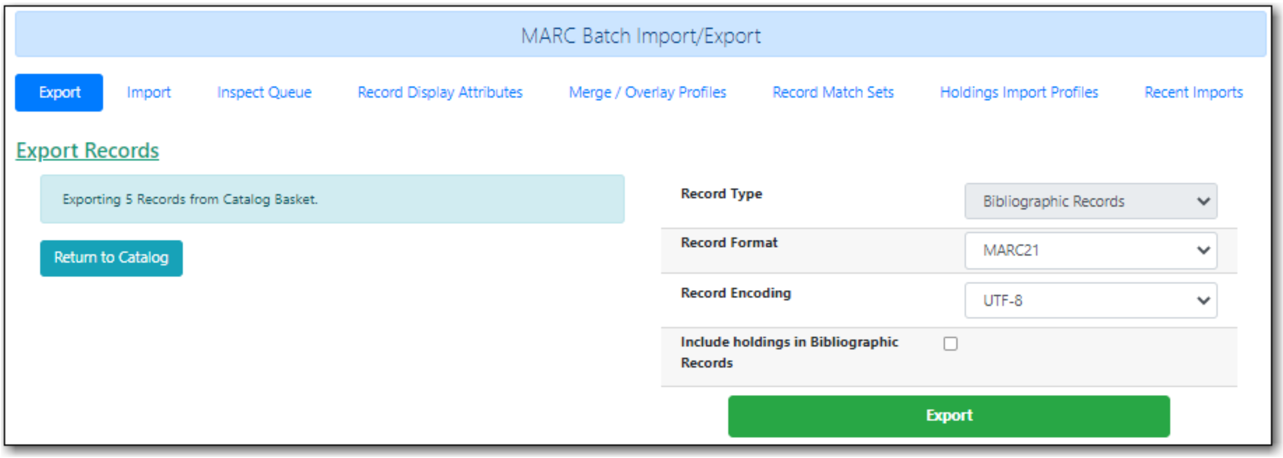
1. Search the catalogue for the records you would like to export, as described in Searching the Database for Cataloguing Purposes.
2. Select the titles you would like to add to the basket.



3. Once all desired titles have been added to the basket choose **Export Records** from the **Basket Actions** drop down menu.



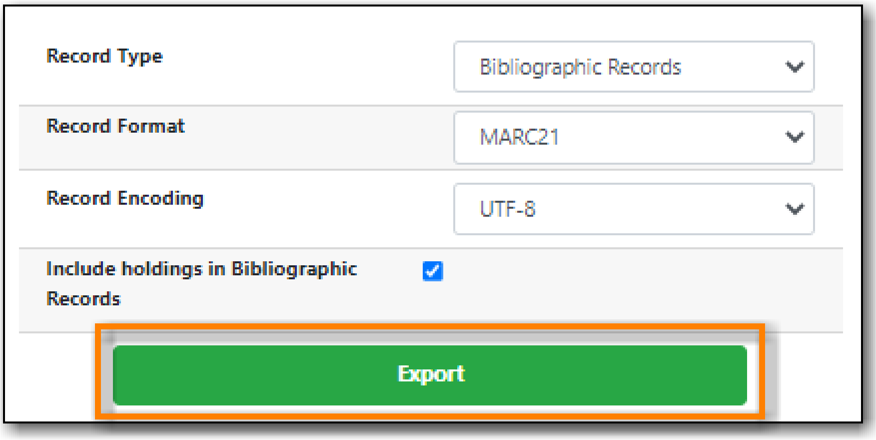
4. The MARC Batch Export interface will open.



5. The *Record Type* will be set to Bibliographic Records.
6. Select a *Record Format* from the drop down menu.
7. Select a *Record Encoding* from the drop down menu.
8. Check the box for *Include holdings in Bibliographic Records* if you would like holdings information included.

NOTE	Holding records are exported in the 852 field and will include holdings across the Sitka consortium, not just your library's holdings.

9. Click **Export**.



10. You will be prompted to save the file.

Chapter 21. Record Buckets

Record buckets are containers that can be used to group MARC records. Once records are in a bucket you can perform batch actions on the records including merging, deleting, and exporting the records. Buckets can also be shared with Co-op Support for batch editing assistance and troubleshooting.

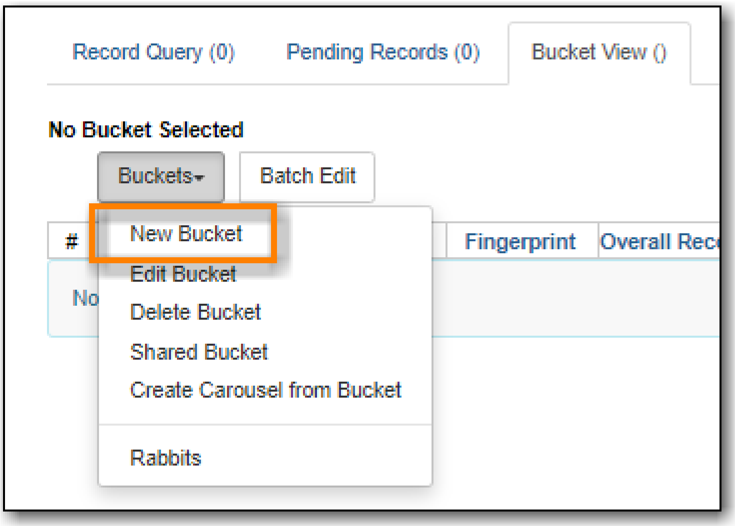
Buckets can also be used for matching when importing records via the Batch Import function.

21.1. Creating Record Buckets

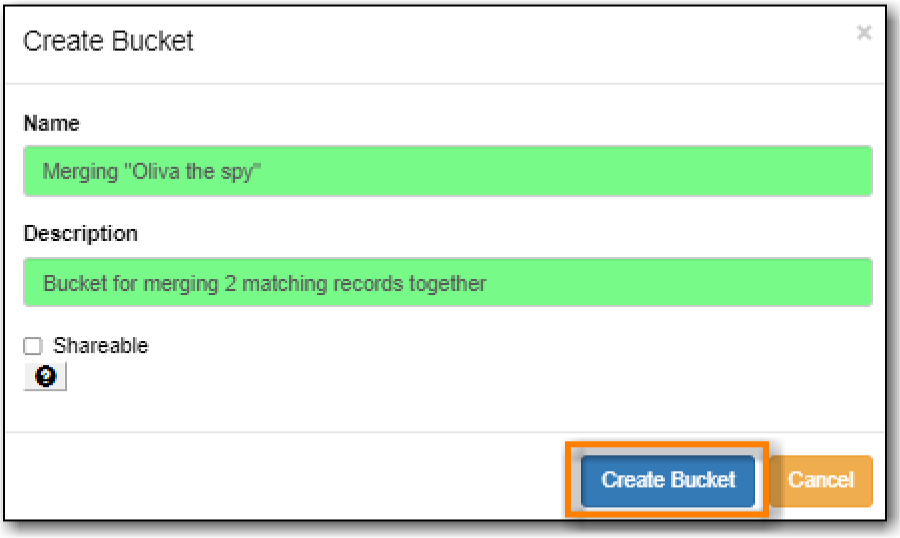
Bucket can be created from within the Record Bucket interface or from within the staff catalogue.

21.1.1. Creating a Record Bucket via the Record Buckets Interface

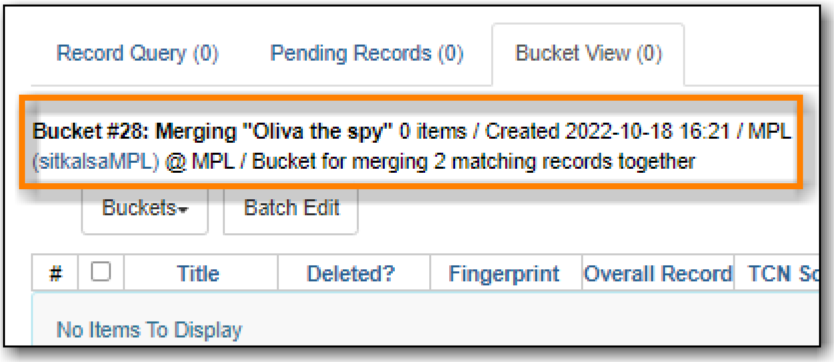
1. Go to **Cataloguing** → **Record Buckets**.
2. Select **New Bucket** from the **Buckets** drop down menu.



3. Enter a name and, optionally, a description.
4. Click **Create Bucket**.

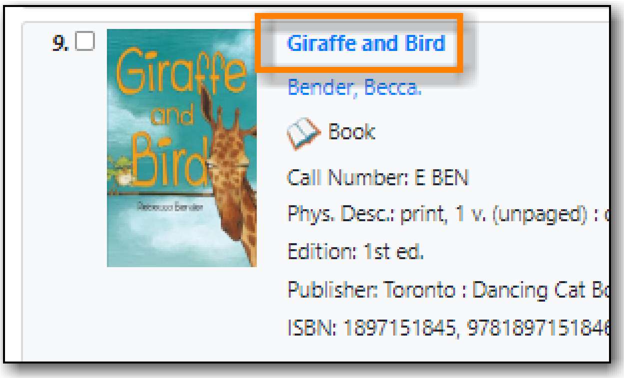


5. The newly created bucket is the active bucket on the *Bucket View* tab. It is now listed in the **Buckets** drop down menu for the owning user.

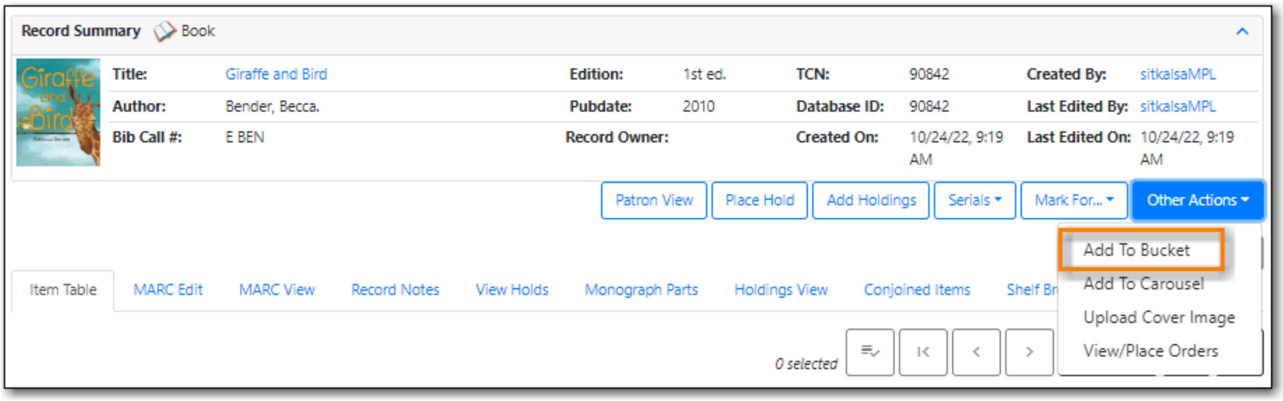


21.1.2. Creating a Record Bucket via the Record Summary

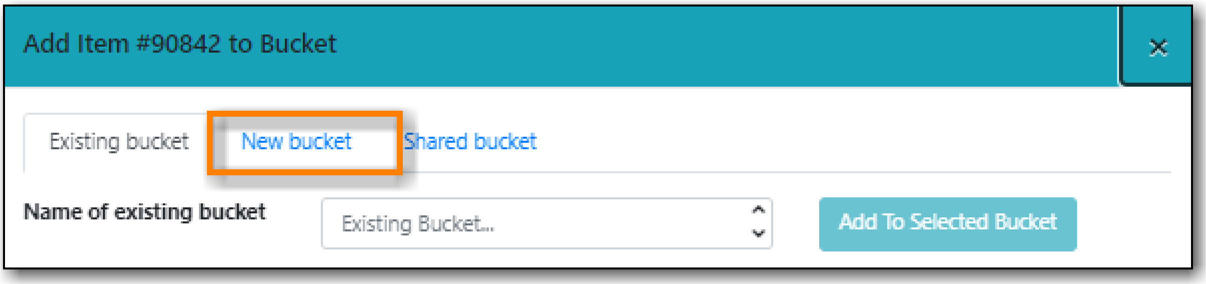
1. Search the catalogue for the record you would like to add to a bucket, as described in Searching the Database for Cataloguing Purposes.
2. Click on the title link to open the record.



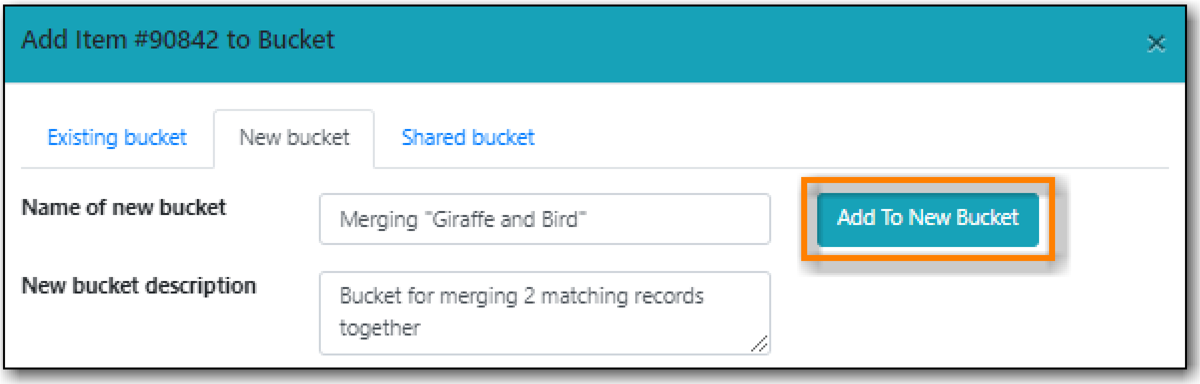
3. Choose **Other Actions** → **Add to Bucket**.



4. On the pop-up that appears click the **New bucket** tab.



5. Enter a name for the new bucket and, optionally, a description. Click **Add to New Bucket**.



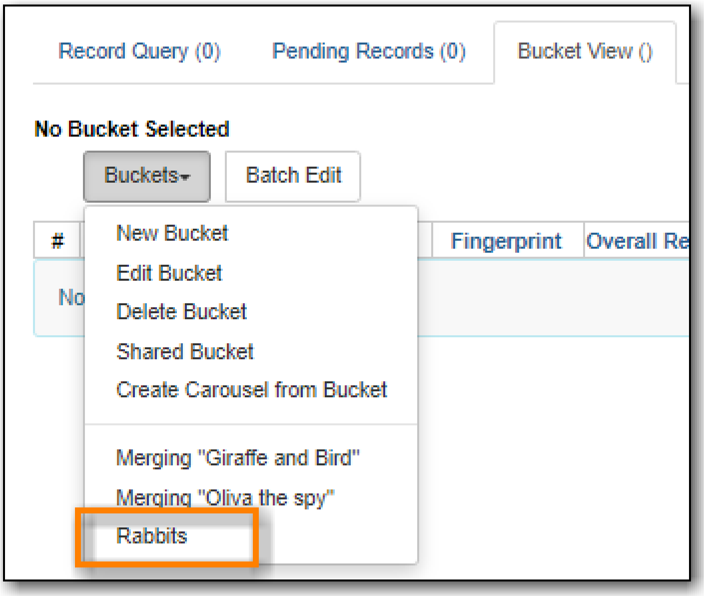
6. The record is added to the record bucket.

21.2. Sharing Record Buckets

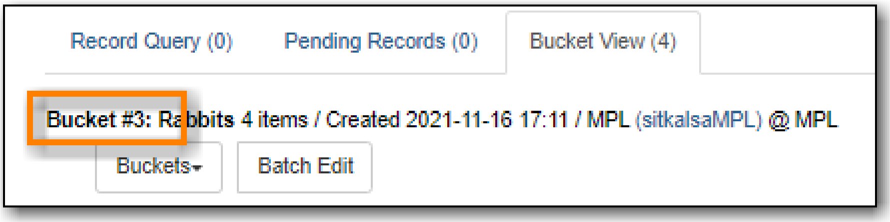
Staff can share their record buckets with other staff at the library, at another branch, or at another library by sharing the bucket ID.

21.2.1. Finding a Record Bucket ID

1. Go to **Cataloguing** → **Record Buckets**.
2. From the **Buckets** drop down menu select the bucket you would like to share.

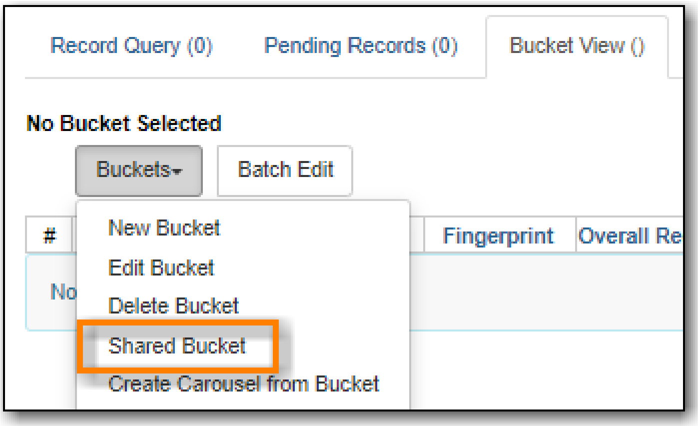


3. Note the bucket ID and tell it to the staff member you would like to share the bucket with.

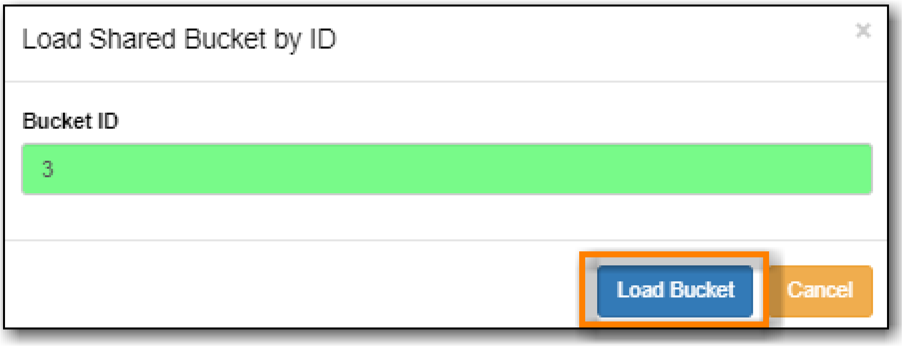


21.2.2. Retrieving a Shared Record Bucket

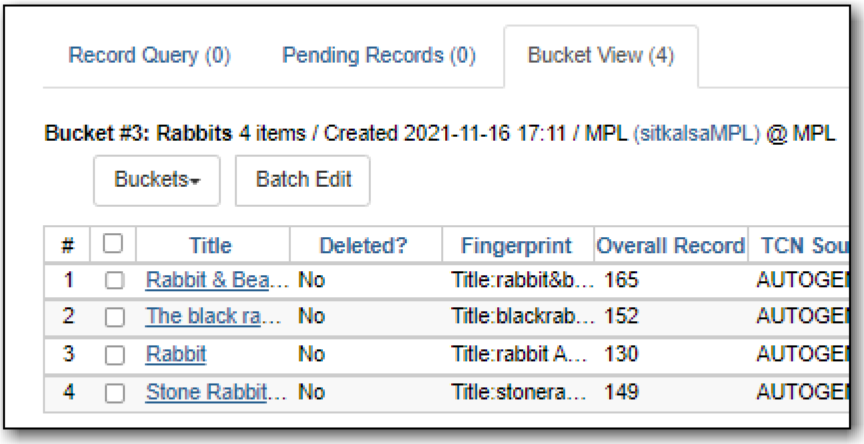
1. Go to **Cataloguing** → **Record Buckets**.
2. From the **Buckets** drop down menu select **Shared Bucket**.



3. Enter the record bucket ID and click **Load Bucket**.



4. The shared record bucket displays.

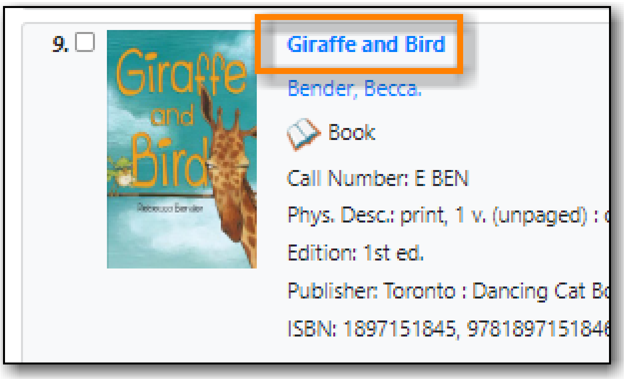


21.3. Adding Records to a Record Bucket

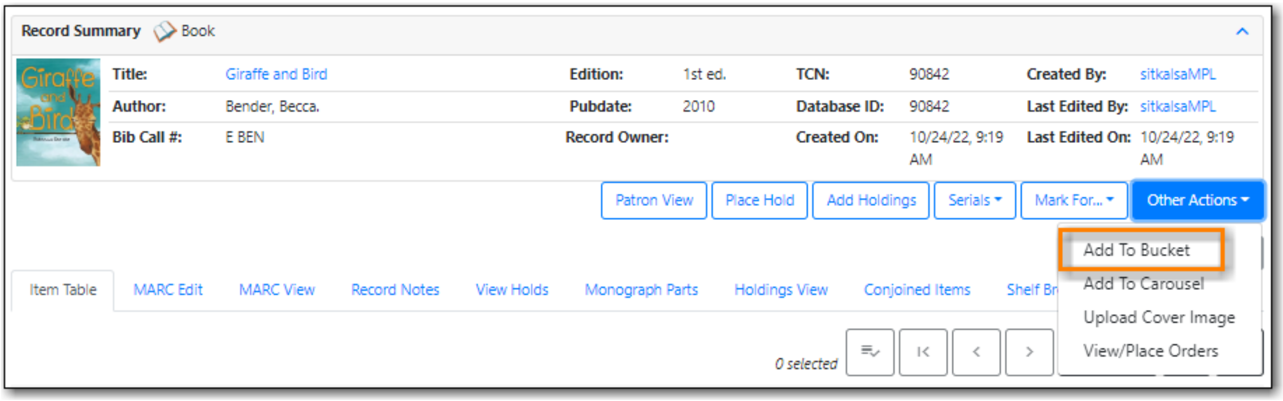
Records can be added to new, existing, or shared record buckets via the staff client, the record buckets interface, or the MARC Batch Import/Export.

21.3.1. Adding Records to a Record Bucket via the Record Summary

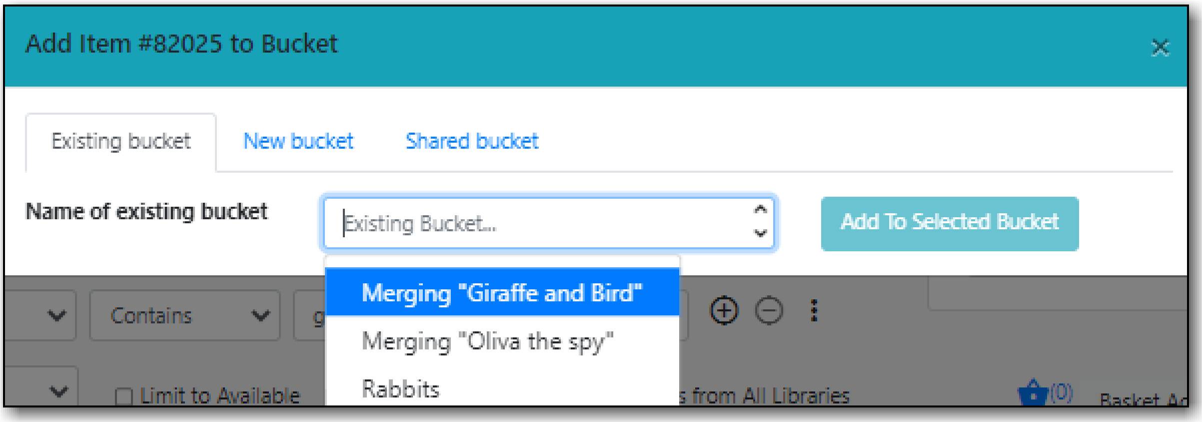
1. Search the catalogue for the record you would like to add to a bucket, as described in Searching the Database for Cataloguing Purposes.
2. Click on the title link to open the record.



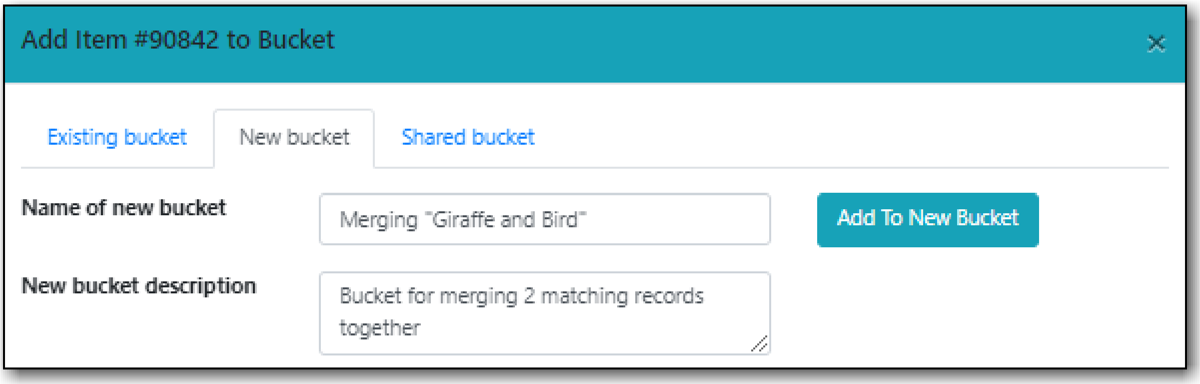
3. Choose **Other Actions** → **Add to Bucket**.



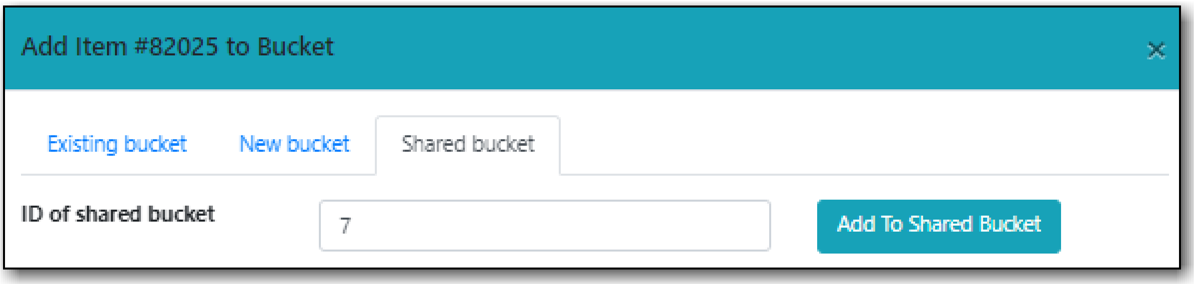
4. On the pop-up that appears records can be added to:
   - an existing bucket.



   - a new bucket.



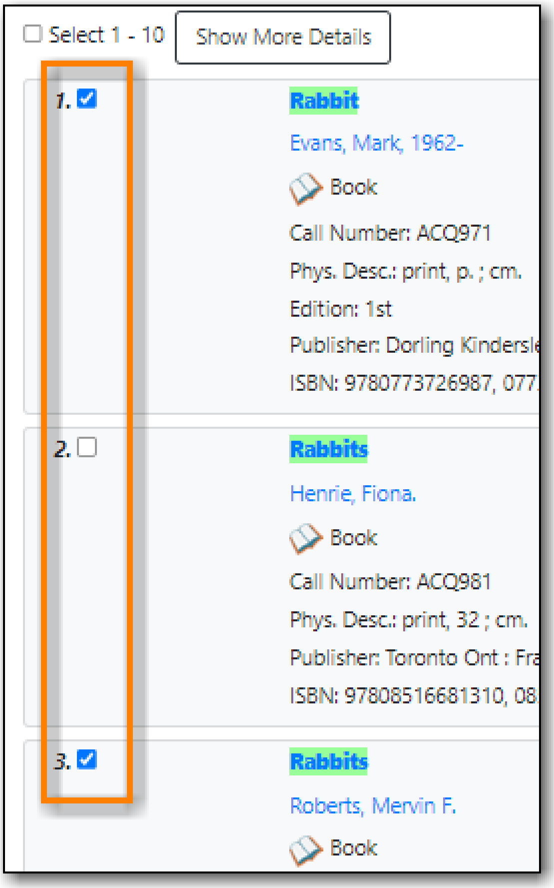
   - a shared bucket.



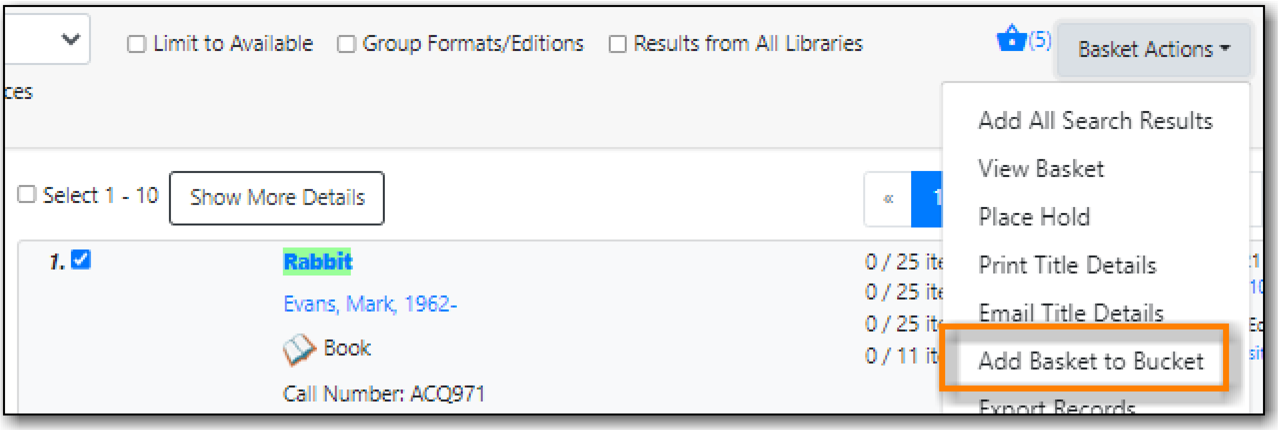
5. Enter the required information and click the appropriate button.
6. The record is added to the record bucket.

21.3.2. Adding Records to a Record Bucket via a Basket

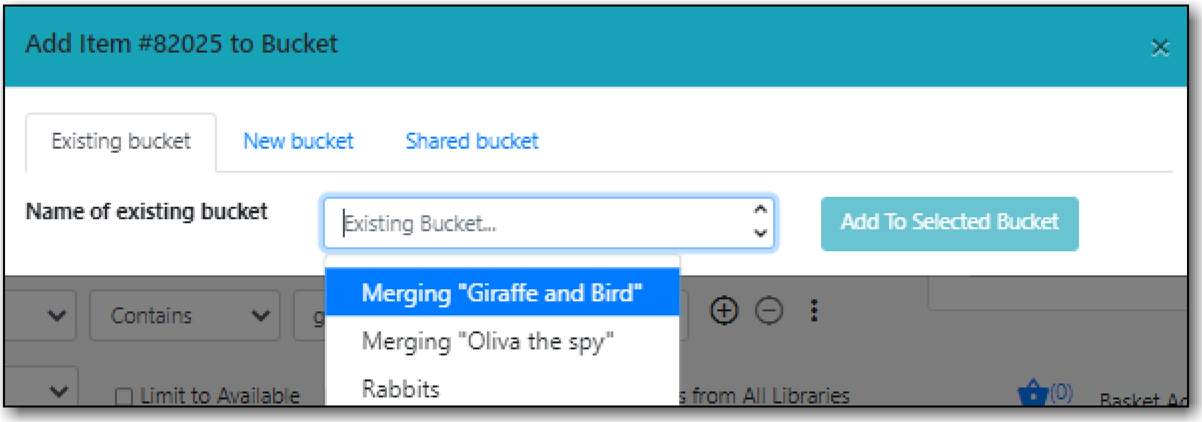
1. Search the catalogue for the records you would like to add to a bucket, as described in Searching the Database for Cataloguing Purposes.
2. Select the titles you would like to add to the basket.



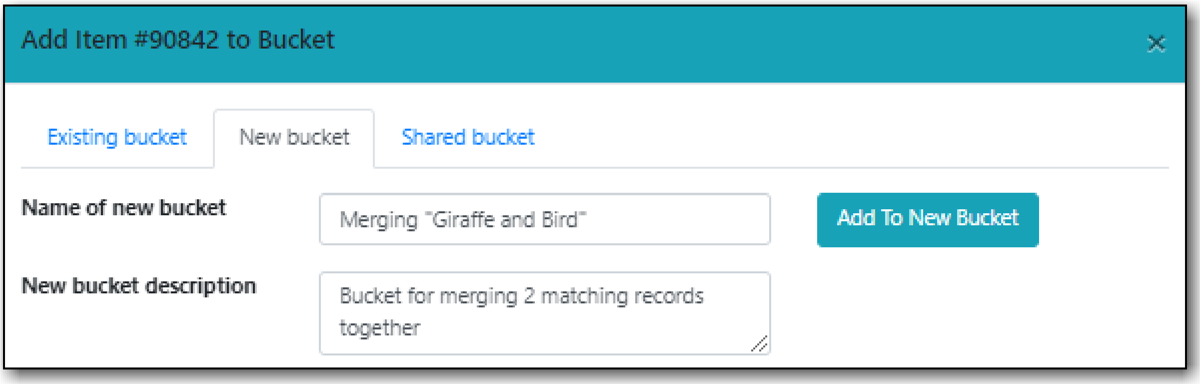
3. Once all desired titles have been added to the basket choose **Add Basket to Bucket** from the **Basket Actions** drop down menu.



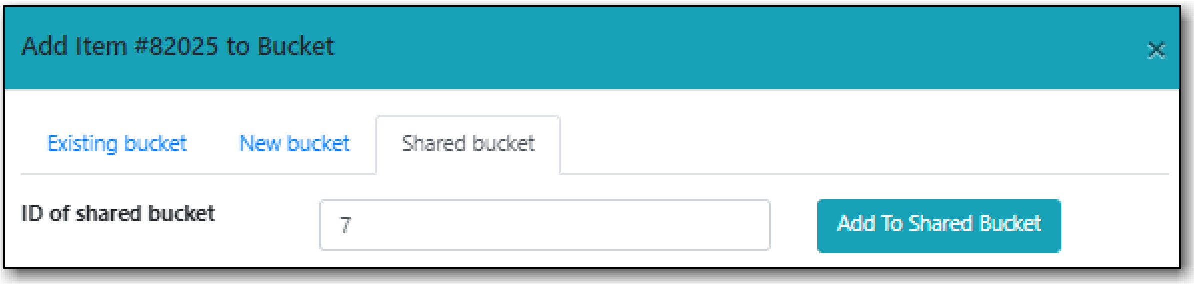
4. On the pop-up that appears records can be added to:
   - an existing bucket.



- a new bucket.



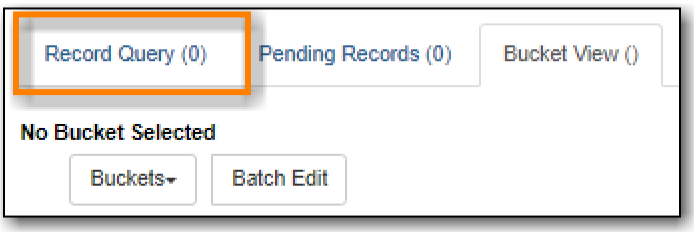
- a shared bucket.



5. Enter the required information and click the appropriate button.
6. The record is added to the record bucket.

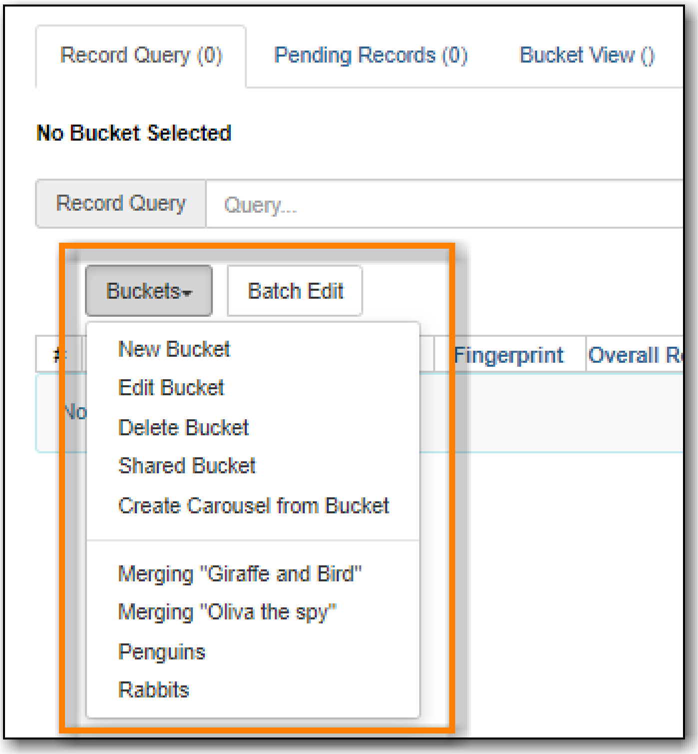
21.3.3. Adding Records to a Record Bucket via Record Query

1. Go to **Cataloguing** → **Record Buckets**.
2. Click on the **Record Query** tab.

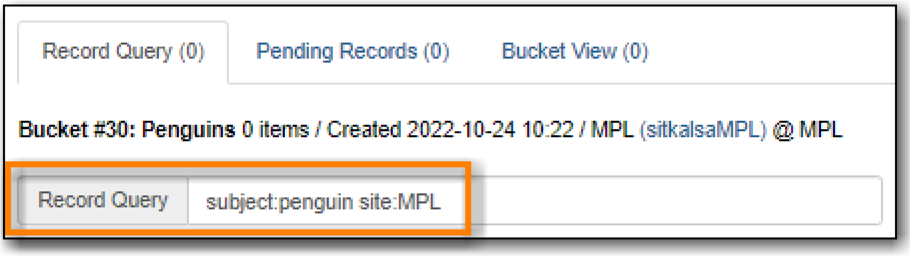


3. From the **Buckets** drop down menu select the existing bucket you'd like to work with, create a

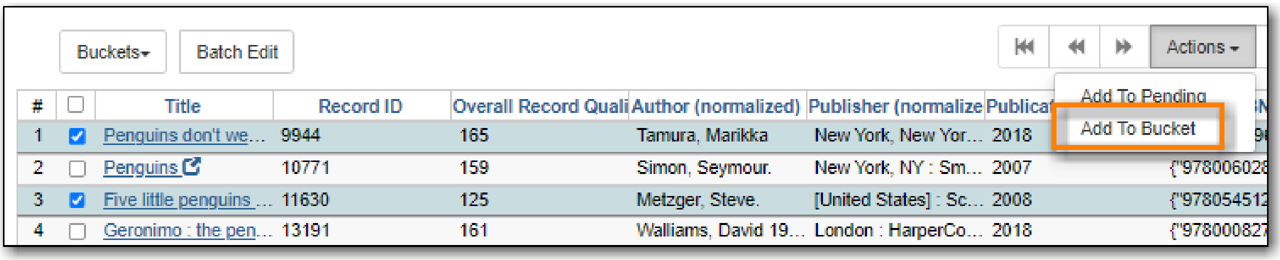
new bucket, or retrieve a shared bucket.



4. Type in your search term, then hit the **Enter** key to start the search.



5. Select the records you would like to add to your bucket and from the **Actions** menu choose **Add to Bucket**.



6. Continue searching and adding records to your bucket or click on **Bucket View** to go to your bucket.

TIP

Record Query 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
site	search at specified library, use the library shortcode.
	keyword, title, author, subject, and **series** support additional search subclasses, specified with a |. For example: title|proper:gone with the wind

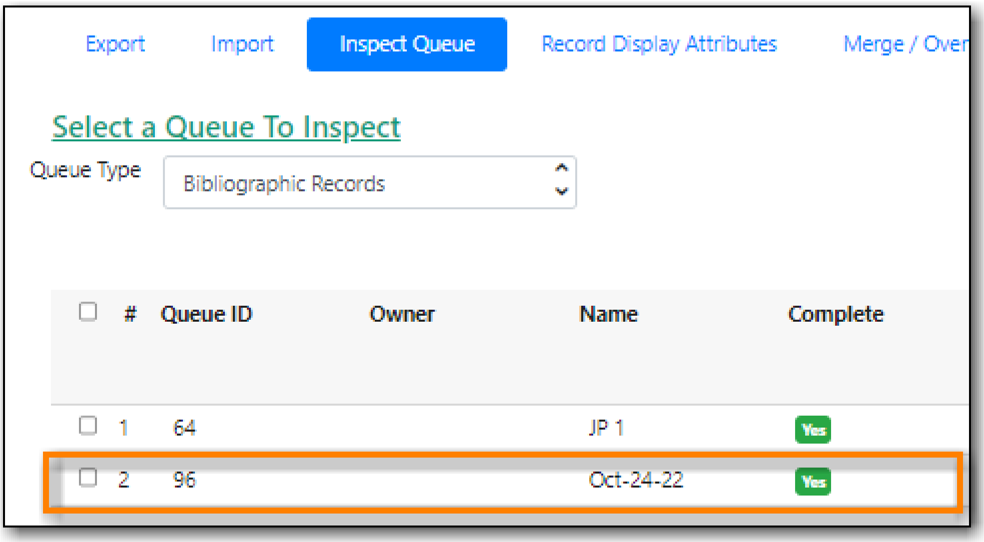
Examples:

- subject:penguin site:MPL
- title:Five little penguins site:MPL
- ti:Five little penguins site:MPL

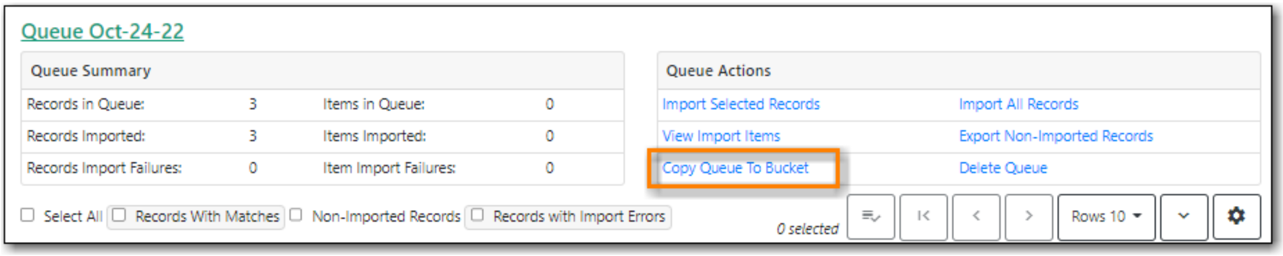
21.3.4. Adding Records to a Record Bucket via MARC Batch Import

MARC records that have already been imported via MARC Batch Import/Export can be added to a bucket.

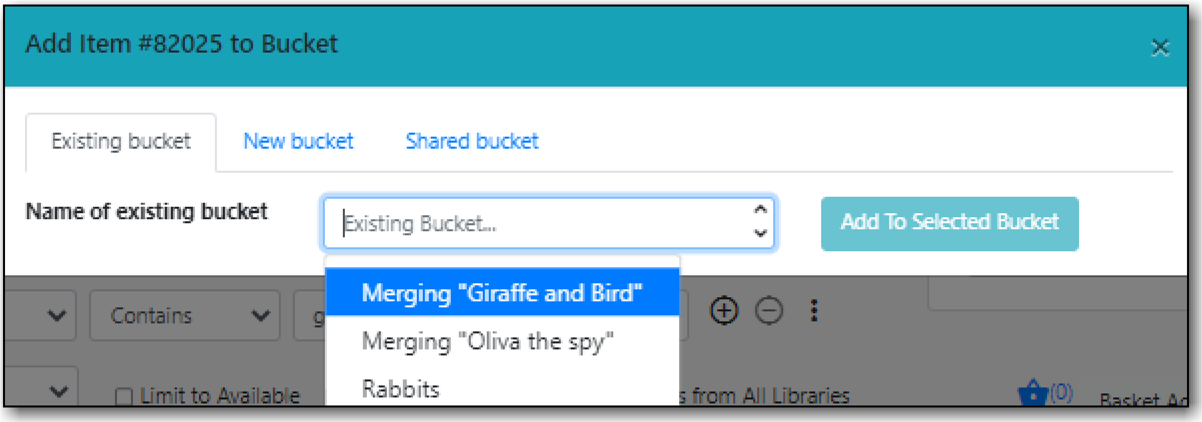
1. Go to **Cataloguing → MARC Batch Import/Export**.
2. Click on the **Inspect Queue** tab.
3. Double-click on the queue you'd like to open.



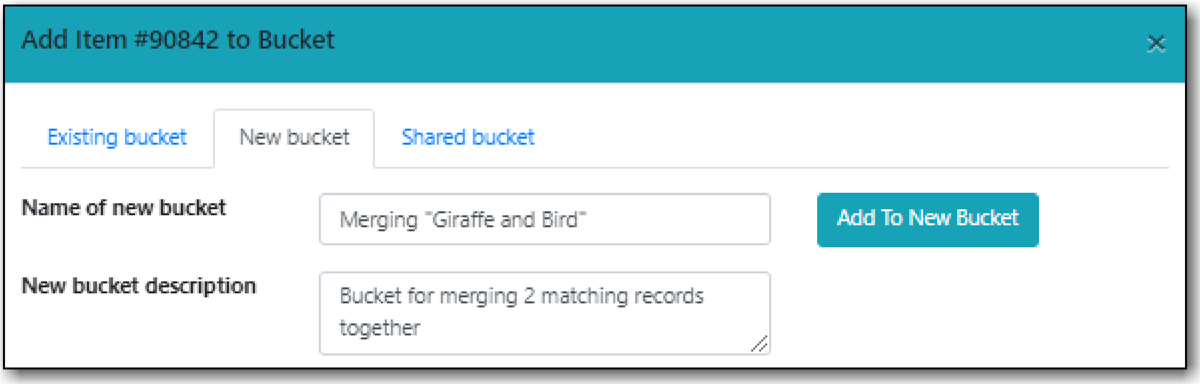
4. Click **Copy Queue to Bucket**.



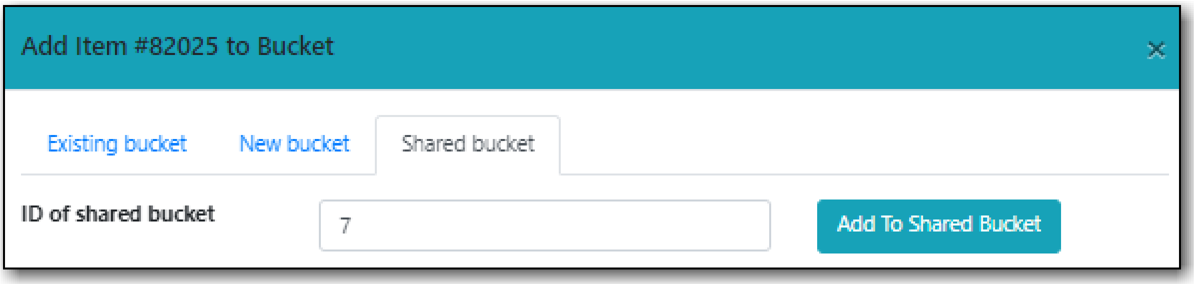
5. On the pop-up that appears records can be added to:
   - an existing bucket.



   - a new bucket.



   - a shared bucket.



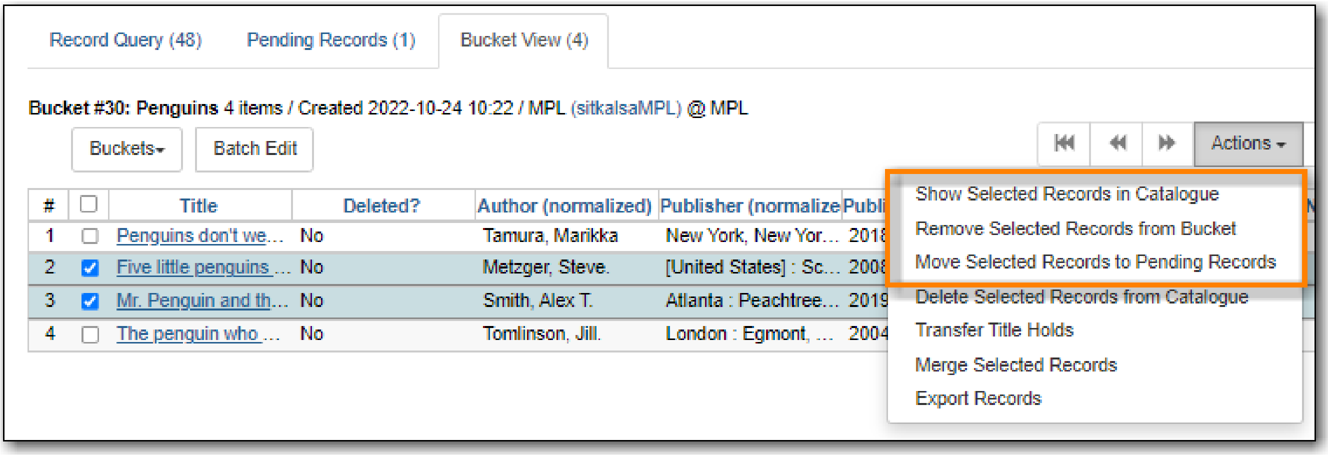
6. Enter the required information and click the appropriate button.
7. The record is added to the record bucket.

21.4. Working with Records in a Record Bucket

Once records have been added to a record bucket there are several functions that can be performed.

21.4.1. Managing Record Bucket Contents

Several options on the **Actions** menu allow staff to manage the contents of their bucket.



- Show Selected Records in Catalogue
  - This action will open the selected records in the staff catalogue in new tabs.

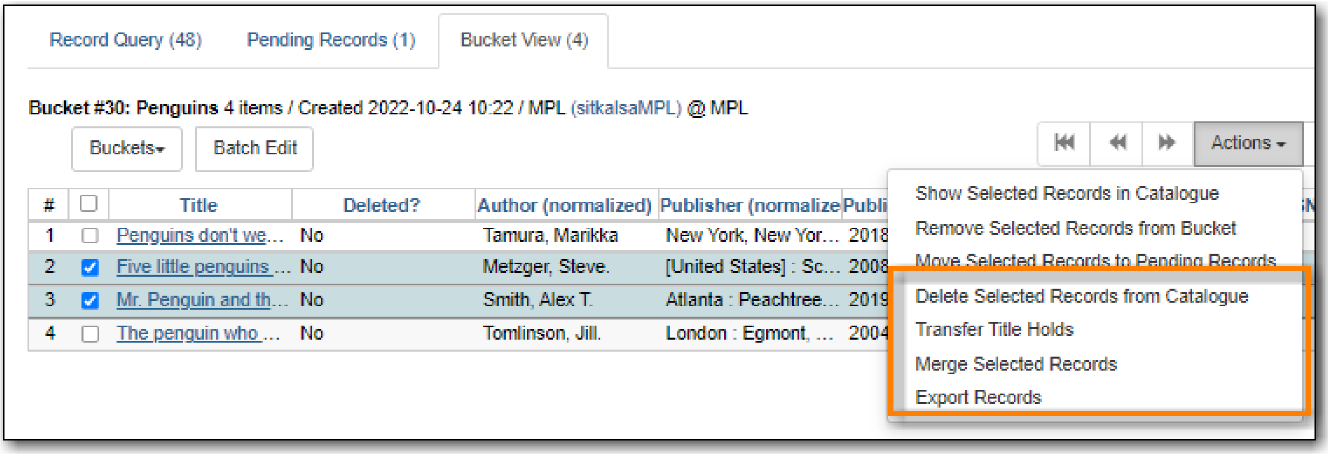
NOTE

If only one record opens your browser is blocking pop-ups.

- Remove Selected Records from Bucket
  - This action will remove the records from the bucket; this does not delete the records from the catalogue.
- Move Selected Records to Pending Records
  - This action will move the selected records to the **Pending Records** tab so they can be added to a different record bucket.

21.4.2. Managing Records in a Record Bucket

Several options on the **Actions** menu allow staff to manage the records in their bucket.



- Delete Selected Records from Catalogue
  - This action deletes the selected records from the catalogue.Records remain in a bucket after they are marked as deleted in the database.
  - See Deleting Records via a Record Bucket.
- Transfer Title Holds
  - This action should never be used as it will transfer title holds for all libraries.
  - See Transferring Title Holds for information on transferring title holds for your library.
- Merge Selected Records
  - This action allows staff to merge multiple records into a single record.
  - See Merging Bibliographic Records.
- Export Records
  - This action allows staff to export the records from a bucket.
  - See Exporting MARC Records via a Record Bucket.

NOTE

The Batch Edit function is not used by Sitka and library staff cannot use it to batch edit MARC records. The Batch Edit button exists in record buckets and will take staff to the MARC Batch Edit interface but permissions will prevent any batch edits. Please contact Co-op Support for assistance with batch editing.

Public Catalogue

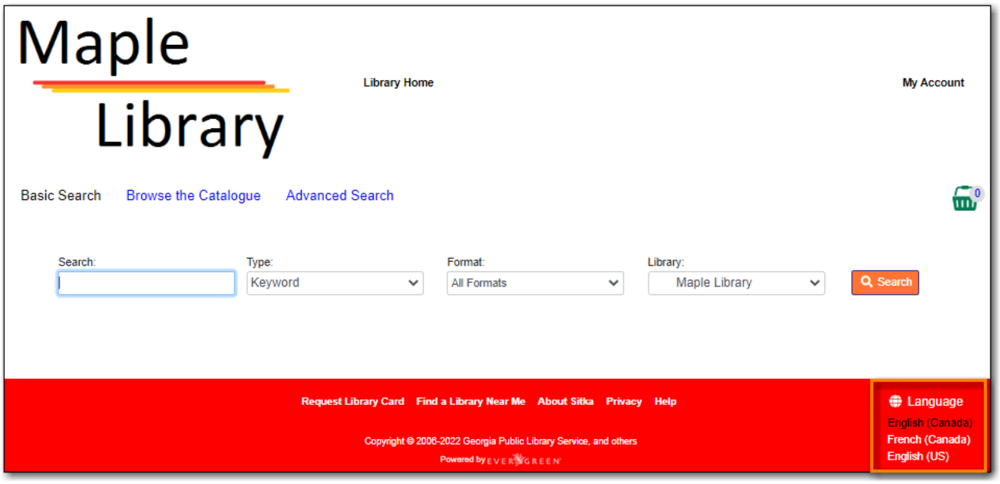
Chapter 22. Search the Public Catalogue

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 bottom-right allows your users to switch between English and French as desired.



NOTE

In order for a library's shelving locations to be translated in the public catalogue the library must first provide Co-op Support with a list of the library's shelving locations with the translations so the translations can be entered into Evergreen.

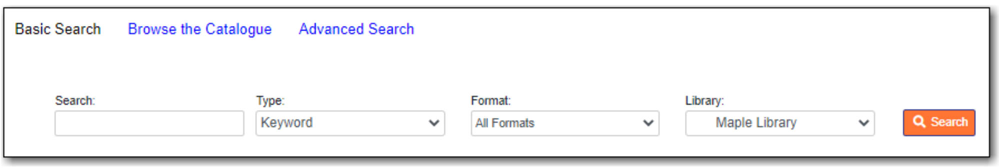
The generic public catalogue which searches all of Sitka is https://catalogue.libraries.coop.

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.

22.1. 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.

22.1.1. 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.

22.1.2. 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.

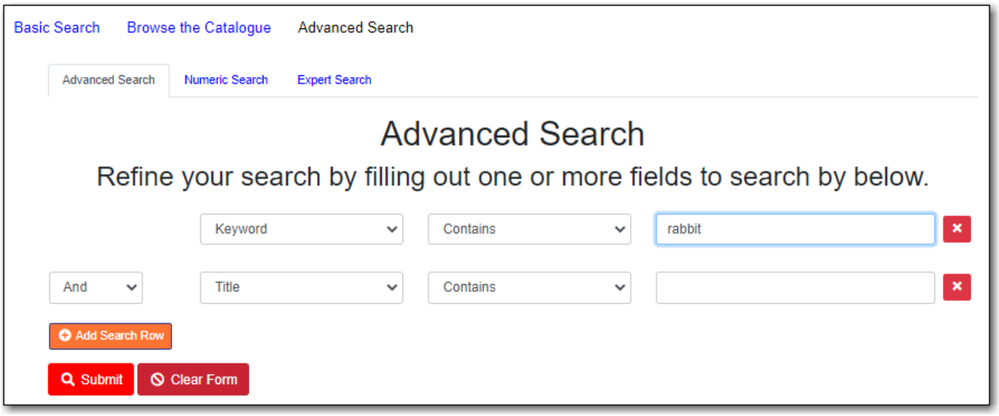
If your library has multiple branches, your search results will display items available at your branch and all branches of your library system separately. If your library participates in Interlibrary Connect resource sharing, the results may display items available across the larger borrowing zone.

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.

22.2. 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.

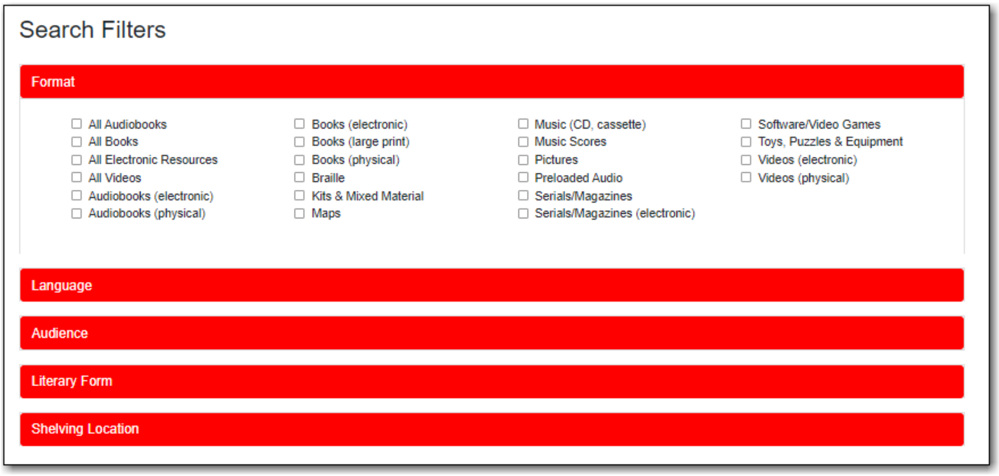


22.2.1. Search Filters

You can filter your search by:

- Format
- Language
- Audience
- Literary Form
- Shelving Location

Click on a filter bar to see the available options.



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.

22.2.2. 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.

22.2.3. Publication Year

For publication year you can filter for items published before, after, in-between, or during a particular 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.

TIP	The publication year filter relies on the values in characters 07-10 in the 008 field of the MARC record. Records with incorrect coding will not filter correctly.

22.2.4. Sort Results

By default, the search results are in order of greatest to least relevance. In the *Sort Results* box you may select to order the search results by relevance, title, author, publication date, or popularity.

For more information see Order of Results.

22.2.5. Exclude Electronic Resources

When the *Exclude Electronic Resources* checkbox is checked electronic resources are not included in the search results.

22.2.6. 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 print editions of *Pride and Prejudice* will appear together.

22.2.7. Limit to Available

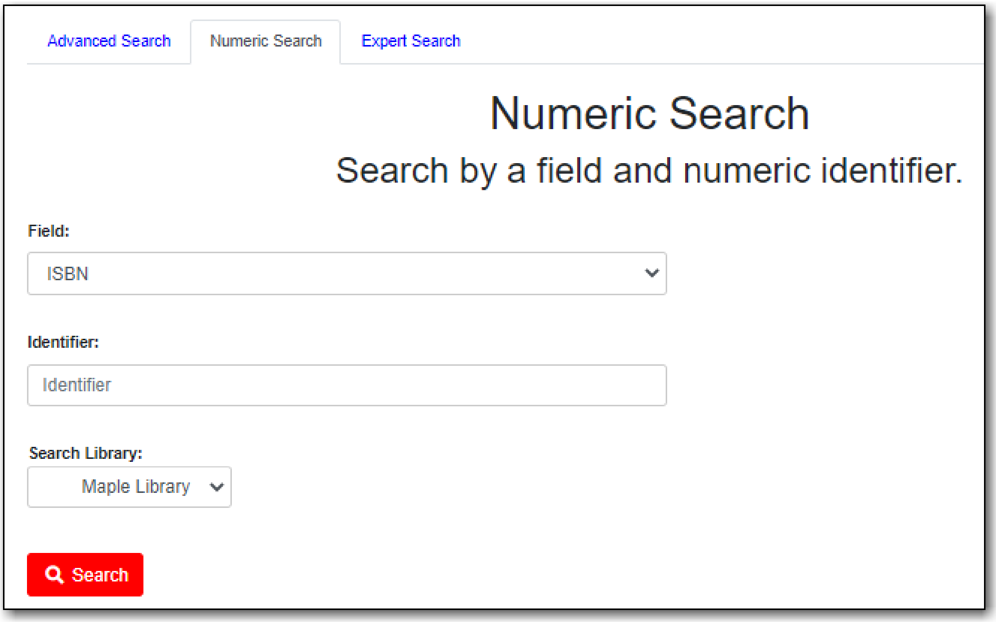
When the *Limit to Available* checkbox is checked search results are limited based on an item's current circulation status. Titles without available items in the selected search library will not be displayed.

Item statuses that show as available are: *Available*, *On Display*, *Onsite Consultation*, *Reserves*, and *Reshelving*.

22.3. 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**.



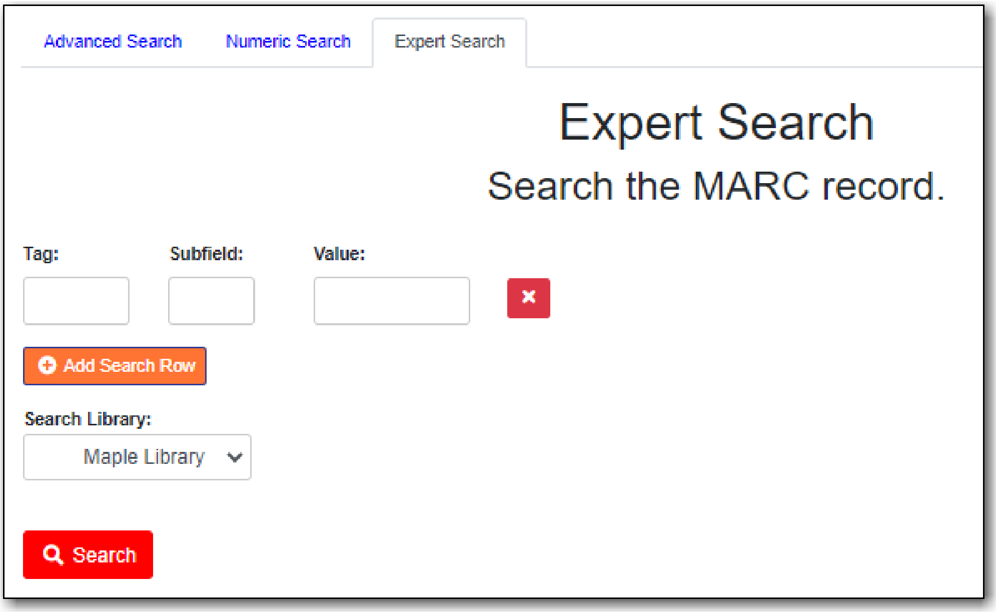
TIP Searching by Call Number will take you to the Shelf Browser.

22.4. 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.

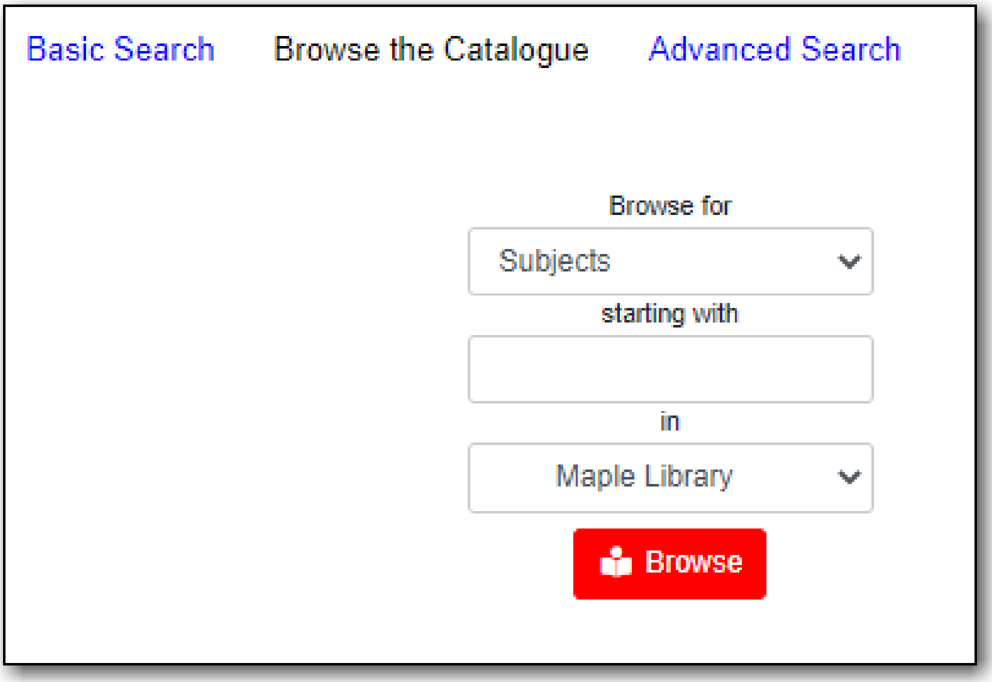
1. Enter the three-digit tag number, the subfield (if relevant), and the value or text that corresponds to the tag. For example, to search by publisher name, enter 264 b Random House.
   a. To search several tags simultaneously, use the **Add Search Row** button.
2. Click **Search** to run the search.



TIP The value in the MARC record must exactly match the value you enter as your search term or it will not be included in the results.

22.5. 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.

22.6. 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.

22.6.1. 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.

22.7. Search Methodology

22.7.1. 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 than 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*.

22.7.2. Truncation

Use the wildcard * (asterisk) at the end of the word to truncate search term.

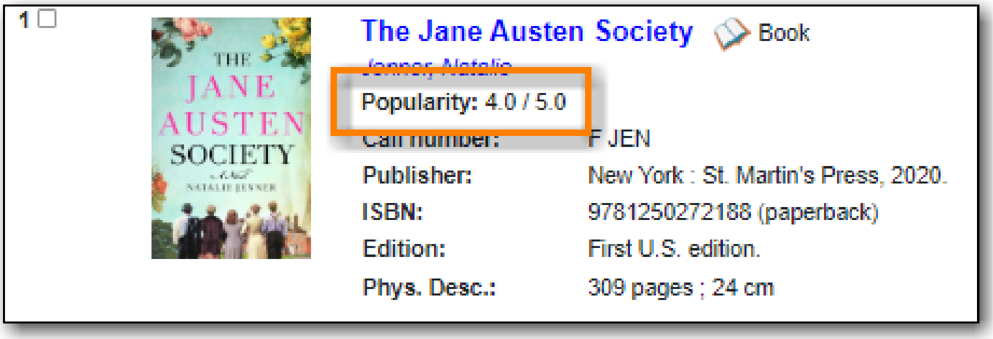
22.7.3. Order of Results

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.

22.7.4. 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.

22.8. 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. The checkbox **Disable Highlighting** will turn this off.

Information about the title, such as author, edition, publication date, call number, shelving location, status, etc., is displayed under each title. The icons beside the title link indicate formats such as books, audiobooks, video recordings, and other formats.

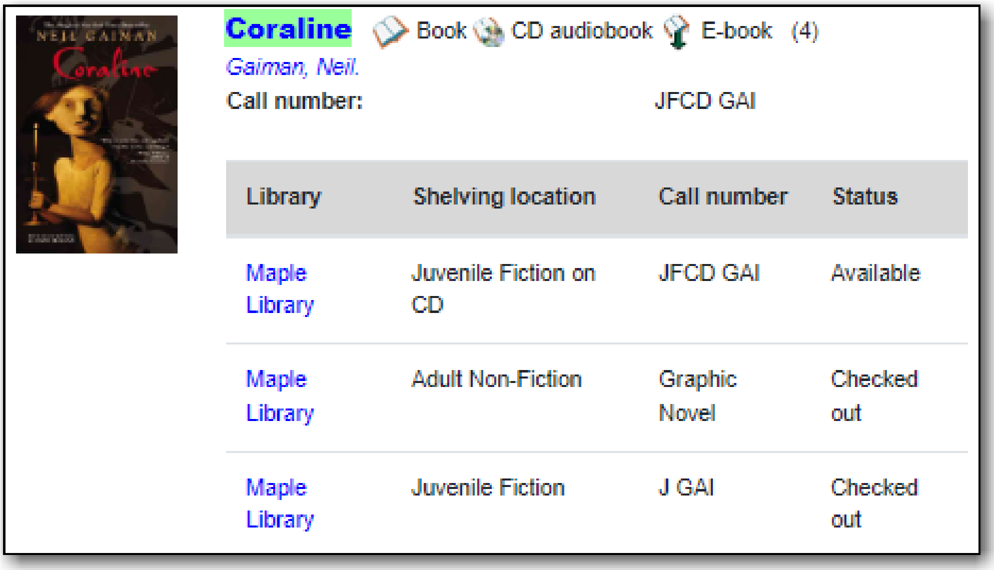
Clicking a title goes to the title details. Clicking an author searches all works by the author. If you want to place a hold on the title, click **Place Hold** to the right of the title information.

Above the results list there are *Limit to Available*, *Group By Formats and Editions*, 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 *Group By Formats and Editions* will group all formats and editions of the same title as one result. 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 above the checkboxes. Clicking an entry on the list will re-sort your search results accordingly.

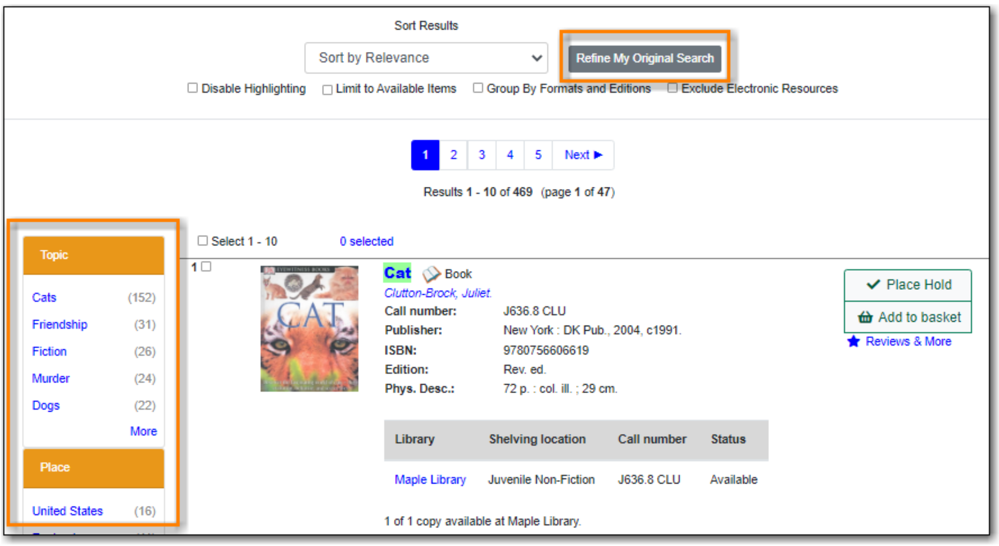
22.8.1. Formats and Editions

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.



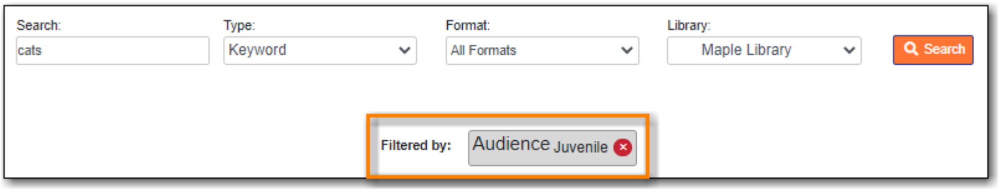
22.8.2. Refine Your Search

You may refine your search results by using the facets. Selecting one of these facet links on the left side of search results page narrows down the search results to your selected term. You may also refine your search by clicking the **Refine My Original Search** button 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.



22.8.3. Expand Your Search

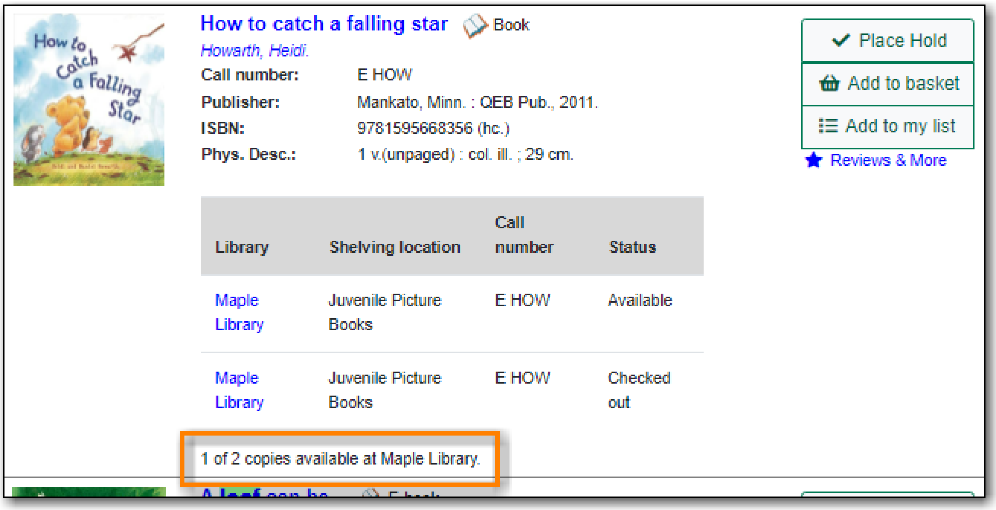
You may expand your search results by removing search limiters that you applied in your initial search. You can remove a limiter by clicking on the *X* beside it.



22.8.4. Availability

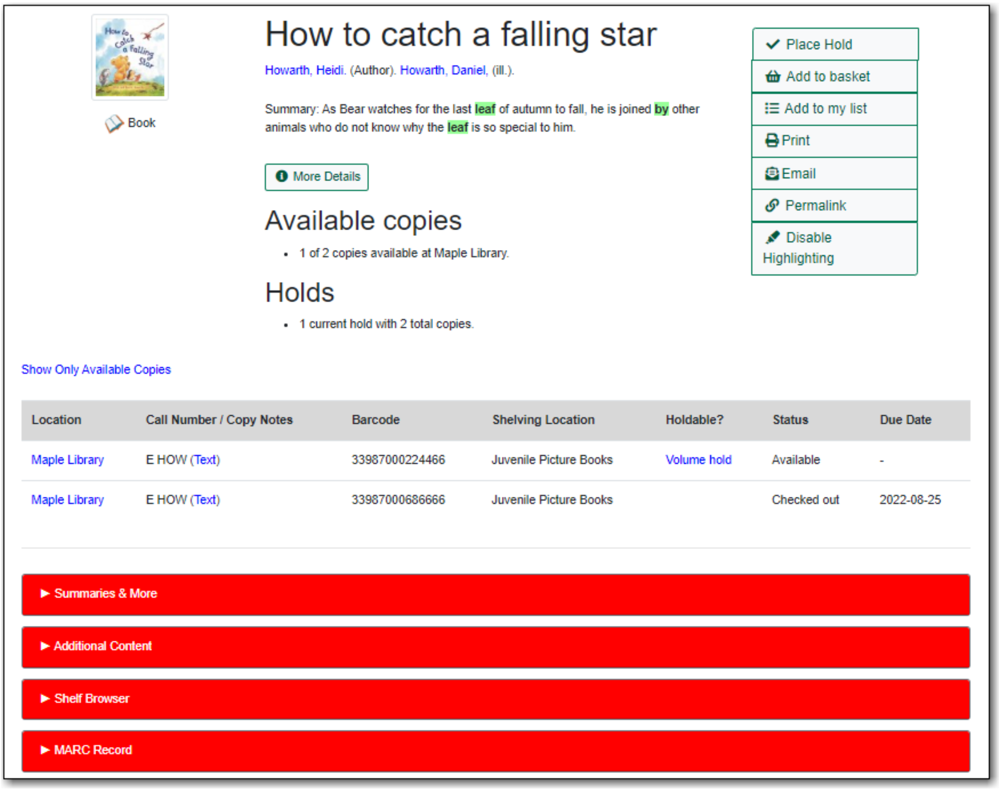
The number of available copies and total copies are displayed below the title details.

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.



22.8.5. View a Title Record

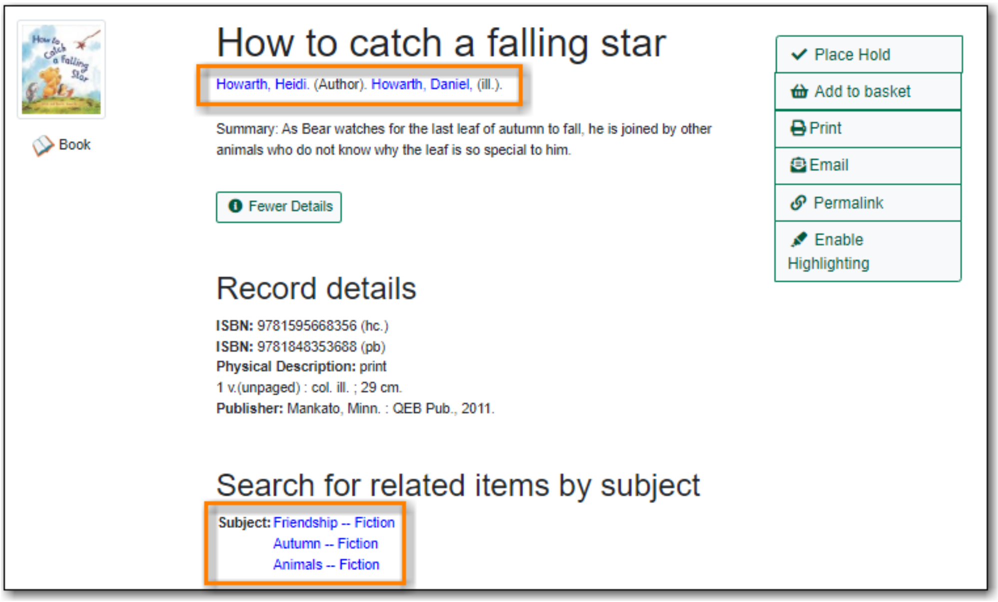
Click on a title to view a detailed record of the title, including descriptive information, location and availability, and options for placing holds.



- Click **More Details** to see more bibliographic details including subjects.
- Click **Show Only Available Copies** to limit view to available items of that title. Click **Show All Copies** to see all items.
- Click **Text** beside the call number to send the item's call number by text message.
- Click the library name to see details about the library such as address and open hours.
- Click **Summaries & More** to see the book's summaries and reviews, if available.
- Click **Additional Content** to see any additional content for the title.
- Click **Shelf Browser** to view items appearing near the current item on the library shelves.
- Click **MARC Record** to display the record in MARC format.
- Click **Awards, Reviews, & Suggested Reads** to see additional information including read-alikes. This will only appear as an option if your library subscribes to a 3rd party service which provides this content.

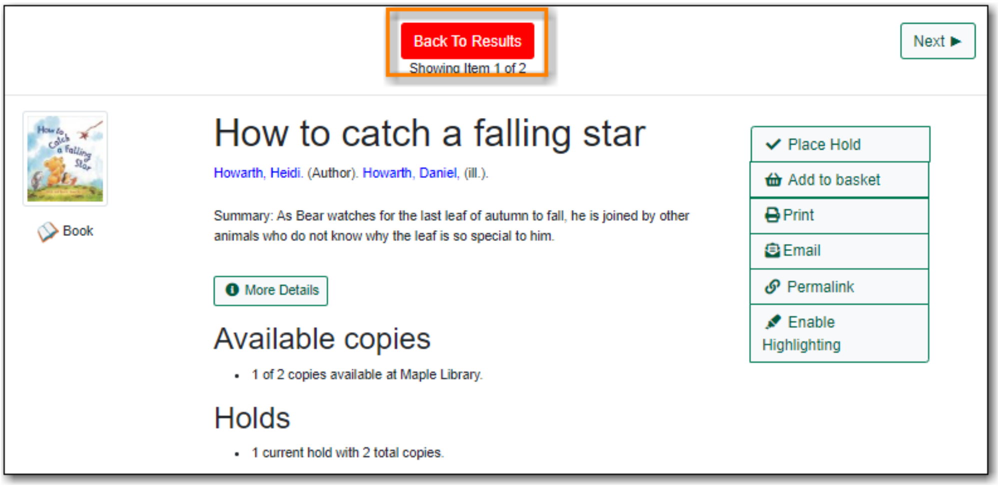
22.8.6. Search Additional Items by Author, Subject or Series

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.



22.8.7. Go Back

When you are viewing a specific record, you can always go back to your title list by clicking the **Back to Results** button.



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 **Basic Search**, **Browse the Catalogue**, or **Advanced Search** links at the top of the search results page.

Chapter 23. Public Catalogue Holds

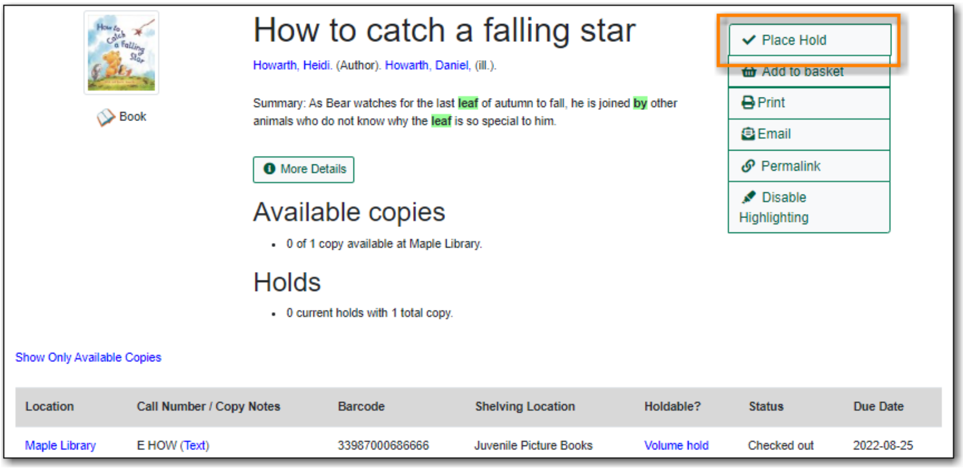
Holds can be placed for a particular title or a specific volume through your public catalogue.

Available items will appear on the library's holds pull list. If the item is not available, the patron is placed on a waiting list and notified when the item become available.

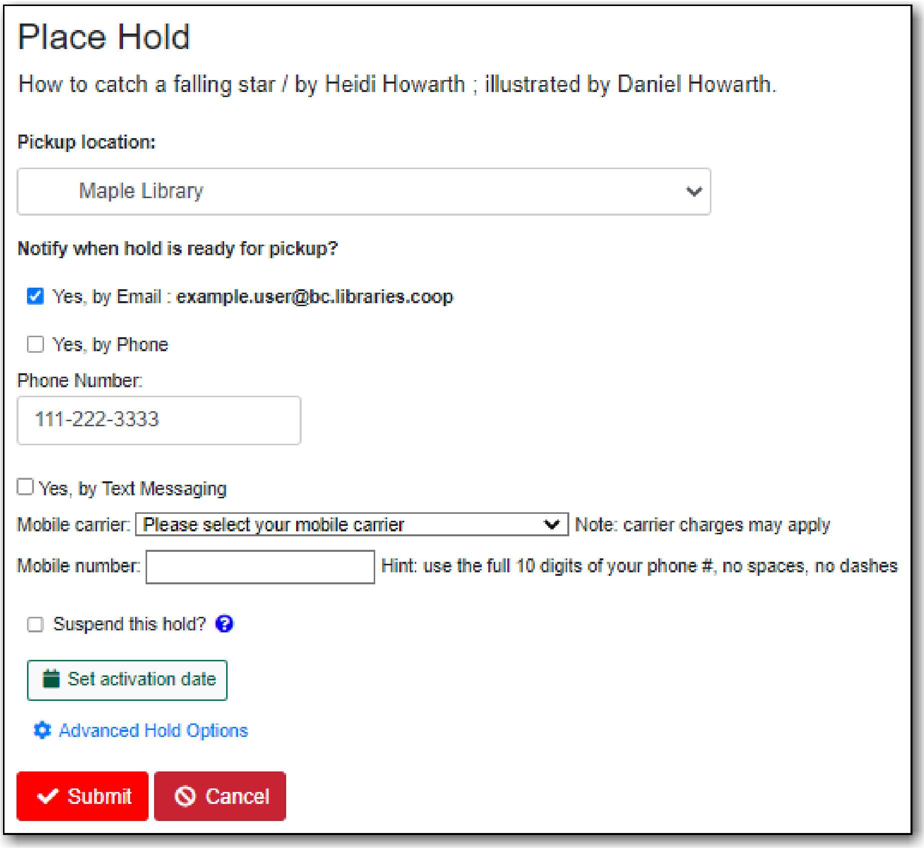
NOTE Some libraries do not allow holds to be placed on available items.

23.1. Placing Holds

1. Click the **Place Hold** button to the right of the record on the search result list, or on the record summary screen.



2. You will be prompted to log in with your library account, if you have not already done so.
3. If your library is multi-branch, or participates in reciprocal borrowing, you can choose the pickup location.
4. Choose the method of notification. The notification method will be selected automatically if it is set in account preferences, but can be overridden on this screen.
   a. 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.



5. Click **Submit**. A message will appear either confirming the hold was successfully placed or indicating that the hold could not be placed.

6. You can view and cancel your holds at anytime through *Holds* in *My Account* and can edit, suspend, or activate your holds until they are captured for pick up.

23.2. 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.

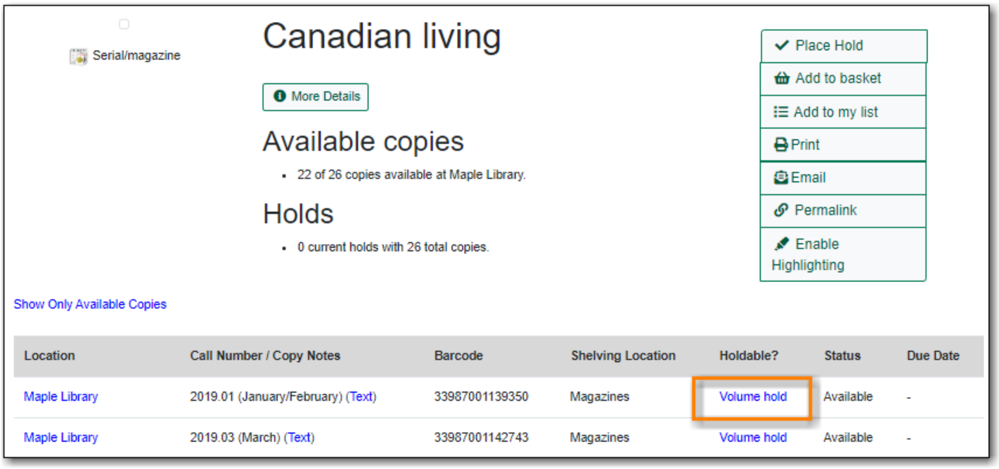
Problem: All available copies are temporarily unavailable at your pickup library. Placing this hold could result in longer wait times. - This indicates that the item is under age-based hold protection set through the Holdings Editor and cannot currently fill holds at your library. If you override and 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.

23.3. Additional Hold Options

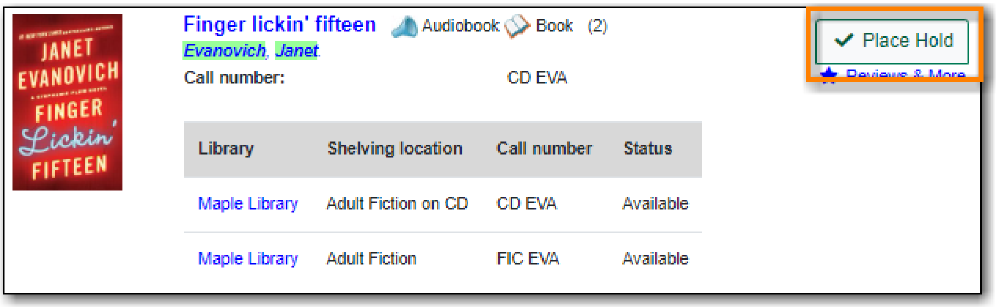
23.3.1. Volume/Issue Holds

If you want a specific issue of a magazine or a specific DVD in a set, select **Volume Hold** in the item details grid.

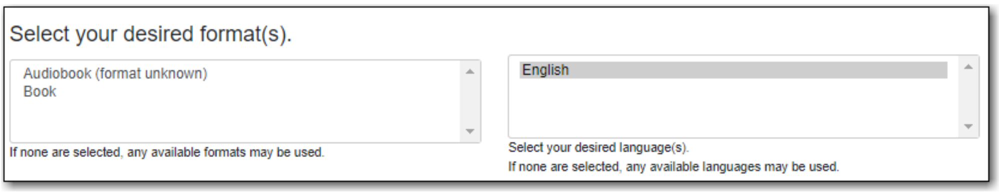


23.3.2. Placing Holds on All Formats of the Same Title

If *Group Formats and Edition* is selected when doing a search, you can place a hold on all formats and editions of the title by clicking **Place Hold** to the right of the search result.



Select the acceptable formats on the *Place Hold* screen.

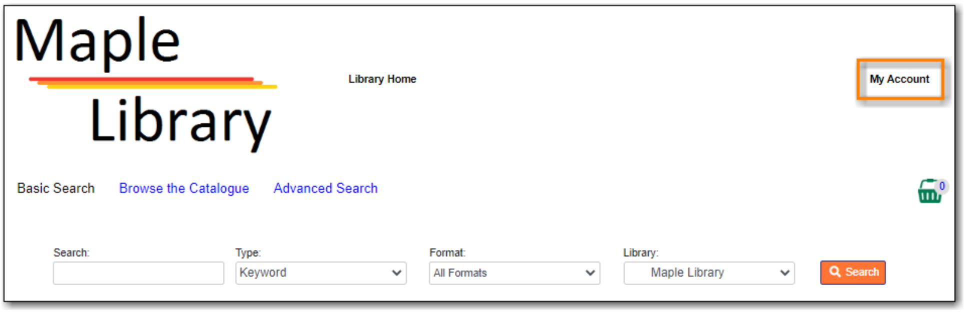


Chapter 24. My Account

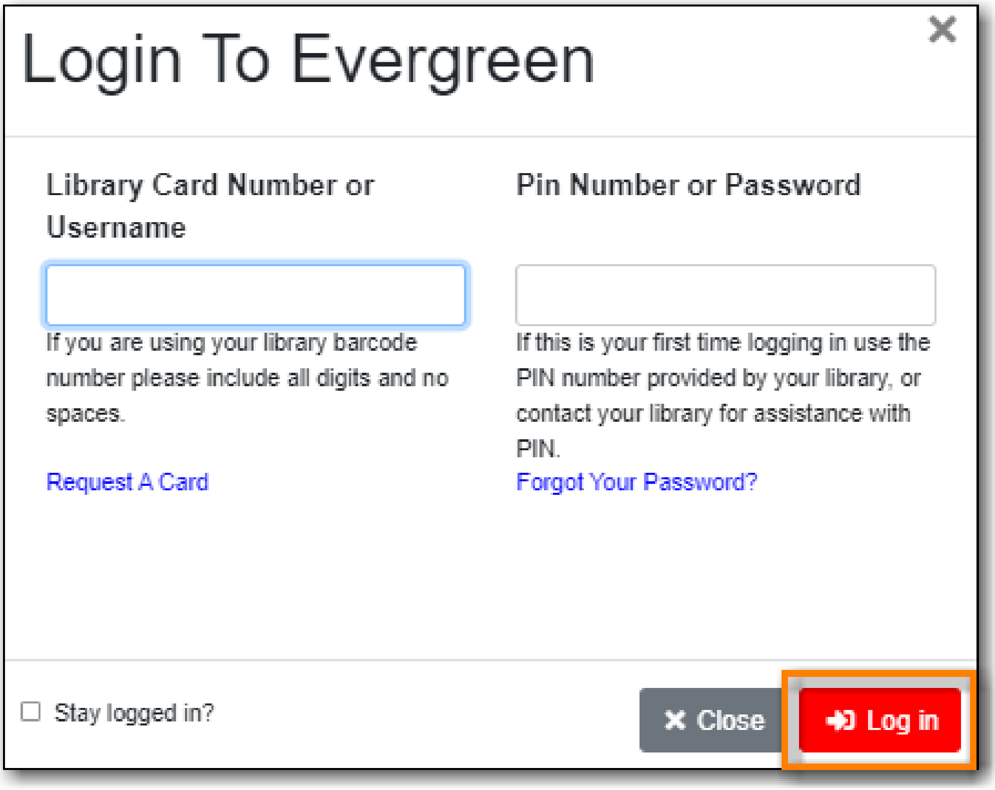
Patrons and staff can access information about their account from any page in the public catalogue by clicking the **My Account** link at the top right of the page. Account information includes contact information, items checked out or on hold, fines, account preferences, notes left by the library (if 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.

24.1. 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 likely 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 **Log in**.



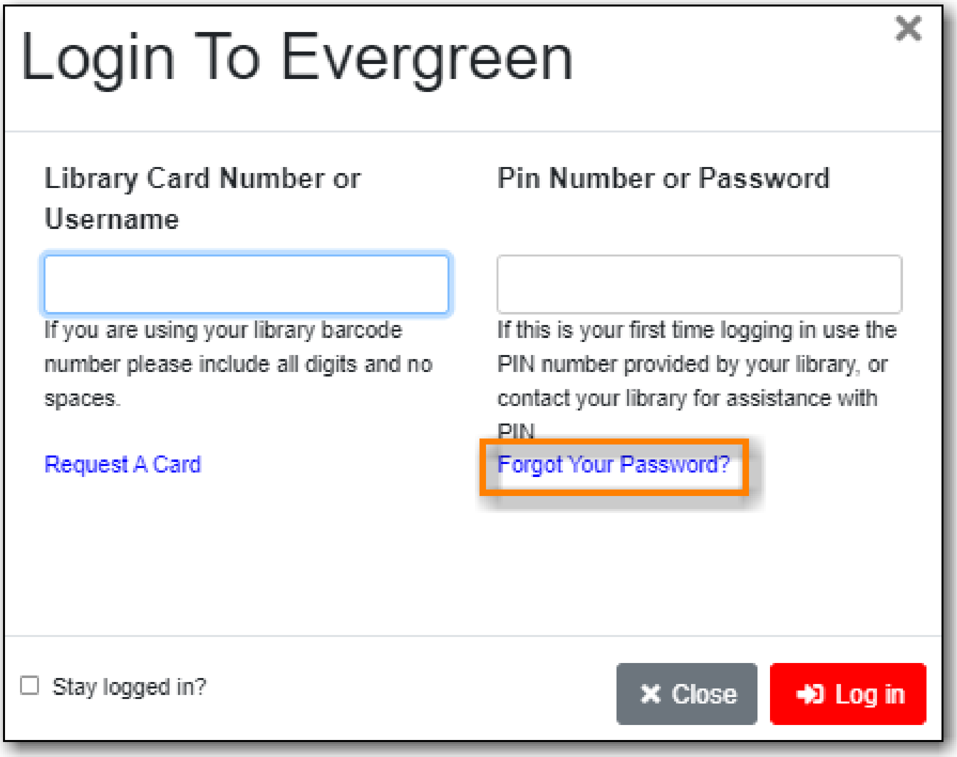
NOTE All patron and staff accounts in Evergreen can access *My Account* through the public catalogue.

24.2. Resetting Your Password

Sitka Snippet Video - Resetting a Forgotten Password (2:09)

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.

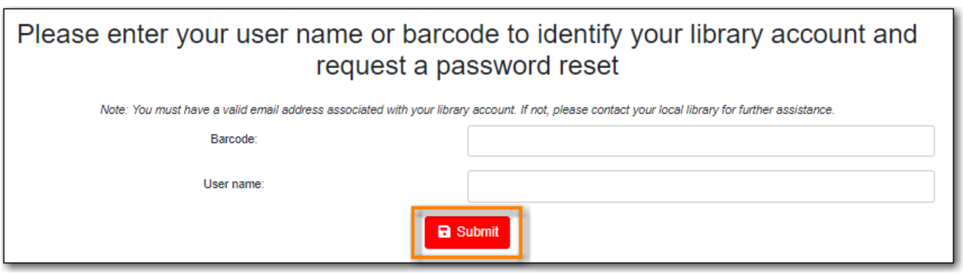
1. Click on the **Forgot Your Password?** link.



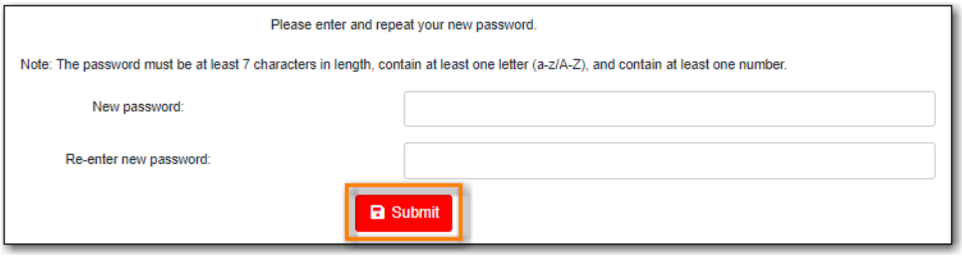
2. Enter your username or barcode into the appropriate field.

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 and click **Submit**.



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.

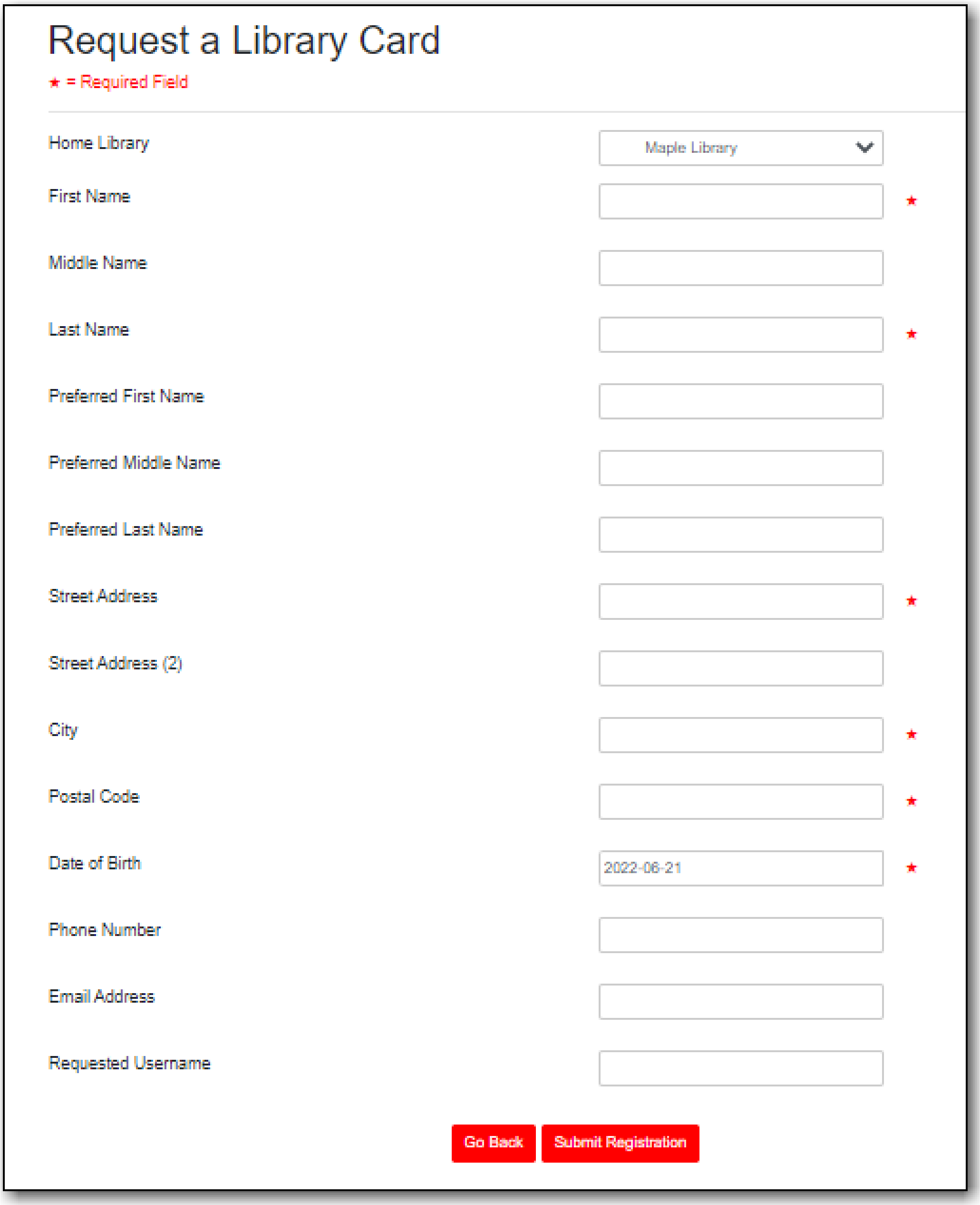
24.3. Request a Library Card

If your library allows self-registration, prospective patrons can request a card through your public catalogue.

1. In the footer of the public catalogue, click on the **Request Library Card** link.

2. Fill out the 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.

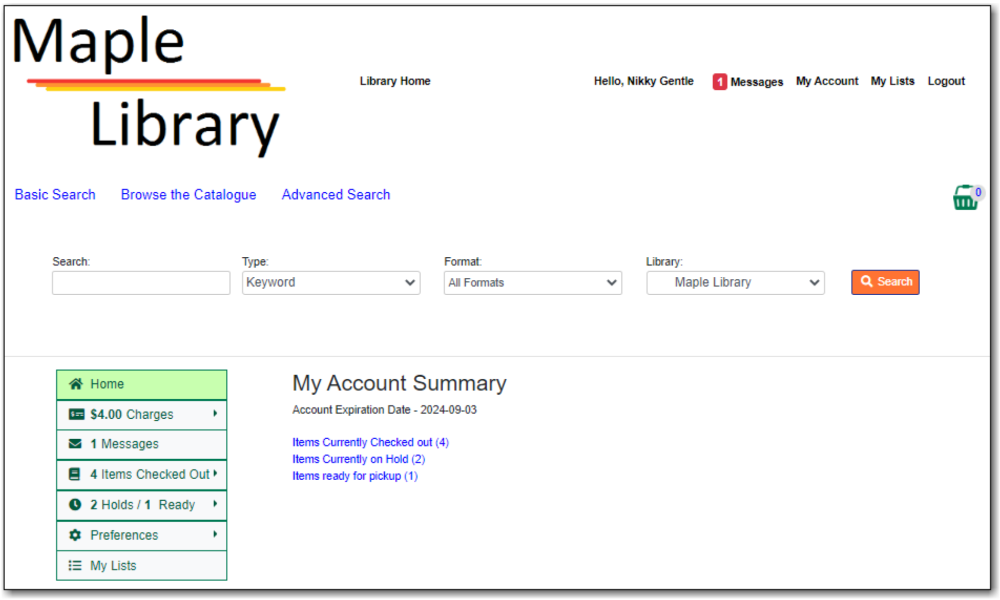


4. A pending patron will be created in Evergreen. See Managing Pending Patrons.

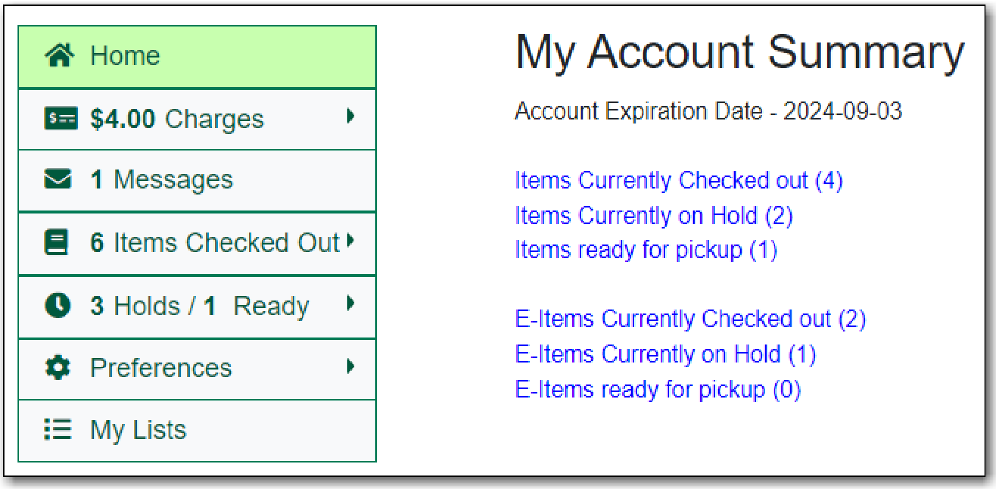
NOTE The patron self-registration form shares settings with the staff client registration form. See Customizing the Display Fields for information on customizing which fields display and which fields are required.

24.4. 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 menu option.

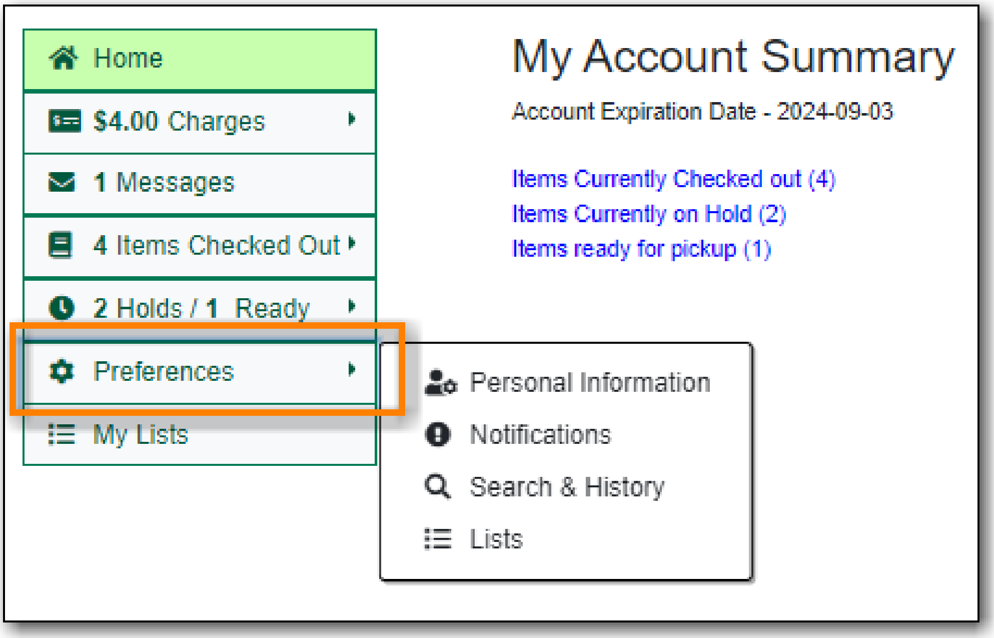


If your library subscribes to Overdrive additional information will display.



24.5. Account Preferences

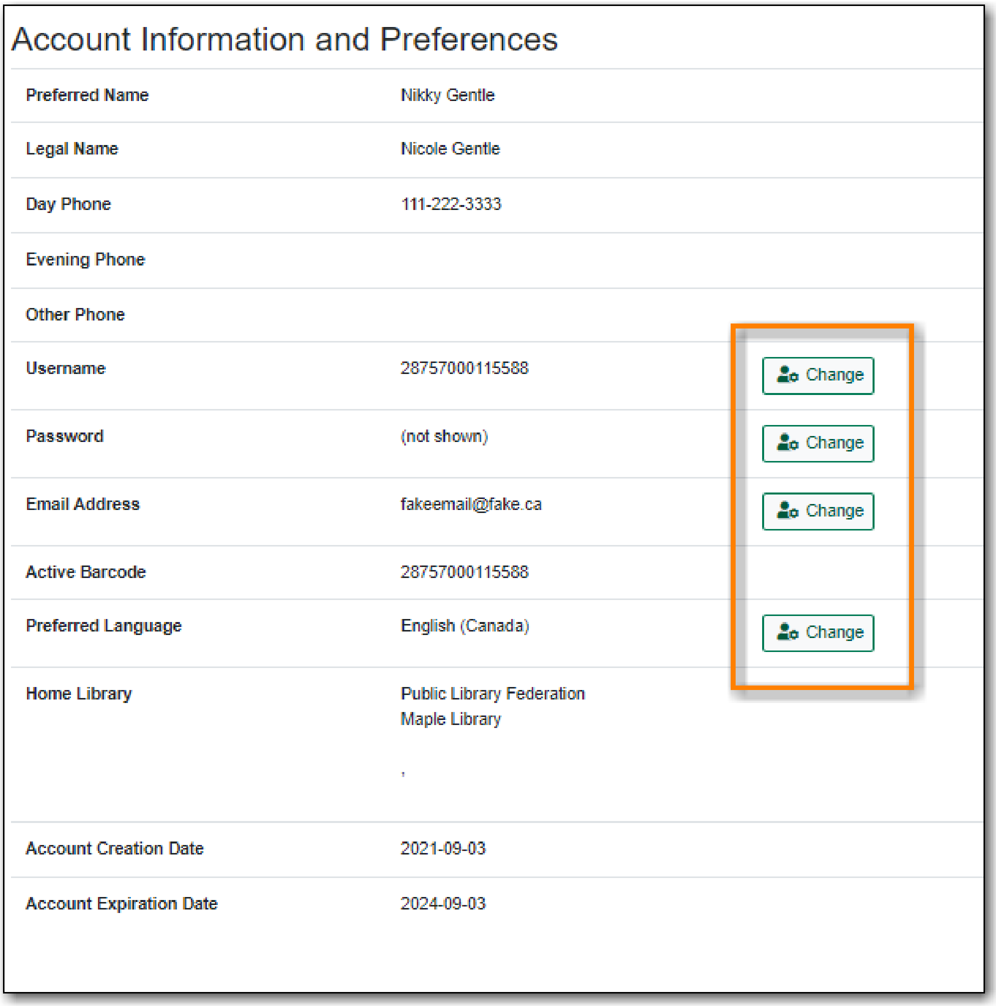
Click **Preferences** to access your preferences.



24.5.1. Personal Information

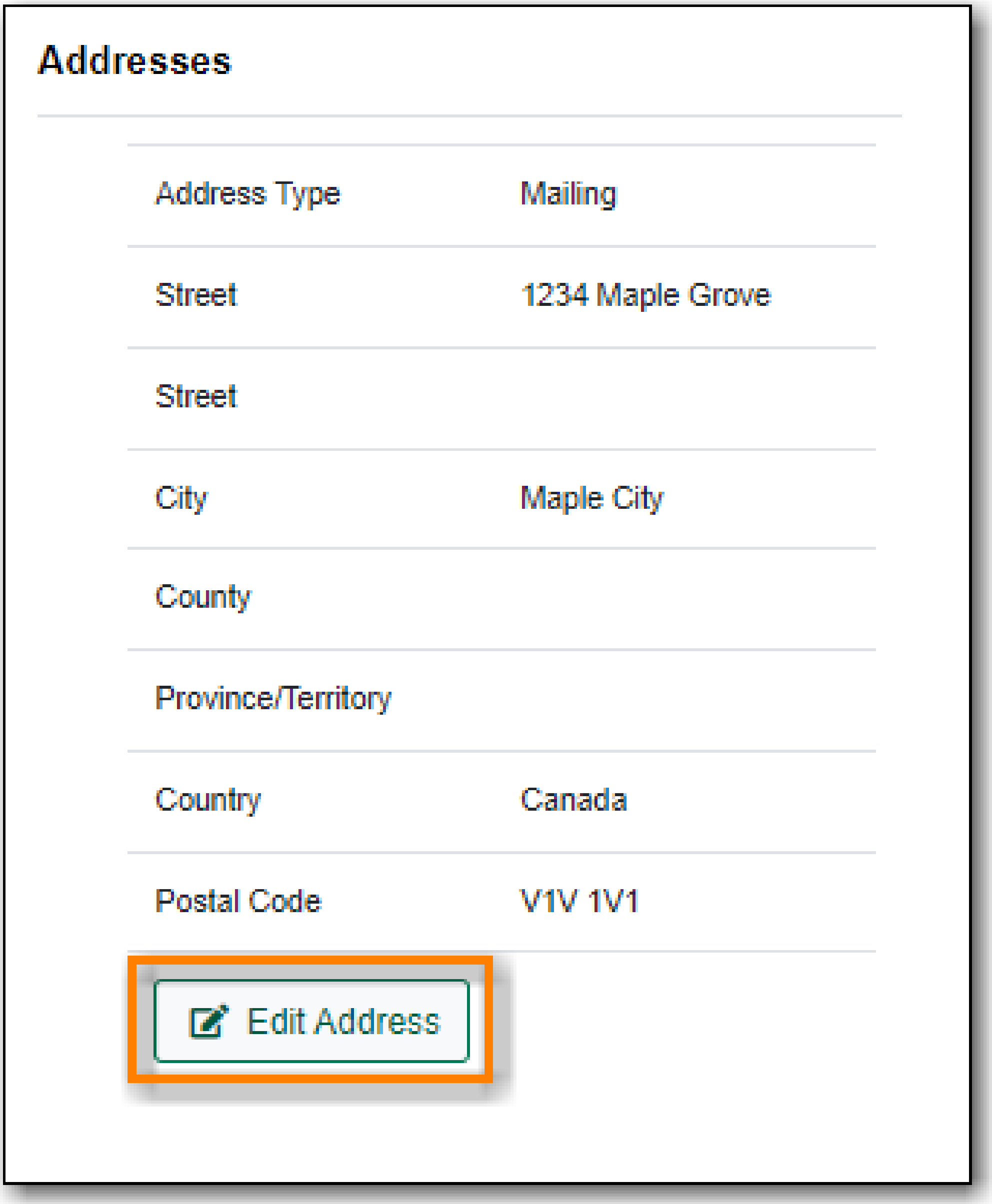
You can change your username, password, email address, and preferred language in *Personal Information*. Libraries using single sign-on or other 3rd party password services may restrict editing of some of these fields.

Click the **Change** button next to the information you'd like to update.



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. This is controlled by the library setting *Allow pending addresses*. Library staff will verify it and update your account.



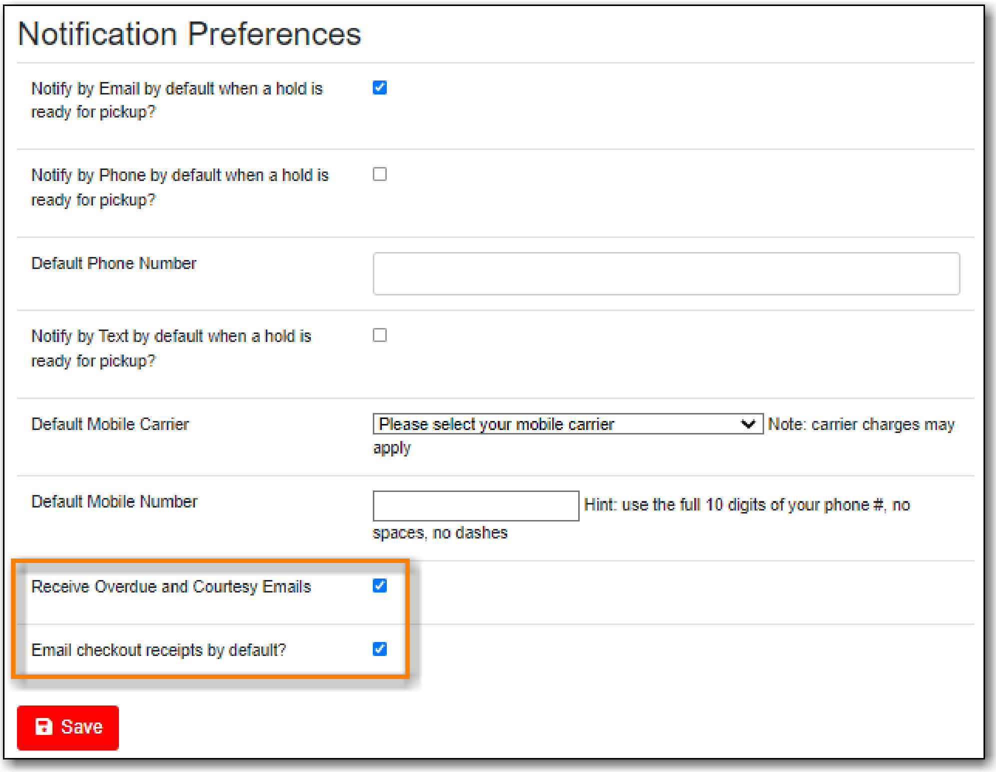
If you need to make a change to other information, such as your phone number, please contact your local library.

24.5.2. Notification Preferences

Notification Preferences is where you set your preferences for holds notification. You can choose to be contacted by email, phone, or text message.

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* .



24.5.3. Search and History Preferences

Search and History Preferences is where you configure settings around search results, history, and allowing others access to your account.

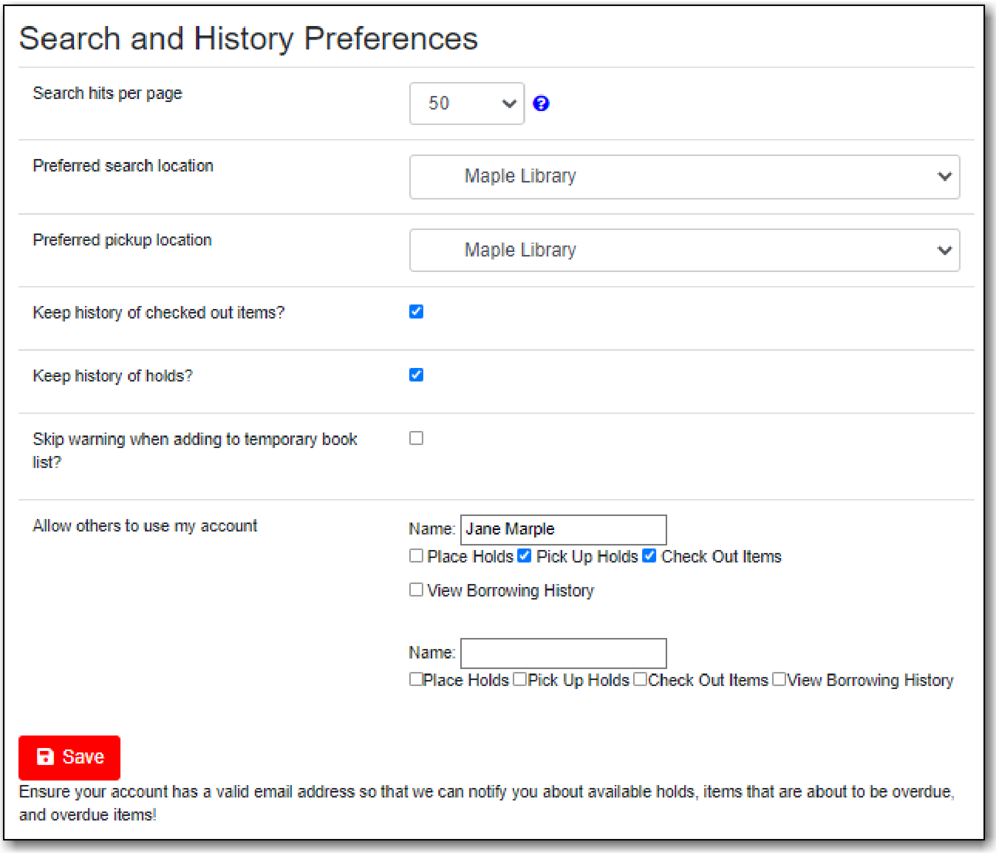
You can select how many search results are displayed per page on your catalogue searches as well as your preferred search location if your library is a multi-branch system or part of a larger borrowing zone.

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.

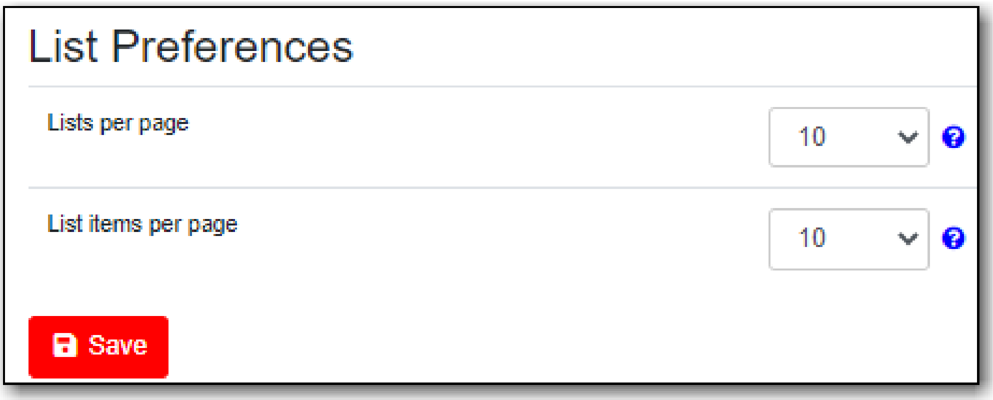
You may also choose to disable a warning about adding items to a temporary list.

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.



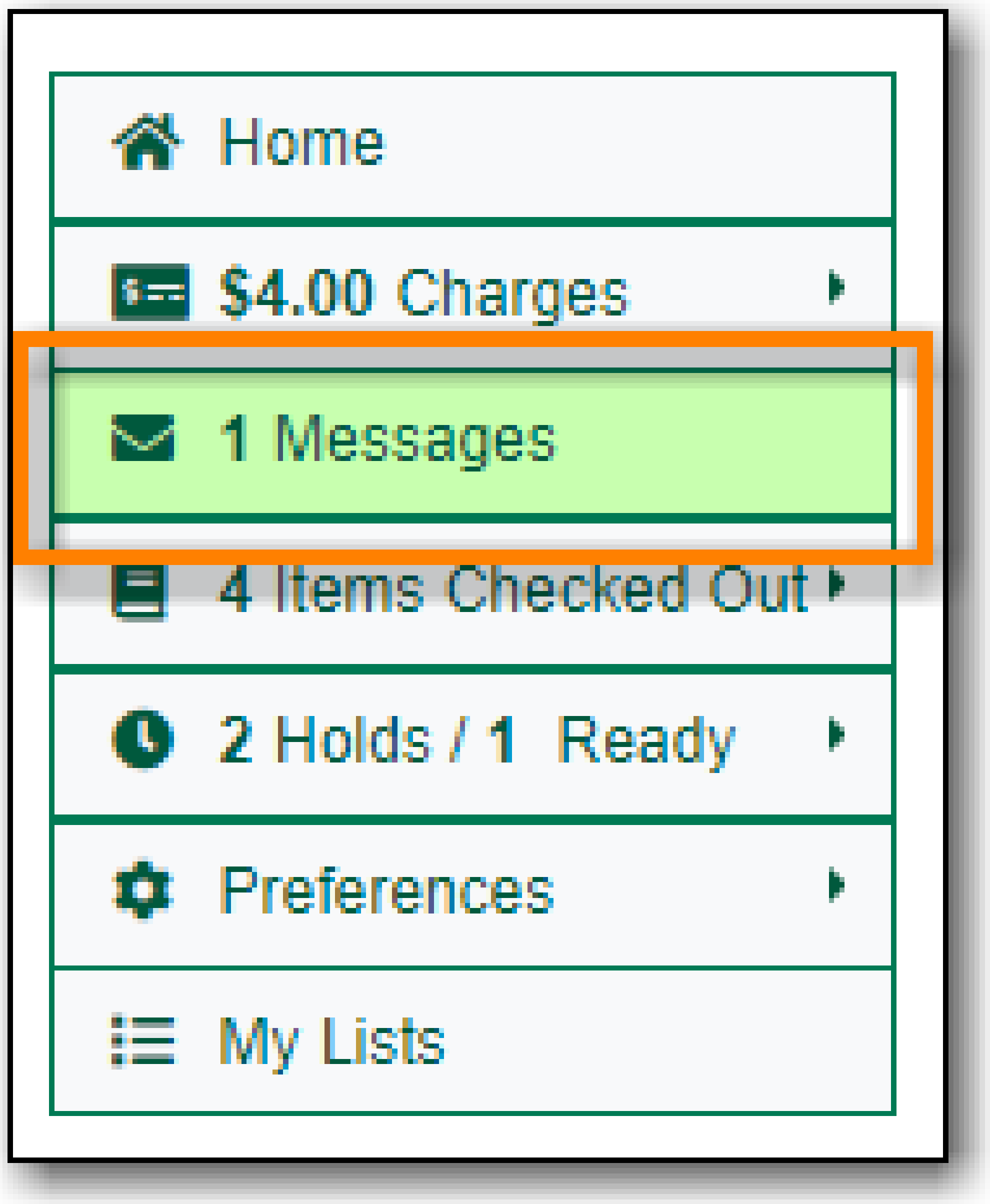
24.5.4. My Lists Preferences

My Lists Preferences 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.

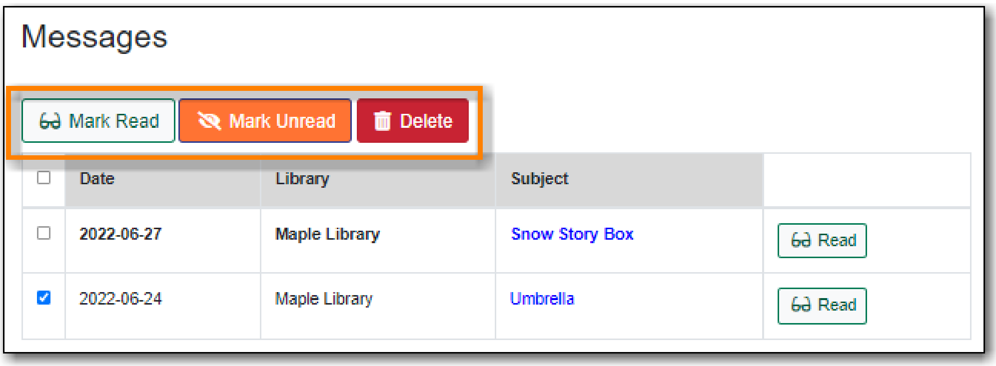


24.6. Messages

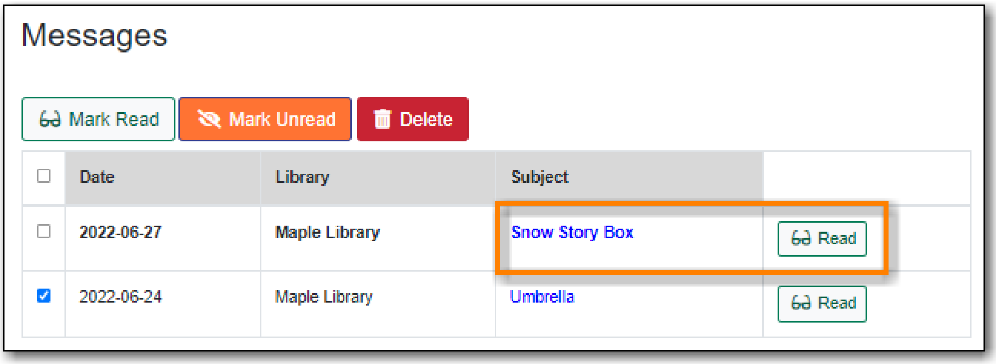
In *My Account* click **Messages** to display any messages library staff have added to your account.



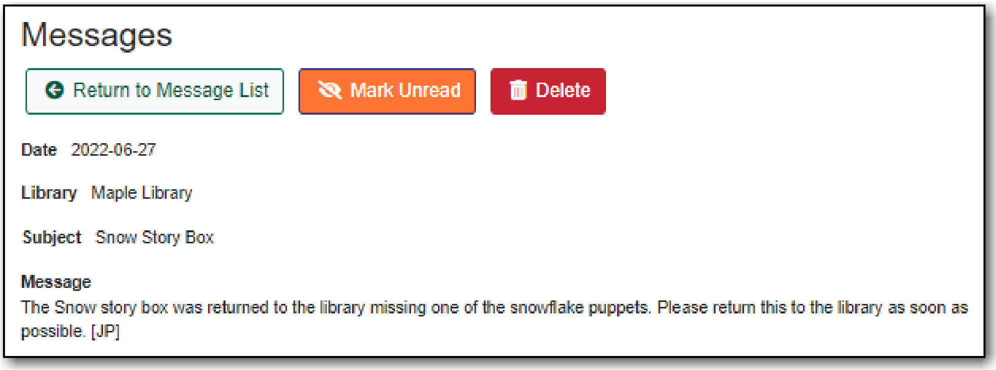
You can set messages to read or unread, or delete them by selecting the message(s) and then choosing the appropriate button.



Unread messages display in bold. Click on the **Read** button or the subject to read the message.



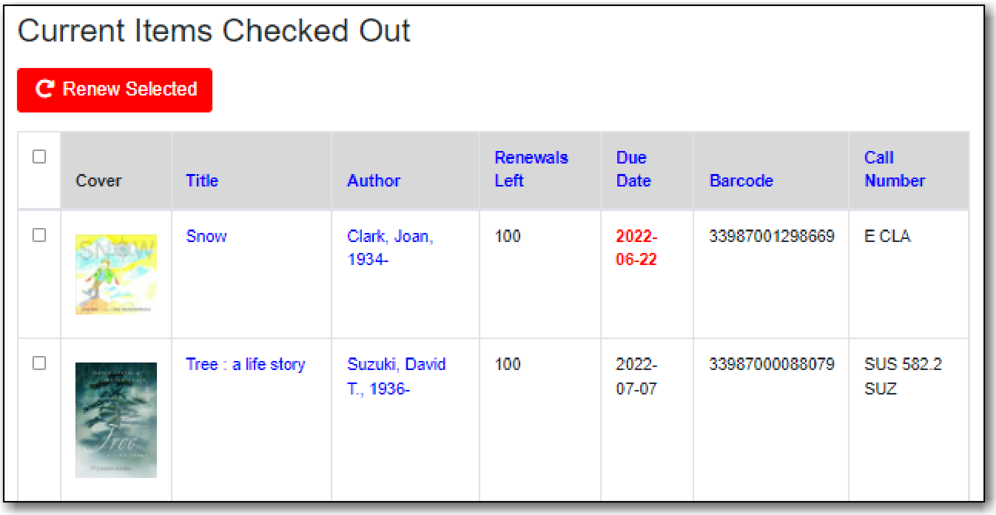
The message will display.



24.7. Items Checked Out

24.7.1. Current Items Checked Out

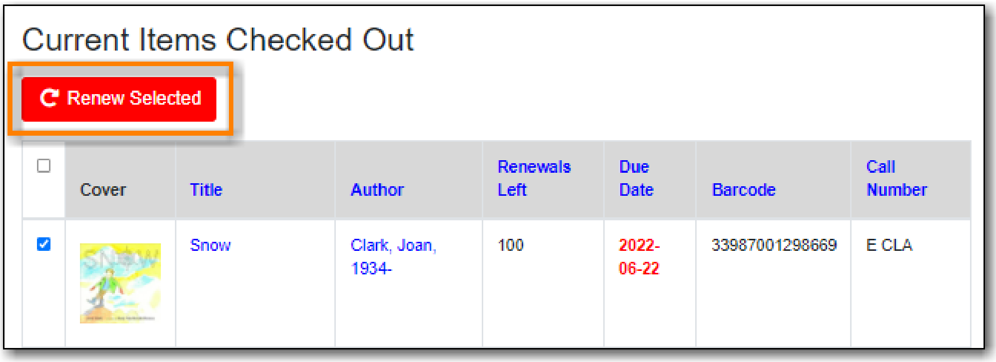
In *My Account* click **Items Checked Out** → **Current Items Checked out** to display all of the items you currently have checked out.



By default the list will sort by due date. The due dates for overdue items will be indicated in red.

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 in ascending order and a second click sorts the list in descending order.

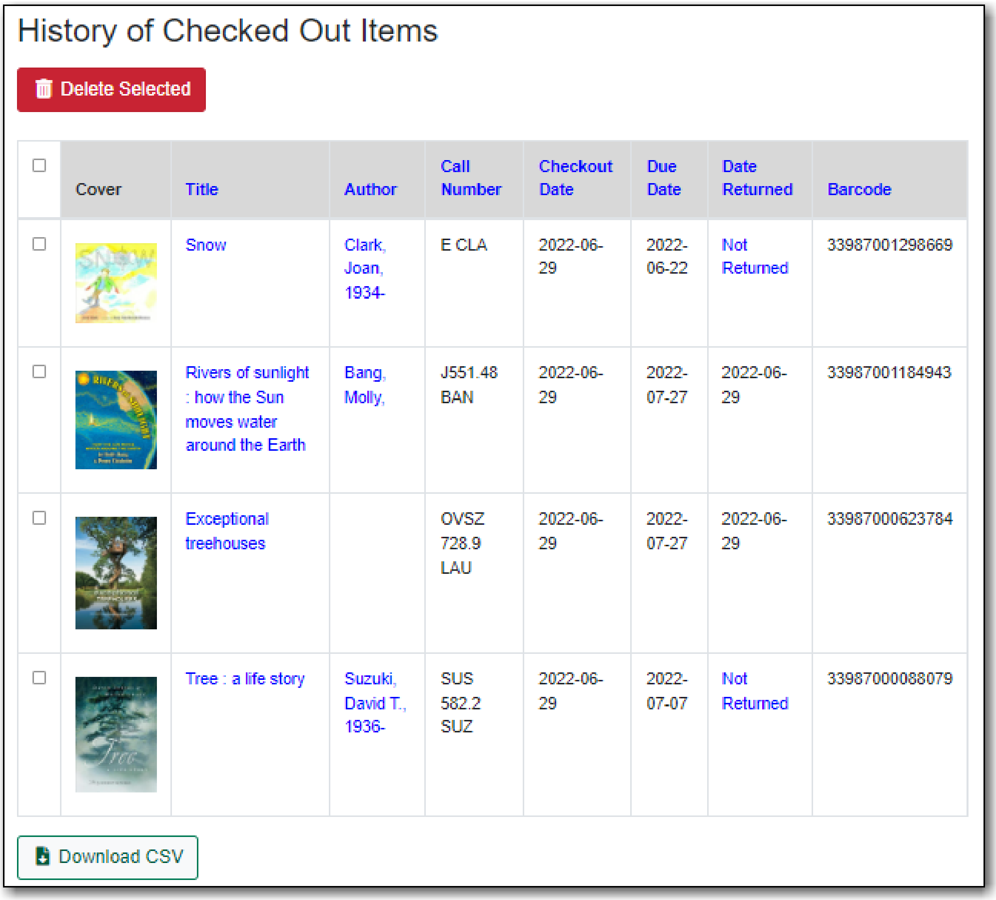
If you wish to renew items, select the items to renew and click **Renew Selected**. A pop-up will ask you to confirm you wish to renew; click **OK**. If the item cannot be renewed a message will indicate to the patron why the renewal was not possible.



	Cover	Title	Author	Renewals Left	Due Date	Barcode	Call Number
☑		Snow	Clark, Joan, 1934-	100	2022-06-22	33987001298669	E CLA

24.7.2. Check Out History

In *My Account* click **Items Checked Out** → **Check Out History** to display a list of items that you have previously checked out.



	Cover	Title	Author	Call Number	Checkout Date	Due Date	Date Returned	Barcode
☐		Snow	Clark, Joan, 1934-	E CLA	2022-06-29	2022-06-22	Not Returned	33987001298669
☐		Rivers of sunlight : how the Sun moves water around the Earth	Bang, Molly,	J551.48 BAN	2022-06-29	2022-07-27	2022-06-29	33987001184943
☐		Exceptional treehouses		OVSZ 728.9 LAU	2022-06-29	2022-07-27	2022-06-29	33987000623784
☐		Tree : a life story	Suzuki, David T., 1936-	SUS 582.2 SUZ	2022-06-29	2022-07-07	Not Returned	33987000088079

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 in ascending order and a second click sorts the list in descending order.

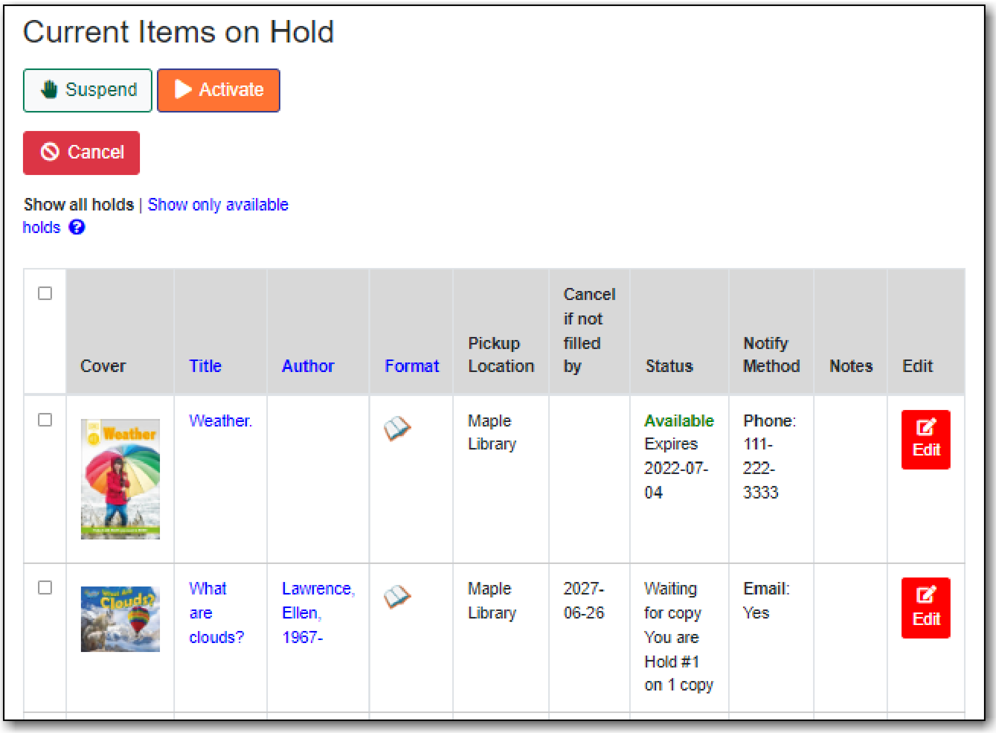
Click Download CSV to download your list in a file that can be opened in a spreadsheet program.

If you wish to delete individual titles from the list select the items you wish to delete and click **Delete Selected**.

24.8. Holds

24.8.1. Items on Hold

In *My Account* click **X Holds / X Ready** → **Items on Hold** 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 in ascending order and a second click sorts the list in descending order.

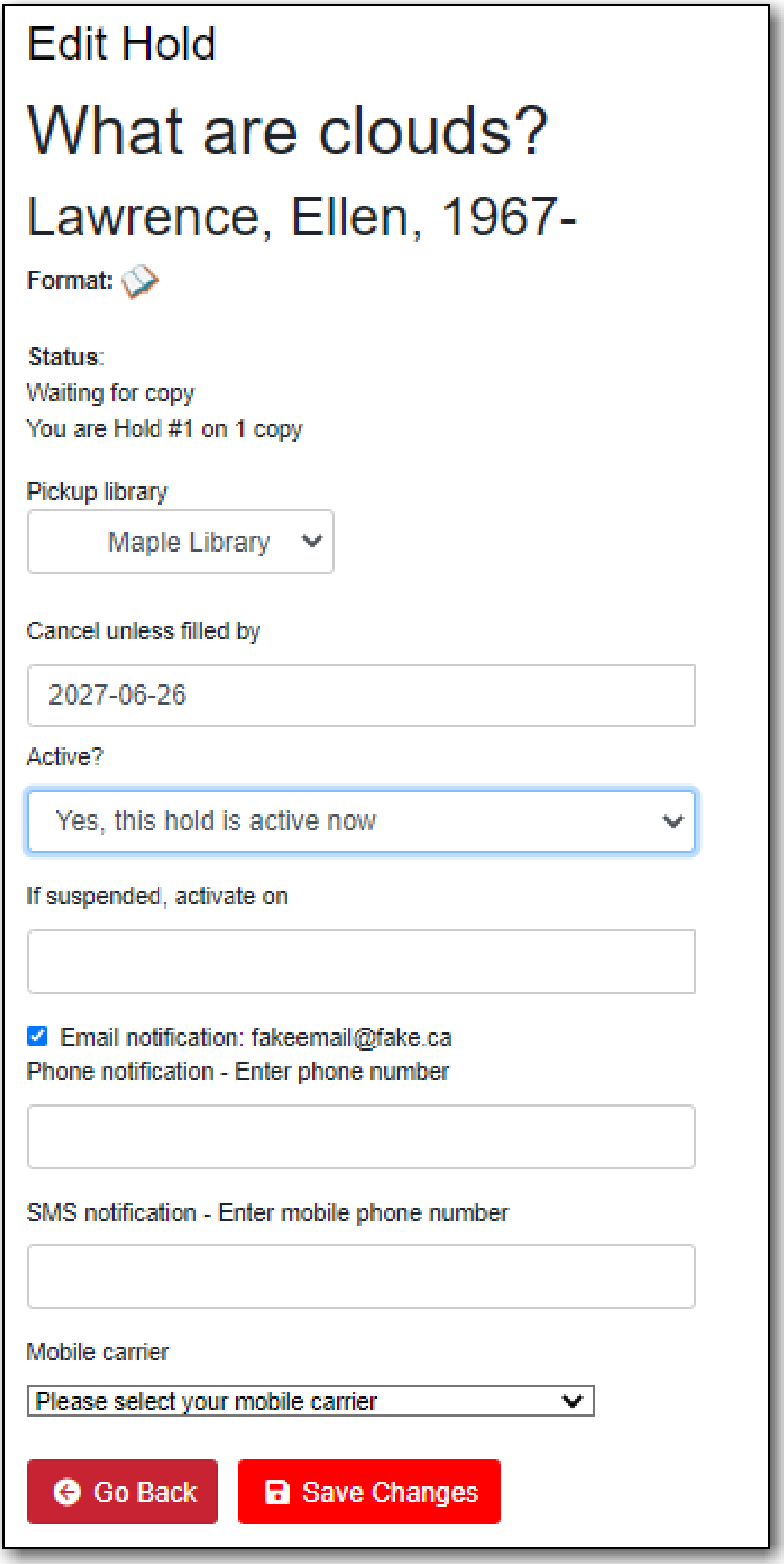
You can use the checkbox beside each hold to select the hold and use the buttons to suspend, activate, or cancel the selected holds. You may set an activation date when you suspend your hold or leave the date blank and manually activate it later. A suspended hold will not lose its hold queue position.

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.

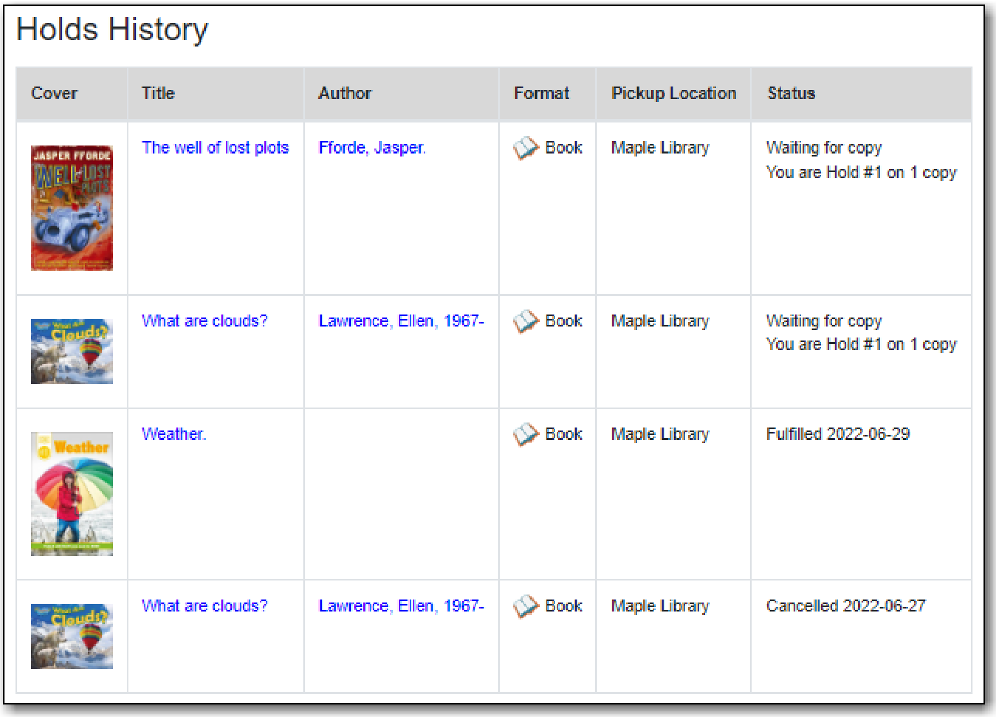
Clicking the **Edit** button will bring you to the hold editing screen. Here you can:

- change the pick up location if you’re 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.


Edit Hold
What are clouds?
Lawrence, Ellen, 1967-
Format:
Status:
Waiting for copy
You are Hold #1 on 1 copy
Pickup library
Maple Library
Cancel unless filled by
2027-06-26
Active?
Yes, this hold is active now
If suspended, activate on
Email notification: fakeemail@fake.ca
Phone notification - Enter phone number
SMS notification - Enter mobile phone number
Mobile carrier
Please select your mobile carrier
Go Back
Save Changes

24.8.2. Holds History

In *My Account* click **X Holds / X Ready** → **Holds History** 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.



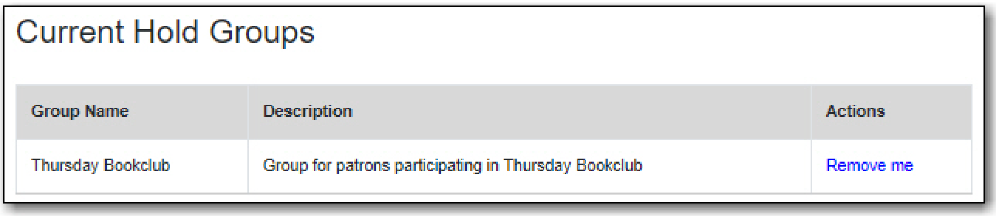
Holds History

Cover	Title	Author	Format	Pickup Location	Status
	The well of lost plots	Fforde, Jasper.	Book	Maple Library	Waiting for copy You are Hold #1 on 1 copy
	What are clouds?	Lawrence, Ellen, 1967-	Book	Maple Library	Waiting for copy You are Hold #1 on 1 copy
	Weather.		Book	Maple Library	Fulfilled 2022-06-29
	What are clouds?	Lawrence, Ellen, 1967-	Book	Maple Library	Cancelled 2022-06-27

Holds history will only display if it has been enabled in your *Search and History Preferences*.

24.8.3. Hold Groups

In *My Account* click **X Holds / X Ready** → **Hold Groups** to display a list of Hold Groups you are included in.



Current Hold Groups

Group Name	Description	Actions
Thursday Bookclub	Group for patrons participating in Thursday Bookclub	Remove me

Click **Remove me** to remove yourself from the Hold Group.

24.9. Reservations

Patrons of libraries using the Booking Module will have a Reservations option on the menu in their account. On the reservations tab patrons can view items they have reserved or borrowed through the Booking Module.

Reservations

Resource type	Start time	End time	Pickup location	Status
Hotspot	2022-08-04 10:00 AM	2022-08-10 05:00 PM	Warhol Art Academy	Reserved

24.10. Charges

24.10.1. Current Charges

In *My Account* click **Charges** → **Current Charges** to display any oustanding charges.

Charges On Your Account

Owed	Billing Type	Note	Date
$4.00	Damaged	"Olivia the spy" returned ripped and missing barcode. JP	2022-06-28

24.10.2. Payment History

In *My Account* click **Charges** → **Payment History** to display any payments that have been made.

Payment History

Payment Date	Payment For	Amount	Receipt
2022-06-27	Rain forest animals	$14.95	Print Email

You can email or print a payment receipt.

Chapter 25. 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.

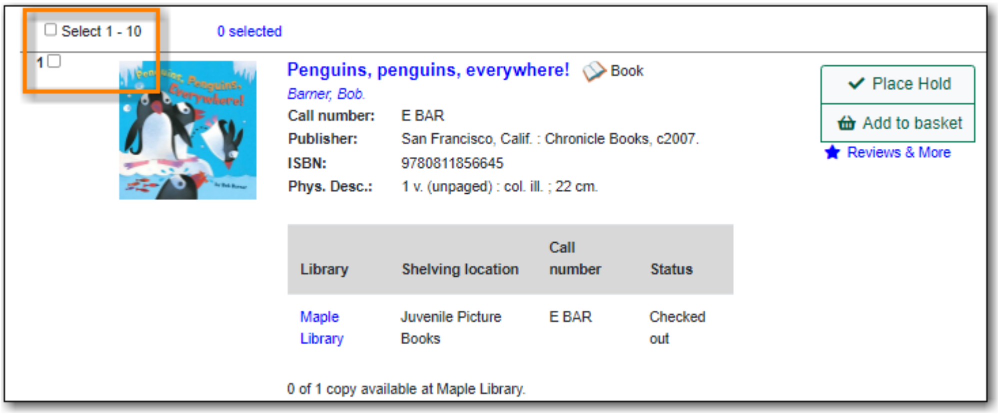
Lists are maintained in My Account and you must be logged in to use this feature. Lists can be used to keep track of what books have been read, to maintain a class reading list, to maintain a reading list for a book club, and more. Lists can also be used for maintaining publicly visible lists such as staff picks or themed lists that can be posted on a library's website.

Lists are accessed via the *My Lists* section of *My Account*.

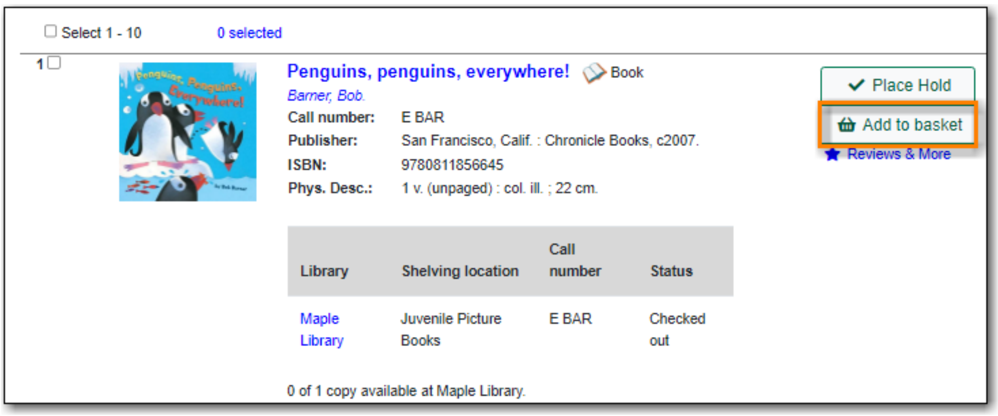
25.1. Adding Titles to the Basket

Titles can be added to the basket in three ways:

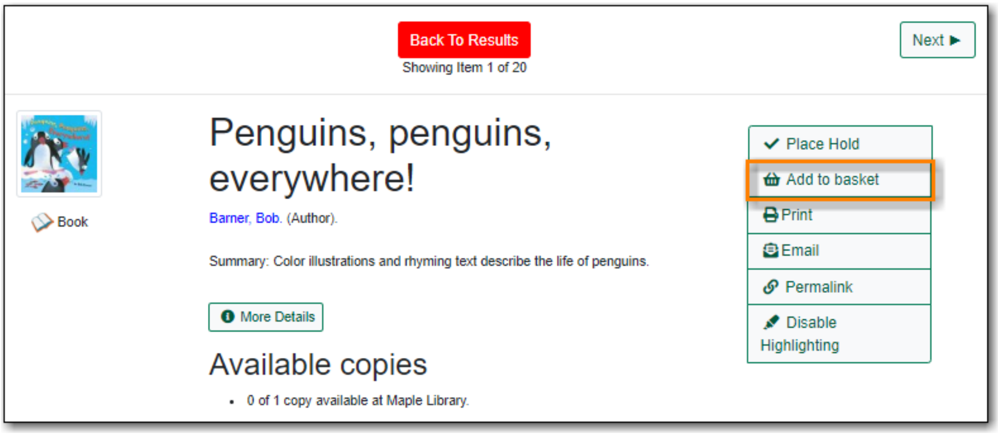
- by checking the box beside the search result. The entire page of results can be added by checking the select all box at the top of the results.



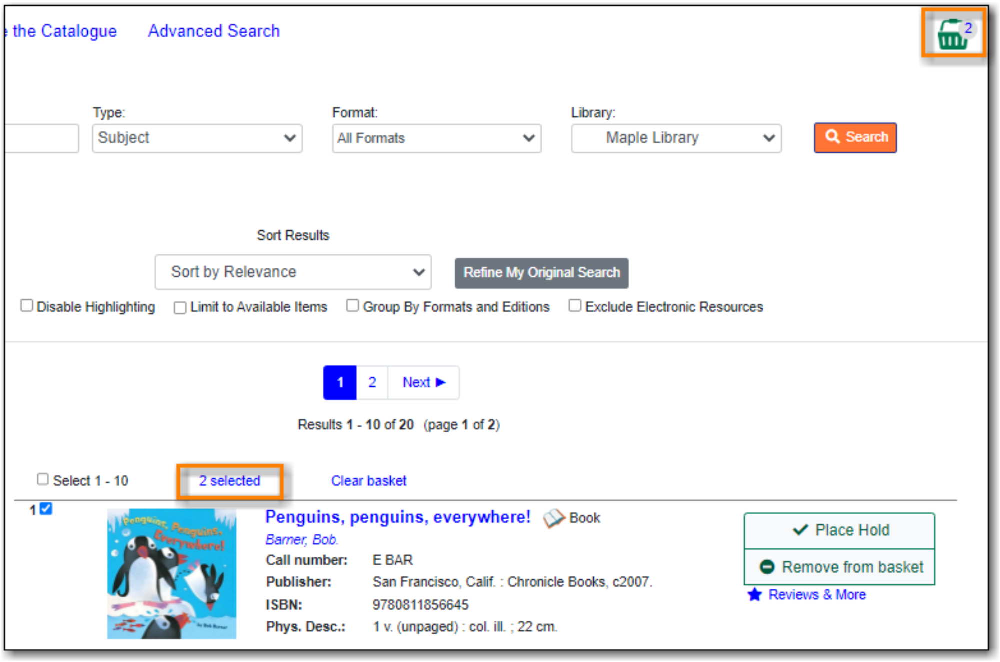
- by clicking **Add to basket** in the search results view.



- by clicking **Add to basket** on the title details page.



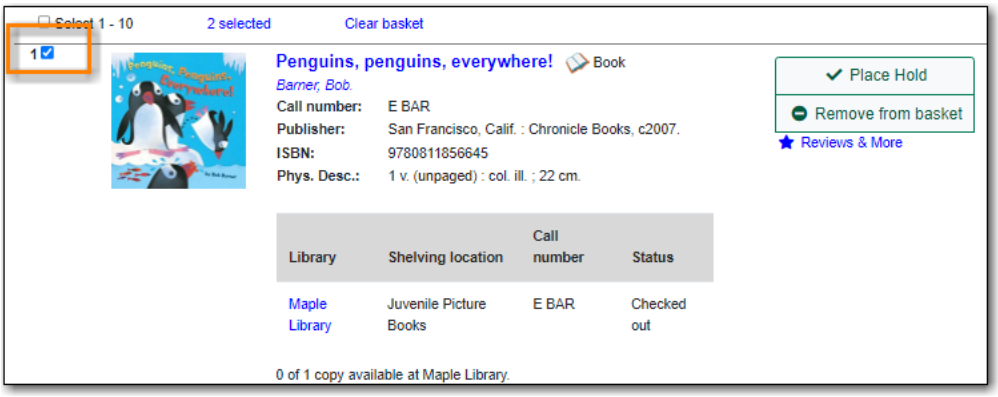
When titles are added to the basket the count at the top of the search results increases as does the count beside the basket icon.



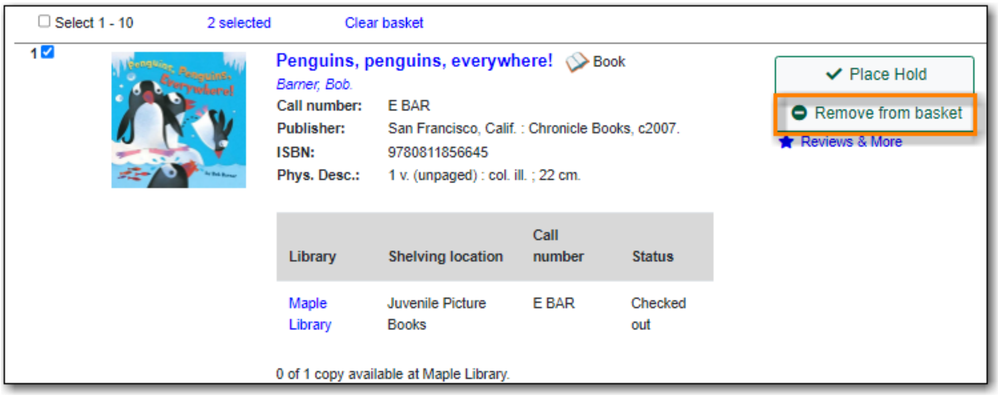
25.2. Removing Titles from the Basket

Titles can be removed from the basket in a number of ways:

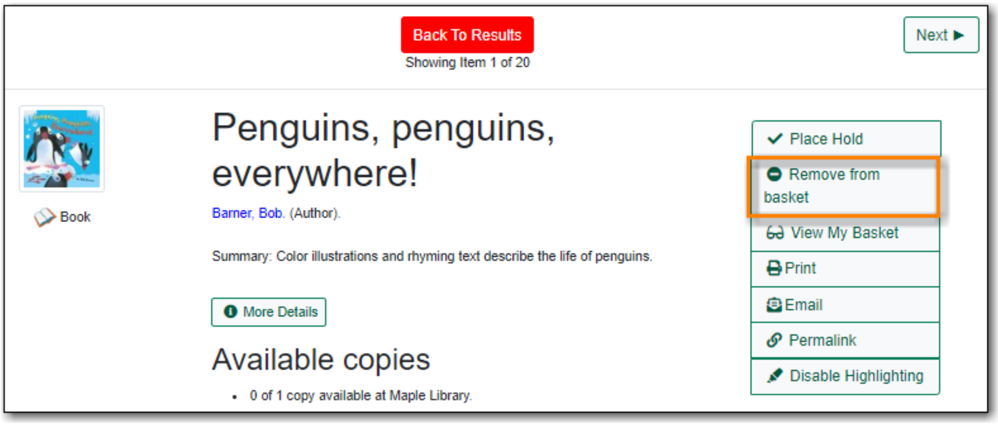
- un-checking the box beside the search results. The entire page of results can be removed by un-checking the select all box at the top of the results.



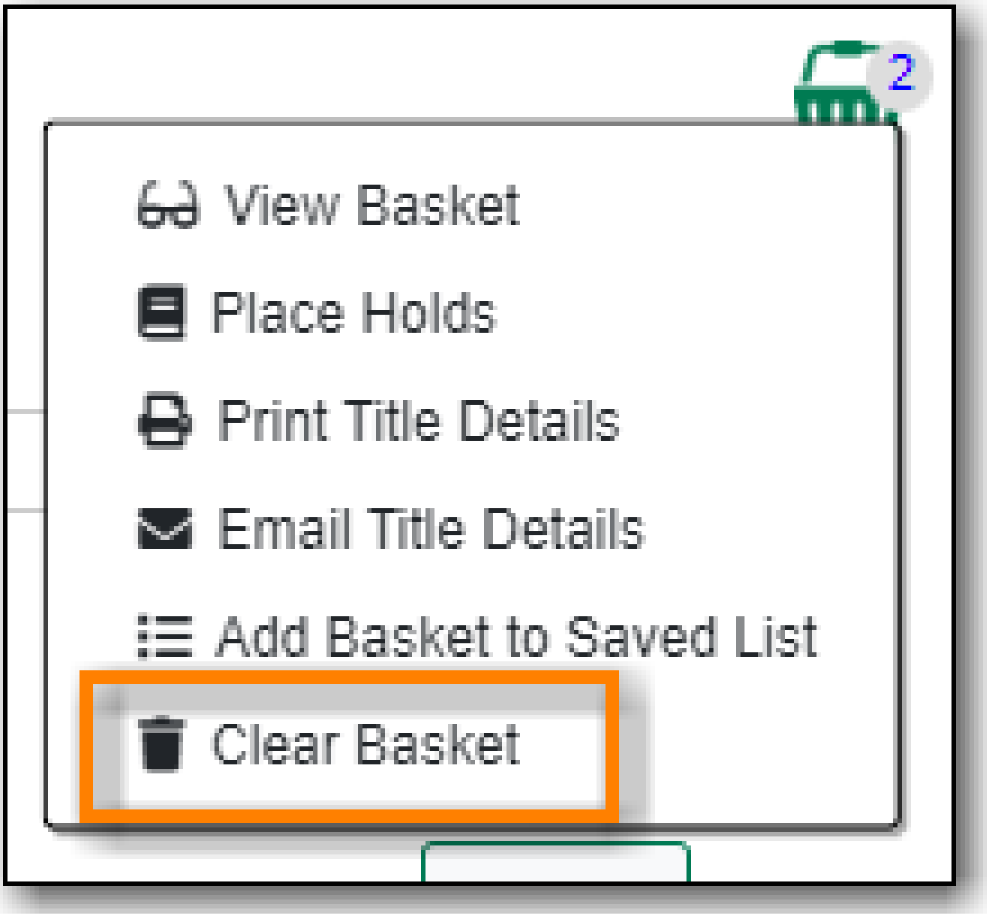
- by clicking **Remove from basket** in the search results view.



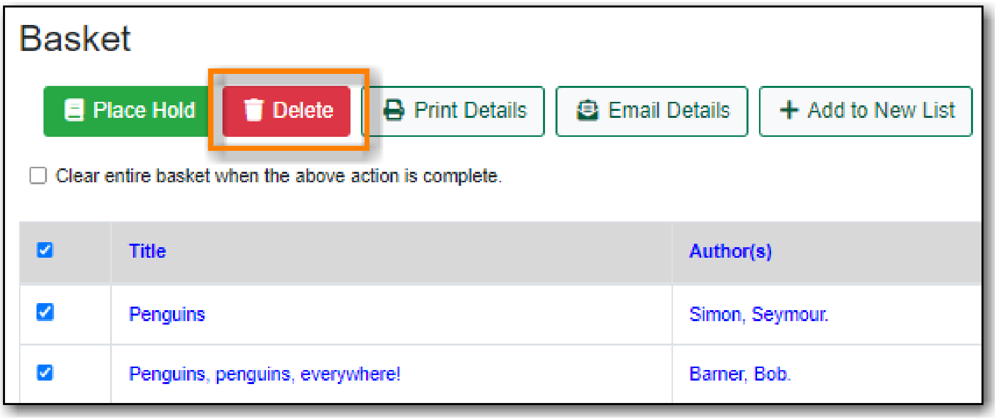
- by clicking **Remove from basket** on the title details page.



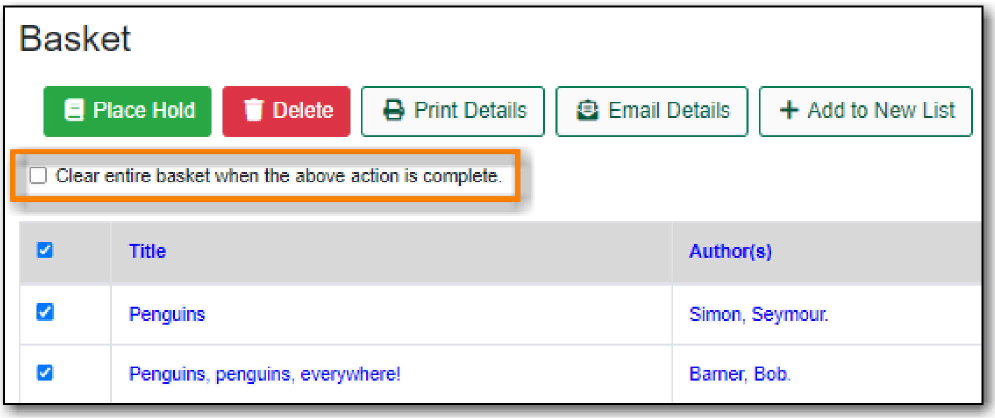
- by using the **Clear Basket** action from the basket icon drop down menu.



- by selecting the titles you wish to remove and using the **Delete** button in the basket view.



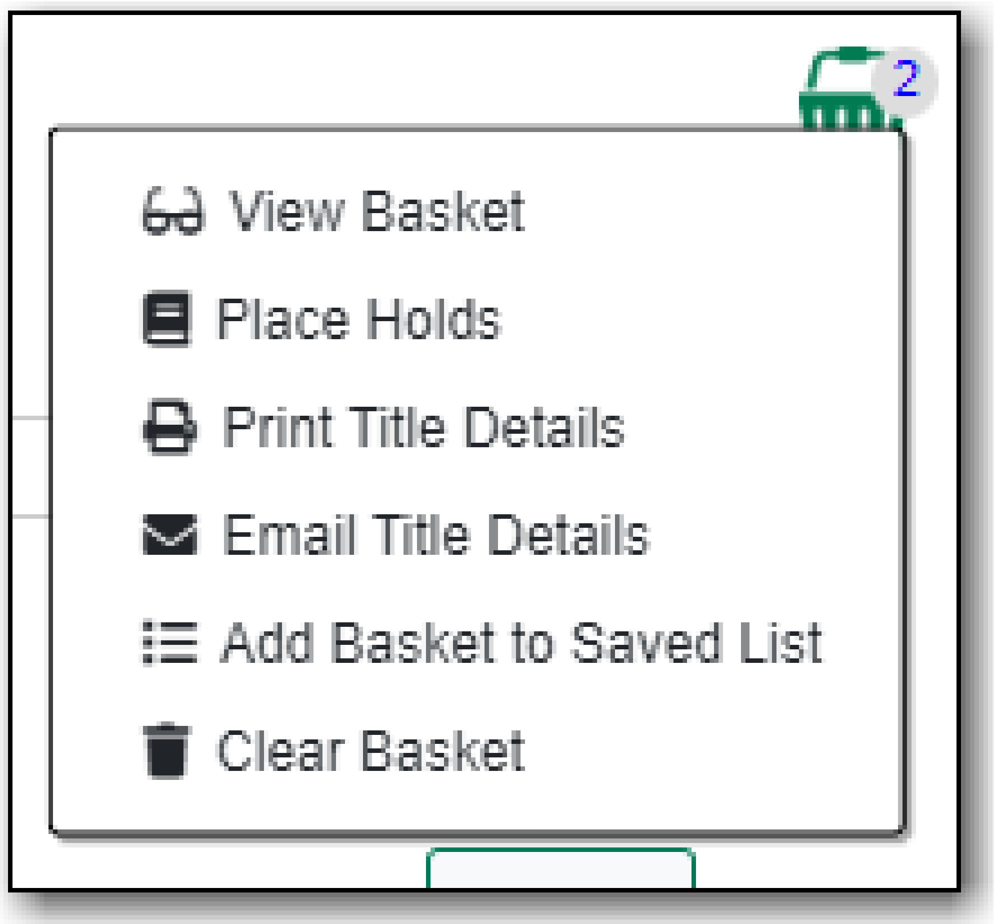
- by checking the box for **Clear entire basket when actions complete** before performing an action.



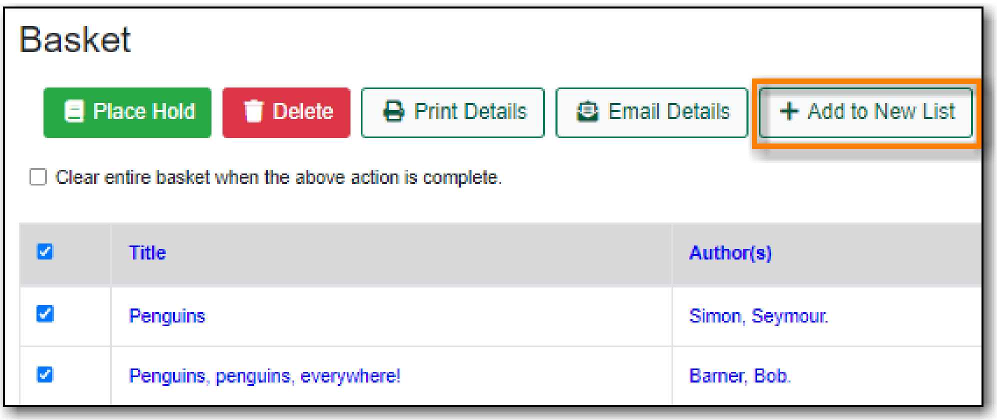
Additionally, the contents of the basket are cleared when you log out of your account.

25.3. Batch Actions Through the Basket

The **Basket Actions** menu, found by clicking on 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.



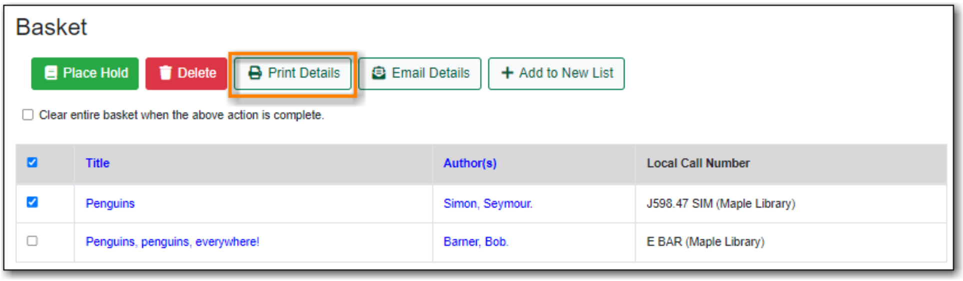
In the basket view there is also a button that allows you to add the contents of the basket to a new list.



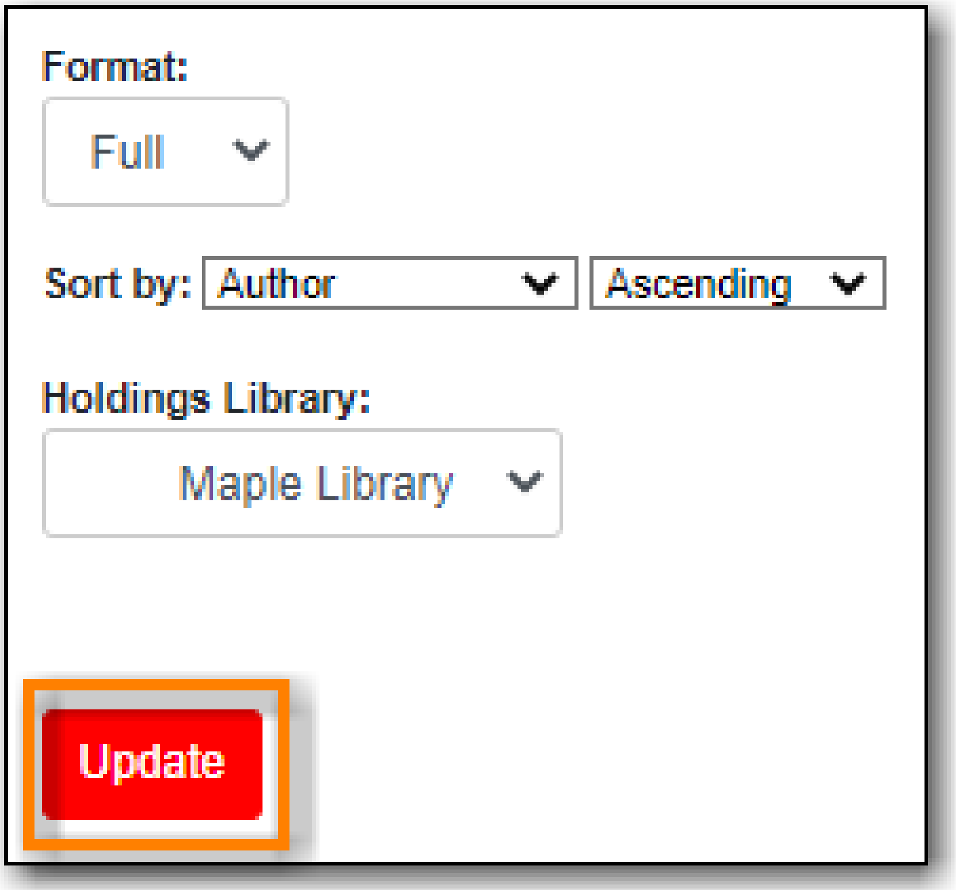
25.3.1. Print from the Baskets

1. Select the titles you'd like included.

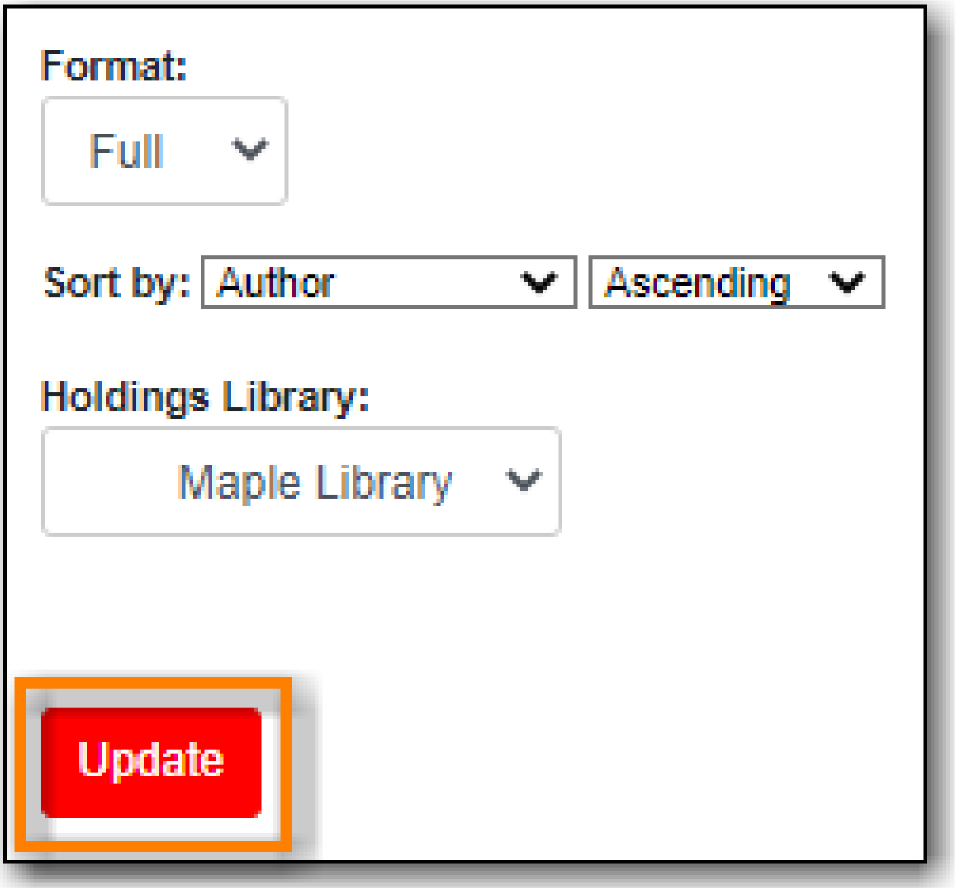
2. Click the **Print Details** button.



3. The print preview and format editor opens.
4. From the **Format** drop down menu, choose **Full** and click **Update**. This ensures the local call number and shelving information will be included.



5. If there are multiple libraries copies in the preview, choose required library in **Holdings Library** field, and click **Update** again.



6. The preview is presented.
7. Click **Print Now**.

8. Follow any prompts from your browser to print the details.

25.3.2. Email from the Baskets

A bug currently prevents Evergreen from sending emails from baskets.

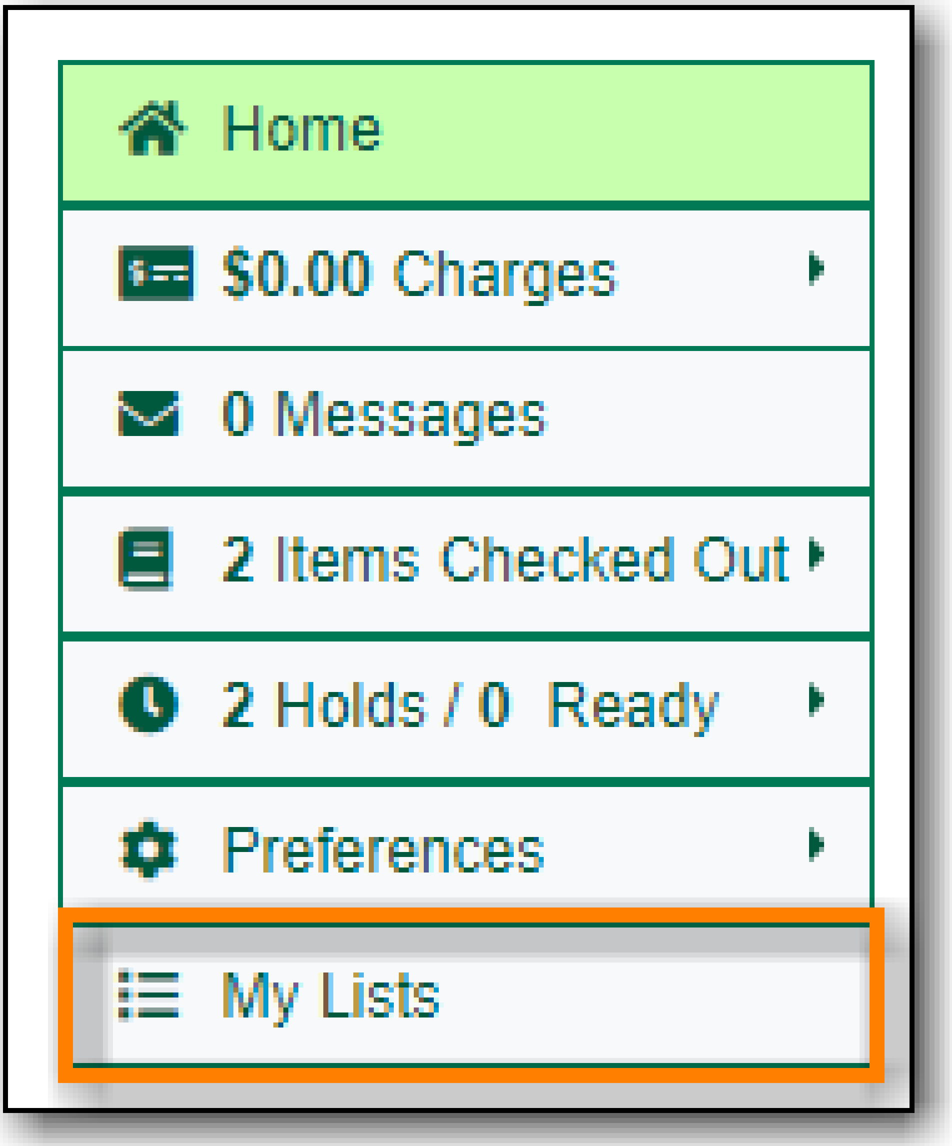
25.4. Creating Lists

TIP	Libraries can use the list functionality in the public catalogue to create lists which can be shared with your patrons directly, or by including the link on your website, social media, etc.

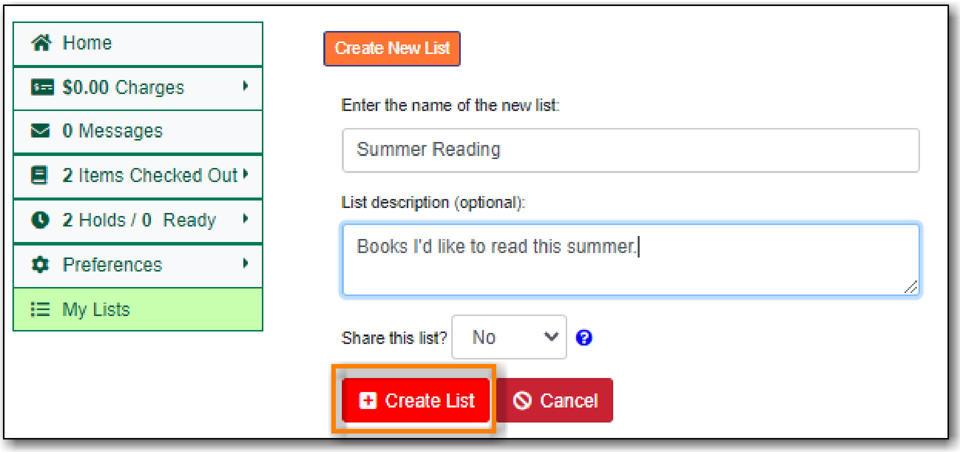
Co-op Support recommends creating a patron account specifically for managing lists. This way, the lists are not attached to a particular staff member's account and continue to be accessible if a staff member leaves the library. The username and password for the patron account can be shared with any staff needing to create or maintain lists.

25.4.1. Creating a List via My Account

1. Select *My Lists* from the menu.

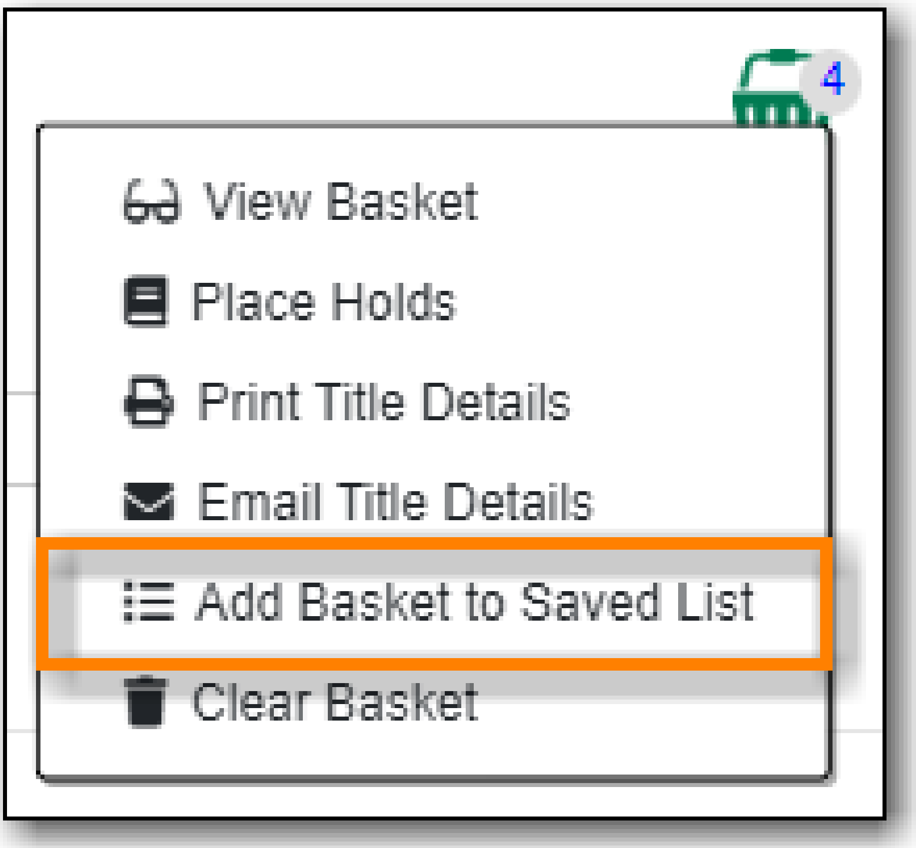


2. In the *Create New List* section, enter a name and optional description for the list.
3. Click **Share** if you'd like to share the contents of the list with other users.
4. Click **Create List**.

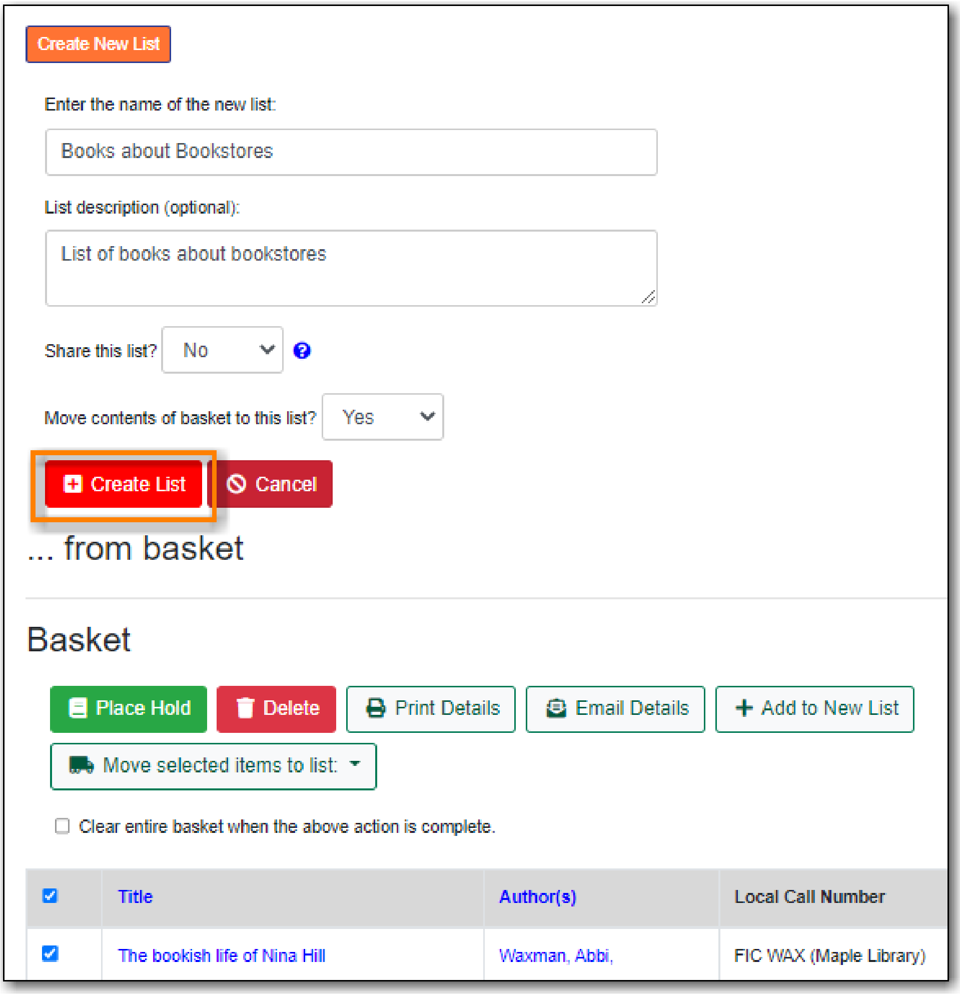


25.4.2. Creating a List from the Basket

1. Add titles to the basket.
2. Select **Add Basket to Saved List** from the basket action menu.
   a. If not logged in, a prompt appears.

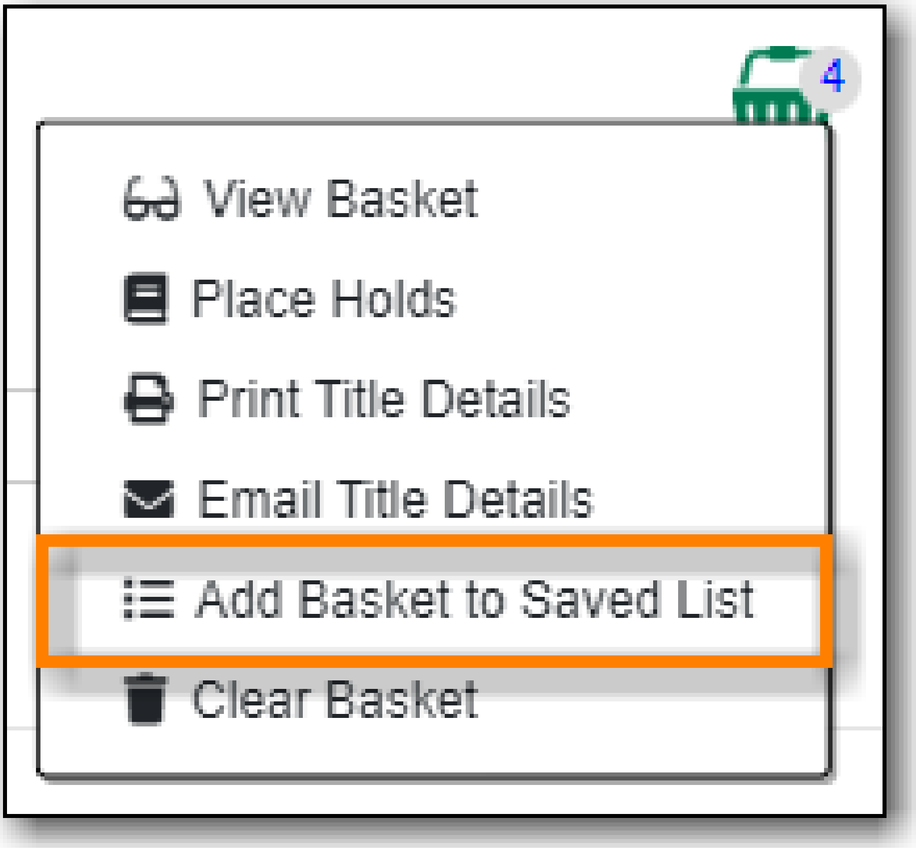


3. In the *Create New List* section, enter a name and optional description.
4. Click **Share** if you'd like to share the contents of the list with other users.
5. By default *Move contents of basket to this list?* is set to YES.
   a. The contents of the basket displays below.
6. Click **Create List**.

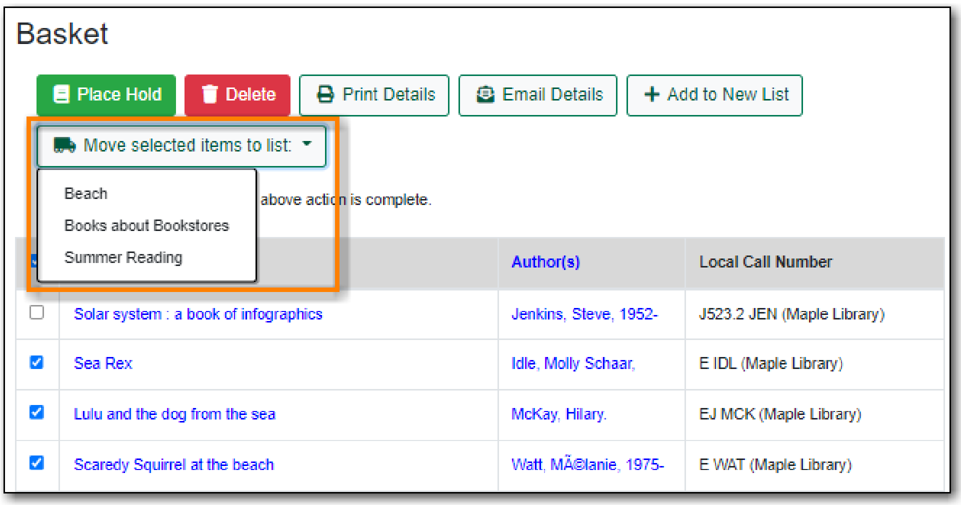


25.5. Adding Titles to a List

1. Titles are added to a list by first adding them to the basket. Refer to Adding Titles to the Basket.
2. Select **Add Basket to Saved List** from the basket action menu.
   a. If not logged in, a prompt appears.



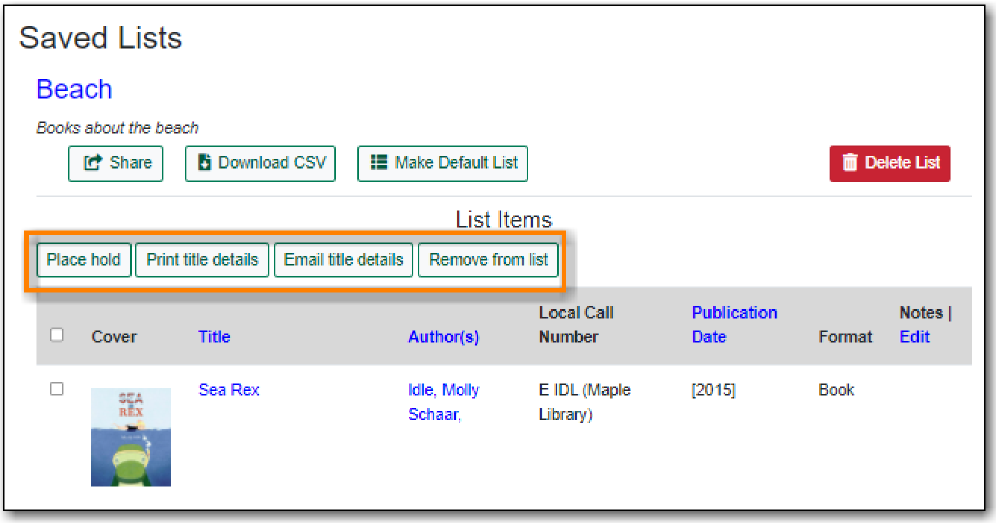
3. Un-check the box beside any titles you don't want added to the list.
4. Click **Move selcted items to list** and choose the list you want from the drop down.



5. The items are moved to your list and removed in your basket. Any titles you de-selected will still be in the basket unless you selected **Clear entire basket when the above action is complete**.

25.6. Managing Titles in a List

You can place holds, print the title details, and remove titles from your list by selecting the relevant titles and using the appropriate button.



Information on placing holds can be found in Placing Holds.

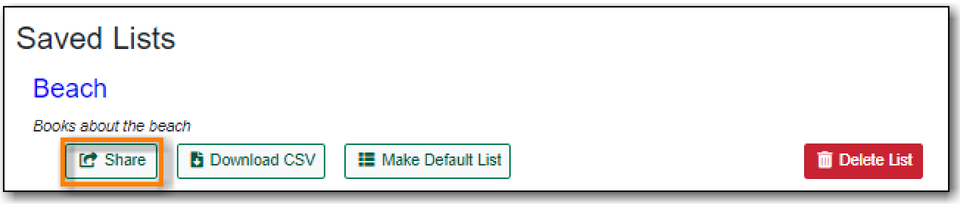
Printing from a list works the same as printing from a basket. See Print from the Baskets.

Emailing from a list is currently not functional.

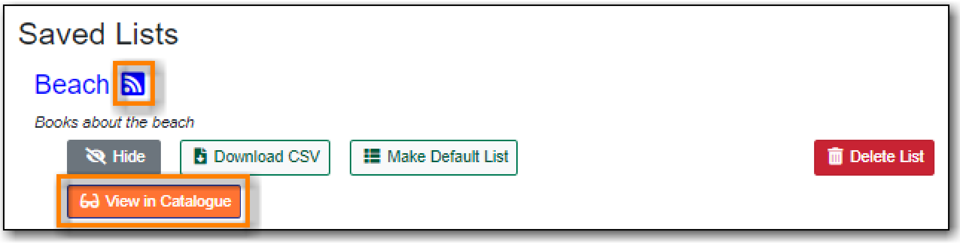
25.7. Managing Lists

25.7.1. Sharing a List

1. In *My Lists*, click on **Share** beside the list you would like to share.



2. The list will now have an icon for RSS and a **View in Catalogue** button. Share the relevant link with the person you'd like to share the list with or include the link on a webpage.



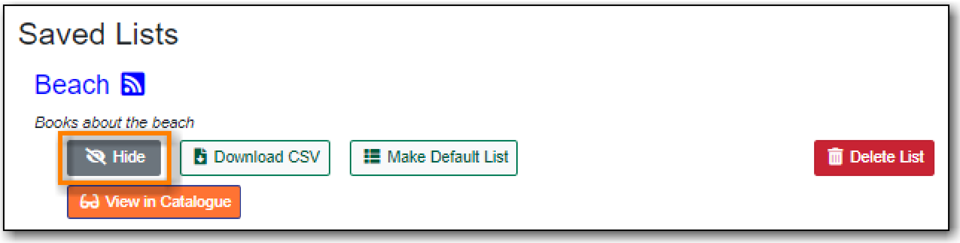
NOTE

Libraries can use shared lists for sharing staff picks and other lists with patrons by creating a list and posting the URL on the library's website.

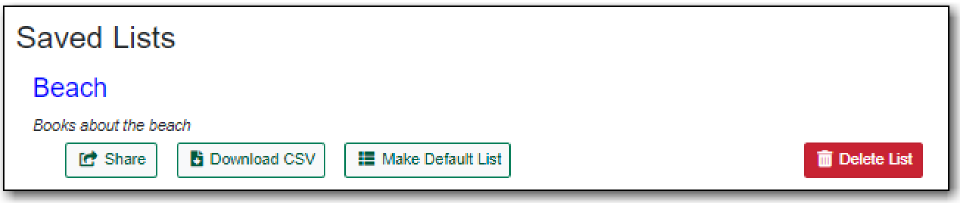
Co-op Support recommends libraries set up a patron account specifically to use for this instead of having staff use their own acounts.

25.7.2. Hiding a List

1. In *My Lists*, click on **Hide** beside the list you would like to hide.

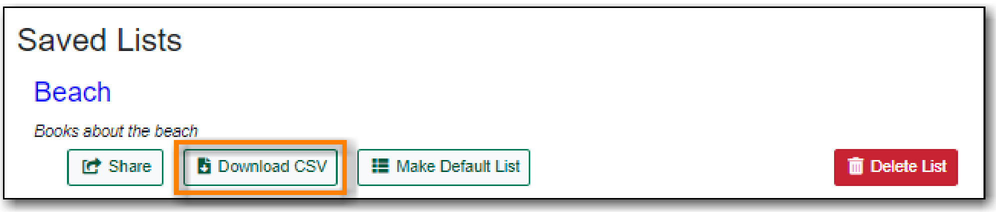


2. The RSS icon and **View in Catalogue** button are removed. Anyone with the link for the list will no longer be able to view it.



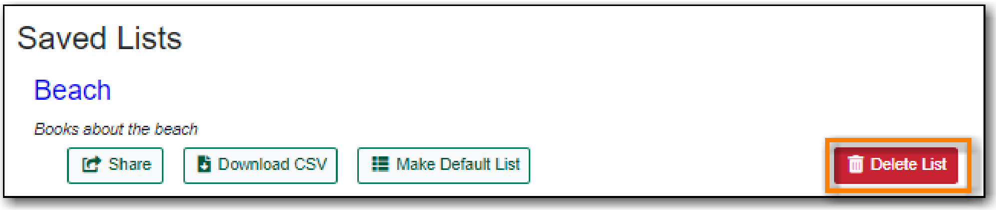
25.7.3. Downloading a List

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.



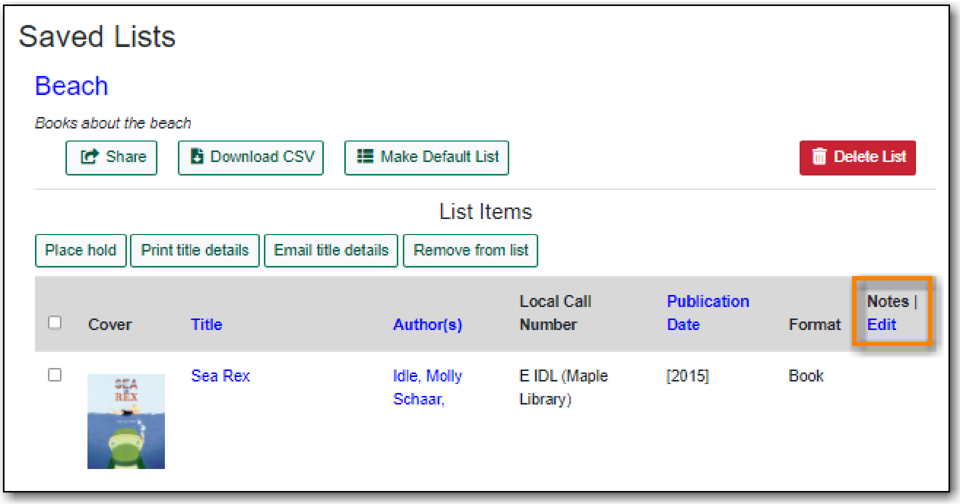
25.7.4. Deleting a List

If you no longer need a list you can delete it by clicking **Delete List**.

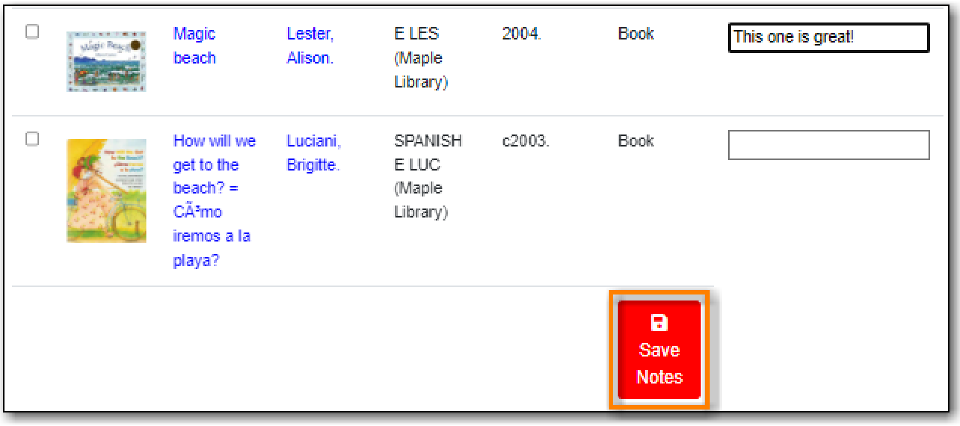


25.7.5. Annotating a List

1. Click on a list to open it and display the contents.
2. In the *Notes* column click **Edit**.



3. Enter the note beside the relevant title(s) and click **Save Notes**.



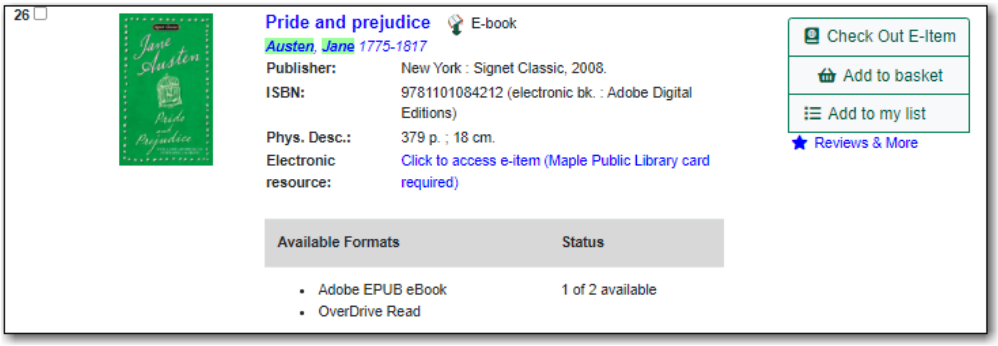
4. The note will display in the patron's view of the list. If the list is shared, the note will also display on the webpage used to access the shared list.


5
Magic beach / Alison Lester.
Book
Lester, Alison.
Call number: E LES
Publisher: Crows Nest, N.S.W. : Allen & Unwin, 2004.
ISBN: 1741144884
Phys. Desc.: [32] p. : col. ill. ; 22 x 28 cm.
Place Hold
Add to basket
Add to my list
Reviews & More
Library
Shelving location
Call number
Status
Maple Library
Juvenile Picture Books
E LES
Reshelving
Maple Library
Juvenile Picture Books
E LES
Available
2 of 2 copies available at Maple Library.
This one is great!

Chapter 26. Integrated E-Items

Electronic resources are usually hosted by separate providers outside the library. Most of these resources have records in the library catalogue. Links leading to the provider's 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 E-Items, and view their borrowed or on-hold items in their library account.

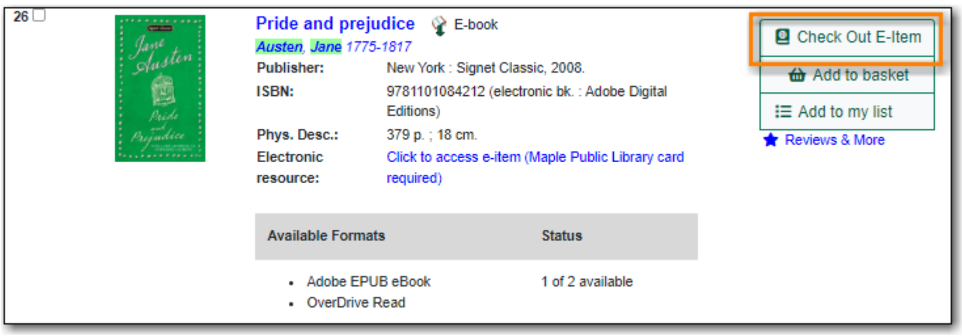
When your search result includes an integrated eBooks and eAudiobooks from OverDrive, you may see the record is marked as electronic resource with a link going to the provider's website. You will see columns for *Available Formats* and *Status*. There will also be a button to **Check Out E-Item** or **Place Hold on E-Item**, depending on whether there is an available copy.



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.

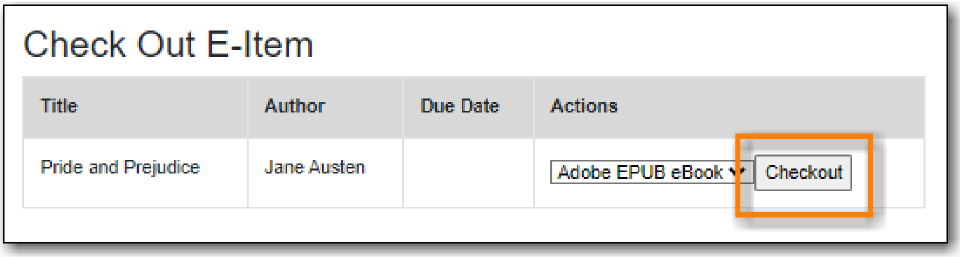
26.1. Checking Out E-Items

1. If there is an available copy under a title, click on **Check Out E-Item** on the search result list or record details screen.

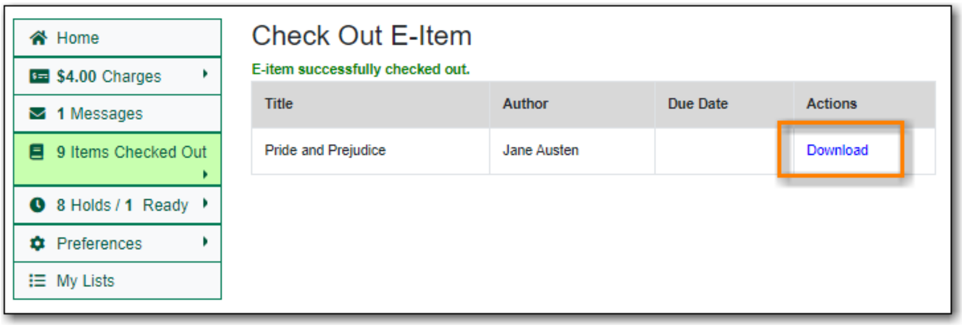


NOTE You will be prompted to log in with your library account, if you have not already done so.

2. Choose a format type from the *Actions* menu and click the **Checkout** button.

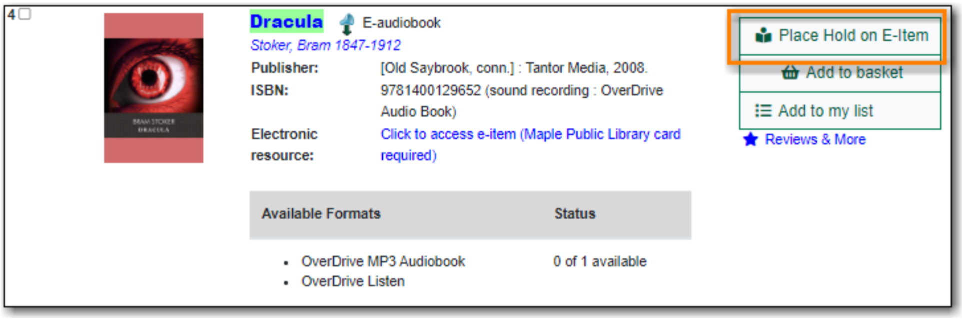


3. Click **Download**. The item will be downloaded in the chosen format.



26.2. Placing Holds on E-Items

1. If all copies under a title are checked out, click on **Place Hold on E-Item** on the result list or record details screen.

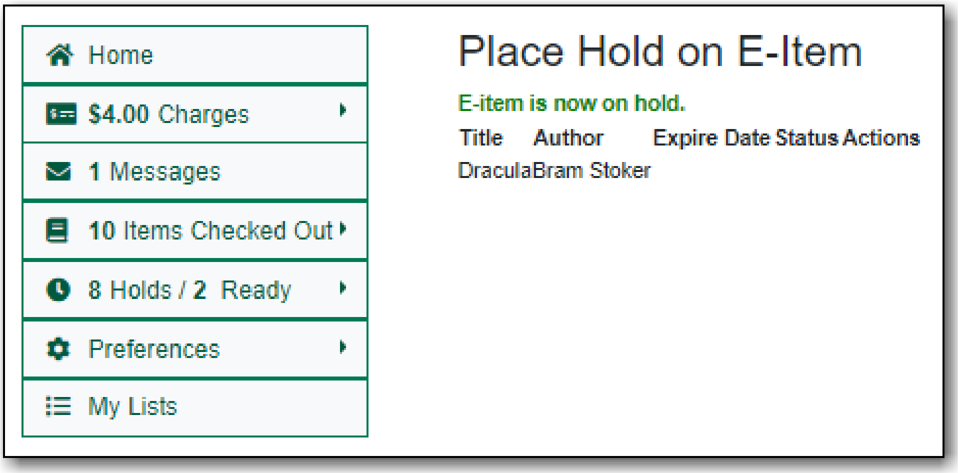


NOTE You will be prompted to log in with your library account, if you have not already done so.

2. Click **Place Hold**.

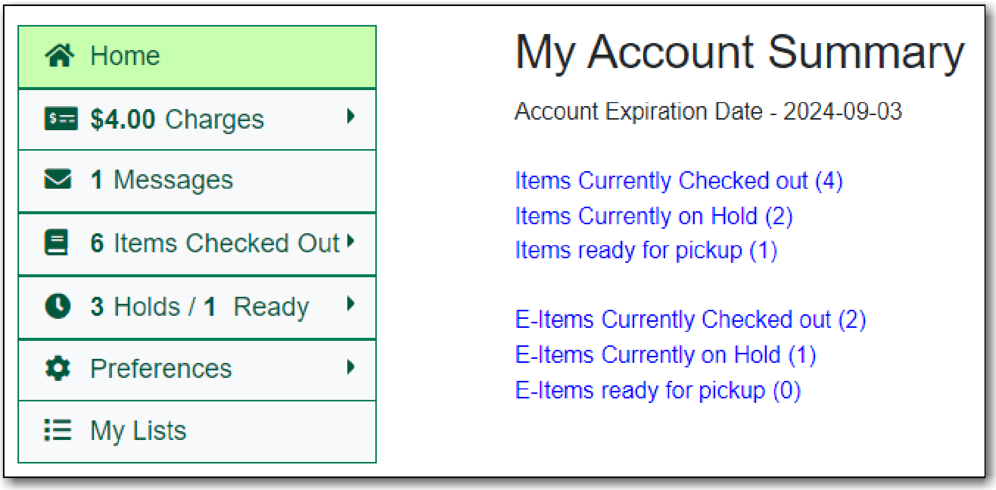
NOTE	You must have an email address recorded in your account in order to successfully place a hold.

3. The hold is placed and you will receive an email when it is ready to be checked out.



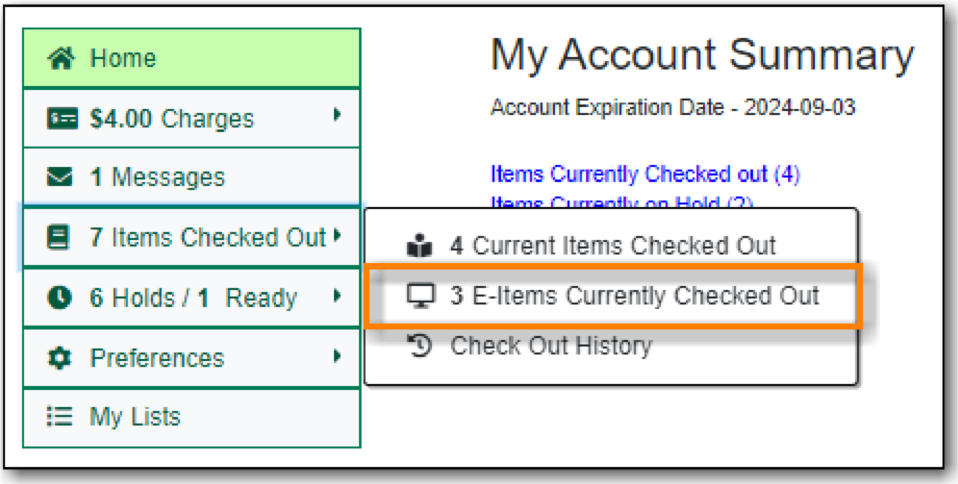
26.3. Checked Out and On Hold E-Items in My Account

You may view E-Items currently checked out to or on hold for you after you log into your account.

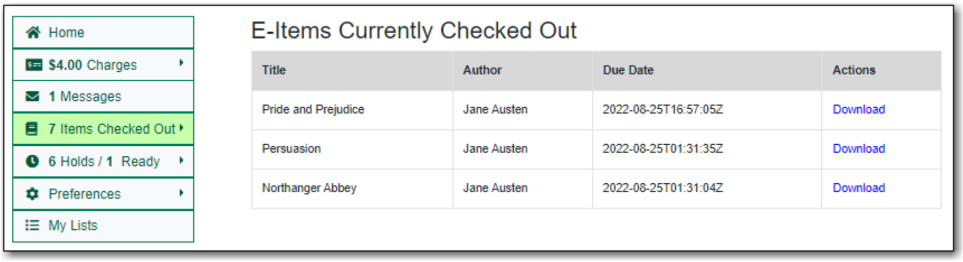


26.3.1. E-Items Currently Checked Out

1. In *My Account* click **Items Checked Out** → **E-Items Currently Checked Out** to display all of the items you currently have checked out.

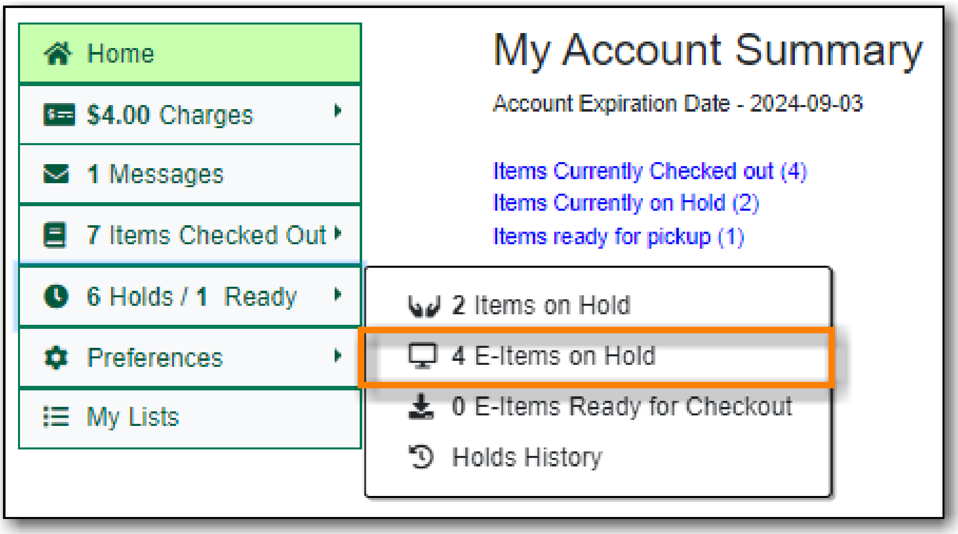


2. Your E-Items will display and can be downloaded.

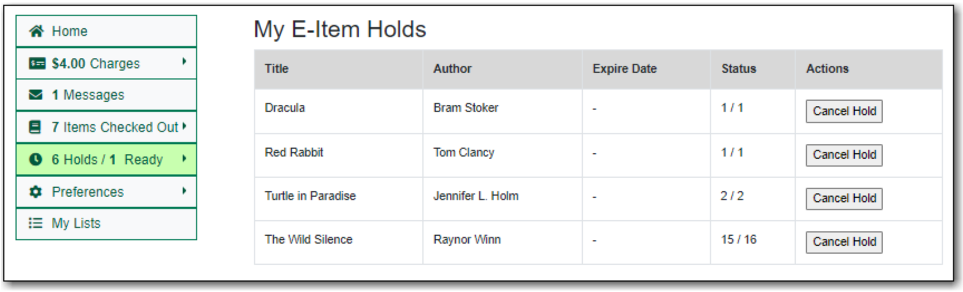


26.3.2. E-Items on Hold

1. In *My Account* click **X Holds / X Ready** → **E-Items on Hold** to display a list of items you have on hold.



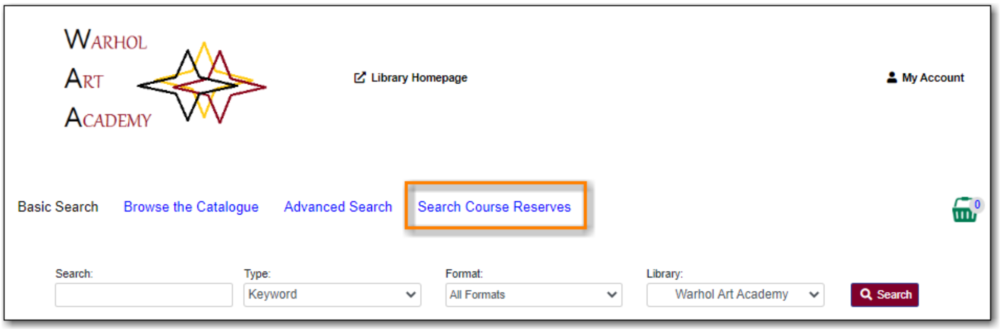
2. Your E-Items on hold will display. Here you can cancel unwanted holds and check where you are in the hold queue.



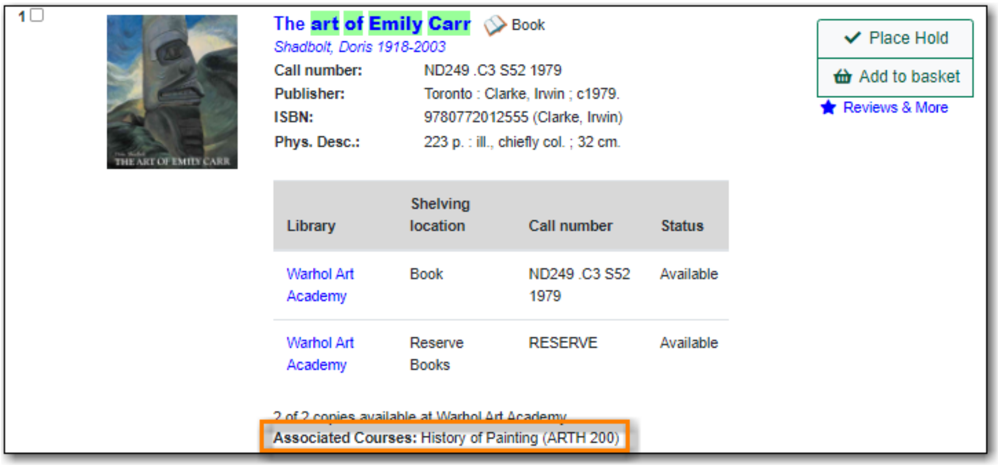
Title	Author	Expire Date	Status	Actions
Dracula	Bram Stoker	-	1 / 1	Cancel Hold
Red Rabbit	Tom Clancy	-	1 / 1	Cancel Hold
Turtle in Paradise	Jennifer L. Holm	-	2 / 2	Cancel Hold
The Wild Silence	Raynor Winn	-	15 / 16	Cancel Hold

Chapter 27. Course Reserves

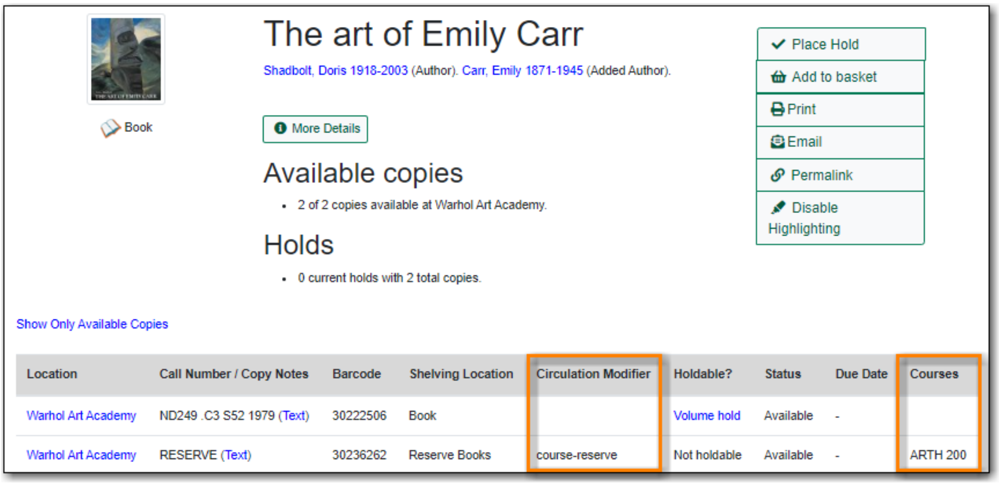
When the course reserves module is enabled an option for searching course reserves displays in the public catalogue.



Associated courses are displayed as part of the search results.



Additional fields for circulation modifier and course also display in the item information on the record view.

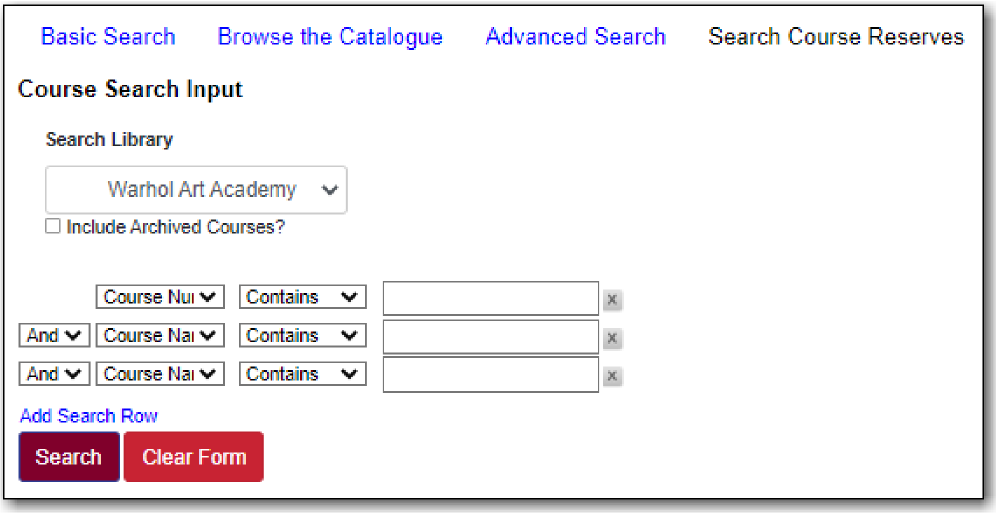


The display of course reserves in the public catalogue is controlled by the library setting *Opt Org Unit into the Course Materials Module.*

27.1. Search Course Reserves

You can access the course reserves search by clicking **Search Course Reserves**.

The Course Reserves Search enables users to search for courses by course name, course number, and instructor. Patrons can search by a particular branch at multi-branch libraries and archived courses can be included in the search results.



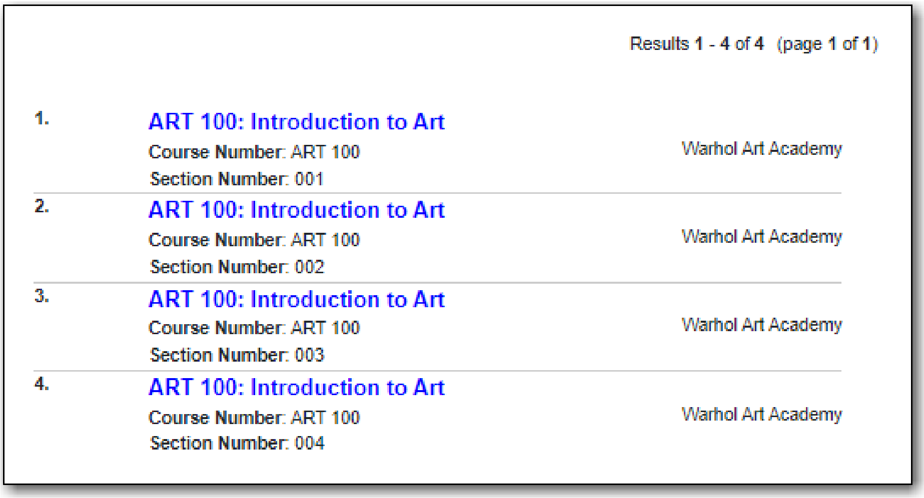
TIP The library setting *Allow users to browse Courses by Instructor* must be set to TRUE to have instructor incluced as a search option.

27.2. Course Lists

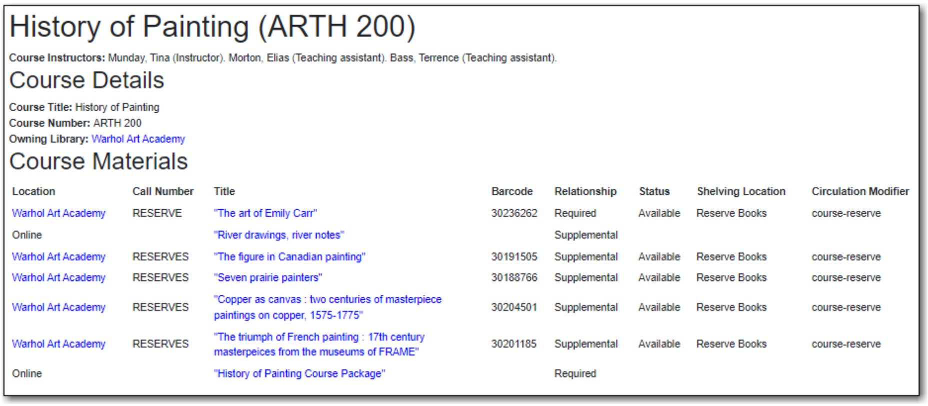
When searching for a course your search results will display.

1. Click on the course you would like to see the reserve list for.

   a. If a course has multiple sections, choose the appropriate section.



2. The course reserves list will display.
    a. Clicking on the title of any of the course materials will open the record in the catalogue.



Location	Call Number	Title	Barcode	Relationship	Status	Shelving Location	Circulation Modifier
Warhol Art Academy	RESERVE	"The art of Emily Carr"	30236262	Required	Available	Reserve Books	course-reserve
Online		"River drawings, river notes"		Supplemental			
Warhol Art Academy	RESERVES	"The figure in Canadian painting"	30191505	Supplemental	Available	Reserve Books	course-reserve
Warhol Art Academy	RESERVES	"Seven prairie painters"	30188766	Supplemental	Available	Reserve Books	course-reserve
Warhol Art Academy	RESERVES	"Copper as canvas : two centuries of masterpiece paintings on copper, 1575-1775"	30204501	Supplemental	Available	Reserve Books	course-reserve
Warhol Art Academy	RESERVES	"The triumph of French painting : 17th century masterpeices from the museums of FRAME"	30201185	Supplemental	Available	Reserve Books	course-reserve
Online		"History of Painting Course Package"		Required			

Reports

Chapter 28. Reporter Overview

It is possible to report on almost every field in every table in the Evergreen database. In accordance with Sitka's privacy policy and owing to the nature of Sitka's shared Evergreen database any staff needing access to the reporter must sign and submit the Full Reporter Privacy Waiver. Once the waiver is completed, if the staff account meets the required criteria, Co-op Support will grant reporter permissions to the account.

There are three main components used by the reporter:

- report template
- report definition
- report output

These components are saved in folders specific to the library account. Users can share their folders to allow others to clone templates and view report definitions and output but only the owning staff account can manage the contents of their folders.

TIP

> Know which library staff at your library have recurring reports set up and make sure to stop those reports when the staff member leaves your library.
>
> Once a library staff account is closed it is no longer possible to access the reporter via the staff client and you will require assistance from Co-op Support to stop any recurring reports run by the library staff account.

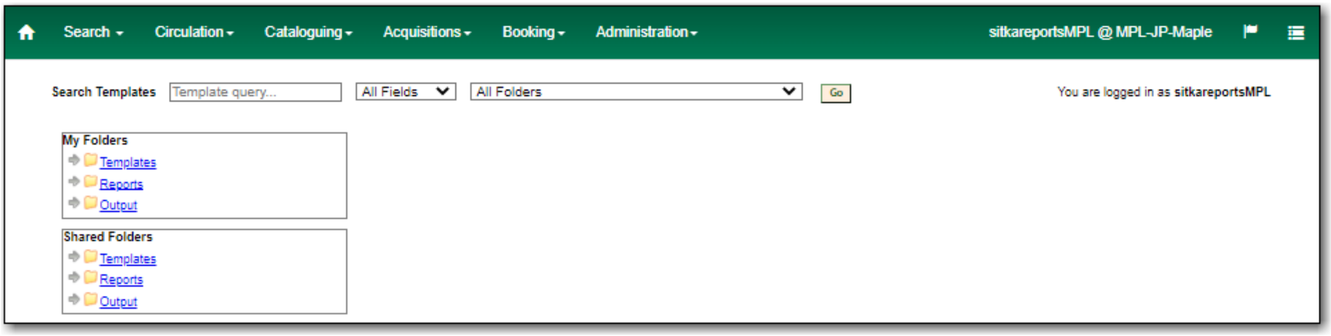
Report templates tell Evergreen what fields are to be displayed in the report output and what conditions to filter on in the database. These templates allow you to run a report more than once, without building it anew every time. Co-op Support has created shared Sitka templates for commonly needed reports. These templates can be cloned and used as is or modified by library staff. Library staff can also create new report templates; successfully creating a new template generally requires a solid understanding of Evergreen and the Evergreen database.

When a report is run Evergreen looks at the values defined for the filters in the report definition and then goes through the database and gathers the records that meet the conditions into an output file. The output file can be viewed via the reporter within the staff client or via the link in the report completion email.

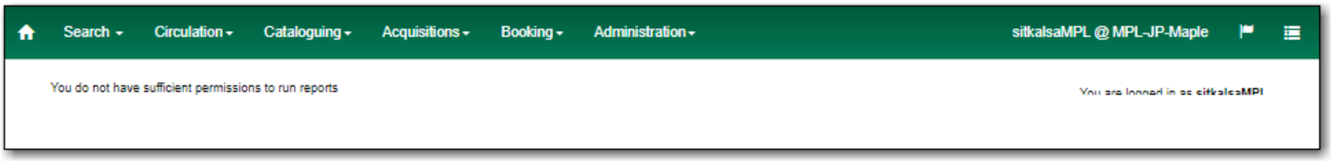
Any staff needing to view report output, but not run reports, must sign and submit the All Staff Reporter Privacy Waiver. Once the waiver is completed, if the staff account meets the required criteria, Co-op Support will grant report output viewing permissions to the account.

Chapter 29. Accessing the Reporter

The Reports interface is accessed in Evergreen by going to **Administration** → **Reports**.



Users without reporter permissions granted to their staff account will see the message *You do not have sufficient permissions to run reports*.



Any staff needing access to the reporter must sign and submit the Full Reporter Privacy Waiver. Once the waiver is completed, if the staff account meets the required criteria, Co-op Support will grant reporter permissions to the account.

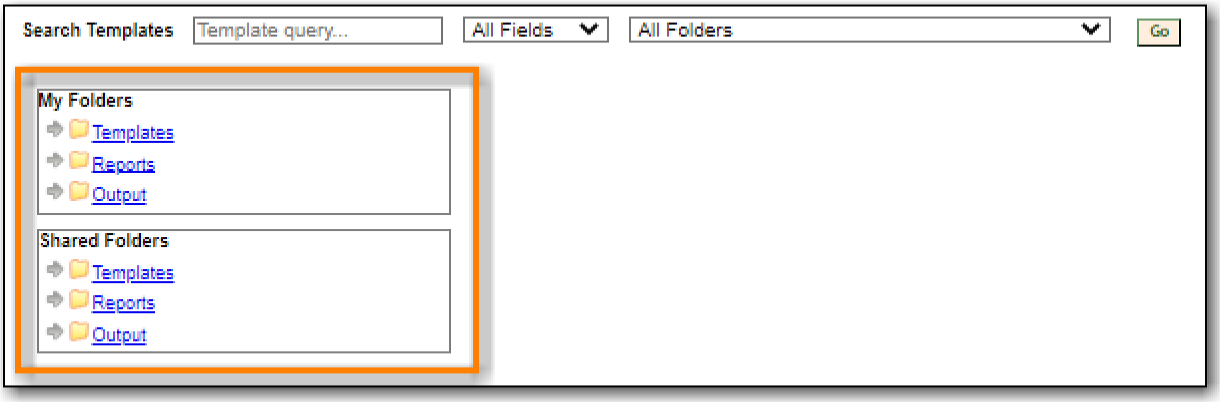
Staff with reporter permissions can use the Sitka report templates *Staff Assigned to Selected Permissions Group(s)* and *Staff Assigned to Supplementary Permission Group(s)* to check who at their library has reporter permissions. Both report templates are found under *Shared Folders* → *Templates* → *Sitka_templates* → *Patrons* → *Other*.

Chapter 30. Folders

Setting Up Report Folders (2:51)

The folders pane in the reporter is divided into two sections:

- *My Folders* which contains the folders created with your Evergreen account.
- *Shared Folders* which contains folders shared with you by other users.



There are three main components used by the reporter which each much be stored in a separate folder:

- *Templates* which tell Evergreen what fields to offer as filters and what columns to display in the results file.
- *Reports* which tell Evergreen what values to filter on, how often to run the report, and what file formats to output the results in.
- *Output* which is the final results file from Evergreen with the information from the database.

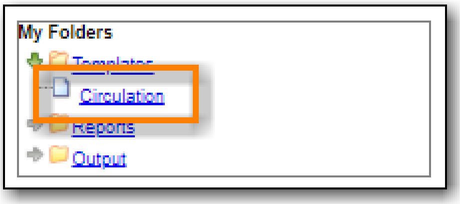
In order to work with templates, reports, and output in the reporter you must have at least one folder created under each component. See Creating Folders.

30.1. Creating Folders

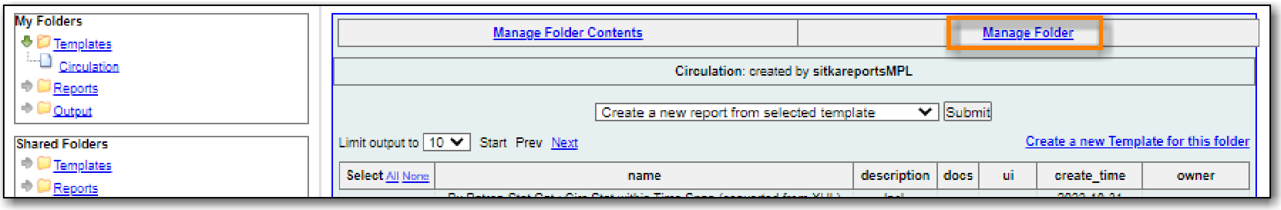
TIP Co-op Support recommends using a parallel naming scheme for folders in Templates, Reports, and Output to help keep your reports organized and easier to find.

To create a folder within *Templates*, *Reports*, or *Output*:

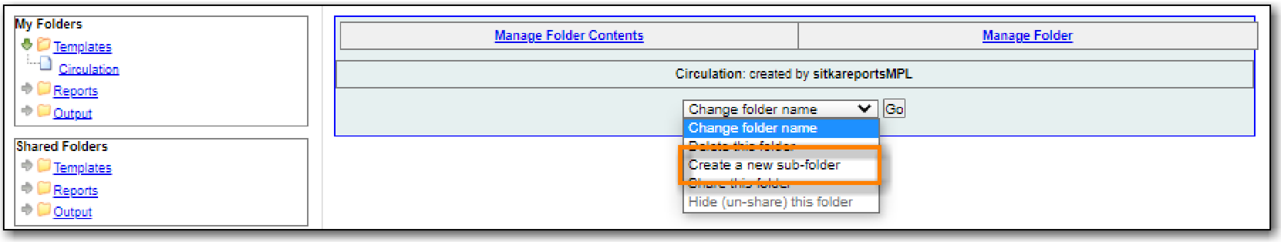
1. Go to **Administration** → **Reports**.
2. In the *My Folders* section click on the folder you would like to create a sub-folder in. You may need to click on the arrows to expand the relevant folder tree.



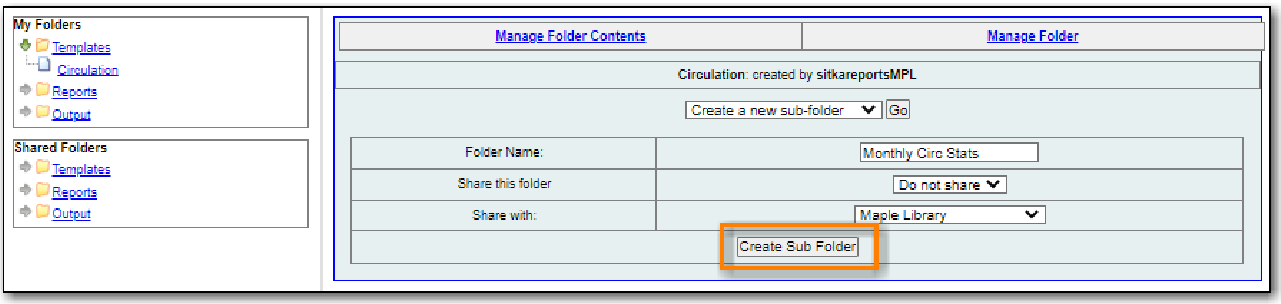
3. Click **Manage Folder**.



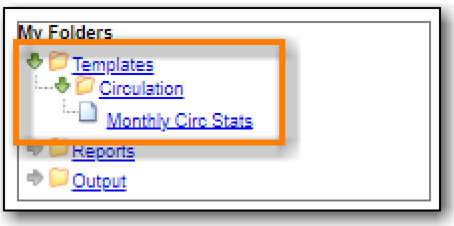
4. From the drop down menu select **Create a new sub-folder** and click **Go**.



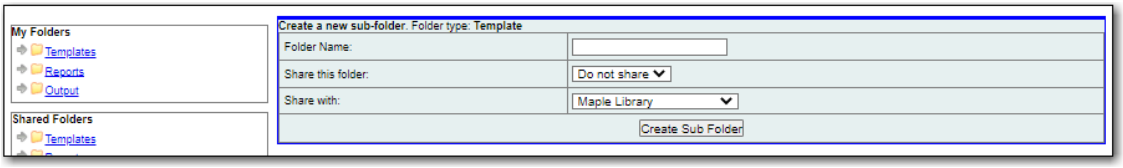
5. Enter a name for the folder and select sharing parameters if appropriate. See Sharing Your Folders for more information on sharing.
6. Click **Create Sub Folder**



7. A pop-up will appear confirming the folder can been created. Click **OK**.
8. The folder can now been seen in the appropriate folder tree.



NOTE	When creating folders at the top level (directly under *Templates*, *Reports*, or *Output*) Evergreen will open the folder creation screen immediately.



30.2. Managing Folders

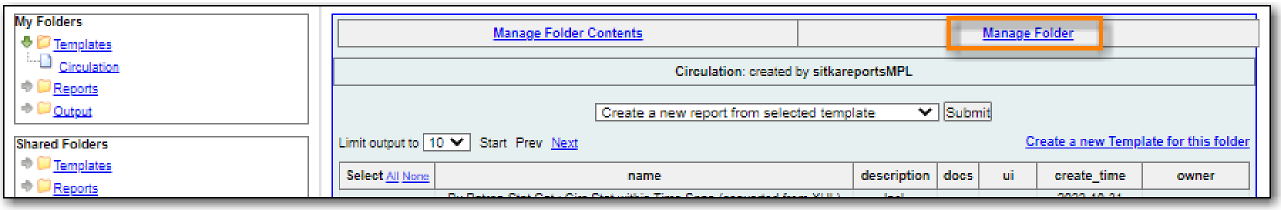
TIP

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 sub-folders.

Once a folder has been created, you can change the name, delete the folder, create a new sub-folder, or change the sharing settings.

1. Go to **Administration** → **Reports**.
2. In the *My Folders* section click on the name of the folder that you wish to manage.
3. Click **Manage Folder**.



4. Select the relevant option from the drop down menu. You can:
   - Re-name the folder.
   - Delete the folder.
   - Create a new sub-folder.
   - Share or hide the folder.
5. Click **Go**.
6. Follow the prompts for the option you choose.

30.3. Sharing Folders

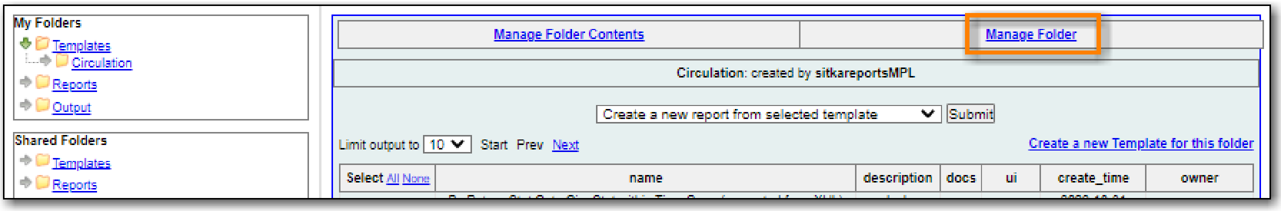
Template, *Report*, and *Output* folders can be private (accessible only to the user who created the folder) or shared with other staff at the library or other libraries in your federation or lending zone who have reporter permissions.

A folder must be shared with at least your library in order for Co-op Support to be able to view it to assist with troubleshooting.

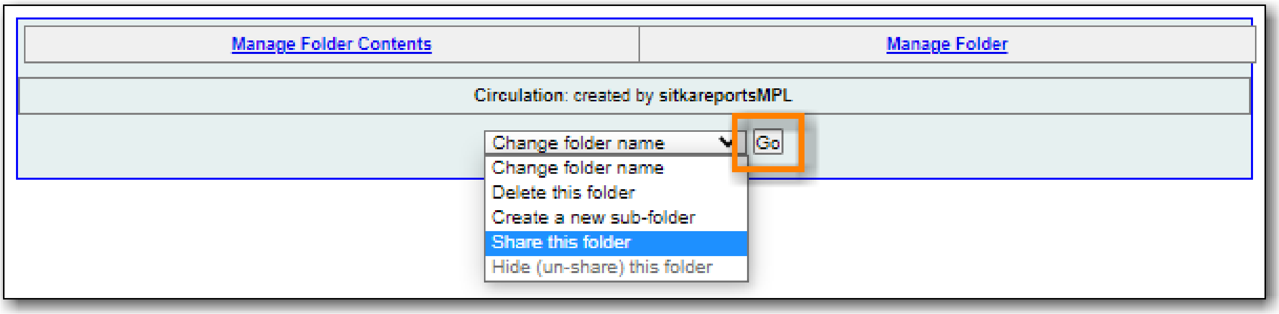
Sharing Your Folders

Folders can be set as shared when they are created or updated afterwards.

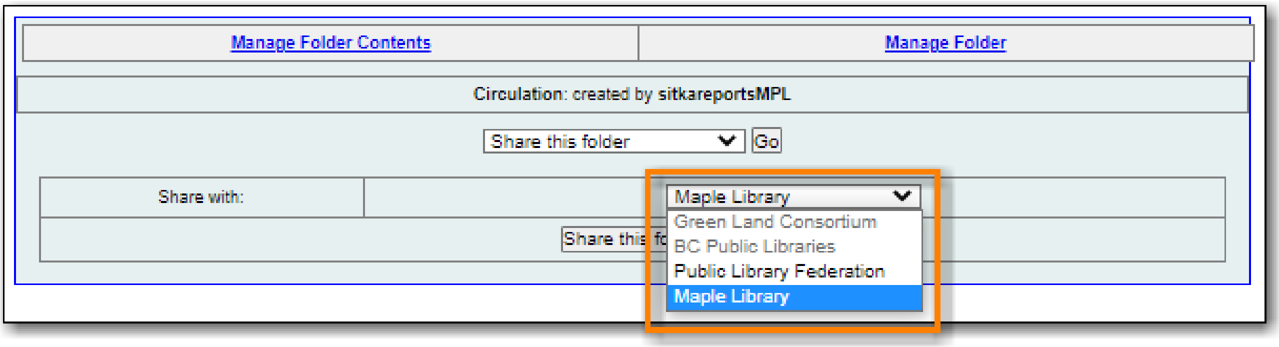
1. Go to **Administration** → **Reports**.
2. In the *My Folders* section click on the name of the folder that you wish to share.
3. Click **Manage Folder**.



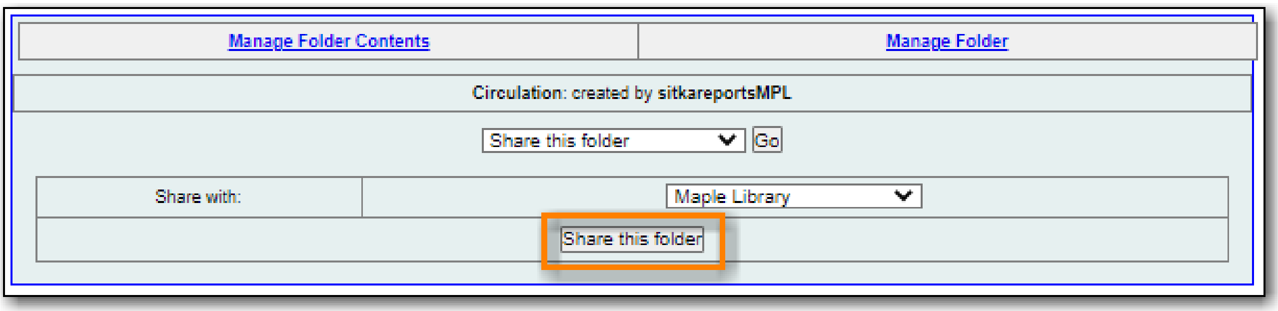
4. From the drop down menu select **Share this folder** and click **Go**.



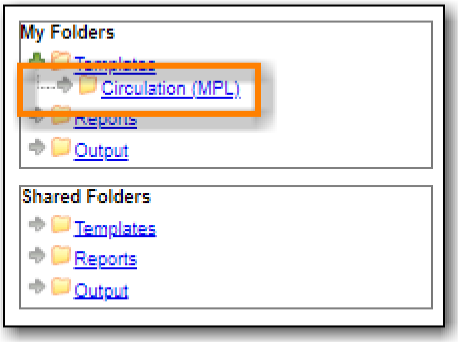
5. Select the level at which you would like to share your folder.



6. Click **Share this folder**.



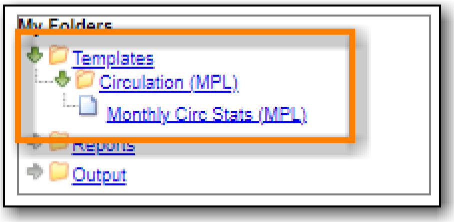
7. A pop-up will appear confirming the folder has been shared. Click **OK**.
8. The folder will now show under *My Folders* with the library code of the organizational unit it is shared with in parentheses.



9. If you wish to change the share scope for the folder you must hide the folder and then re-share it with the new share scope.

CAUTION

A shared sub-folder must be created in a shared folder. The shared sub-folder must have the same share scope or a narrower share scope than the parent folder.



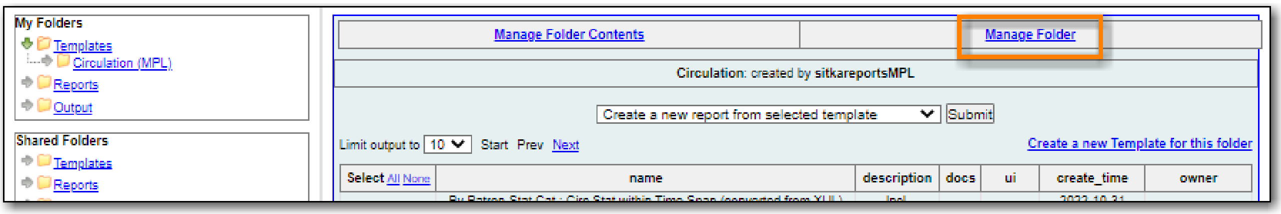
Sub-folders created within unshared folders or folders that are shared with a wider scope than the parent folder may result in folders not displaying at all.

Please be cautious when creating shared subfolders and contact Co-op Support for assistance if you encounter this issue.

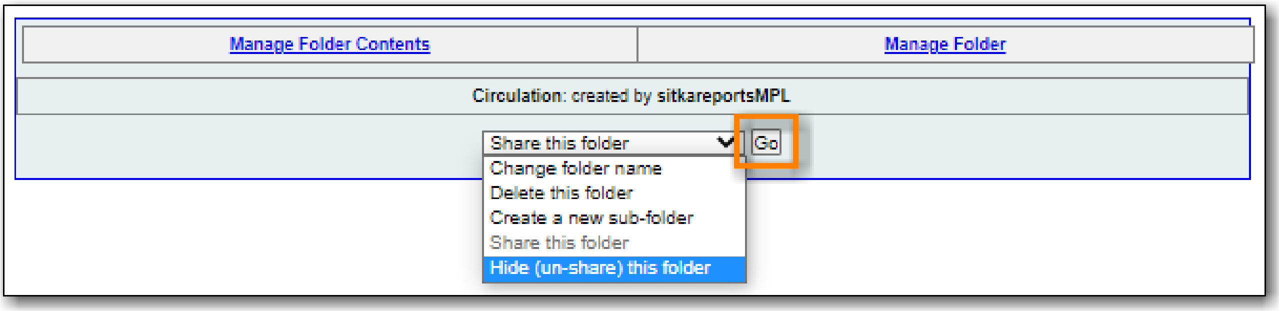
Hiding Your Folders

Folders are hidden by default. Folders that have been shared can be hidden.

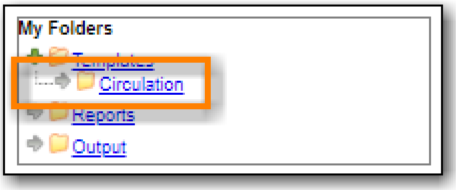
1. Go to **Administration** → **Reports**.
2. In the *My Folders* pane click on the name of the folder that you wish to hide.
3. Click **Manage Folder**.



4. From the drop down menu select **Hide (un-share) this folder** and click **Go**.



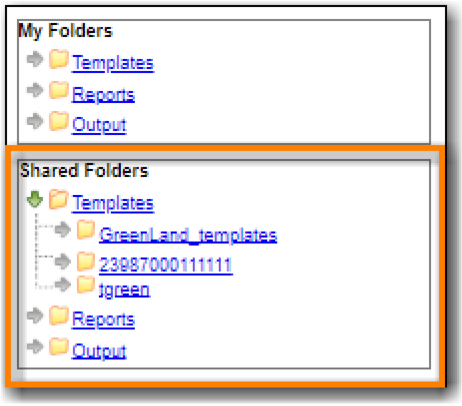
5. A pop-up will appear and ask you to confirm that you wish to hide the folder. Click **OK**.
6. A pop-up will appear confirming the folder has been hidden. Click **OK**.
7. The folder will now show under *My Folders* without a library code in parentheses.



CAUTION If the folder you wish to hide has shared sub-folders you need to hide the sub-folders first or your folders may no longer display at all.

Viewing Shared Folders

Folders that are shared with your library, federation, or lending zone display in the *Shared Folders* section.



The top level of shared folders displays the username of the account that has shared the folder.

While it is most common for users to share template folders, reports and output folders can be shared as well.

You can only view the contents of the shared folders or clone the templates into your own folders.

Chapter 31. Using the Reporter

The basic steps to using Evergreen's reporter are:

1. Find the template
   a. Clone it into your folders if it was created by another user
2. Run the report, also referred to as creating a report definition
3. View your output either through the staff client or via your email

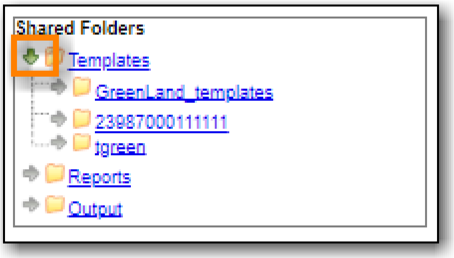
31.1. Cloning a Report Template

Cloning Reports and Sitka Templates (2:35)

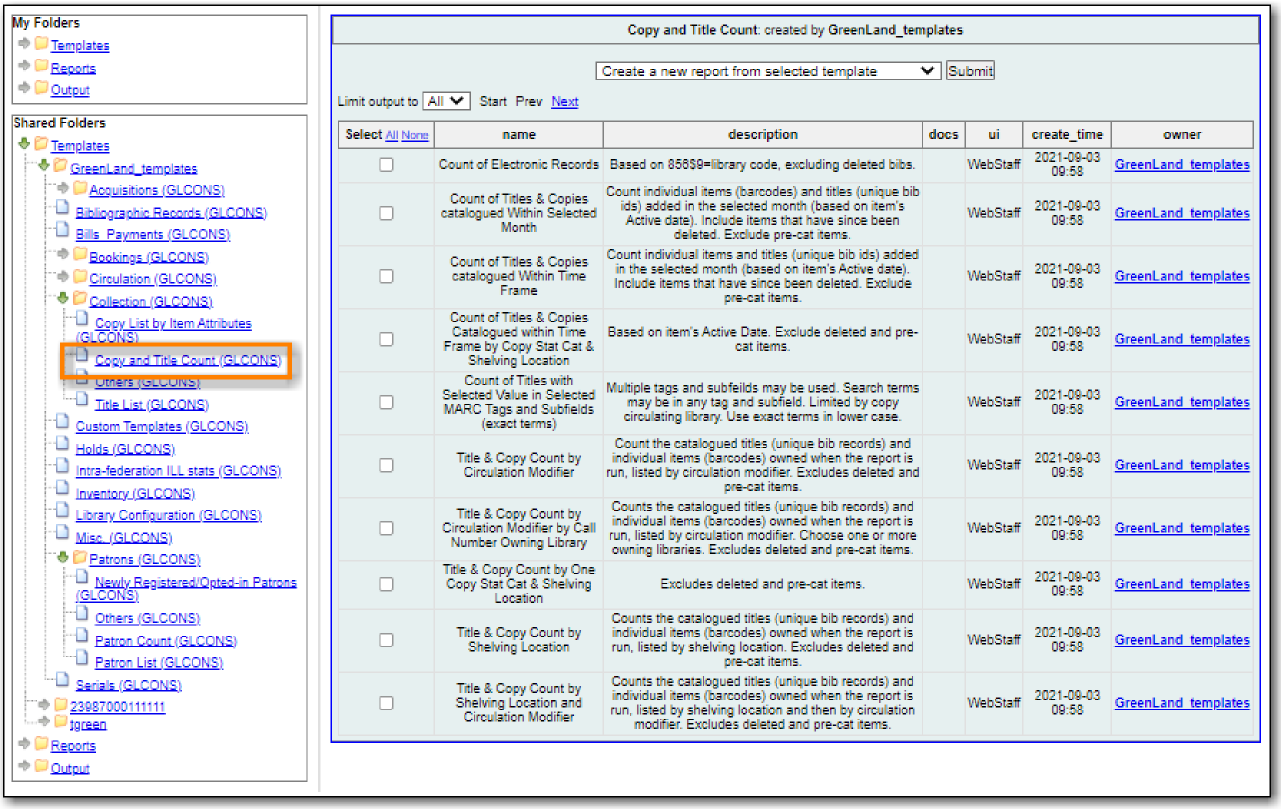
In Evergreen reports are run from templates that can be used multiple times. Library staff can create their own templates or clone templates from other users.

The steps below assume you have already created at least one folder in *Templates*. If you have not done so, please see Creating Folders.

1. Go to **Administration** → **Reports**
2. In the *Shared Folders* section click on the arrow beside the *Templates* folder to see the shared template folders. Use the arrows to expand the folder tree until you find the folder containing the template you would like to clone.

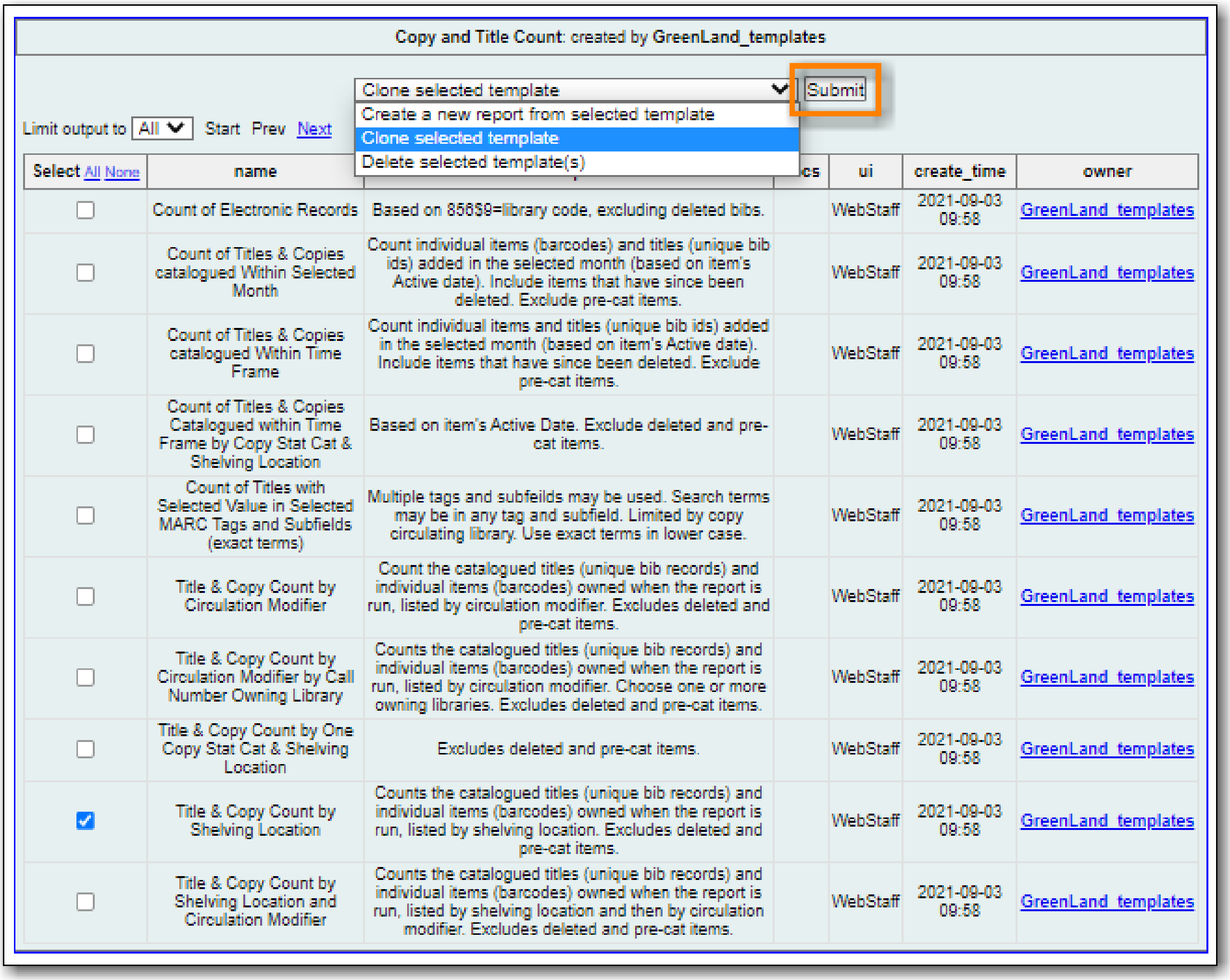


3. Click on the folder name to display the contents.



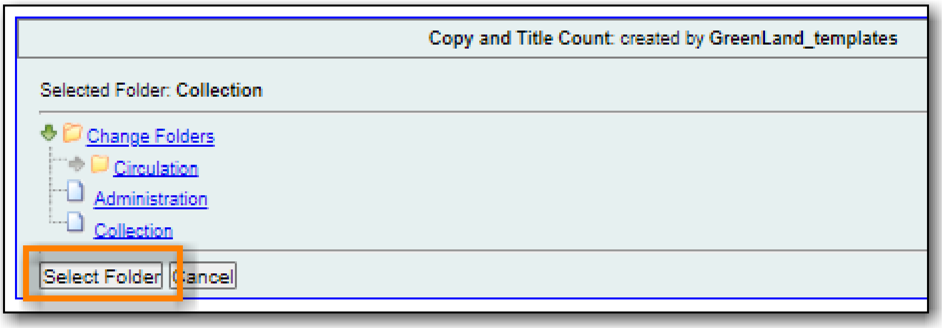
4. Check the box beside the template you wish to clone.

5. From the drop down menu choose **Clone selected template**. Click **Submit**.

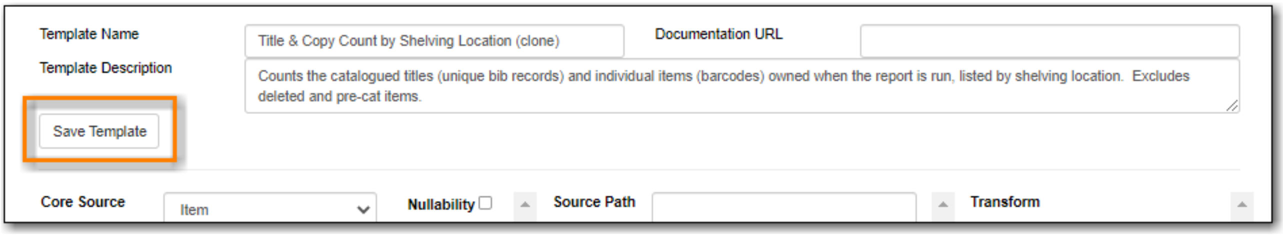


TIP By default Evergreen only displays the first 10 items in any folder. To view all content, change the *Limit output to* setting from *10* to *All*.

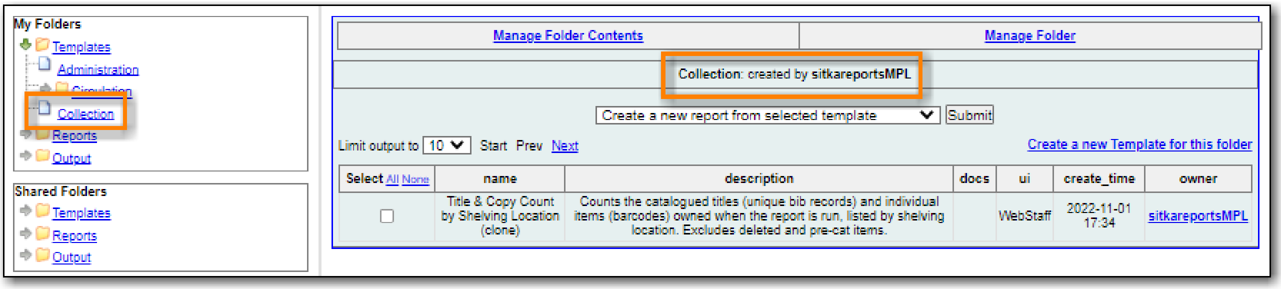
6. Click on the name of your folder where you'd like to save the cloned template and then click **Select Folder**.



7. The template editor will open. For information on modifying templates see Modifying Report Templates.
8. Update the template name and/or template description if desired.
9. Click **Save Template**



10. A pop-up will appear confirming that you wish to save the template. Click **OK/Continue**.
11. The template can now be found in the folder you saved it in.



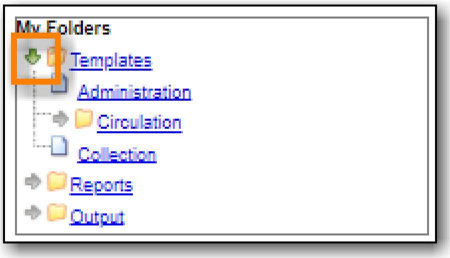
31.2. Running a Report

Running a Report (4:25)

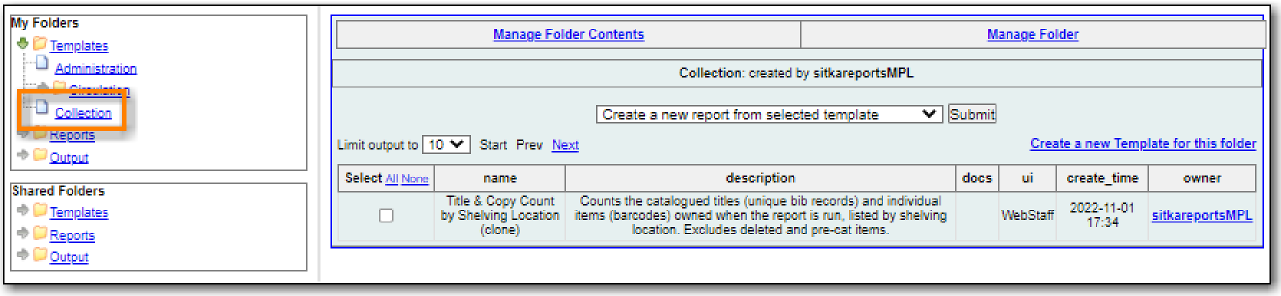
You can run one off reports on demand or schedule recurring reports to run automatically. To run the report you fill out the reports form which creates a report definition, which tells Evergreen how to run the report, what information to include, and what type of output to provide you with.

TIP Examples of how to fill in the report definition for commonly used report templates can be found in Report Definition Examples.

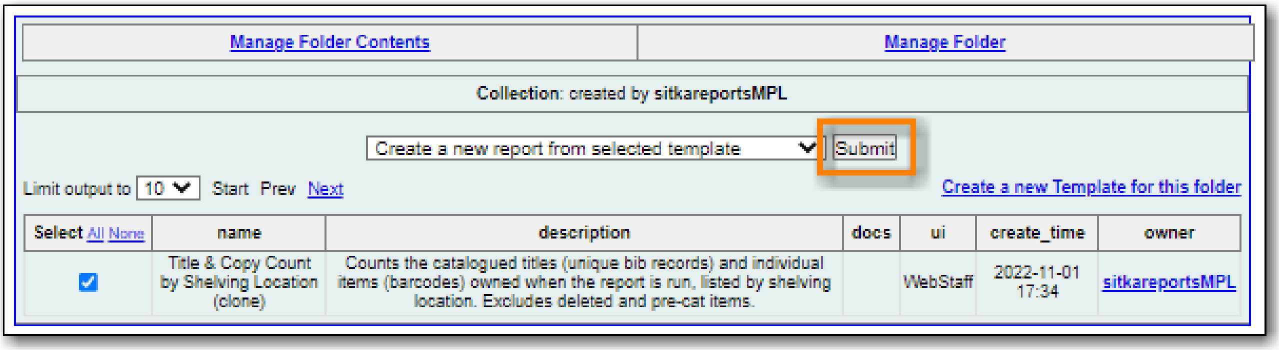
1. Go to **Administration** → **Reports**
2. In the *My Folders* section click on the arrow beside the *Templates* folder to see your template folders. Use the arrows to expand the folder tree until you find the folder containing the template you would like to use for your report.



3. Click on the folder name to display the contents.

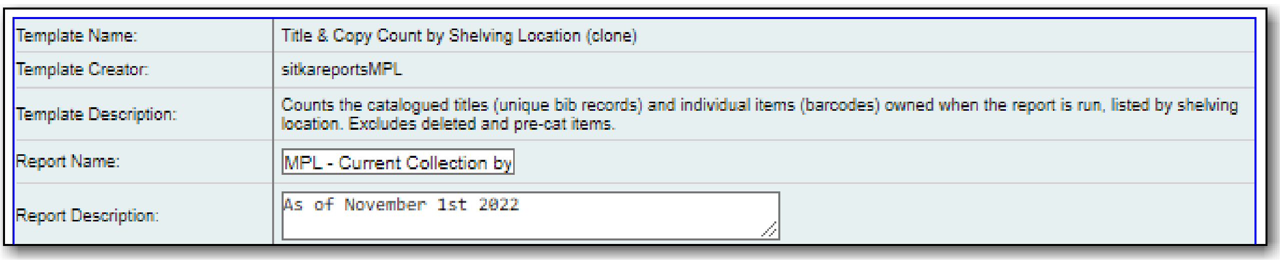


4. Check the box beside the template you wish to use.
5. **Create a new report from selected template** will be selected by default. Click **Submit**.



6. Enter a name for your report.

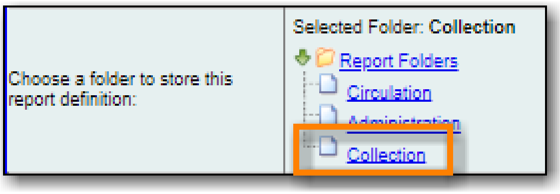
   Optionally, enter a description for your report.



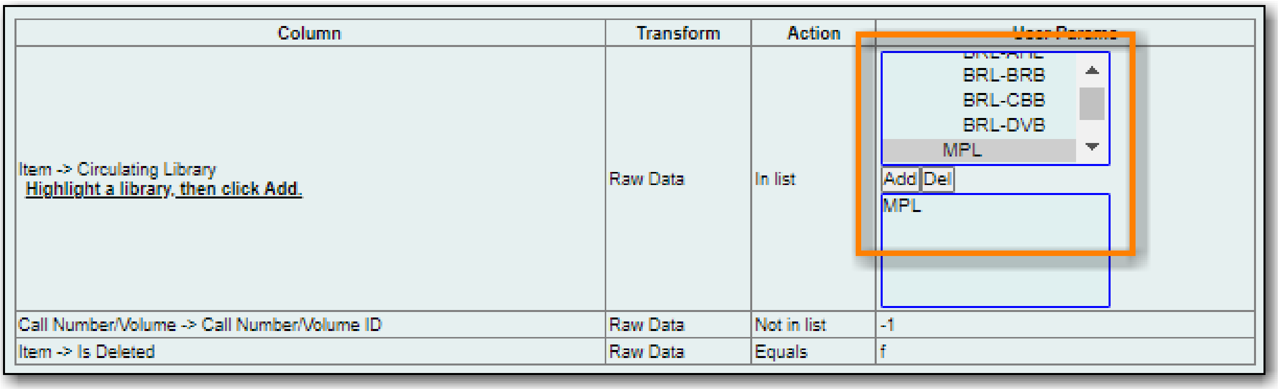
7. The display columns included in the output are listed as Report columns.

   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 only suitable for some types of result data.

8. Choose the Reports folder you would like to save the reports definition in.



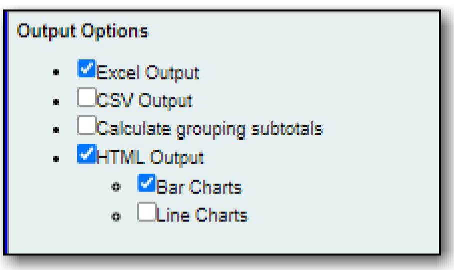
9. Enter values for any filters. For more information on filter values see Report Filters.



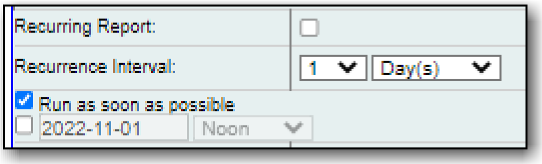
> **NOTE**
>
> Instead of scrolling through the options in the filter lists you can click on one of the visible options and then on your keyboard press the letter the option you want starts with. This will jump you to that spot in the list.

10. Check the boxes to select the types of output you would like.

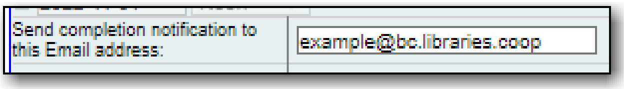
    Check the *Calculate grouping subtotals* check box to add an unlabeled row or column with the subtotals for each grouping and an unlabeled grand total row or column. Please note group subtotals and grand totals will only be useful with some reports.



11. Leave the recurring and run time options as is unless you are running a recurring report. See Recurring Reports.



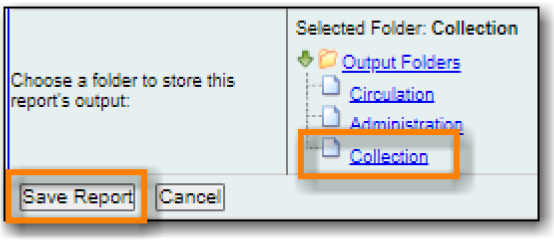
12. Optionally, enter an email address to send the report completion notification to. By default this field will contain the email address saved in your staff account. Additional addresses can be added separated by a comma.



NOTE

The email will contain a link to the password-protected report output. Only staff members with permissions to view reports or full access to the reporter will be able to open the report output. Staff who only need to view report output must first to fill out the All Staff Reporter Privacy Waiver.

13. Choose the Ouput folder you would like to save the report output in and then click **Save Report**.



14. A pop-up appears confirming the report has been saved. Click **OK**.
15. Unless you have set a specific run time the report will run right away. If your report has not completed after 15 minutes please contact Co-op Support.
16. Once the report is complete you can view your output. See Viewing Report Output.

31.2.1. Report Filters

The filters in a report template allow library staff to set the parameters on which the report runs. The ability to select values for certain filters when running a report means a single report template can be used multiple times to generate reports on slightly different data. For example, the same report template can be used to generate separate lists of items using particular circulation modifiers.

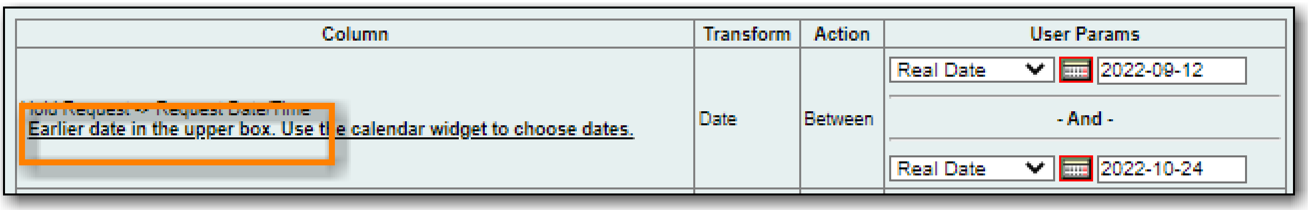
Hardcoded Filters

Hardcoded filters are set when the report template is created. These filters cannot be changed when running a report. Common hardcoded filters include:

Column	Transform	Action	User Params	Description
Bibliographic Record → Record ID	Raw Data	Not in list	-1	Exclude all records where the bibliographic record ID is -1 which is all pre-cat records.
Call Number/Volume → Call Number/Volume ID	Raw Data	Not in list	-1	Exclude all records where the call number ID is -1 which is all pre-cat records.
Circulation → Check In Date/Time	Date	Is NULL		Include only items that have not been checked in.
Circulation → Circulating Item → Copy Status → Name	Raw Data	Equals	name of an item status	Include only items that are in the specified item status.
Circulation → Fine Stop Reason	Raw Data	Not in list	LOST	Exclude items that have stopped generating fines because they have been set to lost.
Item → Is Deleted	Raw Data	Equals	f	Include only un-deleted items.
ILS User → Is Deleted	Raw Data	Equals	f	Include only un-deleted patrons.

Date Filters

Date filters are generally set up to be a specific date, a specific month, or a date range. Date filters will often include tips about how the dates should be entered. For instance, in a date range the earlier date should always be entered in the first date box.

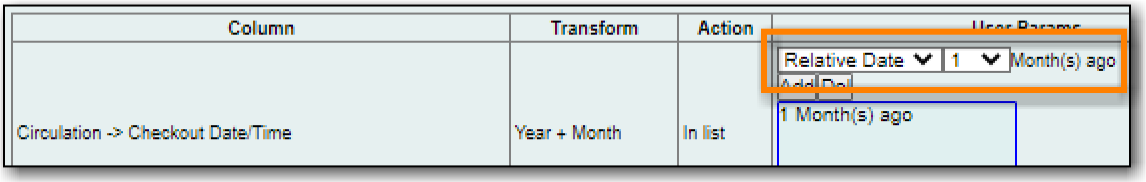


If you'd like to include all possible data for your library in a report that specifies a time range, enter between "1900-01-01" and "today's date".

When running recurring reports it's very important to use *Relative Dates* in your filters. This will allow Evergreen to calculate the time period to report on each time it runs the report. A relative date of 1 month ago will generate a new report each month on the previous month's data; a real date of November 2022 will generate the same report each month with the data from November 2022.

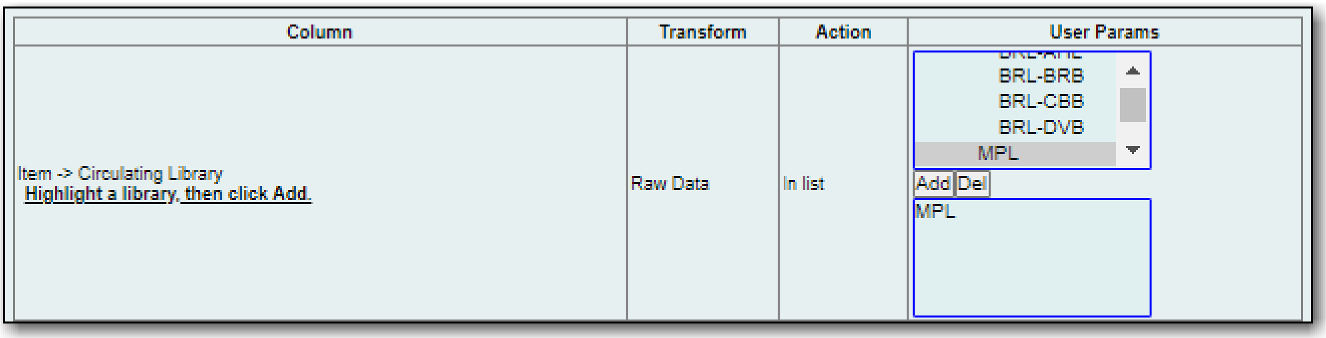
TIP	You can set up recurring monthly reports to show comparative data from one year ago. To do this select relative dates of 1 month ago and 13 months ago.

Use the drop down menu to switch from *Real Date* to *Relative Date*. For a report filtering on month, you will be able to indicate how many months ago the report should look at.



Library Filters

All report templates used by libraries will include a library filter. This filter can look at the library specified in a variety of fields in the data including the checkout library, circulation library, owning library, patron's home library, and organizational unit.

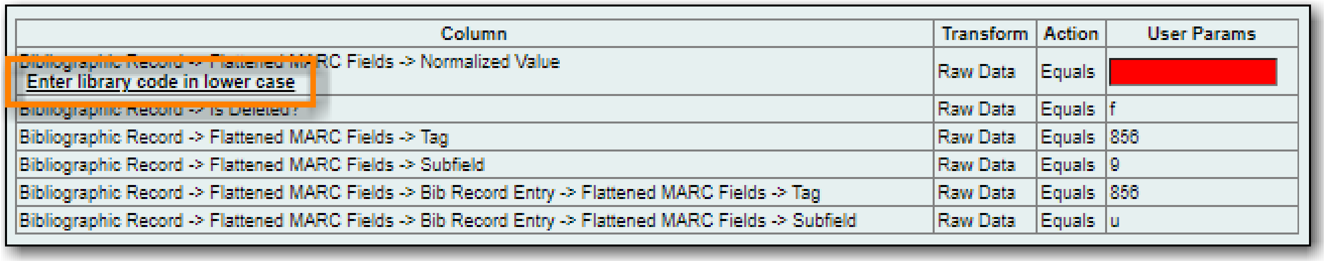


This filter is important as it allows staff to comply with Sitka's data use requirements as per Appendix J of the Service Management Agreement and restrict the data in the report output to only data relevant to their library.

Multi-branch libraries can add specific branches or all of their branches to the list to get a report including data from the select branches.

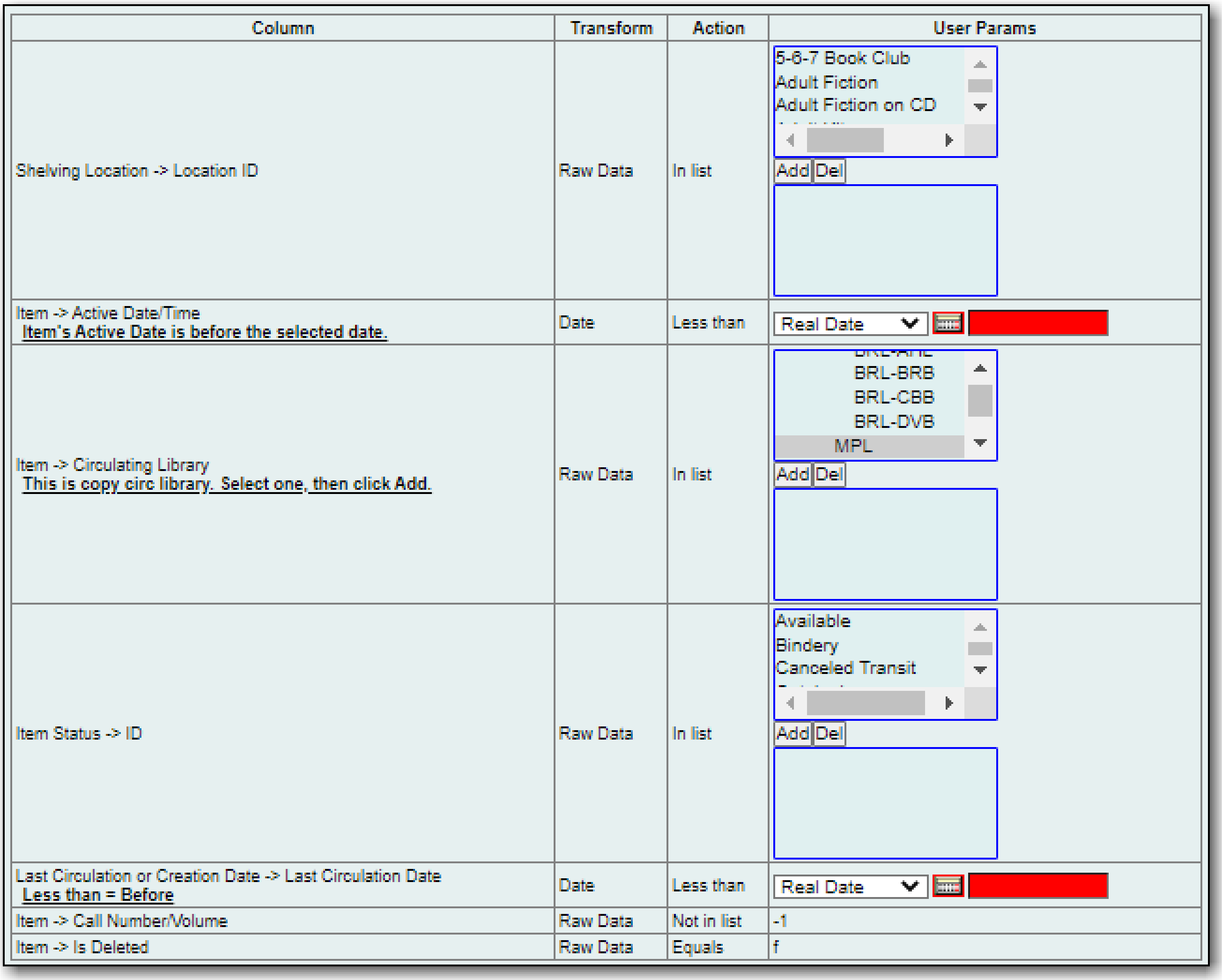
Other Filters

While many filters will require staff to select values from a given list, some filters will require staff to type a value into the filter *User Params* field. In those cases the report will generally indicate how the text should be entered so that Evergreen can use the value and generate usable report output.



Column	Transform	Action	User Params
Bibliographic Record -> Flattened MARC Fields -> Normalized Value Enter library code in lower case	Raw Data	Equals	
Bibliographic Record -> Is Deleted?	Raw Data	Equals	f
Bibliographic Record -> Flattened MARC Fields -> Tag	Raw Data	Equals	856
Bibliographic Record -> Flattened MARC Fields -> Subfield	Raw Data	Equals	9
Bibliographic Record -> Flattened MARC Fields -> Bib Record Entry -> Flattened MARC Fields -> Tag	Raw Data	Equals	856
Bibliographic Record -> Flattened MARC Fields -> Bib Record Entry -> Flattened MARC Fields -> Subfield	Raw Data	Equals	u

Some report templates will have just hardcoded filters and a single library filter that requires staff to enter a value while other reports will have multiple filters where staff need to enter values for the library, dates, and patron or item data.



Column	Transform	Action	User Params
Shelving Location -> Location ID	Raw Data	In list	5-6-7 Book Club Adult Fiction Adult Fiction on CD Add Del
Item -> Active Date/Time Item's Active Date is before the selected date.	Date	Less than	Real Date
Item -> Circulating Library This is copy circ library. Select one, then click Add.	Raw Data	In list	BRL-BRB BRL-CBB BRL-DVB MPL Add Del
Item Status -> ID	Raw Data	In list	Available Bindery Canceled Transit Add Del
Last Circulation or Creation Date -> Last Circulation Date Less than = Before	Date	Less than	Real Date
Item -> Call Number/Volume	Raw Data	Not in list	-1
Item -> Is Deleted	Raw Data	Equals	f

31.2.2. Recurring Reports

Recurring Reports (3:02)

Save time by scheduling recurring reports to run your regular reports automatically. Monthly circulation and patron registration statistics are good candidates for recurring reports.

Staff with access to the reporter can set up recurring reports to email a link to the password-protected report output to another staff member. Staff who only need to view report output must first to fill out the All Staff Reporter Privacy Waiver.

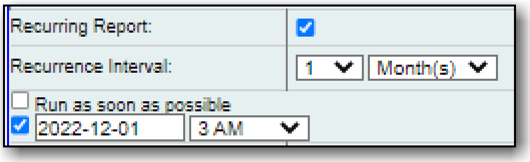
To set up a recurring report, follow the procedure in Running a Report until you reach step 11 and then follow the steps below.

1. Check the box for **Recurring Report**.
2. Select your desired *Recurrence Interval*. Reports can run on a daily, weekly, or monthly interval.

TIP

The recurrence 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. See Date Filters for more information on working with date filters on a recurring report.

3. Check the box beside the date and set the date of the first run of the report.

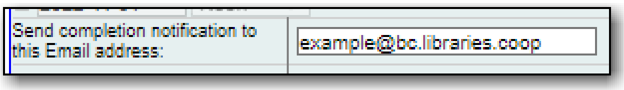


NOTE

Best practice is to always set recurring reports to run in the early hours of the morning (1:00am PT to 4:00am PT).

Monthly recurring reports MUST be set to run on the 1st of the next month in order to capture all monthly data.

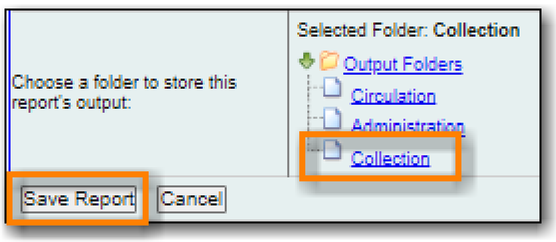
4. Enter an email address to send the report completion notification to. By default this field will contain the email address saved in your staff account. Additional addresses can be added separated by a comma.



NOTE

The email will contain a link to the password-protected report output. Only staff members with permissions to view reports or full access to the reporter will be able to open the report output. Staff who only need to view report output must first to fill out the All Staff Reporter Privacy Waiver.

5. Choose the Ouput folder you would like to save the report output in and then click **Save Report**.



6. A pop-up appears confirming the report has been saved. Click **OK**.
7. Unless you have set a specific run time the report will run right away. If your report has not completed after 15 minutes please contact Co-op Support.

8. Once the report is complete you can view your output. See Viewing Report Output.

31.3. 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. If an email address was included in the report definition Evergreen will send an email containing a link to the password-protected report output.

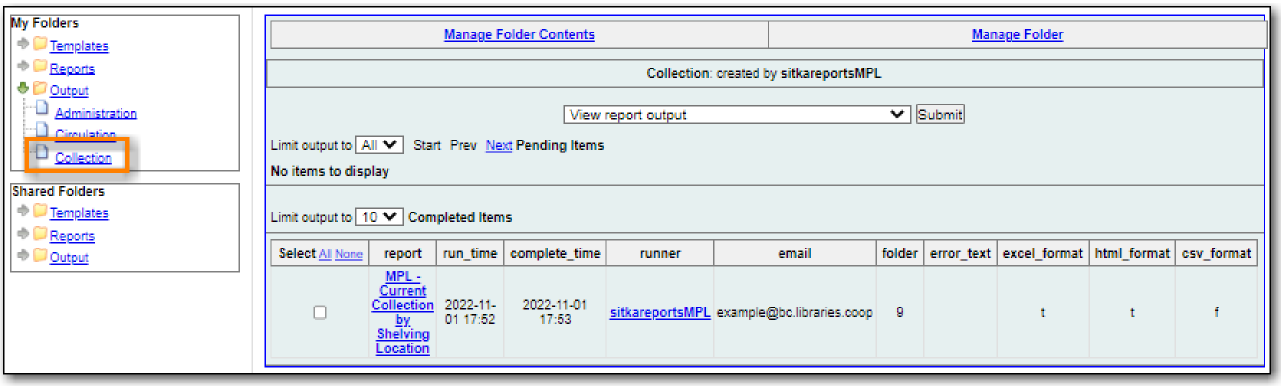
Only staff members with permissions to view reports or full access to the reporter will be able to open the report output in either the staff client or via the email link. Staff who only need to view report output must first to fill out the All Staff Reporter Privacy Waiver.

Unless you have set a specific run time reports generally take about 5 minutes to complete. If your report still shows as pending in the your output folder after 15 minutes please contact Co-op Support.

31.3.1. Viewing Output via the Reporter

1. Go to **Administration** → **Reports**.
2. In the *My Folders* section click on the arrow beside the *Output* folder to see your output folders. Use the arrows to expand the folder tree until you find the folder containing the output you'd like to view.

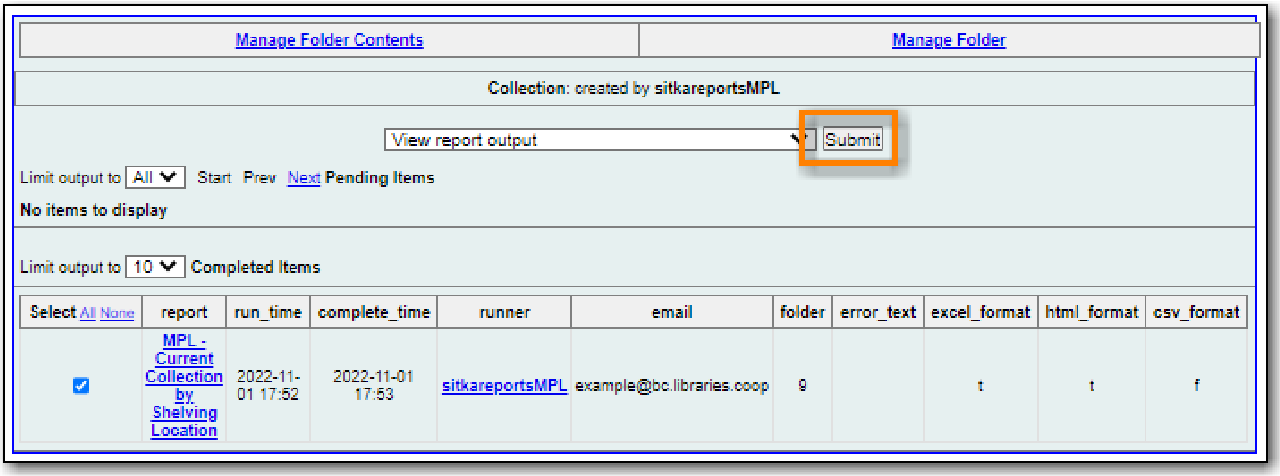
3. Click on the folder name to display the contents.



4. Output will display either under *Pending Items* or *Completed Items*. Click on the folder name

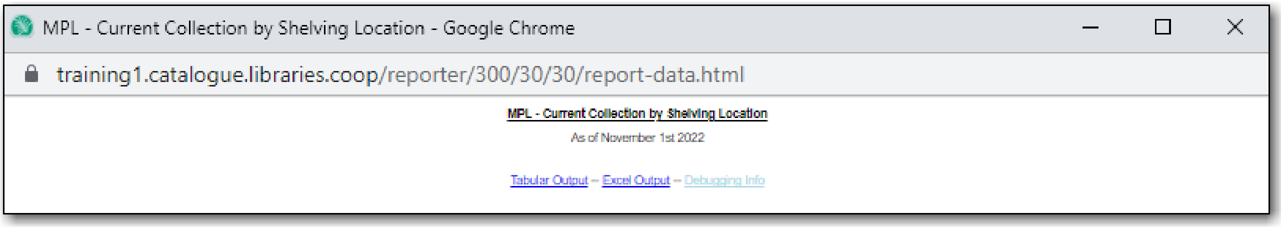
again to refresh if your output hasn't completed yet.

5. Check the box beside the output you would like to view.
6. **View report output** will be selected by default. Click **Submit**.

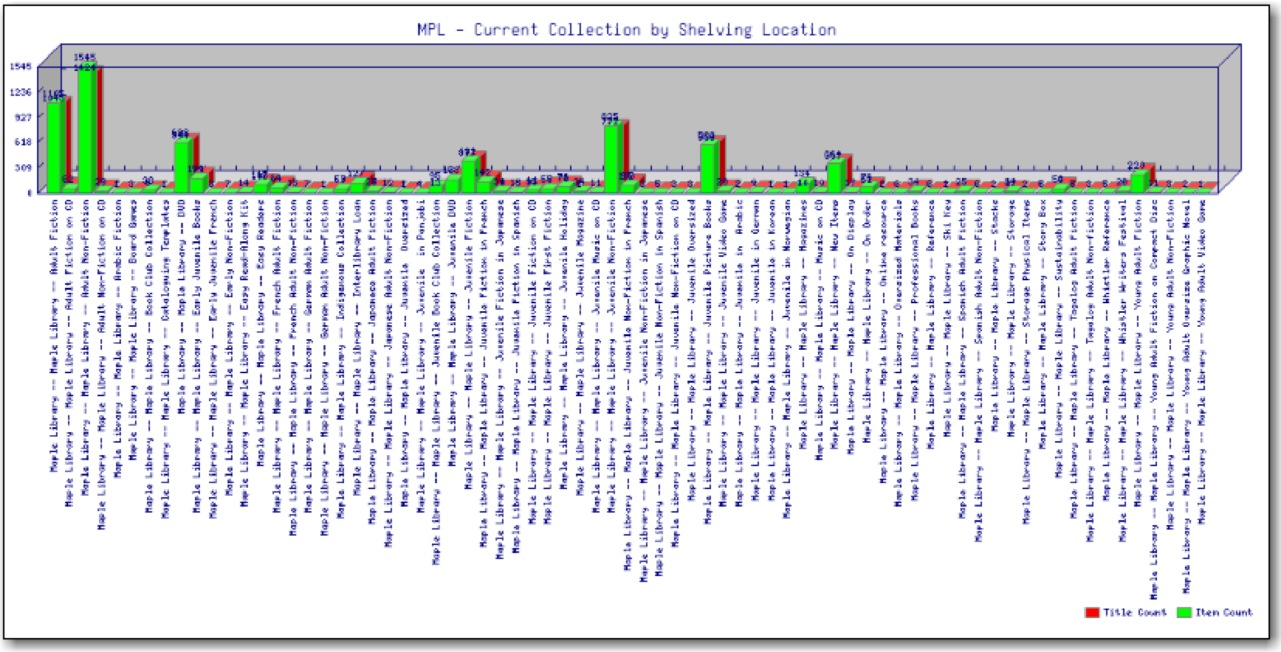


7. The report output will open in a new browser window.

   The report name and description will display as well as links to the output options selected when running the report. The URL can be shared with other library staff who have reporter permissions.

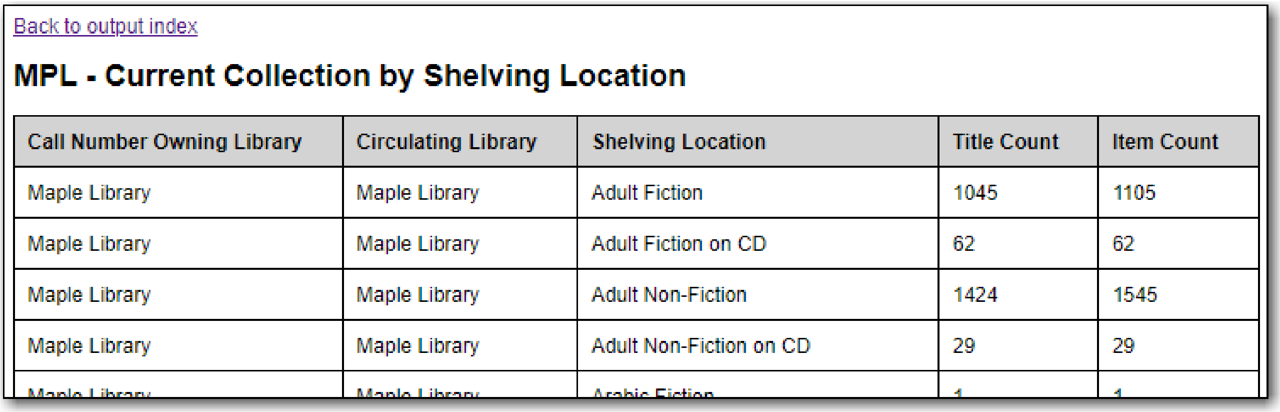


   If *Bar Charts* and/or *Line Charts* were selected in the output options and the data can be shown in those forms the bar and/or line chart will display.



8. Click on **Excel Output** or **CSV Output** to download the output as a file that can be opened in a spreadsheet program. You will be prompted to open or save the the output file.
9. Click on **Tabular Output** to view the output in the browser.

   The tabular output will display and can be sorted by clicking on a column heading.



Back to output index

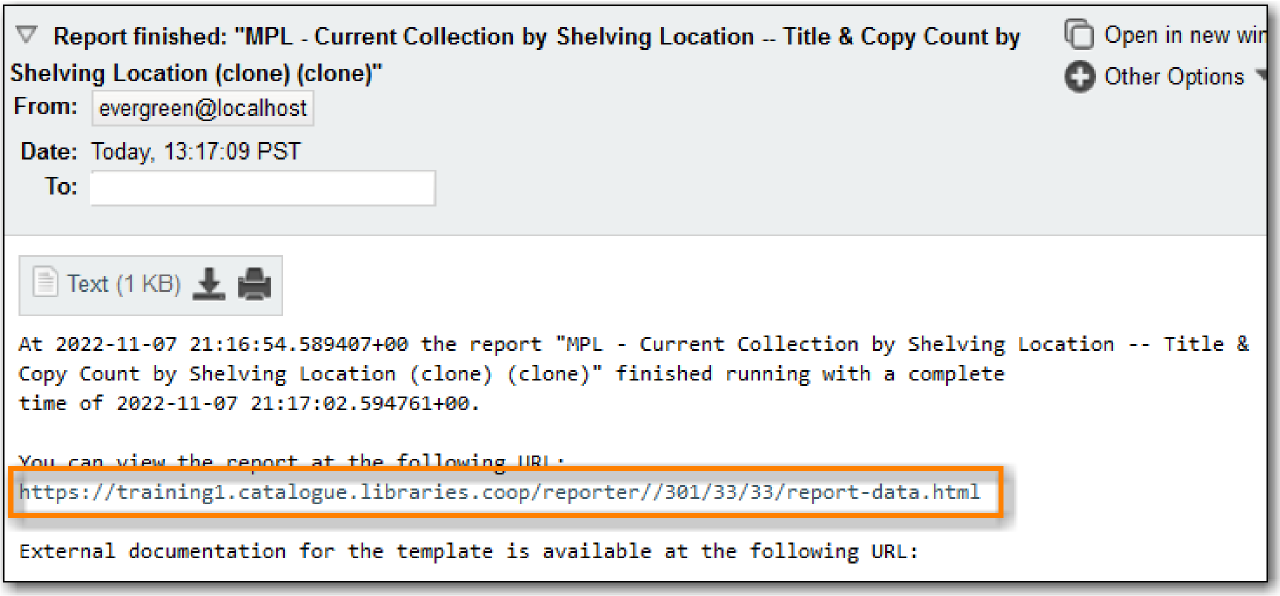
MPL - Current Collection by Shelving Location

Call Number Owning Library	Circulating Library	Shelving Location	Title Count	Item Count
Maple Library	Maple Library	Adult Fiction	1045	1105
Maple Library	Maple Library	Adult Fiction on CD	62	62
Maple Library	Maple Library	Adult Non-Fiction	1424	1545
Maple Library	Maple Library	Adult Non-Fiction on CD	29	29
Maple Library	Maple Library	Arabic Fiction	1	1

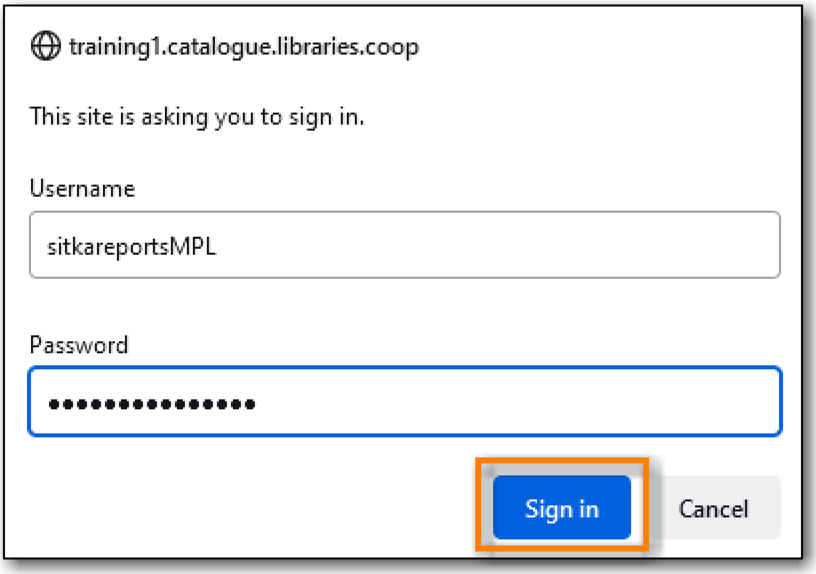
31.3.2. Viewing Output via the Email Link

1. In your email program open the email with the subject *Report finished: Your report name - template used"*.
2. The body of the email will include the run time, the name of the report, the name of the template used for the report, URL for accessing the report, and in some cases a URL for documentation related to the report template.

   Click on the report URL.



3. A pop up will appear asking for your Evergreen staff username and password. Enter your credentials and click **Sign In**.



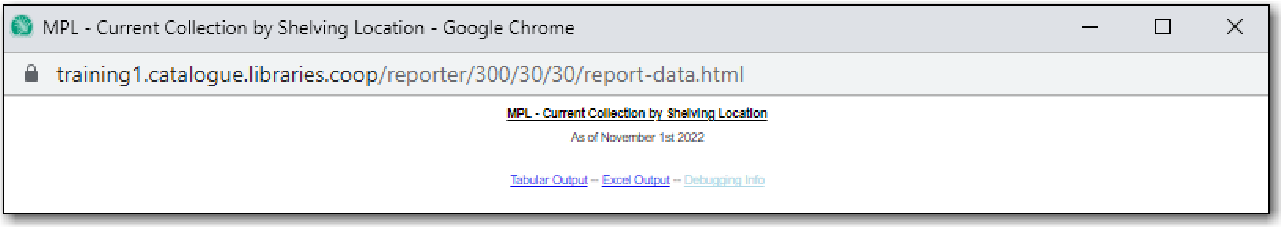
NOTE

Opening subsequent report URLs will not prompt for an additional sign in until the browser is closed.

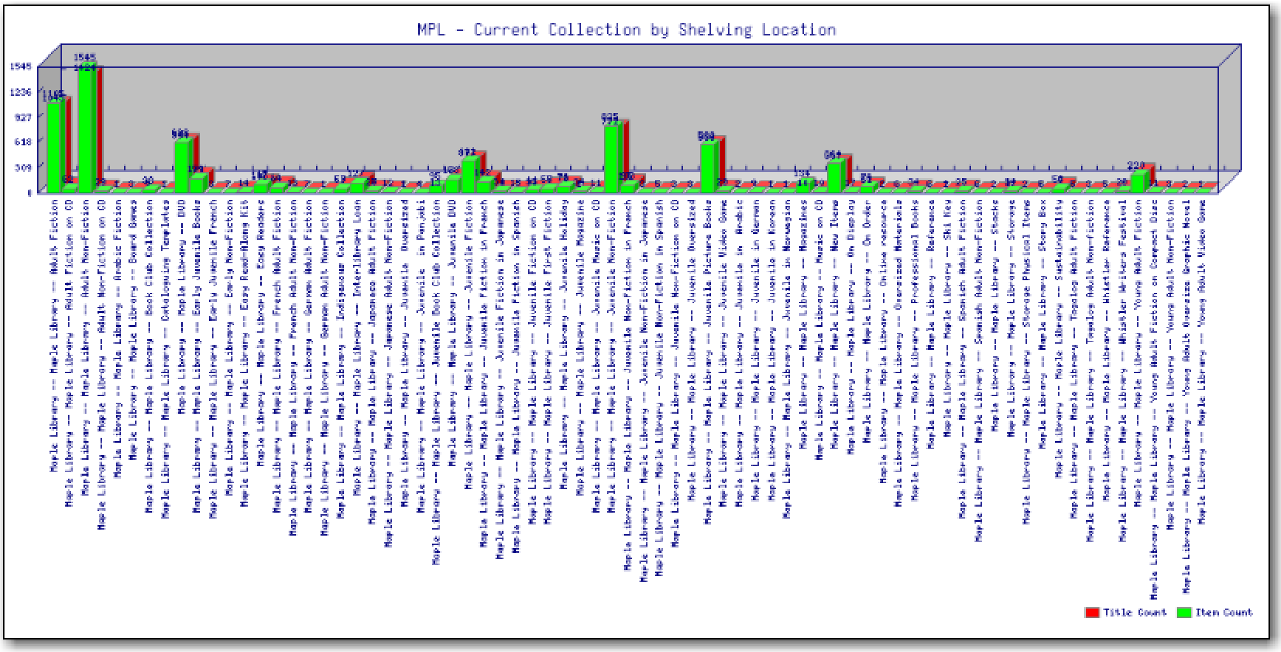
Staff accounts without permissions to use the reporter or view report output will not be able to sign in.

4. The report output will open in a new browser window.

   The report name and description will display as well as links to the output options selected when running the report. The URL can be shared with other library staff who have reporter permissions.

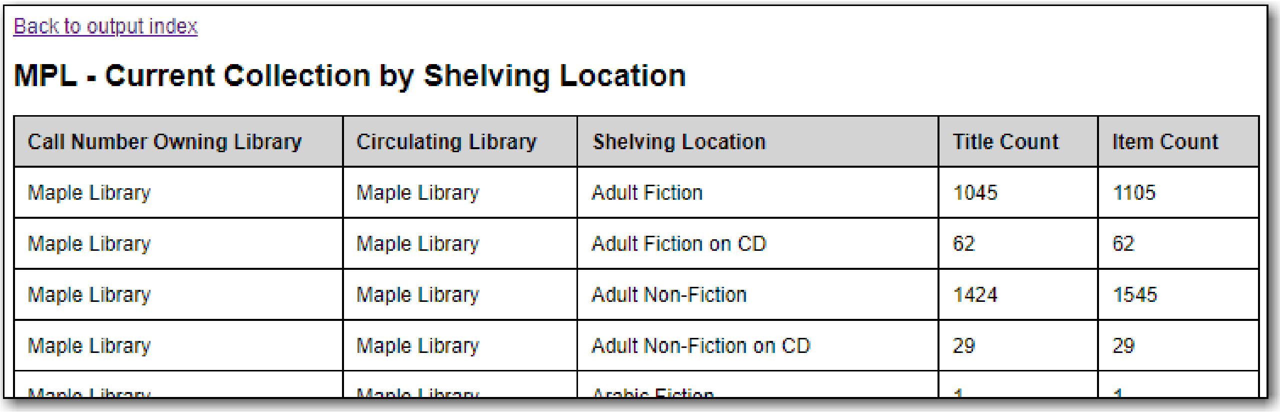


   If *Bar Charts* and/or *Line Charts* were selected in the output options and the data can be shown in those forms the bar and/or line chart will display.



5. Click on **Excel Output** or **CSV Output** to download the output as a file that can be opened in a spreadsheet progam. You will be prompted to open or save the the output file.
6. Click on **Tabular Output** to view the output in the browser.

   The tabular output will display and can be sorted by clicking on a column heading.



Back to output index

MPL - Current Collection by Shelving Location

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Maple Library	Maple Library	Adult Fiction	1045	1105
Maple Library	Maple Library	Adult Fiction on CD	62	62
Maple Library	Maple Library	Adult Non-Fiction	1424	1545
Maple Library	Maple Library	Adult Non-Fiction on CD	29	29
Maple Library	Maple Library	Arabic Fiction	1	1

31.4. Maintaining Reporter Data

Saved report templates will stay in the Sitka database forever unless deleted by the template owner. Report definitions and output are deleted on a yearly basis by Co-op Support. When a template or report definition is deleted all the linked definitions and output files are also deleted.

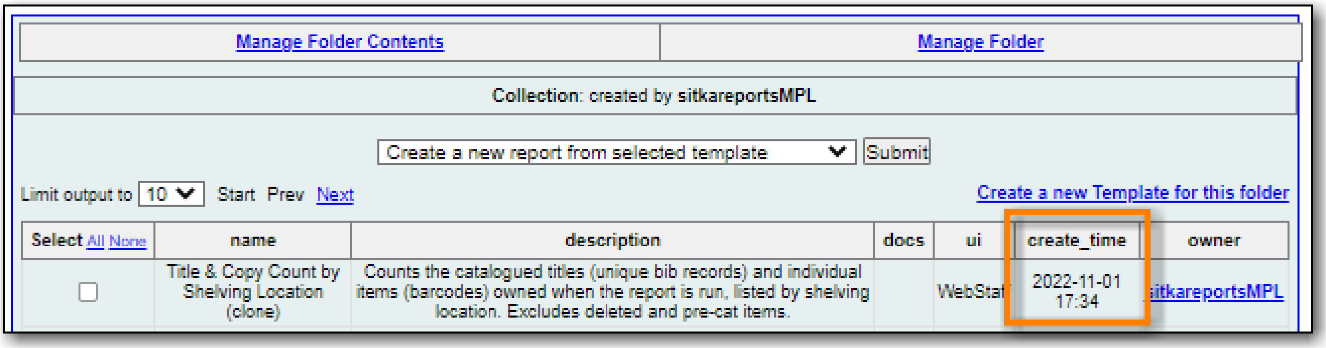
Co-op Support recommends downloading output you need to keep as CSV or Excel output and saving it locally on your computer harddrive or a shared drive.

Managing Reports (3:02)

31.4.1. Maintaining Your Report Templates

As Evergreen evolves from version to version the database tables sometimes change prompting Co-op Staff to update the relevant templates in Sitka_templates. To ensure Evergreen is gathering the correct data it is important to review the templates you use on a yearly basis and clone new templates from Sitka_templates when older versions of a template are retired.

The *create_time* field can be used to determine if your version of a template was created before or after the current version of the template in Sitka_templates.



If you are modifying existing templates or creating your own templates Co-op Support recommends ensuring you delete interim versions of the template created while working on the template. This makes it easier to be sure you are using the correct version of the template.

TIP

Library staff should periodically run a report using the template *Reports Run In Specified Time Period By Specified Library* to see what reports are being run at their library. This template can be found under Shared Folders → Templates → Sitka_templates → Local Administration.

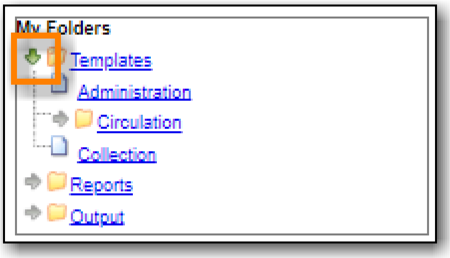
Recurring reports running directly off of Sitka templates or using accounts of former staff members should be stopped and new recurring reports set up properly. Submit a ticket to request assistance with stopping recurring reports for former staff members.

31.4.2. Deleting a Report Template

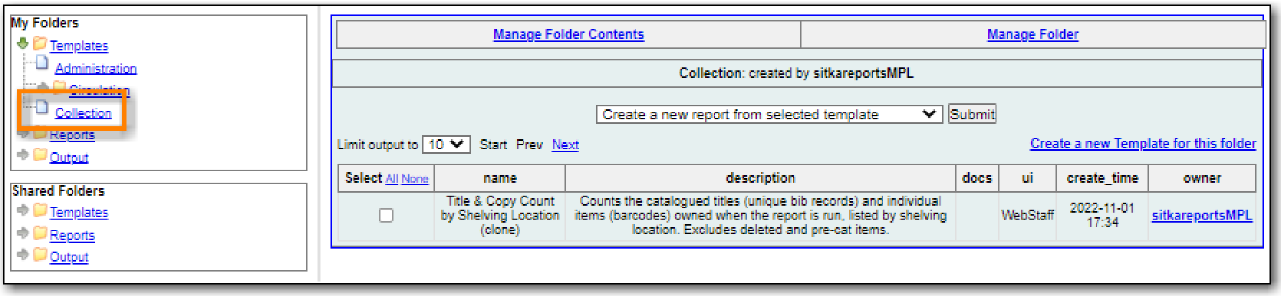
CAUTION

Deleting a template will delete all report definitions and output linked to the template. Make sure any data you need to keep is downloaded and saved locally before deleting.

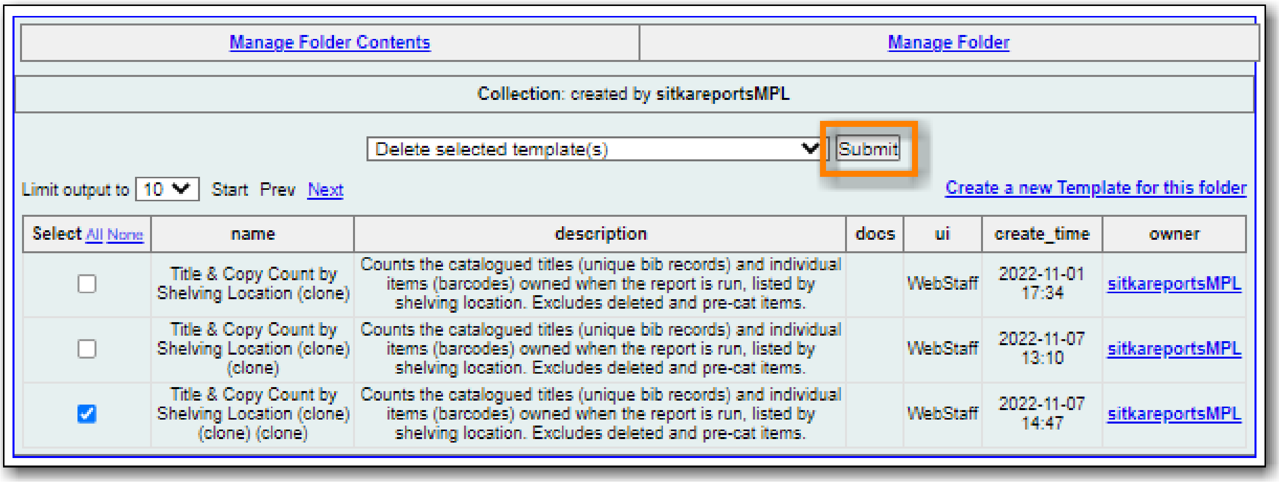
1. Go to **Administration → Reports**
2. In the *My Folders* section click on the arrow beside the *Templates* folder to see your template folders. Continue to use the arrows to expand the folder tree until you find the folder containing the template(s) you would like to delete.



3. Click on the folder name to display the contents.



4. Check the box beside the template(s) you wish to delete.
5. From the drop down menu select **Delete selected templates(s)**. Click **Submit**.



6. A pop up will appear warning you that deleting the template will delete your attached reports and output. Click **OK**.
7. A pop up appears to confirm the deletion. Click **OK**.

NOTE	If you have shared your template and another user has run a report using your template you will not able to delete your template. This is why it is important for all users to clone templates into their own folders before running reports.

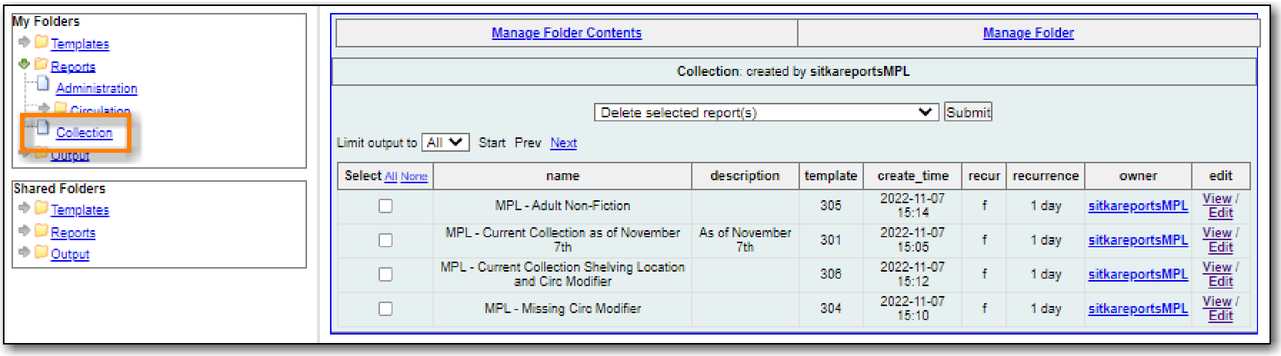
31.4.3. Viewing a Report Definition

You can view the report definitions for the reports you’ve run. This can be helpful if you need to check what values you entered in for the filters.

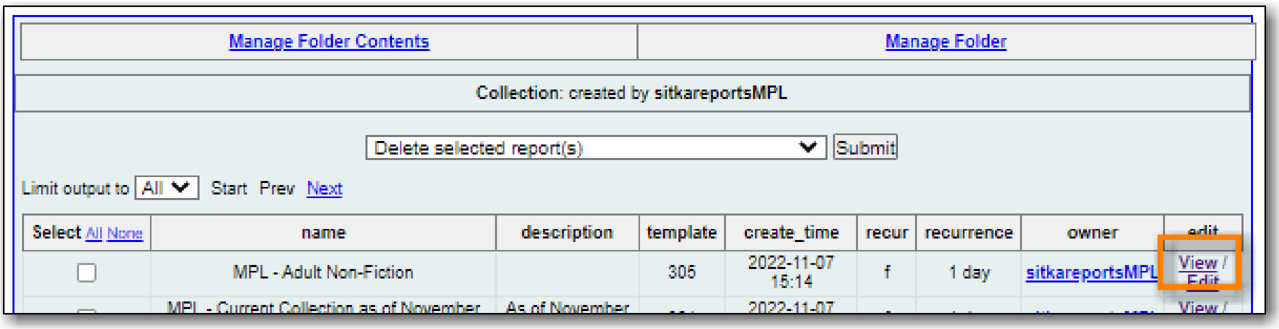
1. Go to **Administration** → **Reports**

2. In the *My Folders* section click on the arrow beside the *Reports* folder to see your reports folders. Continue to use the arrows to expand the folder tree until you find the folder containing the report you would like to view.

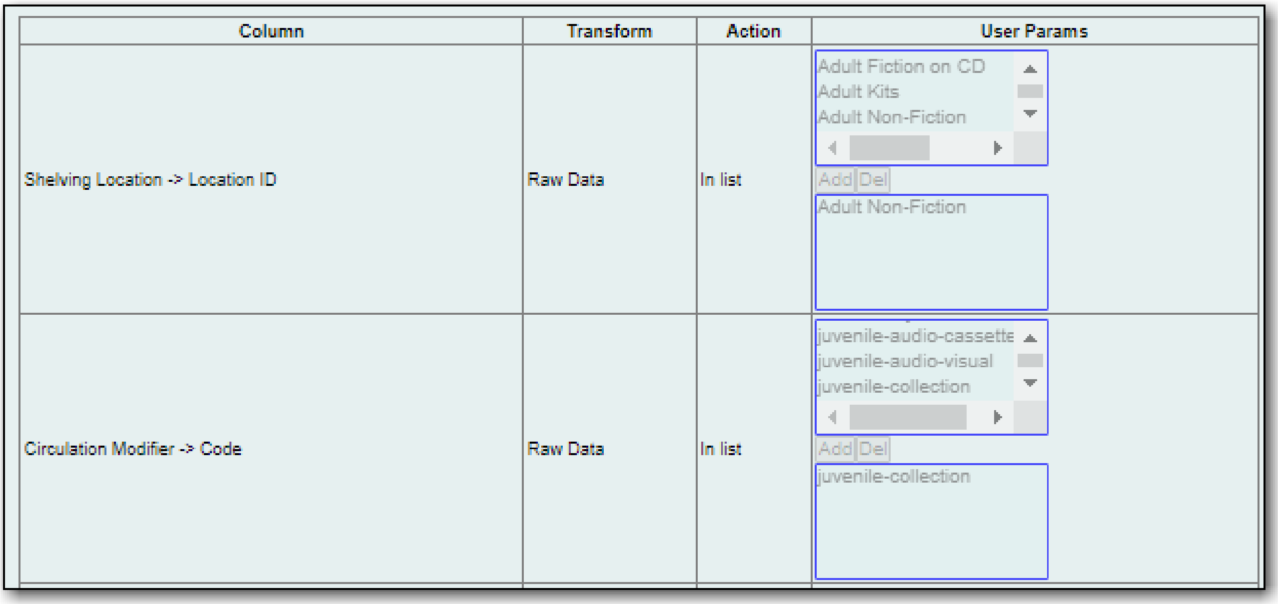
3. Click on the folder name to display the contents.



4. Click the **View** link beside the report definition you would like to view.



5. The report definition will display and you can view the information that was entered. The fields are grayed out as they cannot be edited from this screen.



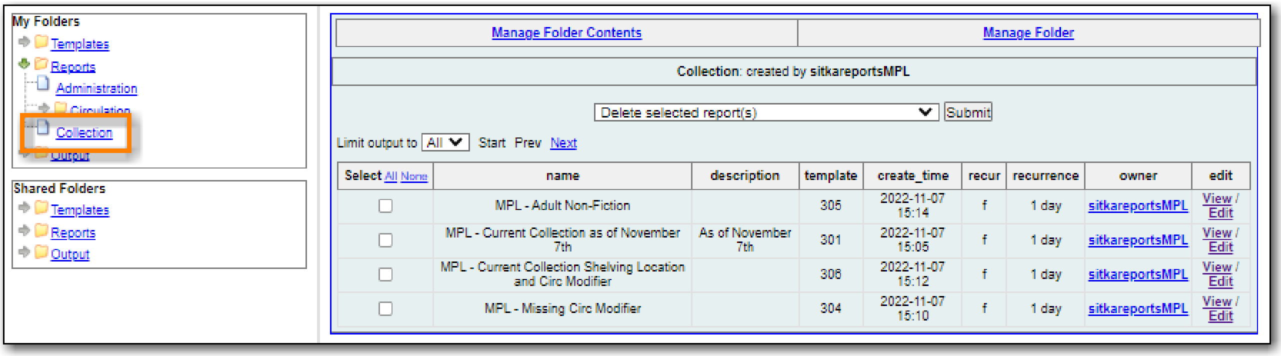
6. Report definitions can also be viewed through the applicable output folder by clicking on the report output's name and then clicking **View**.

31.4.4. Editing a Report Definition

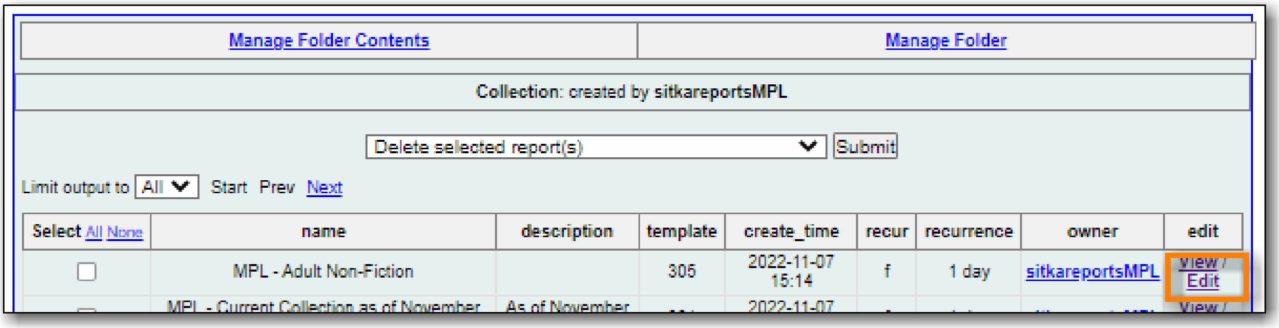
You can edit the report definitions for reports you've run. This can be helpful if you want to run a new report with a slight change.

1. Go to **Administration** → **Reports**
2. In the *My Folders* section click on the arrow beside the *Reports* folder to see your reports folders. Continue to use the arrows to expand the folder tree until you find the folder containing the report you would like to view.

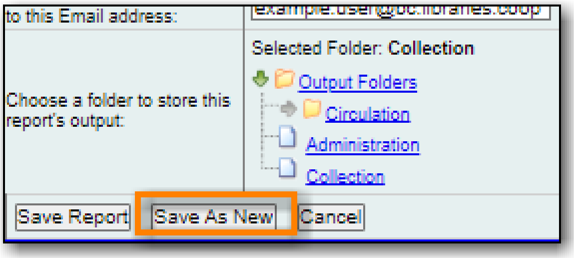
3. Click on the folder name to display the contents.



4. Click the **Edit** link beside the report definition you would like to edit.



5. The report definition will display and you can edit the values entered as desired. You must give the report a new unique name or it will not save.
6. Click **Save As New** to run a new report with the new values.



7. A pop-up appears confirming the report has been saved. Click **OK**.

CAUTION

Due to existing bugs Co-op Support recommends against editing existing recurring reports. Instead library staff should set up a new recurring report with the new parameters and deleted the old recurring report.

31.4.5. Deleting Report Definitions and Output

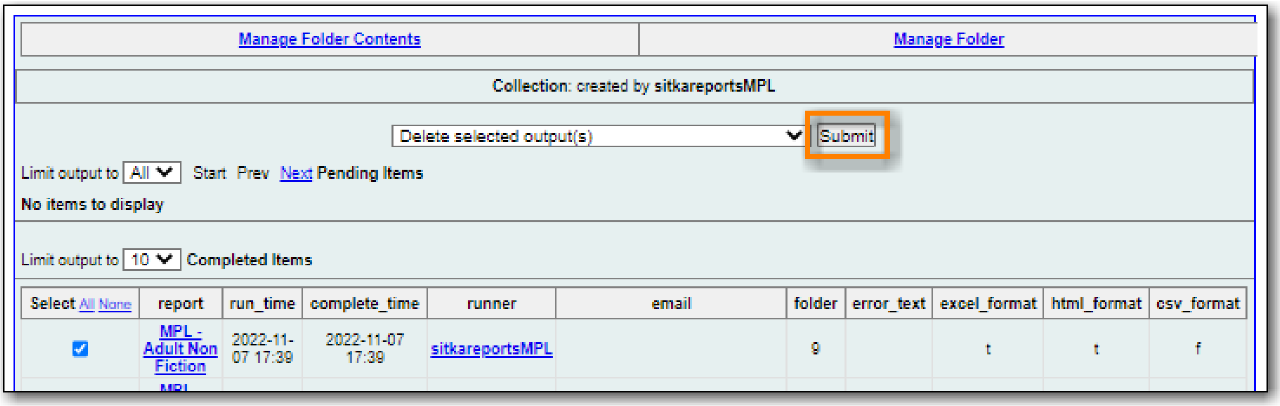
Report definitions and output that you no longer need can be deleted from within the appropriate reports or output folder.

CAUTION

Before deleting ensure that any needed report output has been downloaded and saved locally.

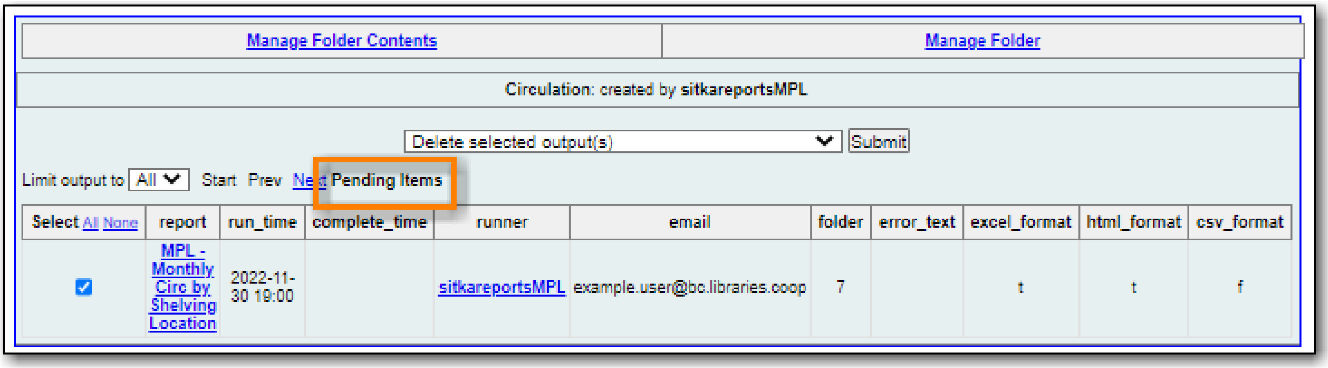
Reports on patron and circulation statistics can be re-done if needed. Reports that capture a moment in time, such as a count of items in each shelving location, cannot be re-created.

1. In the appropriate *Reports* or *Output* folder, check the box for the definition or output you wish to delete.
2. From the drop down menu select **Delete selected report(s)** or **Delete selected output(s)** depending on which folder type you are working in.
3. Click **Submit**



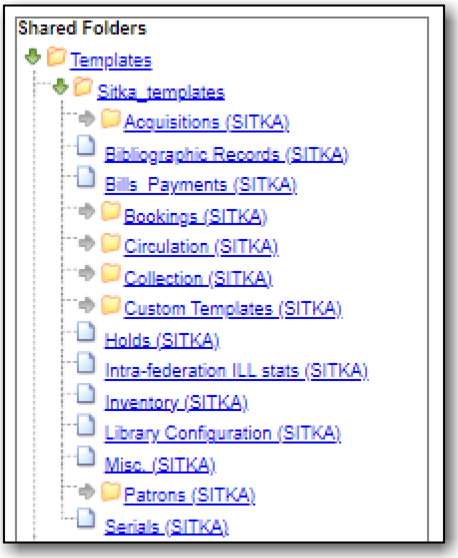
4. A pop up will appear asking you to confirm that you wish to delete your selection. When deleting report definitions you will also be warned that attached output will also be deleted. Click **OK**.
5. A pop-up appears confirming the report definition or output has been deleted. Click **OK**.

Recurring reports can be stopped by deleting the relevant report definition or the pending output.



Chapter 32. Shared Sitka Templates

Co-op Support has created ready-to-use report templates for commonly needed reports. These templates are shared with all of Sitka and can be found in the *Templates* folder in the *Shared Folders* section in Evergreen's reporter. The username of the account is Sitka_templates.



Sitka templates are designed to be used by any Sitka library and so will often include more filter options or display columns than a particular library may need. Library staff can modify the templates to customize them for their library's needs.

We recommend reviewing the shared Sitka templates before contacting Co-op Support for reports assistance or creating your own templates. Even if the exact template you need doesn't exist, you can usually find an existing one that is close to what you need which can be then be modified.

Library staff can also access custom templates created for their library by Co-op Staff through the Sitka_templates folder.

NOTE

When using Sitka templates it is critical that you first clone the template into your own folders.

Reports run directly from Sitka templates cause problems for Co-op Staff when templates need to be updated or retired.

If you encounter issues running a report cloned from Sitka templates please contact Co-op Support with the name of the template and the folder you cloned it from.

32.1. What's in Sitka_templates

The templates within the Sitka templates have been categorized into folders and sub-folders to make it easier for library staff to find the templates they need. The specific contents of the folders change as Co-op Staff add, update, and remove templates as needed.

32.1.1. Acquisitions

The *Acquisitions* folder contains a number of sub-folders which divide the report templates across the different parts of the acquisitions module.

Key templates are:

- *Fund Report by Year* (Funds)
- *Line items that have been Invoiced but not Received* (Line Items)
- *Line items that have been Received but not Invoiced* (Line Items)
- *Orphaned Barcodes (items)* (Line Items)

32.1.2. Bibliographic Records

Here you will find templates that generate lists of bibliographic records, usually with the record ID included in the output. In general it is not easy to generate reports based on bibliographic data based on the bibliographic record structure; this limits the templates that are available.

Key templates are:

- *List of items with selected item_type value in MARC leader*
- *Title, bib id and URL list of records with 856$9 = library shortname code (clone)*

32.1.3. Bills Payments

Here you will find templates related to billing and payments. These templates can be used to track down balances, get totals of payments made in specific time periods as well as generate lists of patrons with bill balances meeting specified criteria.

Key templates are:

- *Open Bills with Negative Balance by Billing Location*
- *Patrons with bill balance incurred at selected libraries within time frame*
- *Patrons with bill balance incurred at selected libraries within time frame, balance exceeding a threshold*
- *Snapshot of total billing balance incurred at selected libraries*
- *System Adjustment: Lost Item Returned*

32.1.4. Bookings

Here you will find templates to give you information about overdue reservations, reservations starting after a particular day, cancelled reservations and more.

Key templates are:

- *All Reservations Starting After a Certain Day with Return Time*
- *List of Reservations Cancelled within Time Span*
- *Overdue Reservation Within Time Span*

- *Overdue Reservations (New)*

The *Bookings* sub-folder *Monthly Stats* contains templates for gathering montly statistics on bookings.

Key templates are:

- *Total Reservations (Monthly) by Barcode*
- *Total Reservations (Monthly) by Patron Type*
- *Total Reservations Cancelled (Monthly)*
- *Total Reservations Picked Up (Monthly)*

32.1.5. Circulation

The *Circulation* folder contains templates primarily concerned with circulations. Templates have been divided into the following sub-folders.

Monthly Circulation Stats

Here you will find templates to use for gathering monthly circulation statistics for circulations done via the staff client, the public catalogue (renewals), and Evergreen's self check.

The templates that you clone from this folder can be set up as monthly recurring reports so staff don't need to manually run them every month.

Key templates are:

- *By SelfCheck (Evergreen SelfChek Module): Circ Stats within Time Frame (by Month)*
- *Monthly Circulation by Patron Home Library*
- *Monthly Circulation by Circulation modifier (New 3.1)*
- *Monthly Circulation by Shelving Location (New 3.1)*
- *Monthly Pre-Cat Circulation Count*

Circulation within time frame

Here you will find templates to use to gather circulation statistics for particular periods of time, including hourly, done via the staff client, self check machines, and public catalogue (renewals).

Key templates are:

- *By Copy Circulating Library : Circ count within time frame*
- *By Day of Week : Circ Count within Time Frame*
- *By SelfCheck (Evergreen SelfChek Module): Circ Stats within Time Frame*
- *By SelfCheck (non-Evergreen SelfCheck Module) : Circ Stats within Time Frame*
- *Circulation Return Count by Checkin Scan Hour at Selected Workstations*
- *Count of Circulations and Unique Borrowers by Hour of Day within Time Frame*

Overdue and others

Here you will find templates that will give lists of items in a particular state of circulation. Many of these templates include patron information in the display fields to assist staff in following up with the applicable patrons.

Key templates are:

- *Claimed Returned Items belonging to Selected Libraries (by copy status change date)*
- *Lost-with-Bills Item List (Owned by Selected Libraries) (x Months ago) (New 3.1)*
- *Overdue Items Checked out at Other Libraries* - helps track your items borrowed by another library
- *Overdues Within Time Span -Phone List for Patrons without Email (based on Checkout Library)*
- *Overdues Within Time Span - General (Based on Checkout Library)*

In-house use stats

Here you will find templates that specifically report on data captured through Evergreen's In-House Use interface.

Key templates are:

- *Monthly In-house Use by Shelving Location - Regular Items*
- *Title List with In-house Use Count by Shelving Location - Regular Items*

Circulation of non-catalogued items

Here are templates for libraries that use non-catalogued items in Evergreen.

Key templates are:

- *Circulation count of non-catalogued items by item type within time frame (converted from XUL) (clone)*
- *Monthly Circulation count of non-catalogued items by item type (converted from XUL) (clone)*

32.1.6. Collection

The *Collections* folder contains templates primarily concerned with your collection. Templates have been divided into the following sub-folders.

Copy and Title Count

Here you will find templates that count the titles and items in your entire collection or subsets of your collection.

Because a bibliographic record (title) can have multiple items attached to it you will often see different counts between title and item.

Key templates are:

- *Count of Electronic Records*

- *Count of Titles & Copies catalogued Within Selected Month*
- *Title & Item Count by Shelving Location*
- *Title & Item Count by Shelving Location and Circulation Modifier*

Copy List by Item Attributes

Here you will find templates that give you lists of items that meet the specified criteria. You can get lists based on shelving locations, item statuses, circulation modifiers, statistical categories, item alerts, barcode prefixes, and more. Some of the templates filter on more than one item attribute enabling you to get exactly the items you're looking for.

Key templates are:

- *Circ Modifier : Copies with Selected Circ Modifiers*
- *Copies with Selected Shelving Location & Status (with total circ and in-house count)*
- *Newly Catalogued Copies within Selected Month(s)*
- *Shelving Location : Copies with Selected Shelving Location (clone)*
- *Shelving Location and Circ Modifier : Copies with Selected Shelving Location and Circ Modifier (clone)*
- *Status : Copies with Selected Copy Status Set within Time Frame*

Many templates in this sub-folder can assist libraries with data clean up.

Key templates for this are:

- *Barcode : Copies with Barcode with Matched Substring* - used to find items using old barcodes
- *Circ Modifier : Copies without Circ Modifier* - used to find items missing a circulation modifier
- *Price : Copies with Price = $0.00* - used to find items where the price is set to zero
- *Price: Copies with Price Unset (NULL)* - used to find items where the price field is blank

Title List

Here you will find templates that give you lists of titles (bibliographic records) that meet the specified criteria. This includes lists of titles catalogued in a specified period, within a certain call number range, or with specific values in MARC tags.

Key templates are:

- *Titles with Multiple Copies at Selected Shelving Locations*
- *Titles with Newly Catalogued Items within Selected Month (converted from XUL) (clone)*
- *Titles with Selected Value in Selected MARC Tags and Subfields (match on exact subject terms)*

Others

Here you will find a variety of templates related to your collection that don't fit into the other categories, including templates related to deleted items, pre-catalogued items, and weeding.

Key templates are:

- *Deleted Items Count by Shelving Location for selected month*
- *Popular Titles at Selected Shelving Locations within Specified Time Span*
- *Pre-cat item list with current title and author (non-deleted only)*
- *Value of Collection by Shelving Location by item circ library*
- *Weeding - Copies Circulated Fewer Times since a Selected Date (excl. Copied added after a Selected Date)*
- *Weeding -Copies Never Circulated after a Selected Date (clone)*

32.1.7. Custom Templates

As needed Co-op Support will assist libraries in modifiying templates or creating new templates specific to that library's needs and will put these new or modified templates into a custom folder specificially for that library.

When the Custom Templates folder is expanded it will show a folder for your federation which can then be expanded further to find the folder specific to your library.

If there are templates in your custom folder that are no longer needed by your library let Co-op Support know and we can remove them for you to help keep the templates in that folder up to date.

32.1.8. Holds

Here you will find templates that will give you counts and lists related to holds.

Key templates are:

- *Long-time Unfulfilled Holds (with Eligible Copy Status Info, excl. holds without eligible copy) (clone)*
- *Monthly Cancelled Holds Count by Cancelation Cause*
- *Monthly Fulfilled Holds Count*
- *Monthly Total Holds Placed by Staff and Patrons*
- *Suspended Holds (holds without expiration date)*
- *Unfulfilled & Uncancelled ILC Holds Placed within Time Span*

32.1.9. Intra-federation ILL Stats

Here you will find templates to track interlibrary loans done via Interlibrary Connect within Evergreen. These templates are relavant to libraries participating in BC ILC, Sea to Sky ILC, or Spruce ILC.

Key templates are:

- *LIBRARY: Inbound ILC holds count for selected month*
- *LIBRARY: Outbound ILC holds count for selected month*

32.1.10. Inventory

Here you will find two templates to assist you in running inventory at your library.

- *Inventory - Scanned Items Count by Shelving Location (NEW)* - this template gives you a count of all items scanned in the specified period, broken down by shelving location.
- *Inventory - Un-scanned Items* - this template gives a list of all items not scanned in the specified time period, with the option to filter the results based on specific item statuses and shelving locations.

32.1.11. Local Administration

Here you will find templates that can be used to display information about to aid library staff when working with local administration functions. Some of the templates duplicate information that can be viewed directly in the staff client but is easier to view as report output.

Key templates are:

- *Circulation Policies by Checkout Library*
- *Circulation Policies filtering by copy circ lib*
- *Hold Policies by Item's Owning Library*
- *Hold policy by pickup library (ILC participants: please select your federation, too)*
- *Reports Run In Specified Time Period By Specified Library*

32.1.12. Misc.

Here you will find templates that don't fit in any other category.

32.1.13. Patrons

The *Patrons* folder contains templates primarily concerned with your patrons. Templates have been divided into the following sub-folders.

Patron Count

Here you will find templates that count patrons whose home library is your library.

Key templates are:

- *Active (having circ history) Patron Count by Patron Home Library and Profile*
- *Active (having circ history) Patron Count by Patron Home Library, Profile and Stat Cat*
- *Patron Count by Profile Group then by one Stat Cat*
- *Total Patron Count by Patron Profiles*

Patron List

Here you will find templates that give you lists of patrons that meet the specified criteria. You can get lists based on shelving locations, item statuses, circulation modifiers, statistical categories, item alerts, barcode prefixes, and more. Some of the templates filter on more than one item attribute enabling you to get exactly the items you're looking for.

Key templates are:

- *Patron List by Expiration Date*
- *Patron List with Full Details by Profile Groups*
- *Patrons without circulation after a selected date (Inactive patrons)*

Newly Registered/Opted-in Patrons

Here you will find templates that allow you to generate a count or a list of patrons who have registered or opted-in to your library in a specified time period.

Key templates are:

- *Count of New Patrons Registered within a Time Frame by Profile Group then by Stat Cat*
- *List of of New Patrons Registered within Time Frame*
- *Monthly Patron Registration*
- *Opted-in Patron Count within Time Frame*

Others

Here you will find templates related to patrons that don't fit in the other categories.

Key templates are:

- *Staff Assigned to Selected Permission Group(s)*
- *Staff Assigned to Supplementary Permission Group(s)*
- *User OPAC Login Count by Patron Home Library and Profile within Time Frame*

32.1.14. Serials

Here you will find templates related to use of the serials module that will help you report on your collection.

Key templates are:

- *Serials Claiming (New)*

Chapter 33. Modifying Report Templates

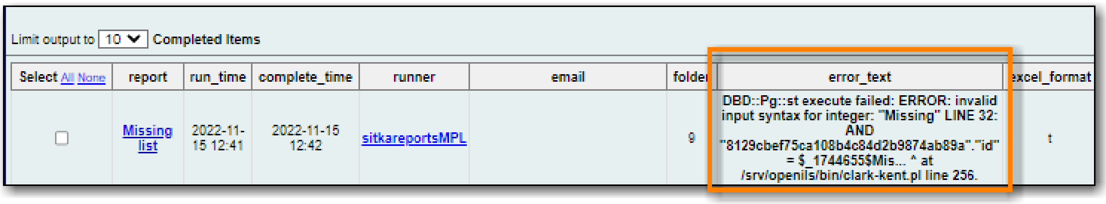
Report templates can be modified to change how the output displays or what data is gathered for the output.

Co-op Support recommends running a report from the original template to see what output is generated before modifying a template.

1. Start by cloning the template you wish to modify. Follow steps 1 through 7 in Cloning a Report Template.
2. The *Report Template Editor* will open. See Report Template Editor for information on using the editor.
3. Make your desired changes.
4. Click **Save Template**.
5. Your new template can now be found in the folder you saved it in.
6. Run a report from the new template to see if the desired output is generated.

TIP

If the path for one of your display fields or filters is incorrect you will get an error instead of the expected report output. Sometimes the error text will give you a clue about what isn't working.



You can modify your template and try again or contact Co-op Support for assistance. Please review Troubleshooting Report Templates before creating a ticket to ensure you include all the information needed for Co-op Support to assist you.

7. Repeat the above steps until your template works as desired.

NOTE

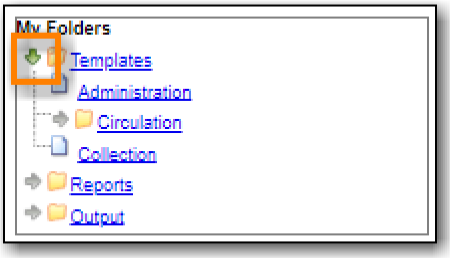
It is not unusual to create multiple versions of a template when working to modify a template. Once you have a template that works as desired Co-op Support recommends deleting the interim versions of the template. See Deleting a Report Template.

Chapter 34. Creating Report Templates

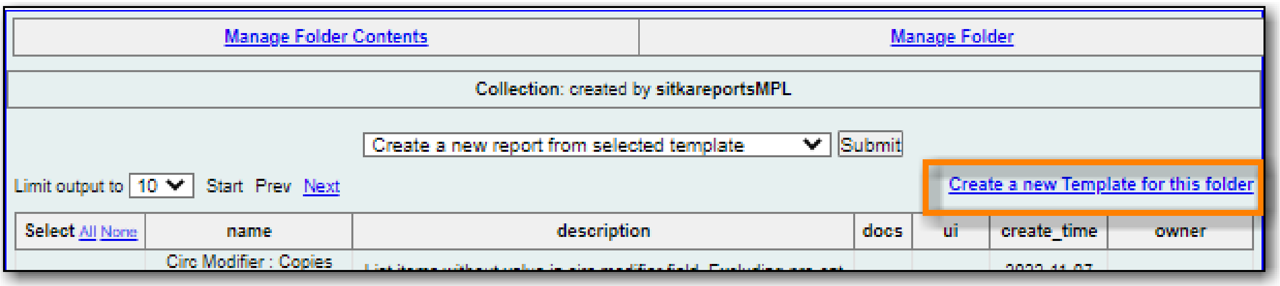
Before creating a completely new template Co-op Support recommends checking the Sitka_templates to see if there is a template that can be modified to give you the information you need.

Creating a template is complex and requires some understanding of the Evergreen database and how Evergreen handles various records when performing tasks on the staff client. It can be useful to plan out your template before getting started with the reporter. Think about what type of records you will be reporting on (circulation, item, bibliographic, patron, etc.) and what information you want to see displayed in your report output. You also want to think about what filters should be used so the report output contains only the records you're interested in.

1. Go to **Administration → Reports**.
2. In the *My Folders* section click on the arrow beside the *Templates* folder to see your template folders. Use the arrows to expand the folder tree until you find the folder where you'd like to create the new template.



3. Click on the folder name.
4. In the folder, click **Create a new Template for this folder**.



5. The *Report Template Editor* will open. See Report Template Editor for information on using the editor.
6. Choose a Core Source. See Core Source.
7. Add Display Fields. See Adding a Display Field.
8. Add Filters. See Adding a Filter.

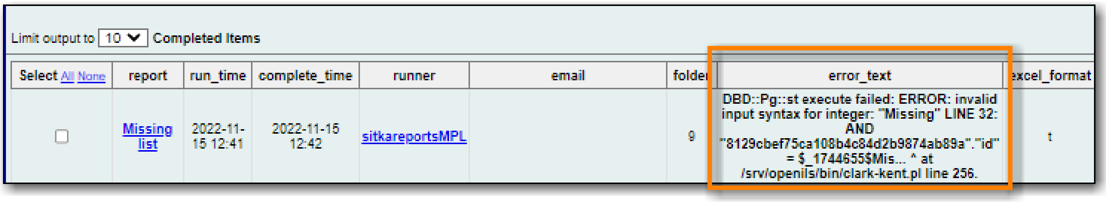
CAUTION	All report templates MUST have at least one filter to choose a specific library. This filter is important as it allows staff to comply with Sitka's data use requirements as per Appendix J of the Service Management Agreement

and restrict the data in the report output to only data relevant to their library.

9. Add hardcoded filter values for any filters that should always use the same value. See Report Filters for a list of filters that are commonly hardcoded.
10. Click **Save Template**.
11. Your new template can now be found in the folder you saved it in.
12. Run a report from the new template to see if the desired output is generated.

TIP

If the path for one of your display fields or filters is incorrect you will get an error instead of the expected report output. Sometimes the error text will give you a clue about what isn't working.



You can modify your template and try again or contact Co-op Support for assistance. Please review Troubleshooting Report Templates before creating a ticket to ensure you include all the information needed for Co-op Support to assist you.

13. Repeat the above steps until your template works as desired.

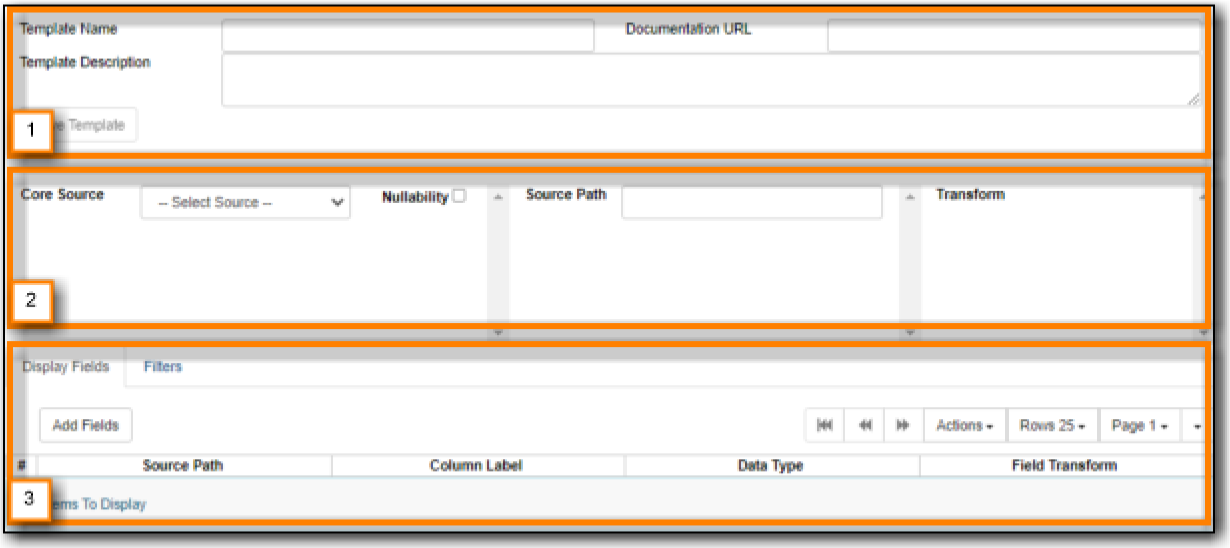
NOTE

It is not unusual to create multiple versions of a template when working to modify a template. Once you have a template that works as desired Co-op Support recommends deleting the interim versions of the template. See Deleting a Report Template.

Chapter 35. Report Template Editor

The report template editor is made up of three section:

1. Basic Information
2. Display Field and Filter Selector
3. Display Field and Filter Tabs



35.1. Basic Information

The *Basic Information* section of the report template editor is where you can add or update the template name, description, and documentation URL.

When cloning an existing template these fields will be auto-populated with the values from the original template and (clone) will be added to the end of the template name. You can edit the data in these fields as needed.

NOTE The names of templates in a folder must be unique. Evergreen will not allow a template using an identical name to be saved into the same folder.

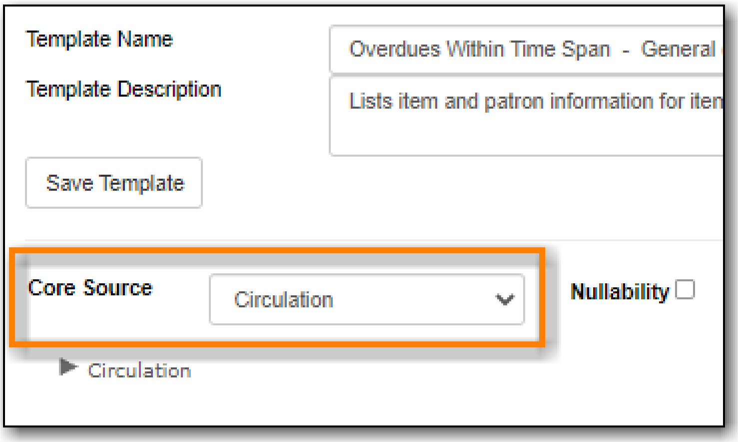
If you have local documentation online that pertains to a report you can add it in the *Documentation URL* field and it will be included as a link in the report output.

35.2. Display Field and Filter Selector

The *Display Field and Filter Selector* is where you build your display fields and filters for your template.

35.2.1. Core Source

Every report template starts with a core source. This is the database table from which your template is built out. The top of the left-hand pane of the *Display Field and Filter Selector* section of the *Report Template Editor* contains the Core Sources drop down menu.



When modifying a template NEVER change the core source. This will scrap your existing template and you will have to start again from scratch.

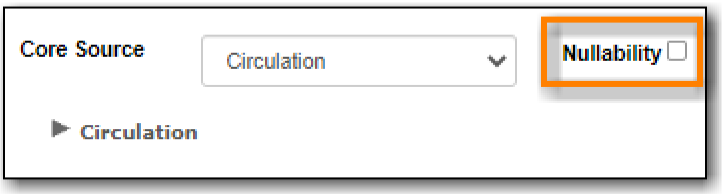
When creating a new template the first thing you need to do is figure out which core source makes the most sense for the data you want to see in your report output. If you need information from other tables you'll follow the links to those tables when adding display fields and filters.

The three most commonly used core sources are Circulation, Item, and ILS User. Templates for monthly circulation statistics and templates for tracking overdue items use the core source Circulation. Templates about the state of your collection use the course source Item. Templates containing counts or lists of your patrons use the core source ILS User. More information can be found in Commonly Used Tables.

You can link to other database tables to include information contained in those tables but not every table links directly. For example, patrons and items aren't directly linked to each other. Information about items out to a patron is held in the circulation table while information about items on hold is held in the hold request table. More information can be found in The Evergreen Database.

35.2.2. Nullability

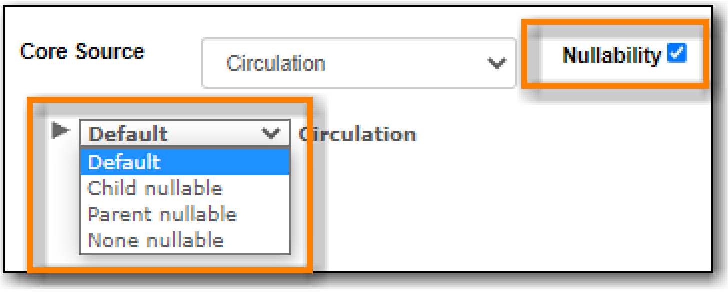
The Nullability check box is beside the core source list. In general this check box should be left un-checked.



You may wish to use nullability if your report output includes null values that you don't want included or if your report output doesn't include null values that you do want to see. Nullability allows you to have more control over whether or not null values in fields are included in your report output. It does this by allowing you to manually select the way in which Evergreen is joining the database tables when running a report from the template. The type of join used will determine what kind of data can display a null value in your report output.

When Nullability is checked the following options show for joins between tables:

- **Default** - defined within Evergreen. See The Evergreen Database for more information.
- **Child Nullable** = depends on the default join (usually left). Evergreen will include all records in the child table (linked to table).
- **Parent Nullable** = depends on the default join (usually right). Evergreen will include all records in the parent table (linked from table).
- **None Nullable** = equivalent to inner join. Evergreen will only include data that is in both tables



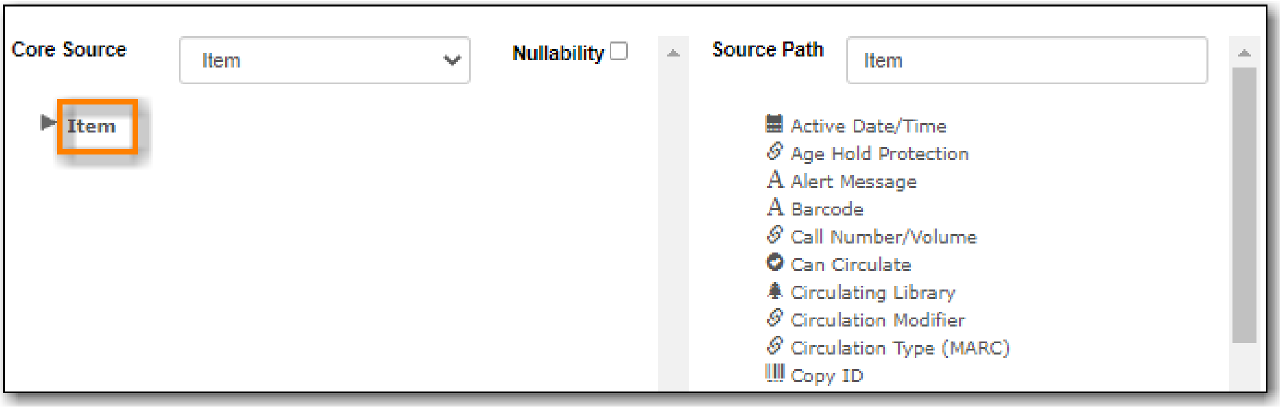
NOTE	You must use the same nullability selection on all display fields and filters that you add from the same table.

To learn more about nullability see the Evergreen conference presentation **Thanks for Nothing: Nullability Selection in Evergreen Reports (45:00)**.

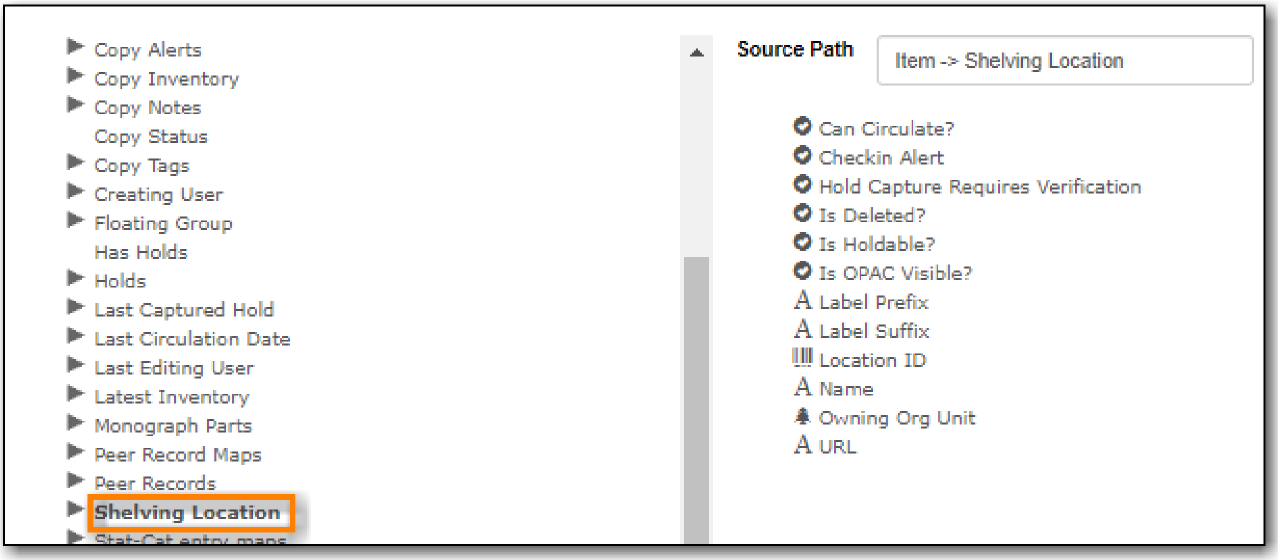
35.2.3. Adding a Display Field

Display fields are the columns which will display in your report output.

1. Ensure the **Display Fields** tab is the active tab in the *Display Field and Filter Tabs* section of the *Report Template Editor*.
2. Click on the top of the tree in the *Core Source* pane. A list of available fields will display in the *Source Path* pane.

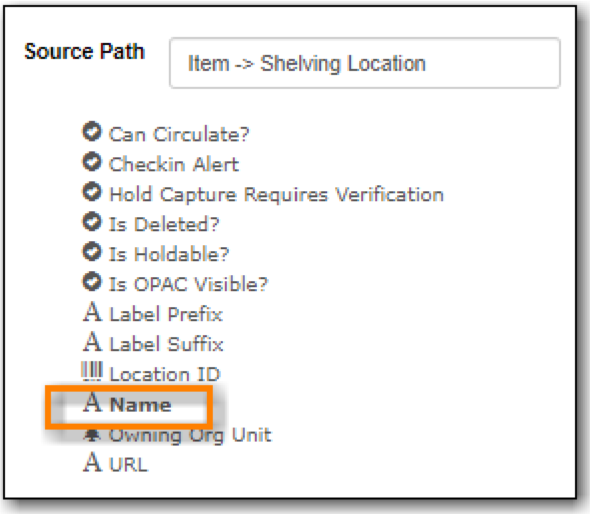


3. The icon beside the field name indicates the data type. If the field you want to use is a Link you need to expand the tree in the *Core Source* pane to find it and then click on it.



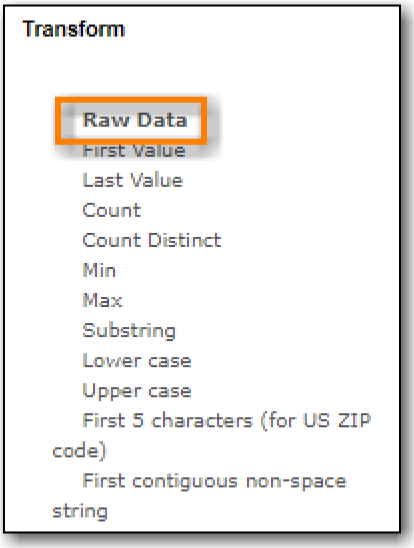
4. Click on the field in the *Source Path* pane you would like to add as a display field.

   For display fields you generally want to pick a Text field over an ID or Org_unit field. For example, to add shelving location as a dislay field you will click on **Name** rather than **Location ID**.

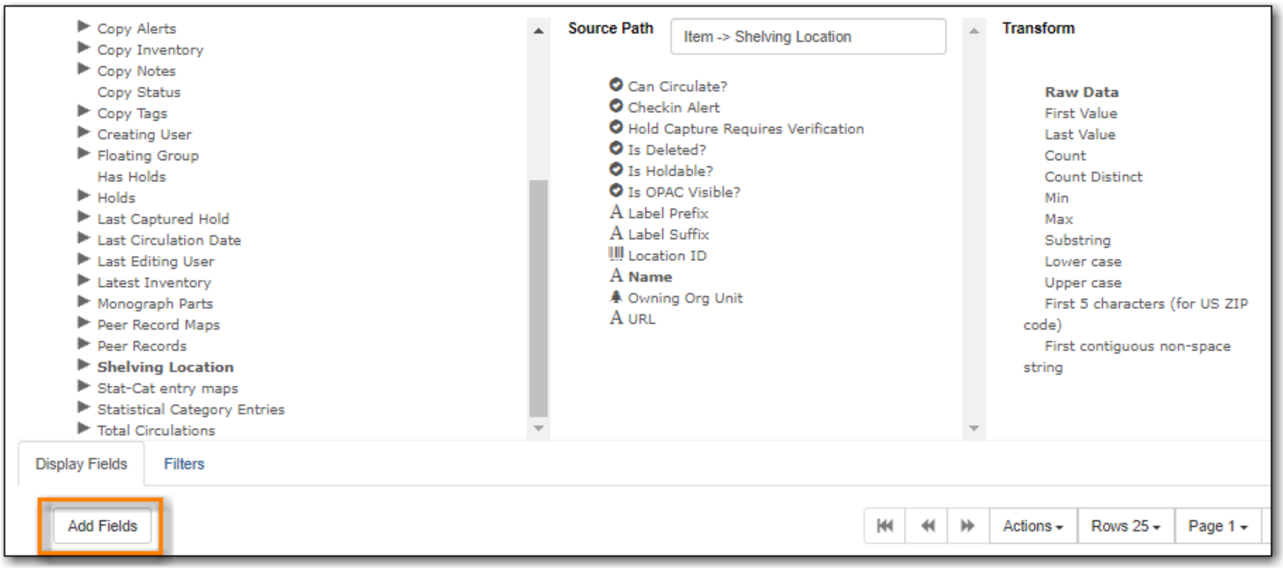


5. In the *Transform* pane click on the transform you would like to use. The transforms available in the list will vary depending on the data type of the selected field.

The transform will determine how Evergreen processes the data when generating the report. Raw data is the most commonly used transform for display fields except when it's a timestamp in which case Date is more commonly used. More information on the available transforms can be found in Field Transforms.



6. Your selected options will display in bold in the three panes. In the **Display Fields** tab click **Add Fields**.



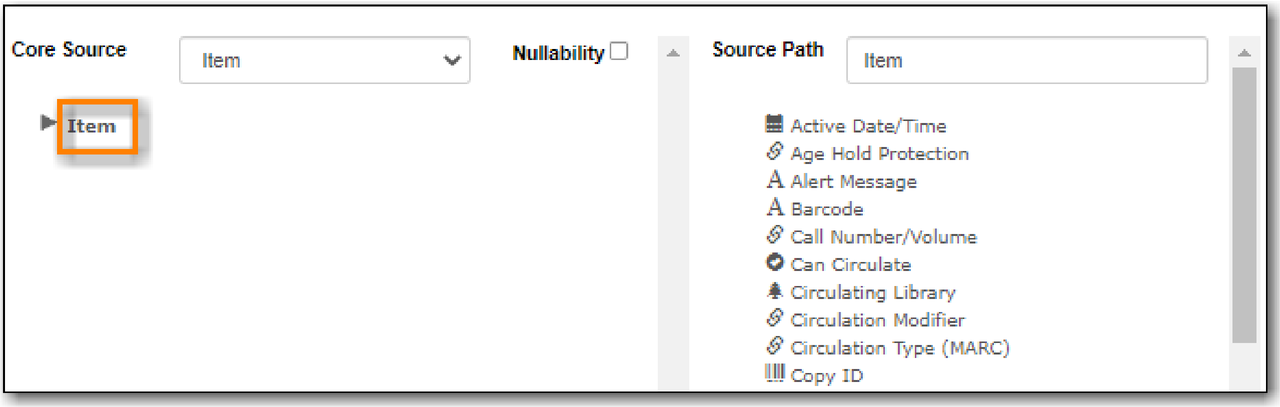
7. Your display field will now display in the grid.

35.2.4. Adding a Filter

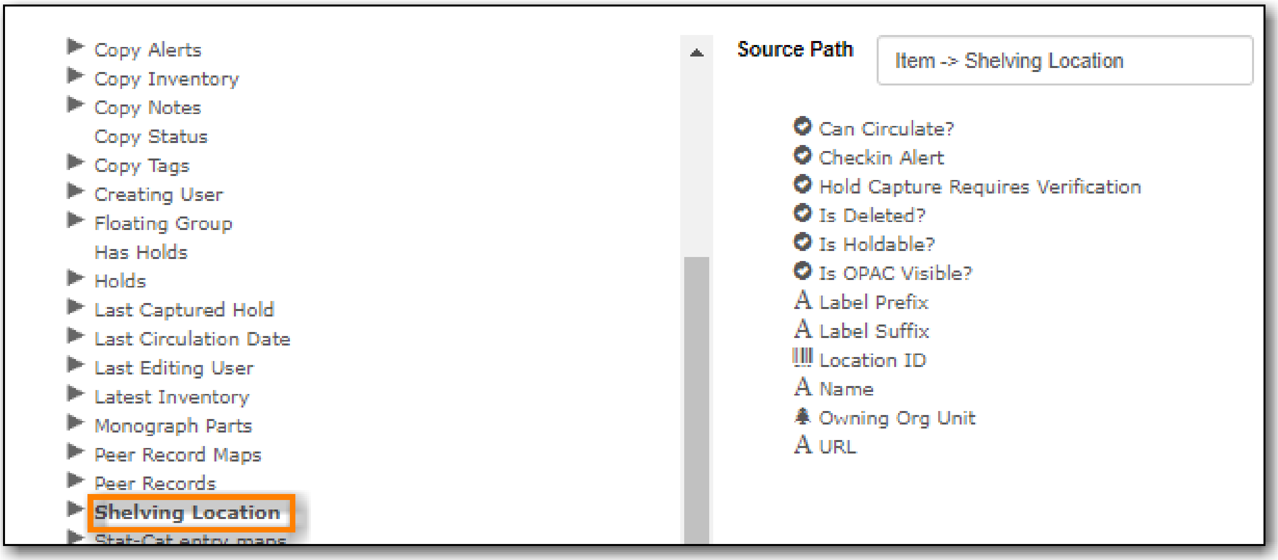
Filters allow you to set up the criteria so that Evergreen returns the information you are looking for. In most cases the value for the filter will be entered when the report is run, rather than included in the template.

1. Ensure the **Filter** tab is the active tab in the *Display Field and Filter Tabs* section of the *Report Template Editor*.

2. Click on the top of the tree in the *Core Source* pane. A list of available fields will display in the *Source Path* pane.

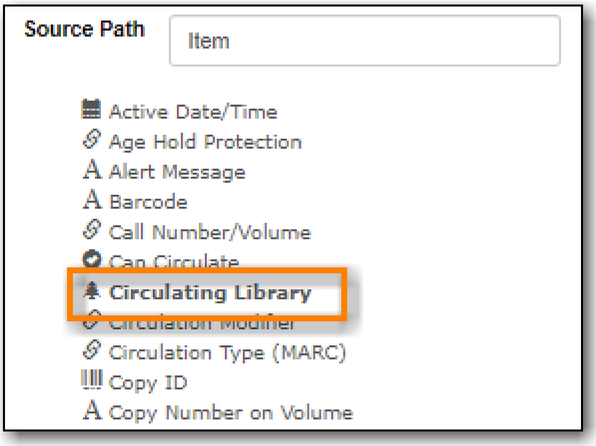


3. The icon beside the field name indicates the data type. If the field you want to use is a Link you need to expand the tree in the *Core Source* pane to find it and then click on it.



4. Click on the field in the *Source Path* pane you would like to add as a filter.

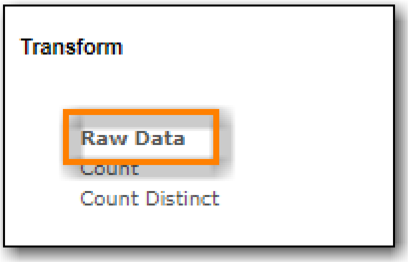
   For filters you generally want to pick an ID or Org_unit field over a Text field. For example, to add circulating library as a filter you will click on **Circulating Library** which has the tree icon indicating it's an Org_unit.



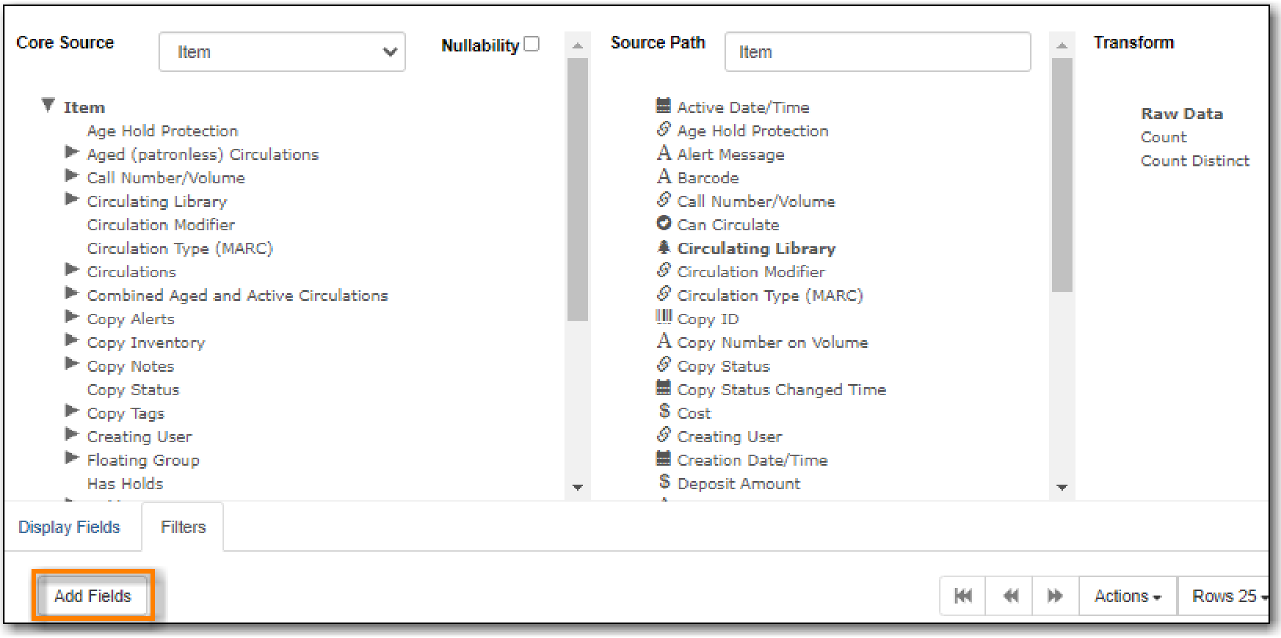
5. In the *Transform* pane click on the transform you would like to use. The transforms available in

the list will vary depending on the data type of the selected field.

The transform will determine how Evergreen processes the data when generating the report. Raw data is the most commonly used transform for filters except when it's a timestamp in which case Date or Month + Year is more commonly used. More information on the available transforms can be found in Field Transforms.



6. Your selected options will display in bold in the three panes. In the **Filter** tab click **Add Fields**.



7. Your filter will now display in the grid.

8. If desired, you can hardcode the value of the filter into the template. See Updating a Filter Value.

35.3. Display Field and Filter Tabs

35.3.1. Display Fields

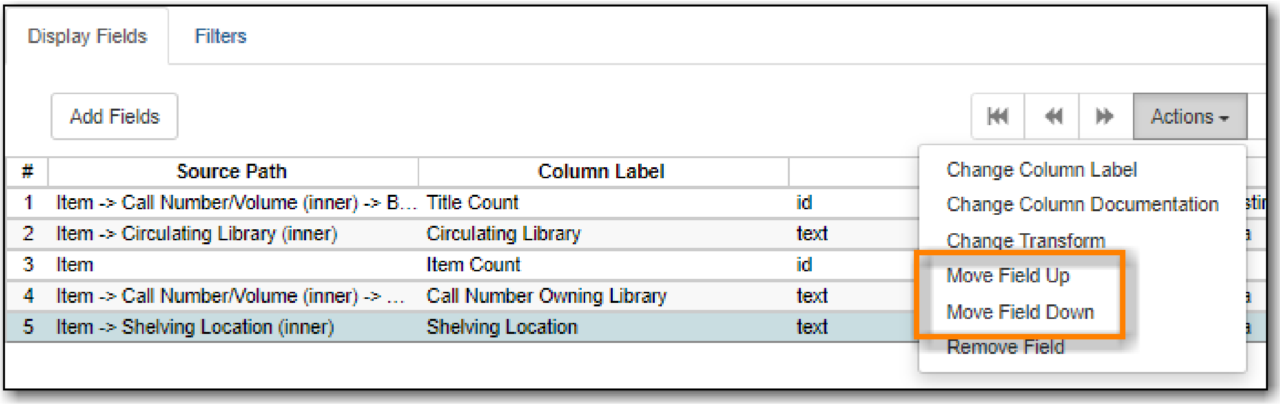
- Reordering Display Fields
- Renaming a Display Field
- Changing a Transform
- Removing a Display Field

Display fields are the columns of information that will display on your report output. The **Display Fields** tab is the active tab by default in the *Report Template Editor*.

NOTE	The action **Change Column Documentation** on the **Display Fields** tab can be ignored as it does not apply to display fields.

Reordering Display Fields

1. On the **Display Fields** tab select the field you would like to re-order.
2. From the **Actions** menu choose **Move Field Up** or **Move Field Down**. You can also right-click on the field to open the **Actions** menu.

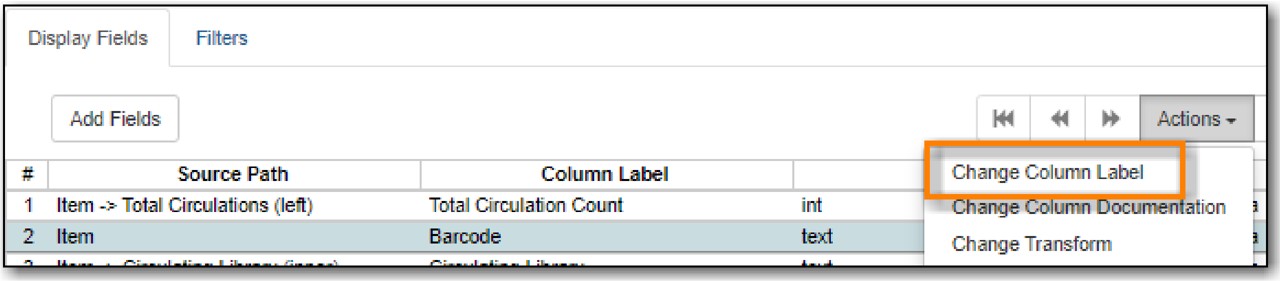


3. Repeat until your fields are in the order you desire.

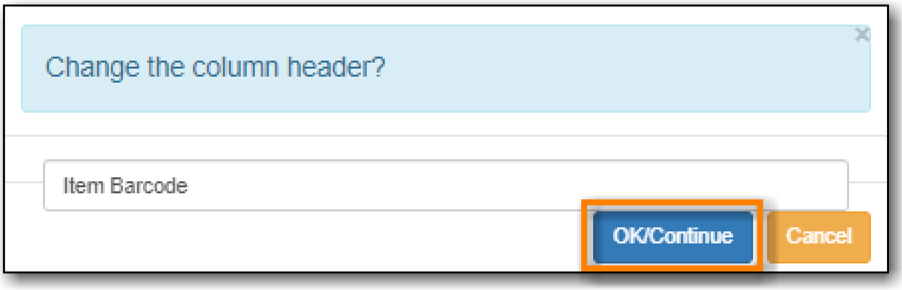
Renaming a Display Field

Each dislay field in a template has a column label which displays as the column header in the report output.

1. On the **Display Fields** tab select the field you would like to rename.
2. From the **Actions** menu choose **Change Column Label**. You can also right-click on the field to open the **Actions** menu.



3. In the pop-up that appears enter the new name for the field and click **OK/Continue**.



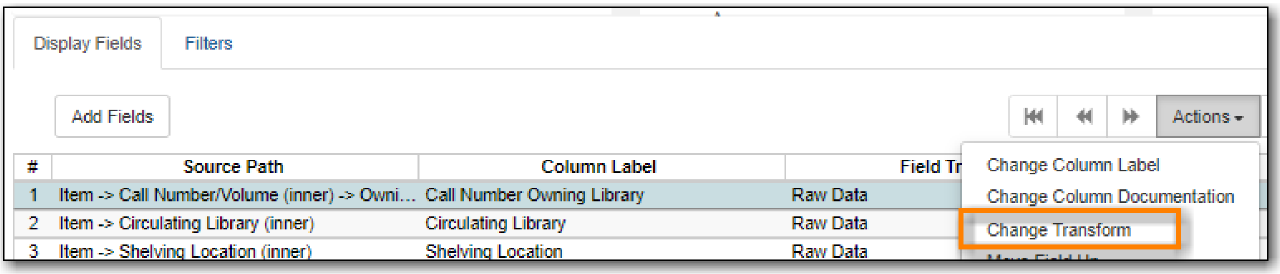
4. The new field name displays in the *Column Label* column and will display as the column header on your report output.

> **NOTE**
>
> It is best practice to include qualifiers in the field names for fields like barcode and library so that staff know what data they are looking at in the report output.
>
> For example, for multi-branch libraries and libraries participating in reciprocal borrowing it is not uncommon for the Circulating Library and Owning Library of an item to be different. In this case it is important to specify in the field name which type of library is being presented in the report output data.

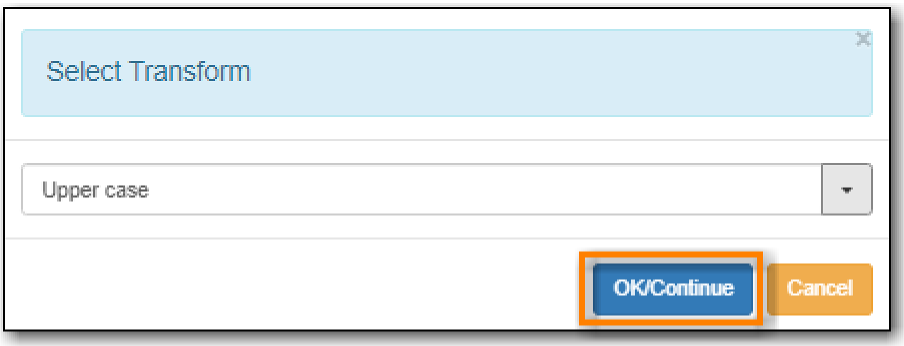
Changing a Transform

For information on specific transforms see Field Transforms.

1. On the **Display Fields** tab select the field you would like to change the transform for.
2. From the **Actions** menu choose **Change Transform**. You can also right-click on the field to open the **Actions** menu.



3. In the pop-up that appears select the new transform from the list and click **OK/Continue**.

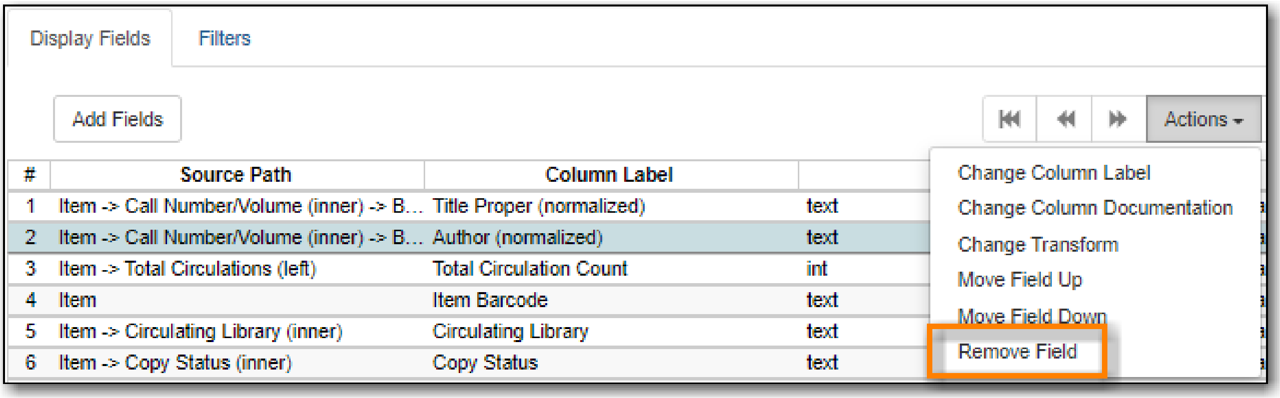


4. The new transform will displays in the *Field Transform* column in the grid.

Removing a Display Field

CAUTION	Removing display fields usually does not affect the result set for the report output but it can, especially when the report output displays a count of records (whether item, patron, circulation, hold, or bibliographic). When removing fields be mindful of whether or not it will still be clear in the report output what your results mean.

1. On the **Display Fields** tab select the field you would like to rename.
2. From the **Actions** menu choose **Remove Field**. You can also right-click on the field to open the **Actions** menu.



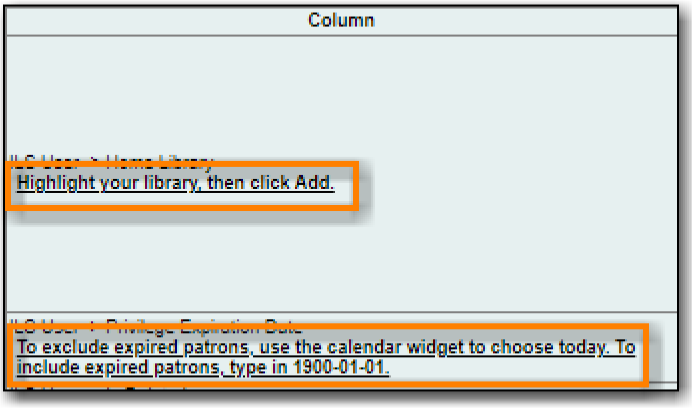
3. The selected field is removed and no longer shows as a display field.

35.3.2. Filters

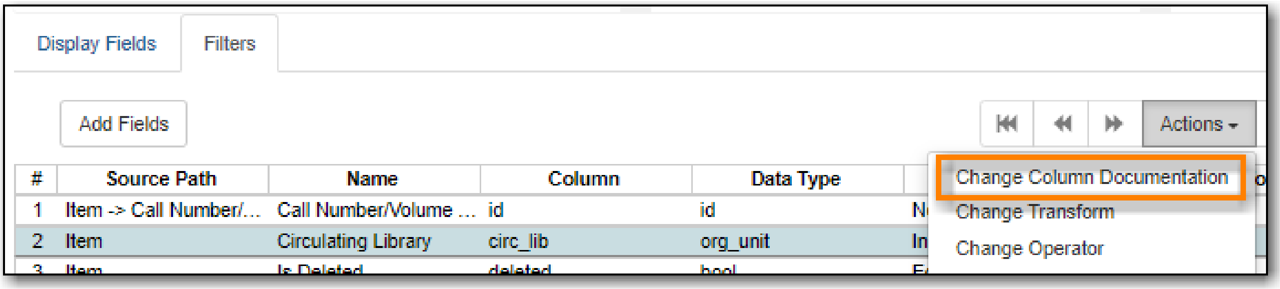
- Changing the Column Documentation
- Changing an Operator
- Changing a Transform
- Updating a Filter Value
- Removing a Filter

Changing the Column Documentation

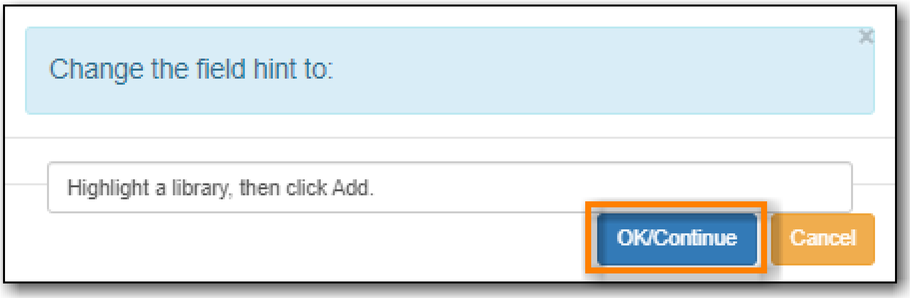
When running a report the filter can include text which gives information on how to use the particular filter and in some cases how to enter the filter value. In the *Report Template Editor* this is referred to as column documentation or a field hint.



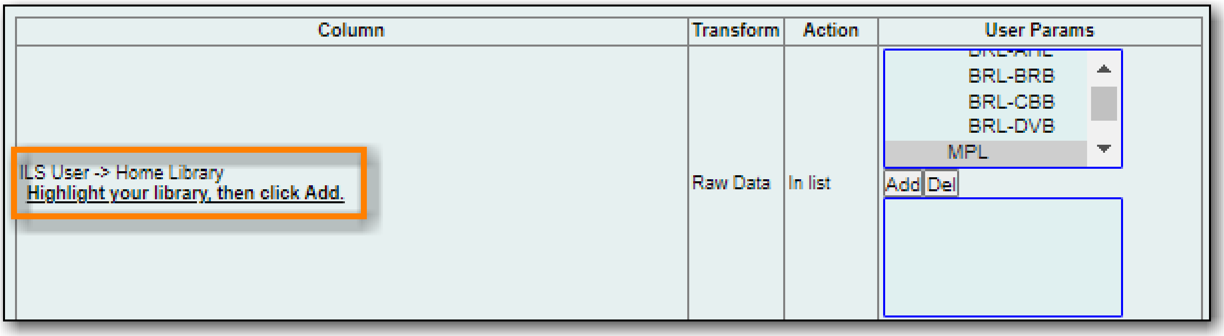
1. On the **Filter** tab select the field you would like to add column documentation to.
2. From the **Actions** menu choose **Change Column Documentation**. You can also right-click on the field to open the **Actions** menu.



3. In the pop-up that appears add or update the text and click **OK/Continue**.



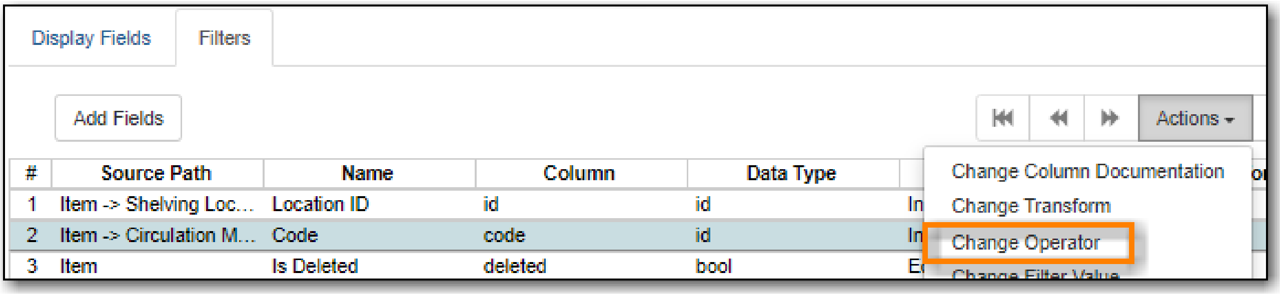
4. When running a report the column documentation will display under the filter path.



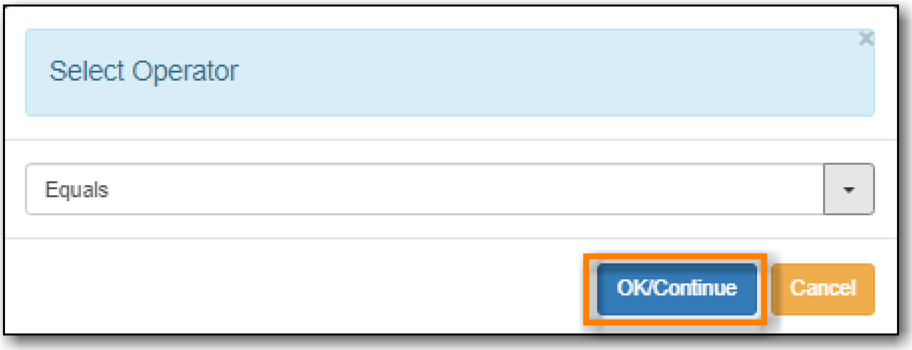
Changing an Operator

For information on specific operator see Operators.

1. On the **Filter** tab select the field you would like change the operator of.
2. From the **Actions** menu choose **Change Operator**. You can also right-click on the field to open the **Actions** menu.



3. In the pop-up that appears select the new operator from the list and click **OK/Continue**.

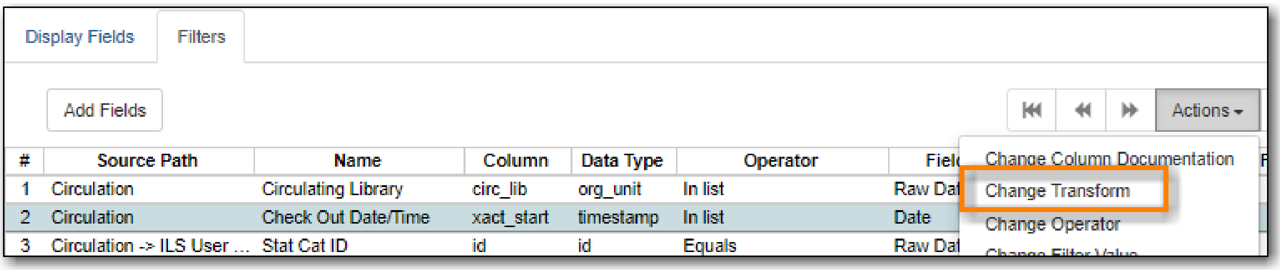


4. The operator will be updated in the grid.

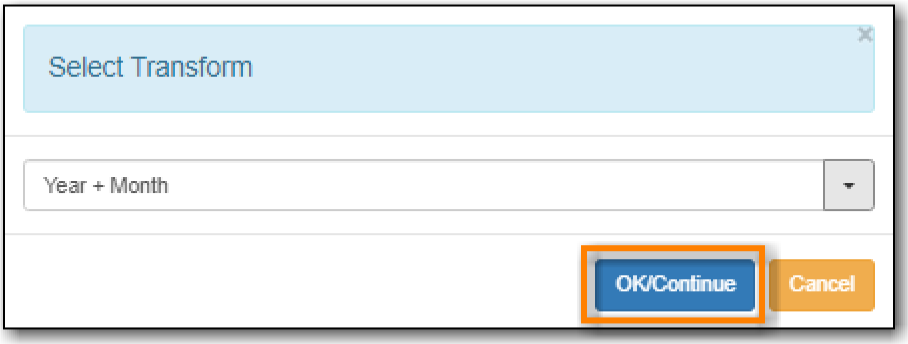
Changing a Transform

For information on specific transforms see Field Transforms.

1. On the **Filters** tab select the field you would like to change the transform for.
2. From the **Actions** menu choose **Change Transform**. You can also right-click on the field to open the **Actions** menu.



3. In the pop-up that appears select the new transform from the list and click **OK/Continue**.



4. The new transform will displays in the *Field Transform* column in the grid.

Updating a Filter Value

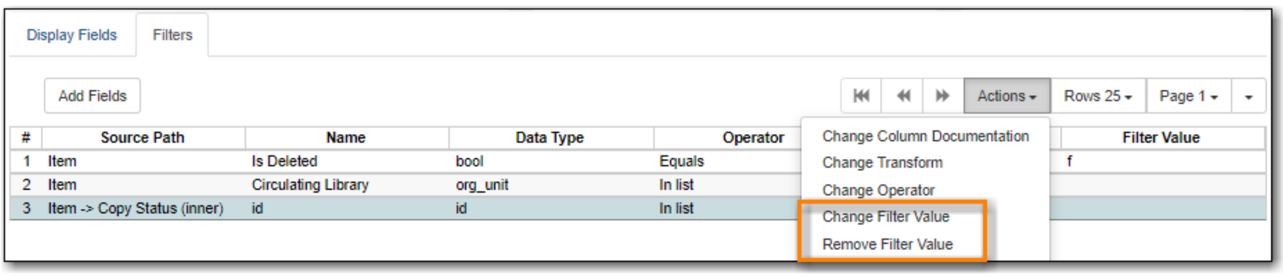
Filter values can be hardcoded into a template or left blank to be filled in when the report is run. Information on commonly hardcoded filters can be found in Report Filters.

Hardcoding a filter is recommend when the value of the filter will not change. For example, hardcoded filters are often used when filtering out deleted items.

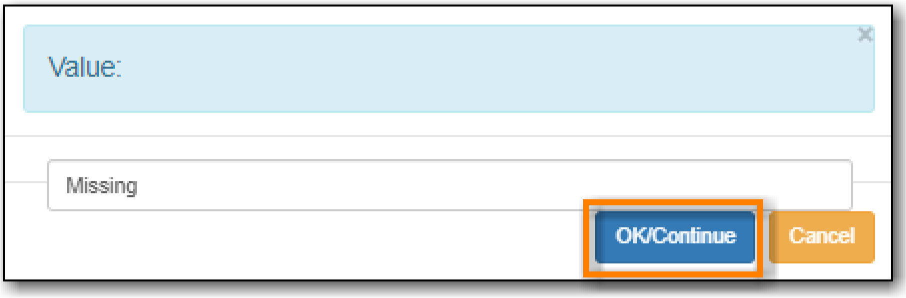
Filter values can also be hardcoded into templates to make it easier for staff with less reporter experience to run certain reports. For example, you can set up a report with a Item Status filter with a hardcoded value of *Missing* so that staff can run a report to get a list of all missing items without having to enter filter information.

Co-op Support recommends balancing the re-usabilty of templates that comes when staff enter filter values at the time of running a report versus the ease of use for staff with less experience with the reporter. For example, when no value is entered in the template for a filter on Item Status staff can pick the relevant status from the 26 statuses currently in use in Sitka's Evergreen. When a value is hardcoded in for item status a new template must be created everytime you wish to filter on a different item status.

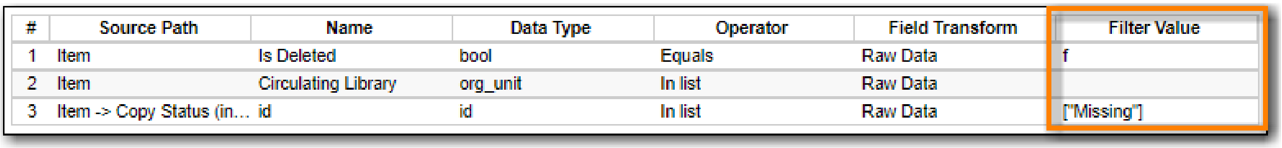
1. On the **Filter** tab select the field you would like add, update, or remove the filter value for.
2. From the **Actions** menu choose **Change Filter Value** to add or update the value or choose **Remove Filter Value** to remove it. You can also right-click on the field to open the **Actions** menu.



3. When changing a filter value a pop-up will appear where you can add the relevant value. See Filter Values for details on exactly how different values must be entered.
4. Click **OK/Continue**.



5. The filter value will display in the grid.



#	Source Path	Name	Data Type	Operator	Field Transform	Filter Value
1	Item	Is Deleted	bool	Equals	Raw Data	f
2	Item	Circulating Library	org_unit	In list	Raw Data	
3	Item -> Copy Status (in…	id	id	In list	Raw Data	["Missing"]

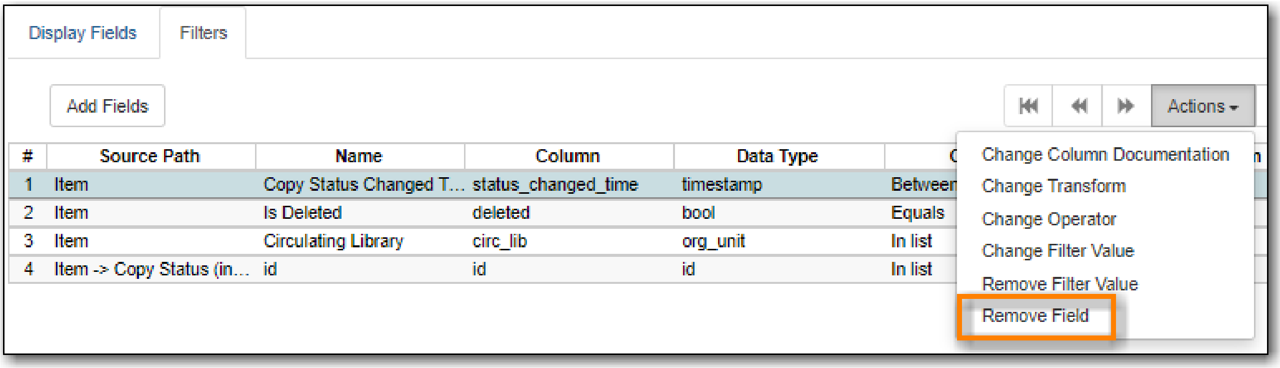
Removing a Filter

CAUTION

Removing a filter WILL affect what results are included in your report output. Ensure you don't need to filter on a particular field before removing it.

All report templates MUST have at least one filter to choose a specific library. This filter is important as it allows staff to comply with Sitka's data use requirements as per Appendix J of the Service Management Agreement and restrict the data in the report output to only data relevant to their library.

1. On the **Filter** tab select the filter field you would like to remove.
2. From the **Actions** menu choose **Remove Field**. You can also right-click on the field to open the **Actions** menu.



3. The selected field is removed and no longer shows as a filter field.

35.4. Template Terminology

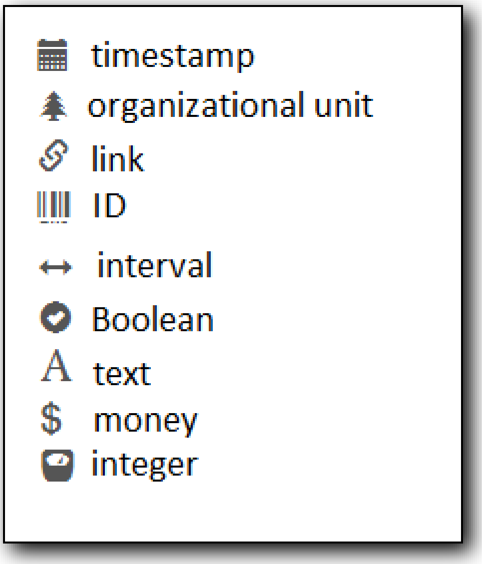
35.4.1. Data Types

Every field that display in *Source Path* pane of the Report Template Editor is associated with a data type. This indicates what kind of information is stored in the field and Evergreen will handle 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,
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.

Data Type	Description	Notes
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.



35.4.2. 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.

This table lists the commonly used transforms. Some data types, like timestamp, will have additional transforms available when adding fields or filters to a template.

Transform	Applicable Data Types	Description	Notes
Raw Data	All Data Types	To display the data exactly as it is stored in the database.	Most commonly used transform
Date	Timestamps	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.
Year + Month	Timestamps	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.
Upper Case	Text	Transforms text to all upper case.	
Lower Case	Text	Transforms text to all lower case.	
Substring	Text	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.
First Continuous Non-space string	Text	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.
Count	Text, Integer, ID, Money, Timestamp, Org_unit	This transform counts the records found.	Though you can count by any field, very often id field is used.

Transform	Applicable Data Types	Description	Notes
Count Distinct	Text, Integer, ID, Money, Timestamp, Org_unit	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.
Max	Text, Integer, Money, and Timestamp	It compares the values in the field of all result records and then returns the one record with the highest value. 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	Text, Integer, Money, and Timestamp	It works the same way as Max except that it returns the lowest value.	

35.4.3. 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. The available operators are:

Operator	Description	Notes
Equals	Compares two operands and returns TRUE if they are exactly the same.	

Operator	Description	Notes
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.	
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".
Greater than or equal to	This operator returns TRUE if a field is greater than or equal to 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 or equal to" can be thought of as "later than or equal to" or "after or equal to".
Less Than	This operator returns TRUE if a field is less than, lower than, earlier than or smaller than your parameter.	
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.	

Operator	Description	Notes
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	Returns TRUE for fields that contain no data.	For example, an overdue report will include a filter for Check In Date/Time is NULL as an item is no longer overdue if there is a value for Check In Date/Time.
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.	

35.4.4. Filter Values

If you enter hardcoded values for filter fields, the data must match exactly how is displays in Evergreen. For example, if the status is *Missing* in Evergreen you must use *Missing*, a value of *missing* will not return results.

Multiple filter values can be included separated by commas.

If hardcoding a value for a library filter you must use your library's unique Evergreen ID. Single branch libraries can find this by opening their public catalogue and looking at the URL that displays on the initial load. This URL will contain *physical_loc=X*. The value of X is your Evergreen ID. Multi-branch libraries should contact Co-op Support as the URL for your public catalogue will only show you the ID for your system, not your branches.

Chapter 36. Troubleshooting Report Templates

If you run into difficulties creating or modifying a template you can contact Co-op Support for assistance. Please be aware that tickets for reports requests may take 1 to 2 weeks.

Before contacting Co-op Support please ensure the applicable template folder is shared with your library so Co-op Staff are able to view the template in question.

When contacting Co-op Support please include the following information:

- Username of the staff account where the template has been created
- Folder where the template has been created
- Name of the template in question
- Desired end result for the template (what do you want it to report on?)
- Specific display fields or filters you are having difficulties modifying or adding
- Links to your current report output from the template if relevant

Chapter 37. The Evergreen Database

When you use Evergreen you are creating and updating records within the Evergreen database. Evergreen's reporter enables you to create reports to extract those records from the database. Understanding some basics about the Evergreen database and how records are created and/or updated when tasks are performed on the staff client and public catalogue will help you when working with the reporter.

Various kinds of data are used by Evergreen to enable you to perform routine actions in Evergreen such as checking out an item, registering a patron, or placing a hold. Data such as a patron names, address, patron barcodes, item barcodes, shelving locations, statuses, item prices, check out dates, due dates, check in dates, and more are saved in the Evergreen database. This data must be organized in an efficient and effective way to make sure it can be stored and retrieved easily.

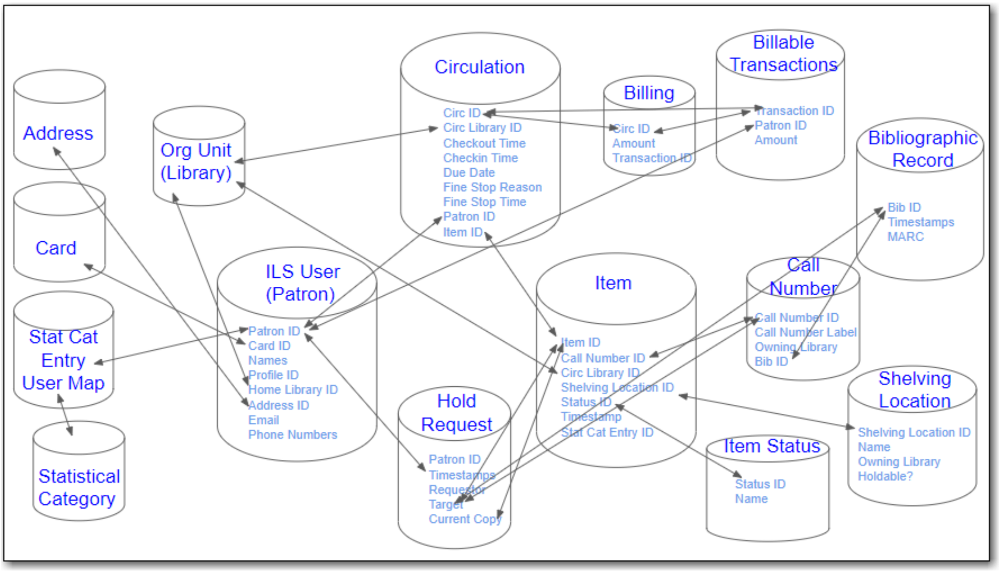
Evergreen uses various tables to keep each type of records. You can visualize a table as a spreadsheet: a specified number of columns with unlimited number of rows. Each column is called a field in the database terminology and each row is a record.

There are many tables in Evergreen's database. Each table contains a certain type of records and the information you see displayed on any interface is the staff client is likely coming from more than one table. For example, in a patron account, you can find the patron's names, address, phone number, barcode, main (profile) permission group, etc. all displaying as one record on the *Edit* tab of the patron's account. However, in the database the patron's address, barcode, and main (profile) permission group are saved in separate tables. You don't need to know which tables the information is being pulled from when editing a patron record on the staff client, but you do need to know when creating a report template involving patron information.

Since various information about one patron is saved in separate tables, there has to be way to match the information about one patron correctly to make sure all the information is about the same patron. Evergreen does this by assigning each patron with a unique database ID and recording the database id in every related table. So by recording the ID of a record in another table, two tables are connected. Some database IDs, such as patron and bibliographic, are visible in the staff client, others can only be seen within the database.

The connections among many tables are pre-made by the reporter. 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 which can be a guide for you to find various fields in different tables.

Simplified Diagram of the Tables and Connnections Among Them



TIP	Some tables do not link directly with each other. For example, there is not a direct link between the ILS User (patron) table and the item table. Instead these tables link to each other via other tables such as the circulation table and the hold request table.

The connections between tables are called joins. Evergreen uses the default join when creating report templates which is usually what you need for a template. When working with data that can be null (have no value) you may need to use Nullability which allows you to control the type of join used to link two tables.

To find out what the default join is for a table you can view the fm_IDL.xml file for Sitka's Evergreen.

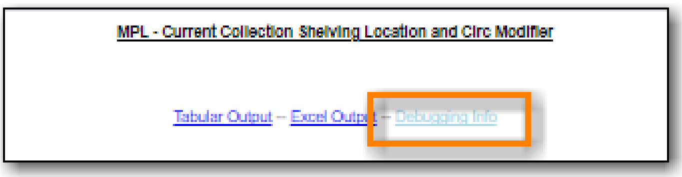
1. Search for the name of the source.
2. Find the column you're interested in and take note of the vlaue for *Name*.
3. Search the page for the *Name* and look for it to appear in a <links> section.
4. The reltype indicates the join.

   "has_a" = inner join

   "has_many" or "might_have" = left outer join

When you create a template you are writing a SQL (standard query language) query that will run on the Evergreen database.

This can be viewed in the report output by selecting **Debugging Info**.



37.1. Commonly Used Tables

NOTE Some tables and fields in the database still use the term *copy* while the preferred term *item* is used throughout the staff client.

ILS User Table

This table contains patron/user records. Important fields in this table include:

- Patron names (primary and preferred)
- Phone numbers
- Email address
- Home Library
- Privilege Expiration Date
- Record Creation Date/Time

To find more information about patrons follow the links to the *Current Library Card* table for patron's current barcode, the *Circulation* table to find the circulation history, and the *Mailing Address*, *Physical Address*, and *Main Profile Group*, etc.

Item Table

This table contains item records. Important fields in this table include:

- Barcode (item)
- Creation Date/Time
- Active Date/Time
- Copy Status Changed Time
- Last Edit Date/Time
- Price

Pre-catalogued item information including Dummy ISBN, Precat Dummy Title, and Precat Dummy Author is 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.

To find more information about items follow the links to the *Circulation Modifier* table, the *Copy Status* table, and the *shelving location* table.

For circulation information follow the link to the *Circulations* table.

For basic bibliographic information follow the link to the *Call Number/Volume* table. From here go to the *Bib Record* table and then click on *Simple Records Extracts*. Title, Author, ISBN, ISSN, Publisher, Publication Year, and Record ID can be found in this table.

Bibliographic Record Table

This table contains title information. In most cases you will want the basic bibliographic information which is found within the *Simple Record Extract* table. When linking from other tables you usually have to link through the *Call Number/Volume* table to find the *Bib Record* table.

Circulation Table

This table contains circulation records, including pre-catalogued item circulations.

NOTE	When an item is checked out a circulation record is created. When an item is renewed the existing circulation record is closed and another circulation record is created.

Important date/time fields in this table include:

- 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.

For patron information follow the link to the *Patron* table.

For item information follow the link to the *Circulating Item* table.

In-house Use Table

This table contains in-house use records for catalogued items. These in-house circulations are done via the *Record In-House Use* interface.

For item information follow the link to the *Item* table.

Non-catalogued Circulation Table

This table contains circulations for non-catalogued items.

For Non-catalogued item type information follow the link to the *Non-cat Item Type* table.

Non-catalogued In-house Use Table

This table contains in-house use records for non-catalogued items.

These in-house circulations are done via the *Record In-House Use* interface.

For Non-catalogued item type information follow the link to the *Item Type* table.

Hold Request Table

This table contains hold records for holds that are waiting to be filled or waiting to be picked up.

For patron information follow the link to the *Hold User* table.

For information on who placed to hold follow the link to the *Requesting User* table. The requesting user will either be the patron or a staff member if they placed the hold for the patron.

For information on the items that can be used to fill a hold follow the link to the *Hold Copy Map*. Outside of the reporter this is refered to as the Eligible Copies table.

TIP	Target Object ID is shown as a link but there is no linked table in the Source pane. Depending on the type of hold the value in this field could be a bibliographic record ID, a call number record id or an item record ID. This is one of the rare cases where you would select a link field to use for your display field.

Important date/time fields in this table include:

- Activation Date - the date on which a suspended hold will be activated
- Capture Date/Time - the time when the hold is captured for the hold shelf or sent into transit
- Fulfillment Date/Time - the time when the on hold item is checked out
- Hopeless Date -
- 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 an item to fill the hold. Usually the time will match the Hold Request Time as the hold targeter will generally check every 24 hours. It is usually not useful for reporting, but it can serve as an indicator of whether or not the request time has been edited.
- 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 item’s status is updated to On Hold Shelf

For notification information follow the link to the *Notifications* table. This table includes Notification Date/Time which indicates when the automatic notification was sent.

Copy Transit Table

This table contains records of item transits. Records are created in this table both when an item is sent back to its circulating library as well as when it is sent to another library to fill a hold.

For item information follow the link to the *Transited Copy* table.

Hold Transit Table

This table contains records of item transits specifically when the item is transitting to fill a hold.

For item information follow the link to the *Transited Copy* table.

For hold information follow the link to the *Hold requiring transit* table.

Billing Line Item Table

This table contains all the billing line items such as each day's overdue fines and the manually created bills.

The records in this table are viewable on the Full Details screen on Bills tab in a patron's account in the staff client.

Billable Transaction with Billing Location Table

This table contains the summary records of billings and payments.

Most of information in these records is displayed on the Bills tab or Bills History screen. The records are updated when either the related billings or payments are updated.

Important fields in this table include:

- Transaction ID - this is the bill ID and also the circulation record ID for circulation bills
- Transaction Start Time - this is the check out time for circulation related bills and the creation time for manually created bills
- Transaction Finish Time - this is when the bill is resolved by being paid, refunded, or adjusted to zero

Payments: All Table

This table contains ALL payment records.

When a payment is made in the staff client payment records are created. This could be one record or multiple depending on the number of bills resolved or partially resolved by the payment.

One bill may be resolved by multiple payments. One payment may resolve multiple bills.

Payments: Brick-and-mortar Table

This table contains all payments made at the circulation desk through staff.

Payments: Desk Table

This table contains payments made using the payment type Cash, Check, Credit Card, or Debit Card.

Payments: Non-drawer Staff Table

This table contains payments made using the payment type Patron Credit, Work, Forgive, or Goods.

Simple Reports

Chapter 38. Simple Reports

Sitka does not currently use the Simple Reports feature.

Serials

Chapter 39. Serials Administration

Serials Training Video - Serials Overview (10:41)

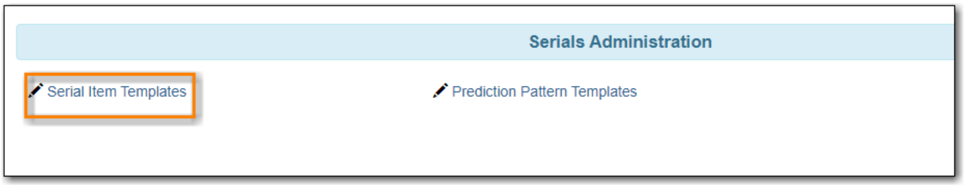
39.1. Serial Item Templates

Serials Training Video - Serial Copy Templates (2:30)

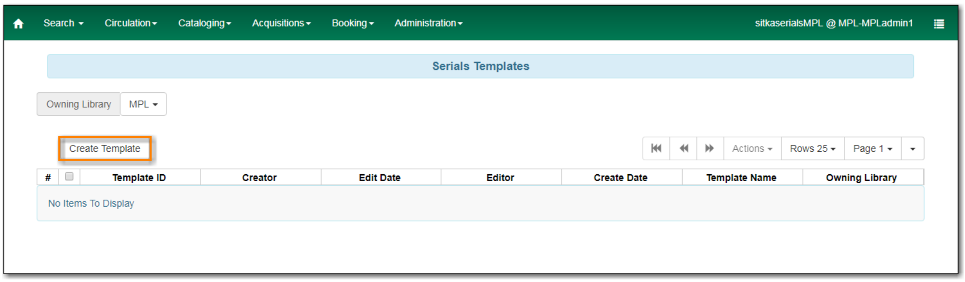
Serial Item Templates specify the item attributes that should be applied when a serial item is received. You must create at least one template to receive serials.

39.1.1. Create a Serial Item Template

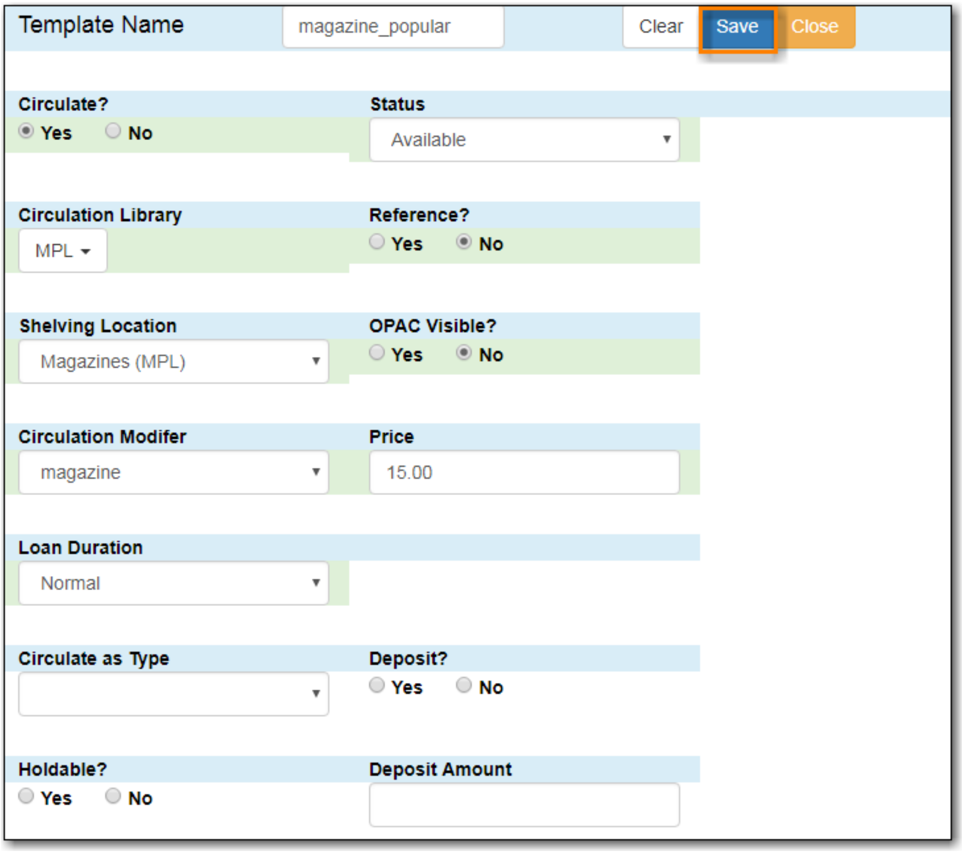
1. Click **Administration** → **Serials Administration** → **Serial Item Templates**.



2. Click **Create Template**.

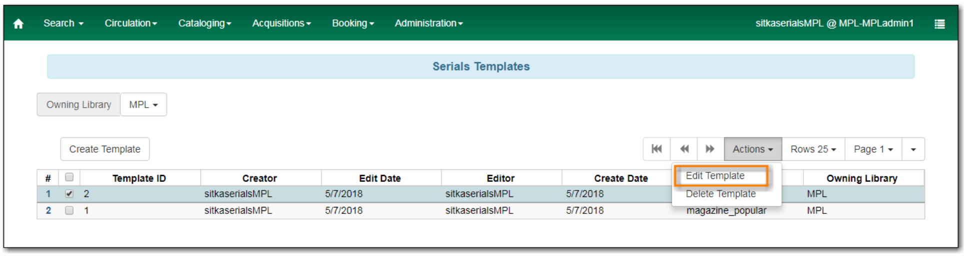


3. Enter a *Template Name*.
4. Choose the item attributes for this template.
5. Click **Save**.



39.1.2. 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*.



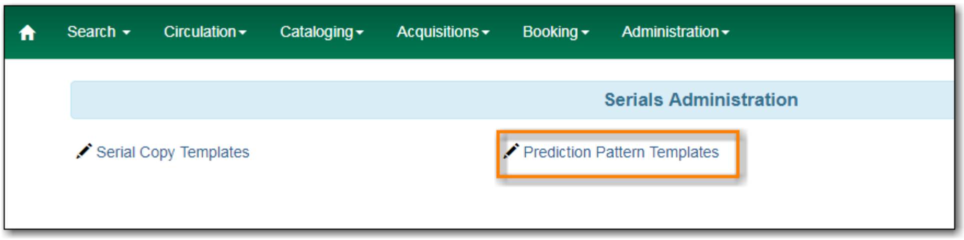
4. Edit the item attributes for this template.
5. Click **Save**.

NOTE Serial Item Templates cannot be deleted.

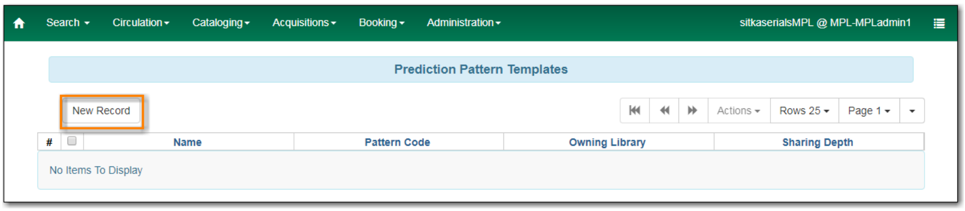
39.2. Prediction Pattern Templates

39.2.1. Create a Prediction Pattern Template

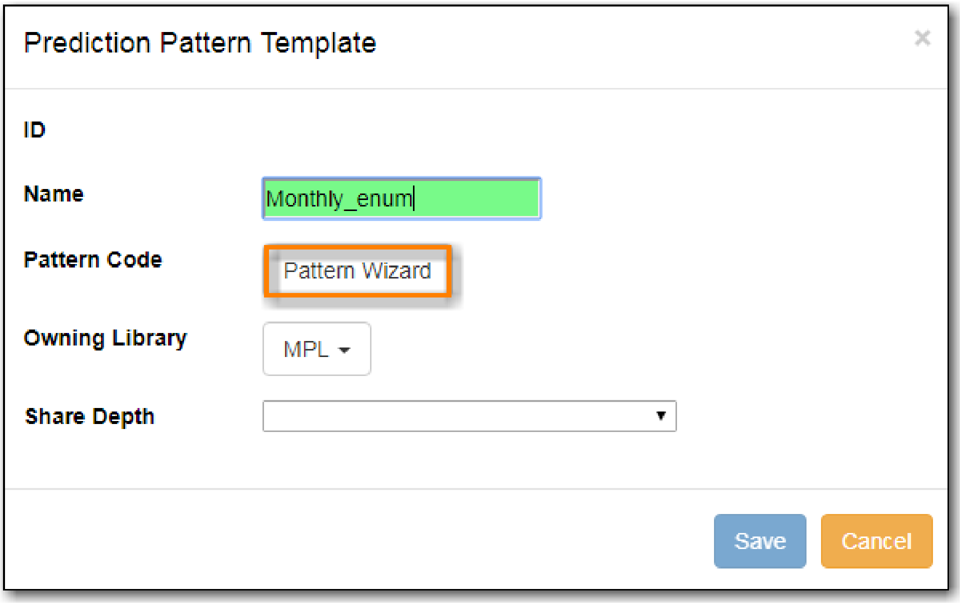
1. Click **Administration** → **Serials Administration** → **Prediction Pattern Templates**.



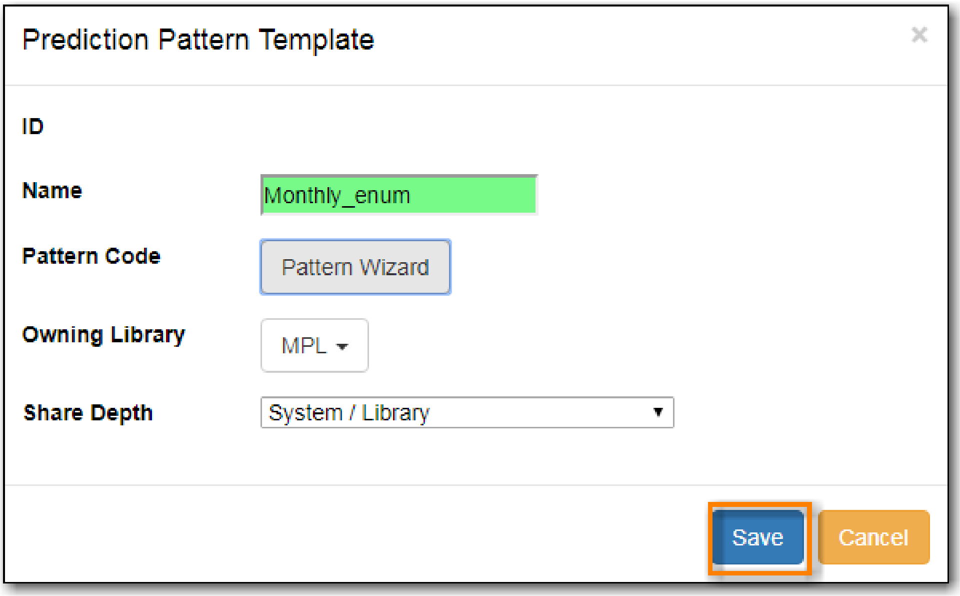
2. Click **New Record**.



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.



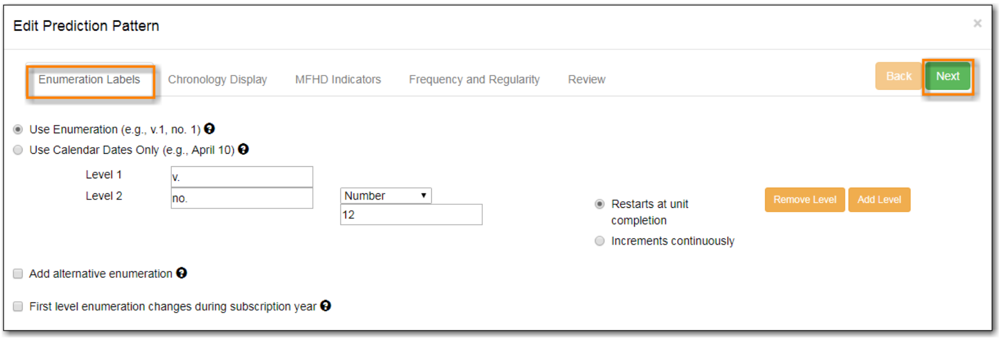
   a. See Pattern Wizard for detailed instructions.
5. Choose the **Owning Library**.
6. Choose the **Share Depth**.
7. Click **Save**.



Pattern Wizard

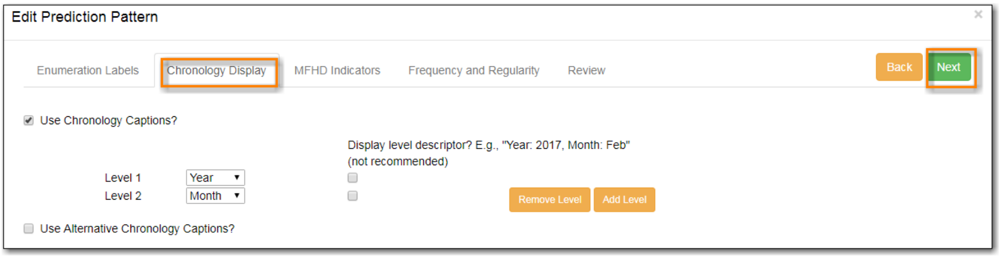
Enumeration Labels

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**



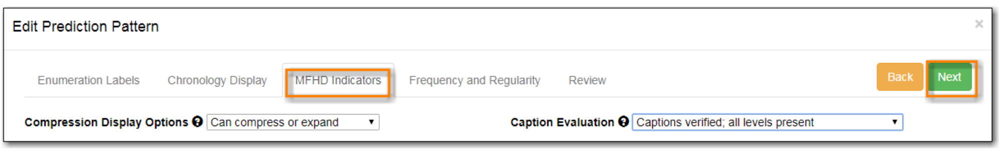
Chronology display

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**

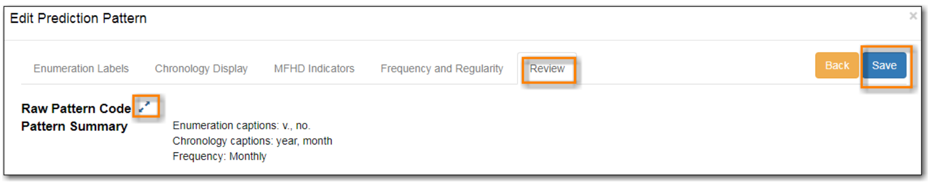


Frequency and Regularity

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

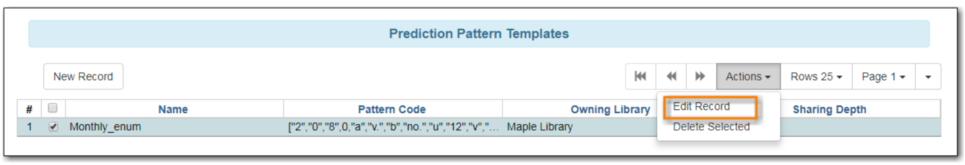
1. Review the **Pattern Summary**
    a. Click the blue arrows to see the **Raw Pattern Code**



2. Click **Save**

39.2.2. Edit a Prediction Pattern Template

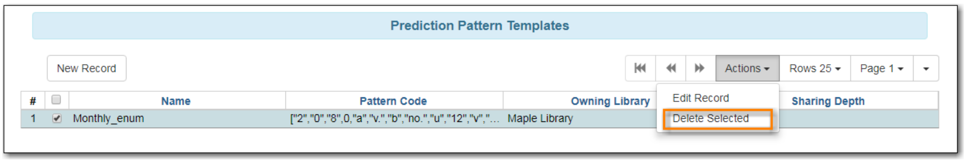
1. Click **Administration** → **Serials Administration** → **Prediction Pattern Templates**.
2. Click the check box beside the template you want to edit.
3. Click **Actions** → Choose **Edit Record**.



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.

39.2.3. 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.

39.3. Serials Settings

Click **Administration** → **Local Administration** → **Library Settings Editor**.

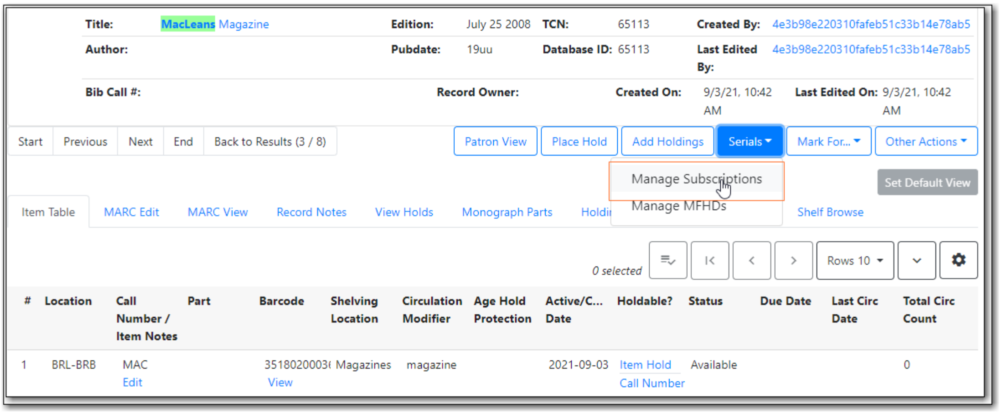
The following settings should be configured in the Library Settings Editor before you start using the Serials module.

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 40. 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.

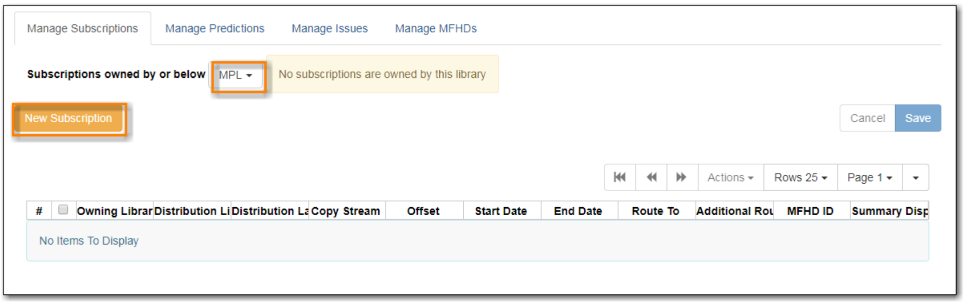
To access the Serials Module, retrieve a bibliographic record and click on **Serials** → **Manage Subscriptions**. This will open the serials interface for that particular record.



40.1. 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.

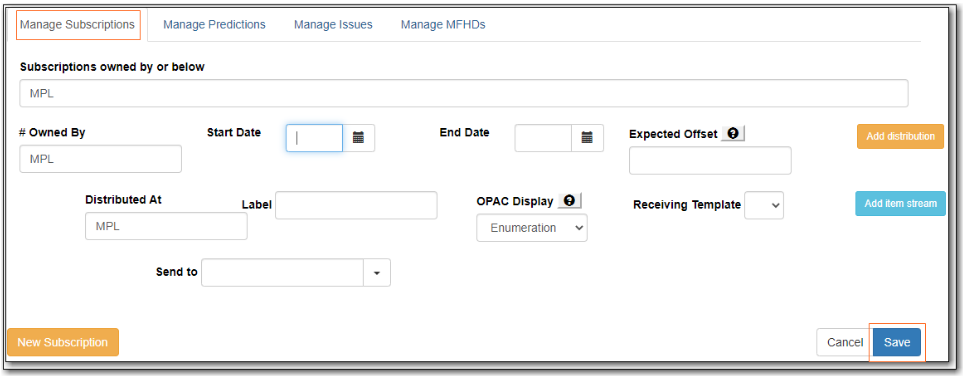
g. **OPAC Display** - Whether the public catalog display of issues should be grouped by chronology (e.g., years) or enumeration (e.g., volume and number).

h. **Receiving Template** - Specifies the item attributes applied on receipt - see Serial Item Templates 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 item stream** to add additional Routing.

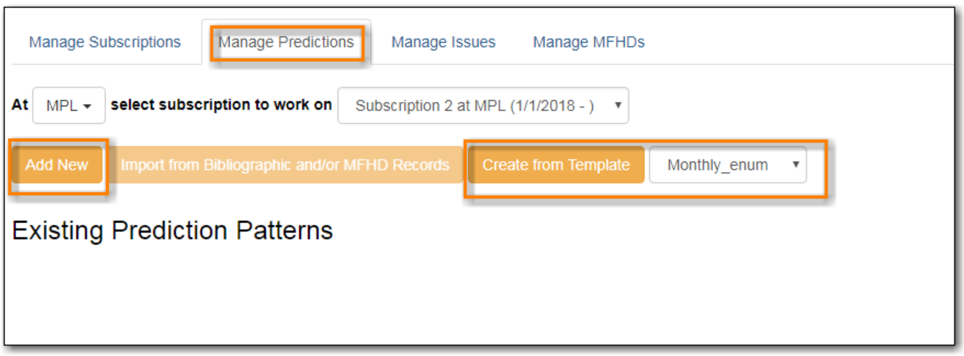
6. Click **Save**



40.2. 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.

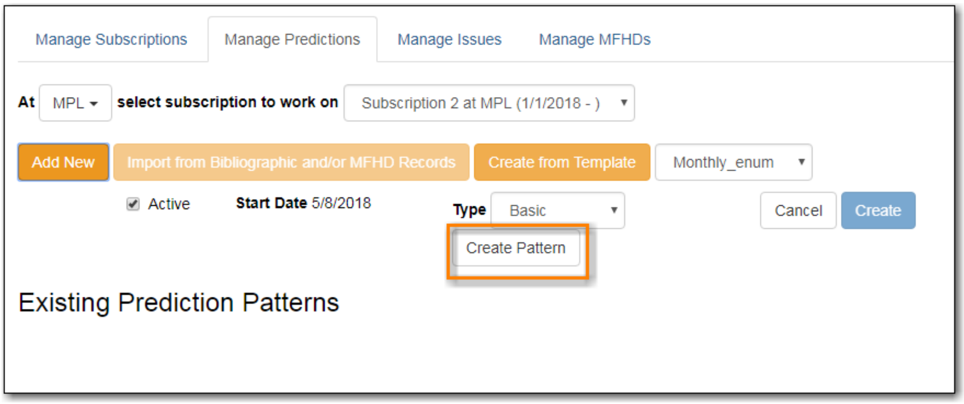
1. Retrieve the bibliographic record your subscription is attached to.
2. Click **Serials** → Choose **Manage Subscriptions** → Click **Manage Predictions**



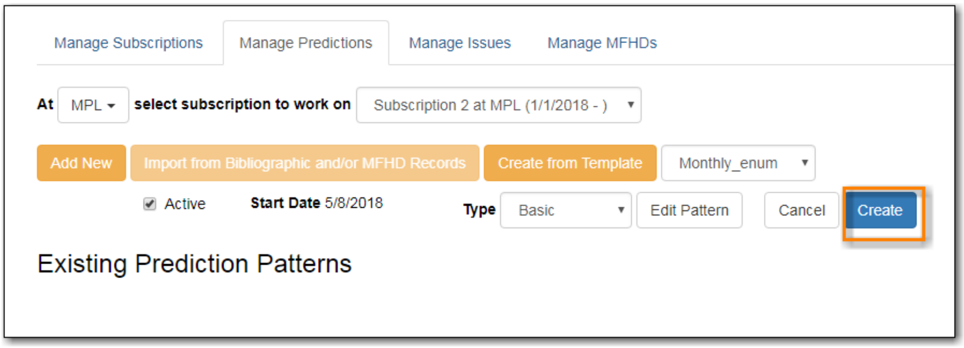
40.2.1. Predict Issues Using a New Prediction Pattern

1. Within the *Manage Predictions* tab, **Select Subscription** to work on from the drop down menu.

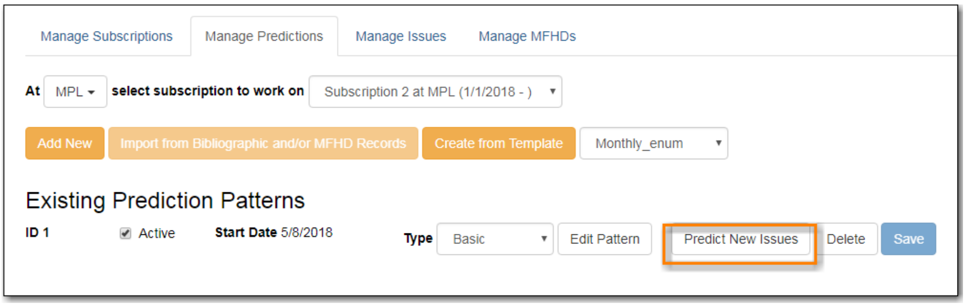
2. Click **Add New**
3. Click **Create Pattern**



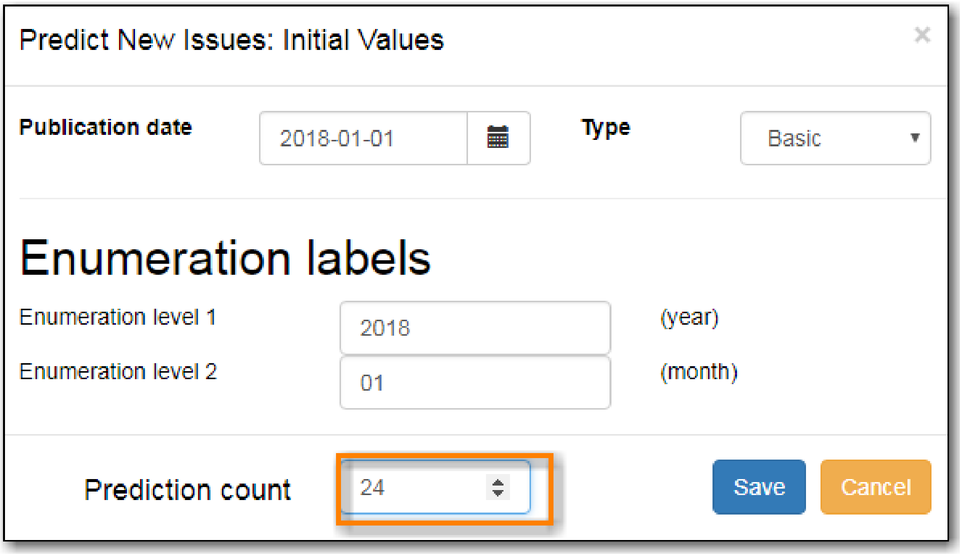
4. Follow the Pattern Wizard steps to modify the template.
5. Click **Create**.



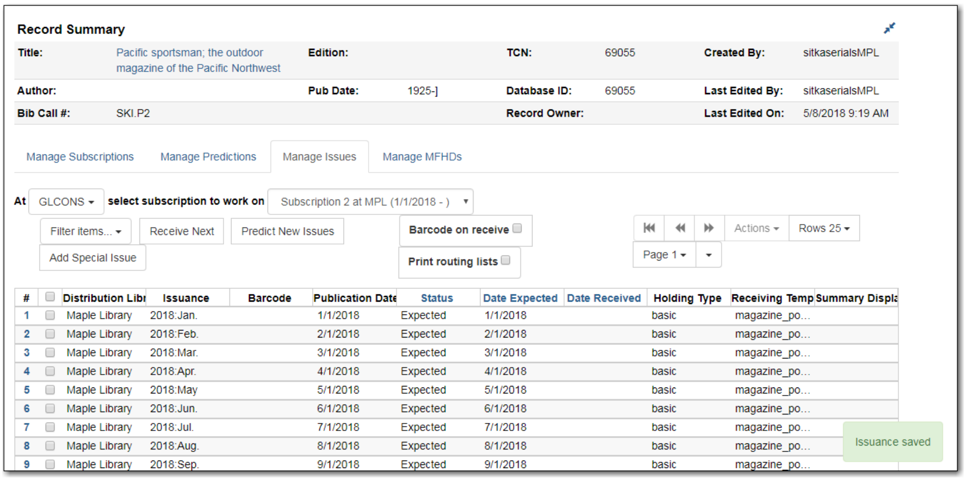
6. To create predictions, click **Predict New Issues**.



   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**.

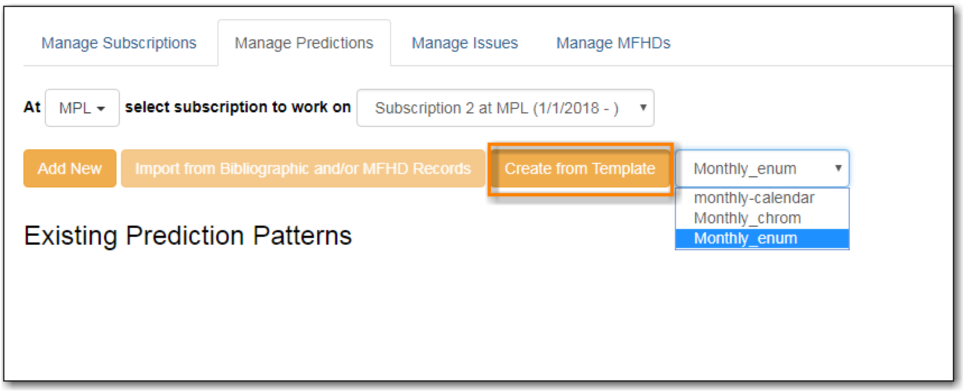


9. Evergreen will generate the predictions and bring you to the *Manage Issues* tab to review the predicted issues.

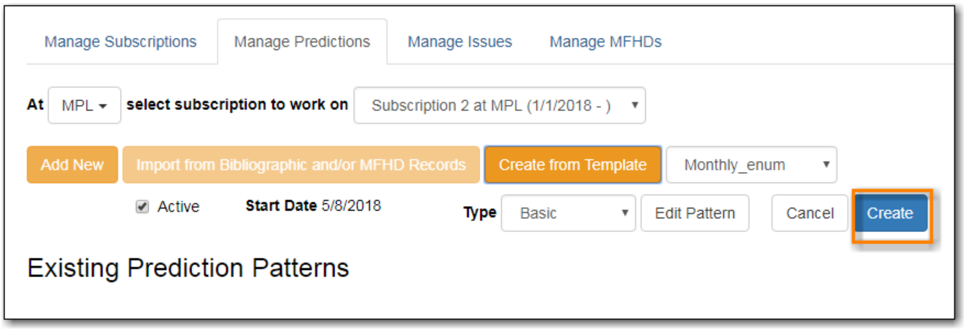


40.2.2. Predict Issues Using a Prediction Pattern Template

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.

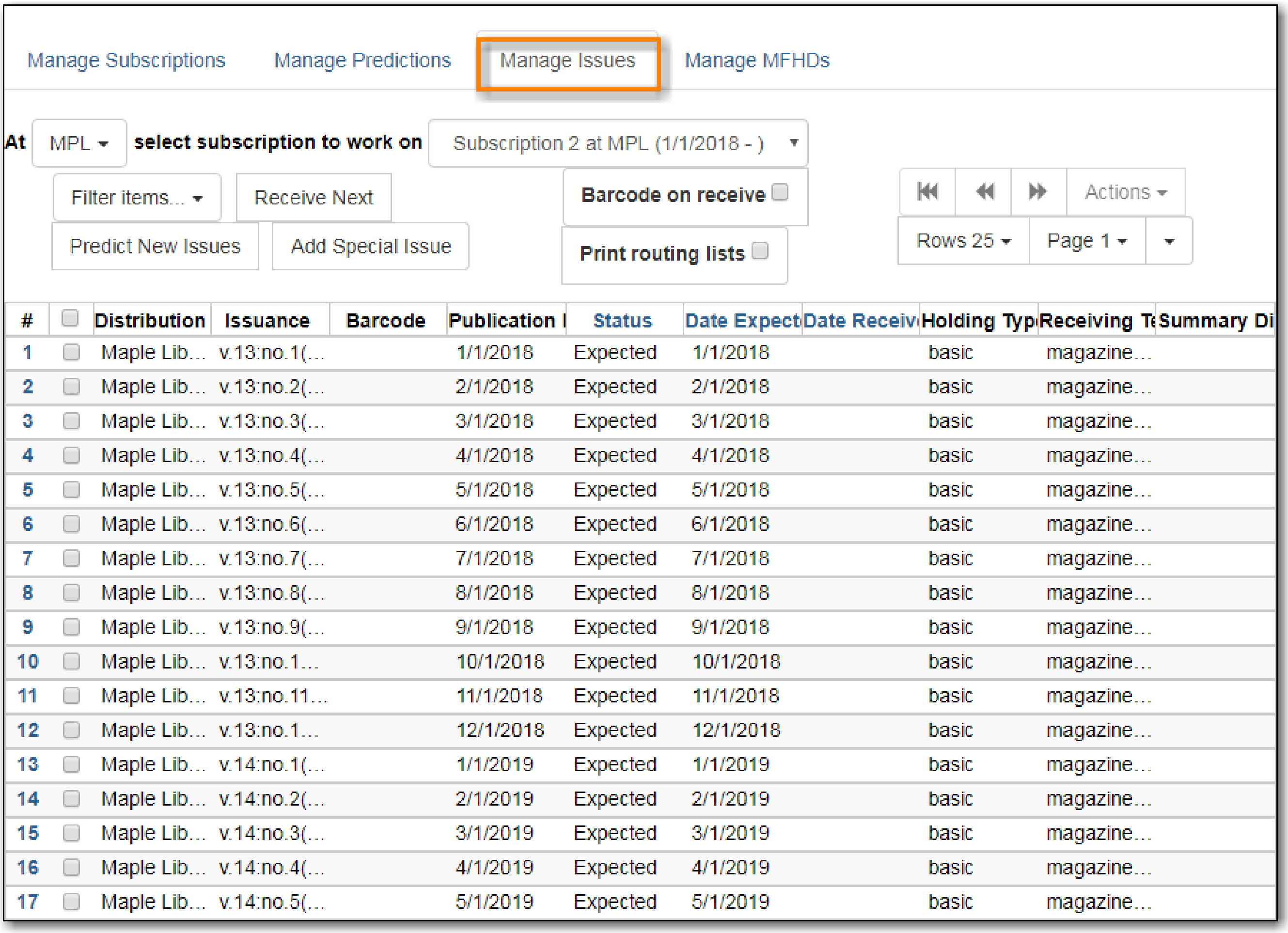
7. Click **Save**.

8. Evergreen will generate the predictions and bring you to the *Manage Issues* tab to review the predicted issues.

40.3. 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.



#		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 41. Serials Receiving

Issues can be received through the **Manage Issues** tab.

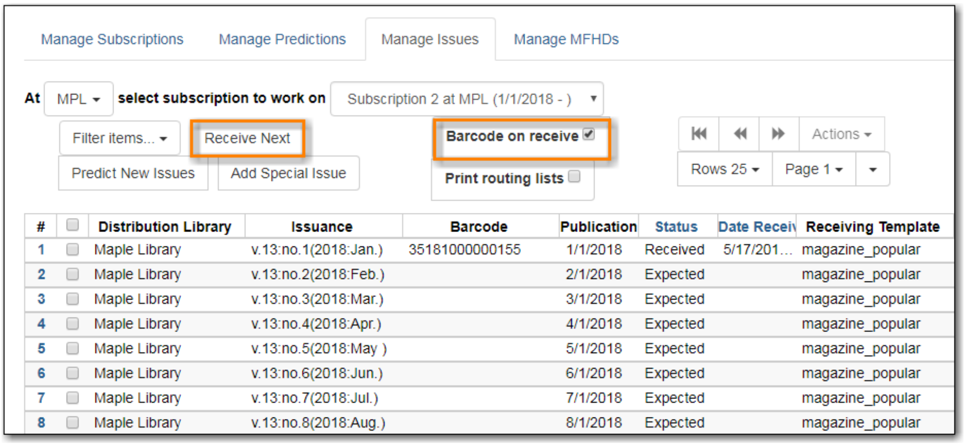
41.1. Receive Issues

The **Manage Issues** tab can be used to receive the next expected issue and to receive multiple expected issues.

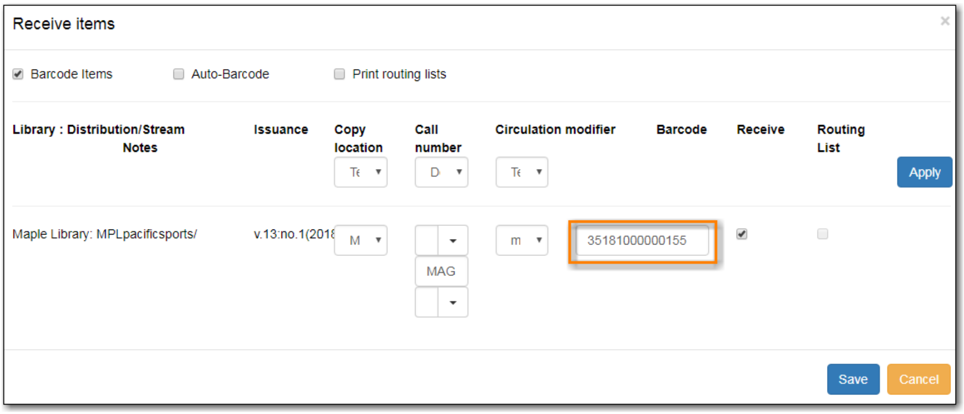
1. Retrieve the serial record
2. Click **Serials** → **Manage Subscriptions** → **Manage Issues** tab.

41.1.1. 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**.



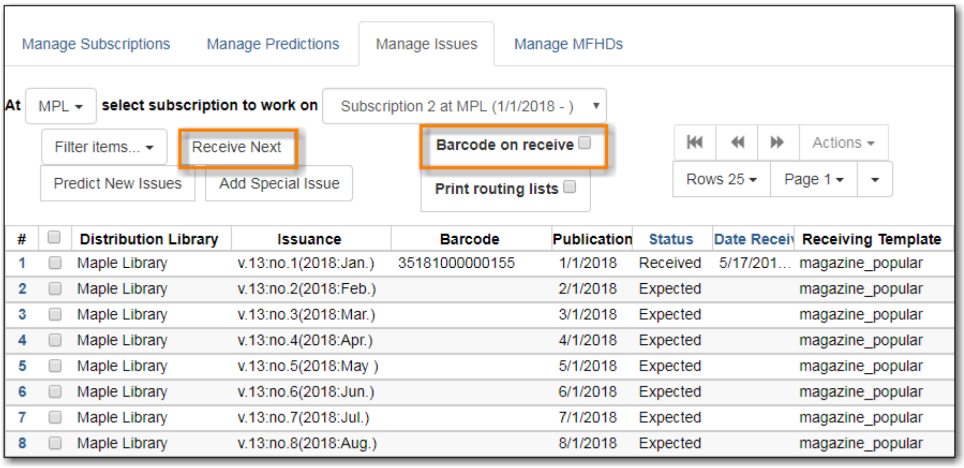
4. A Receive items dialog box will appear with the next expected issue and item(s).
5. The Shelving Location and Circulation Modifier will be pre-populated from the Receive Template associated with the Distribution. Changes can be made to the pre-populated information.
6. **Call Number**: Enter a call 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.



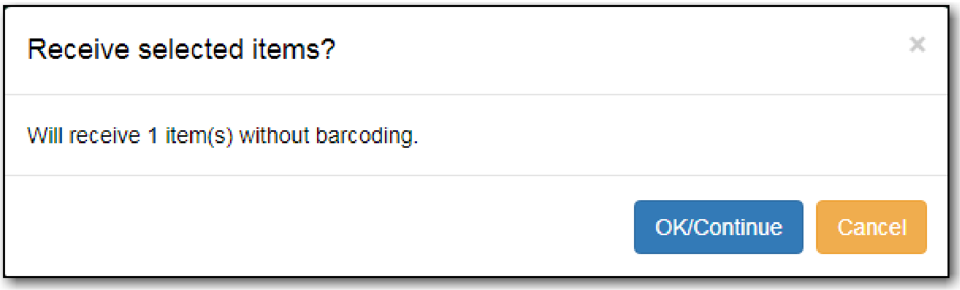
10. Click **Save** to receive the item(s). The Status of the issue will update to "Received" and a Date Received will be recorded.
    a. The barcoded item(s) will now appear in the holdings area of the catalogue and the Holdings Summary in the Issues Held tab in the catalogue will reflect the newly received issue.

41.1.2. 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."



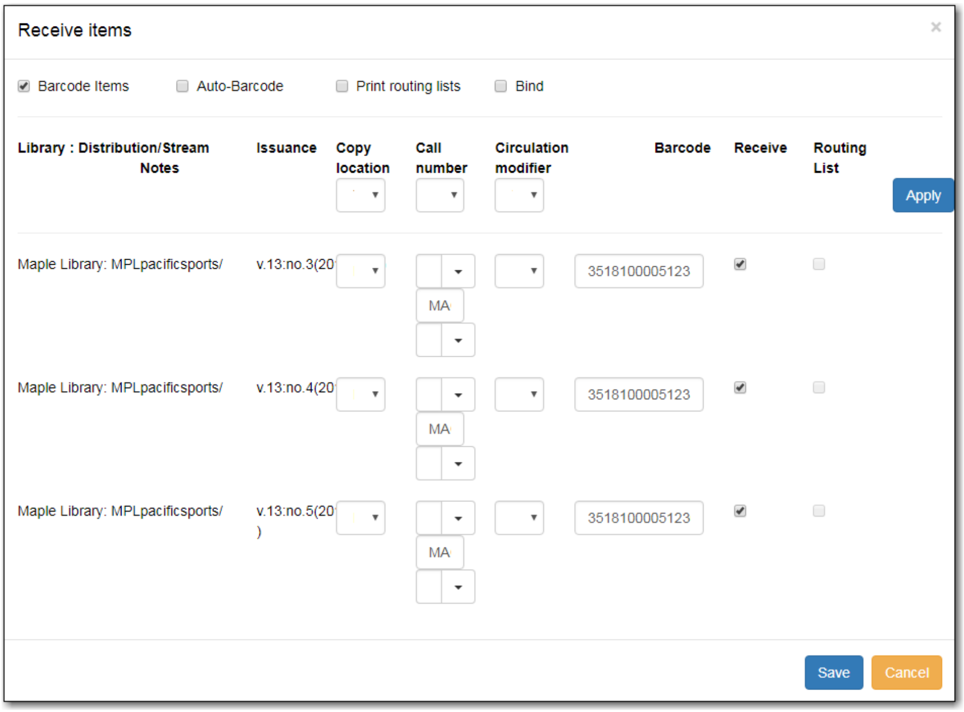
3. Click **OK/Continue** to receive the issue. The Status of the issue will update to "Received" and a Date Received will be recorded. The Holdings Summary in the Issues Held tab in the catalogue will reflect the newly received issue.

41.2. Batch Receive

Multiple issues can be received at the same time using the Manage Issues tab.

41.2.1. Batch Receive and Barcode

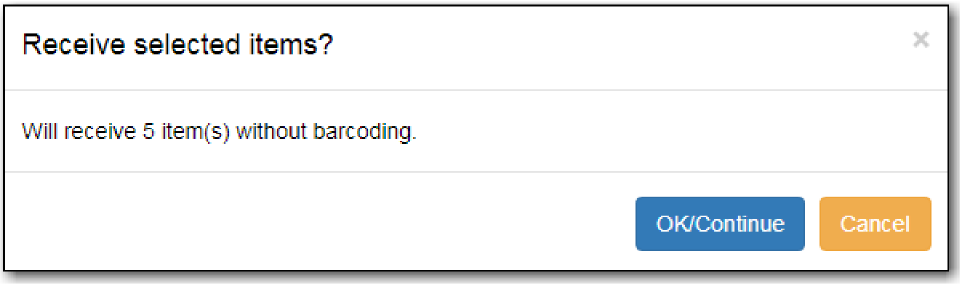
1. Within the Manage Issues tab, **Select Subscription** from the drop down menu. The list of predicted issues for the subscription will appear.
2. Check the box adjacent to **Barcode on receive**.
3. Check the boxes adjacent to the expected issues you want to receive.
4. Go to **Actions** → **Receive 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.

41.2.2. 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.

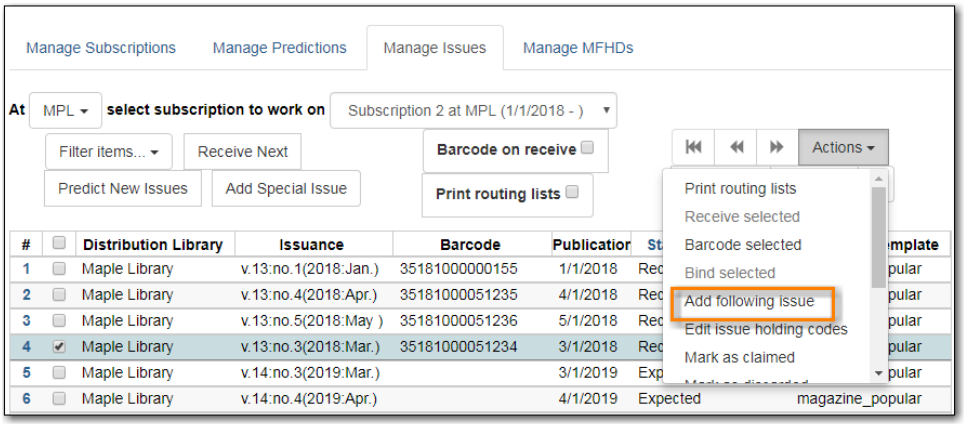
Chapter 42. Special Issues

42.1. 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.

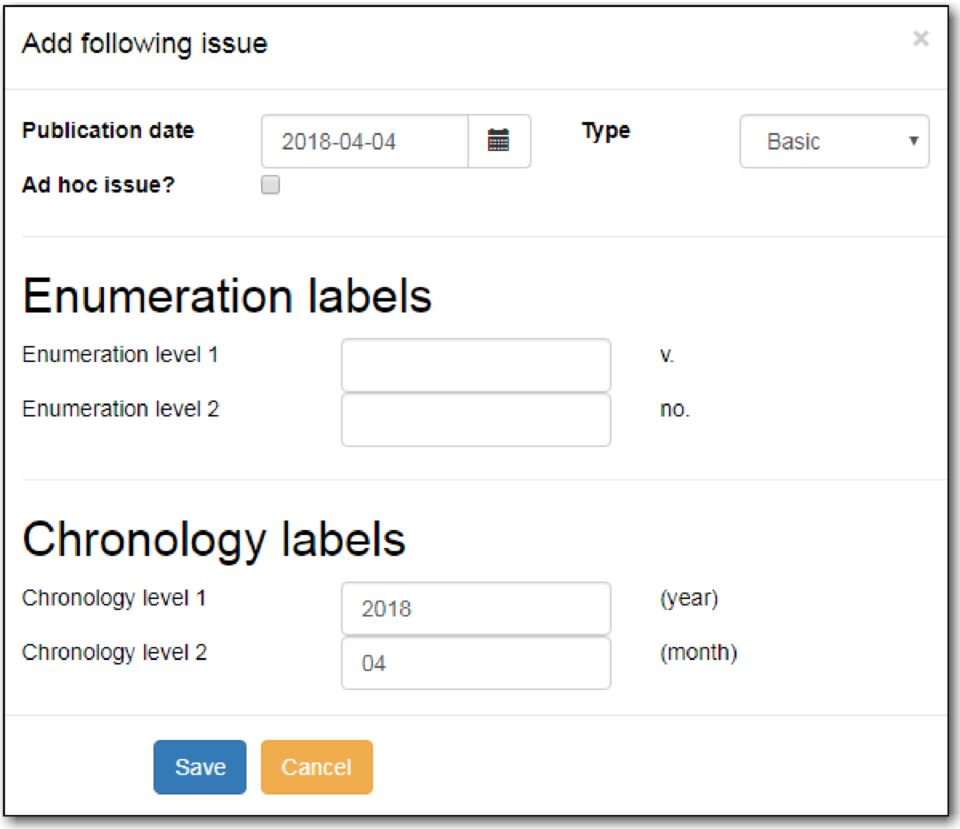
To add an extra copy of an expected issue:

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.

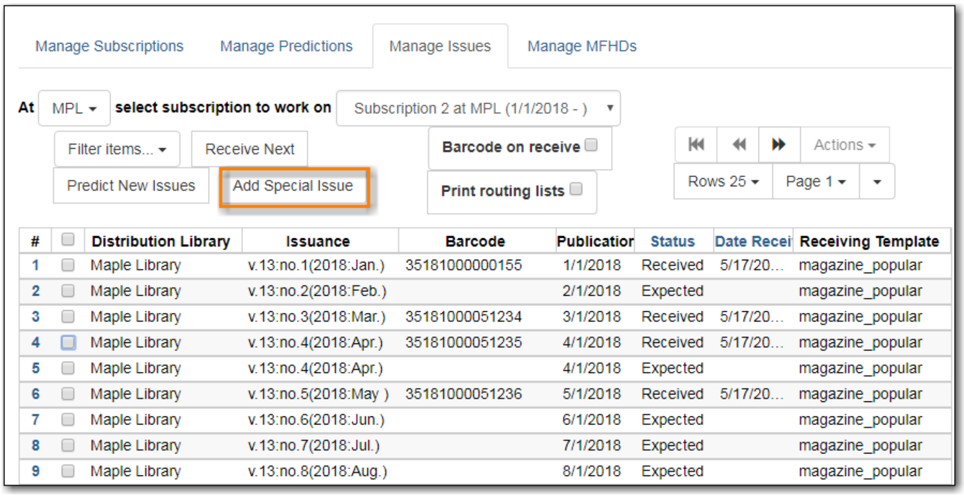
5. The extra copy will appear in the list of issues and can be received using your typical workflow.

42.2. Adding Special Issues

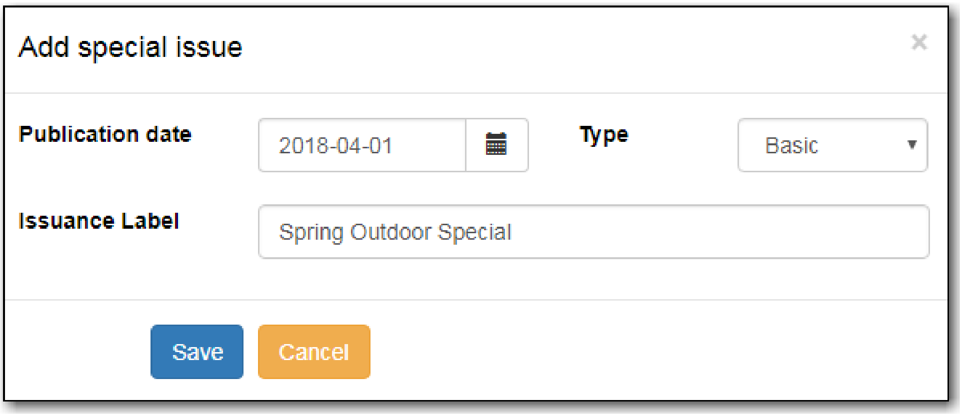
If the library receives an unexpected issue of a subscription, such as Summer Issue or Holiday Issue, it can be added to the list of predicted issues as a Special Issue so it can be received through the serials module.

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

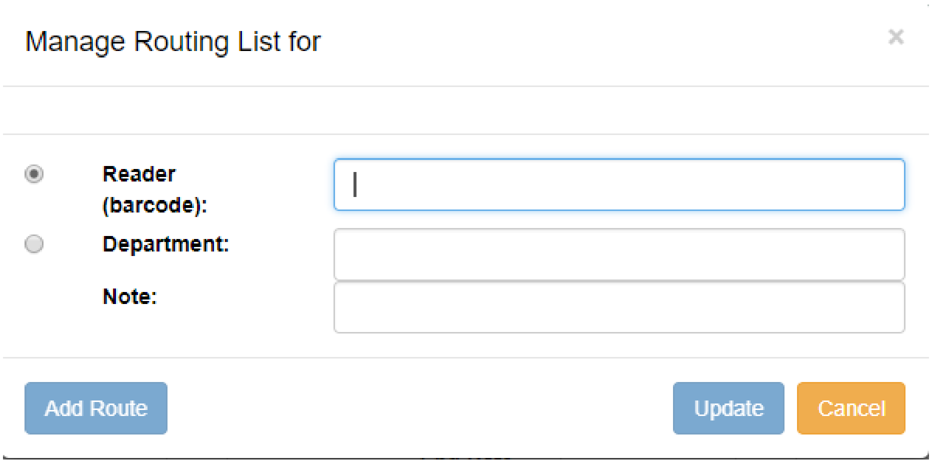
A special issue may also be added as an ad hoc issue by following the instructions for Adding Extra Copies. Enter the Publication date and Type and check the box adjacent to Ad hoc issue? The form will update to allow you to enter an Issuance Label.

Chapter 43. Routing List

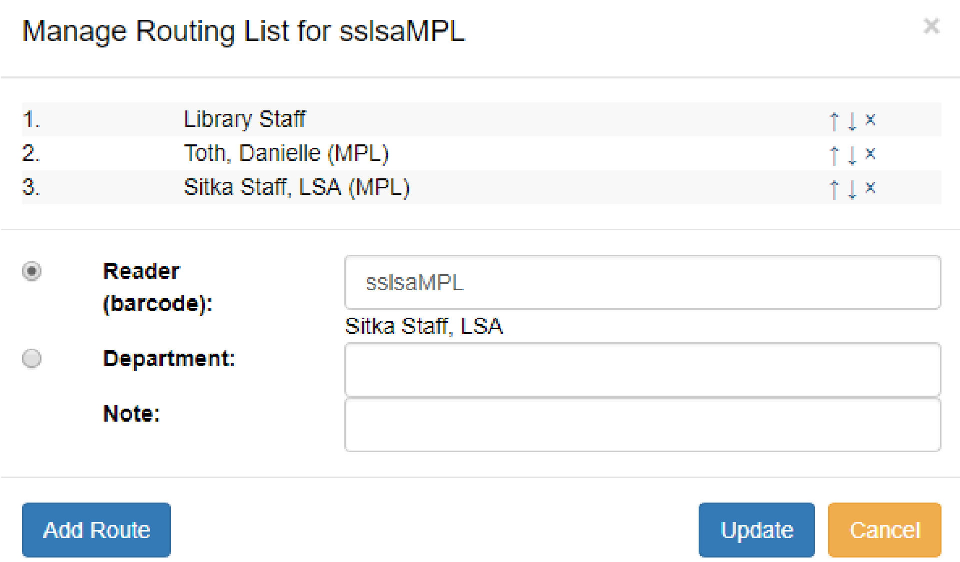
Routing lists enable you to designate specific users and/or departments that serial items need to be routed to upon receiving.

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.



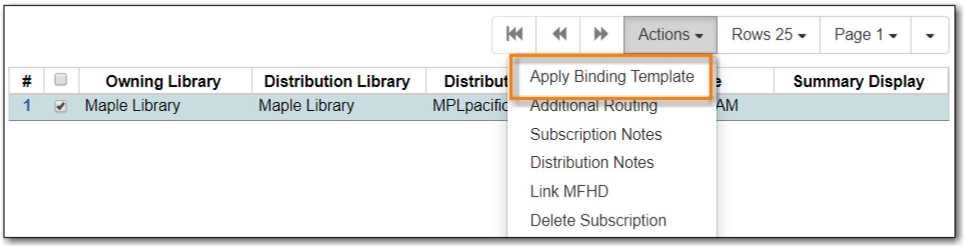
7. When the list is complete, click **Update**.

Chapter 44. Serials Binding

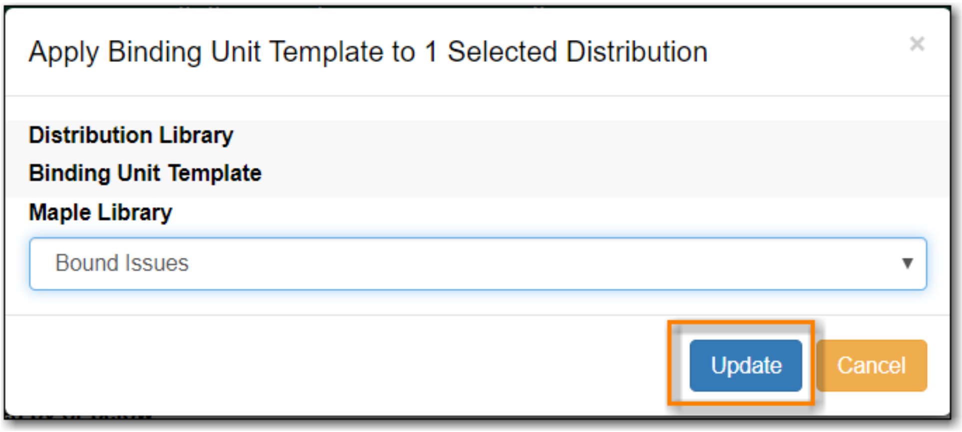
44.1. Apply a Binding Template

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**.

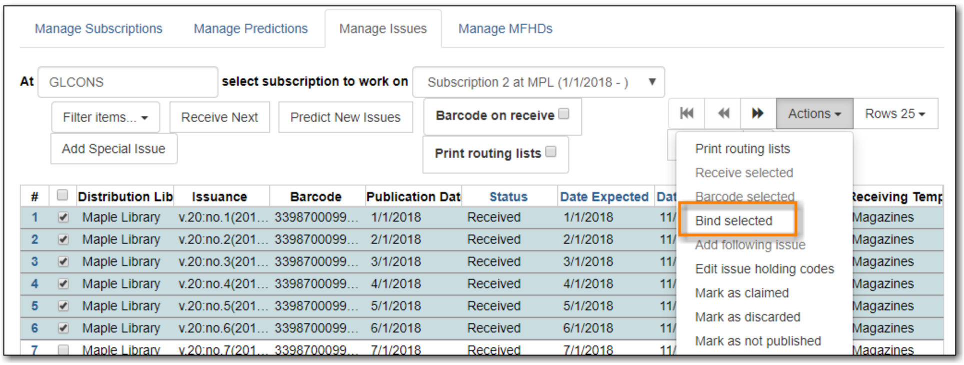


3. In the dialog box that appears, select the Serial Copy Template you'd like to use from the dropdown and click **Update**.



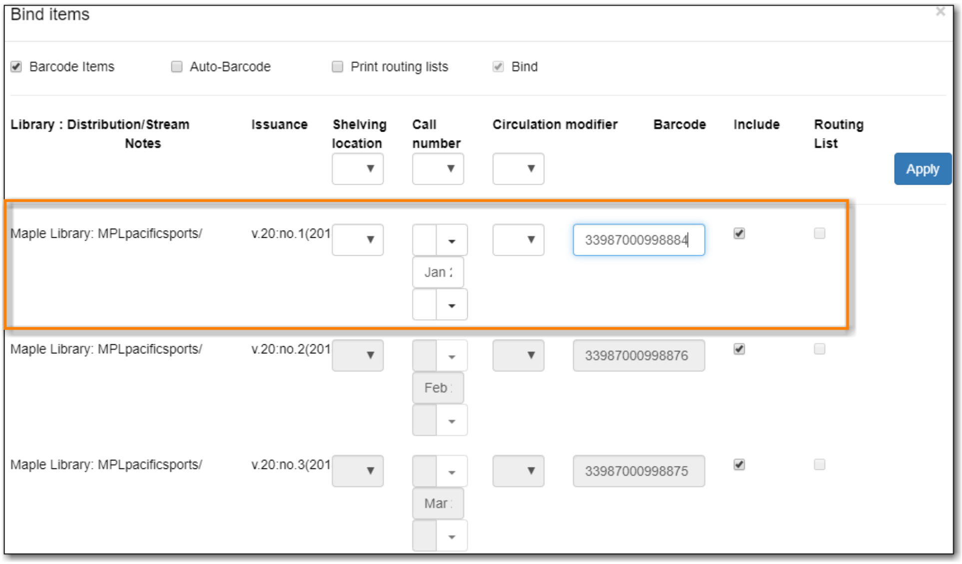
44.2. Bind Received Issues Together

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 45. 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.

45.1. 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.

45.2. 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.

45.3. 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.

45.4. 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 46. 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 47. Implementing Course Reserves

Before implementing course reserves you will need to consider the following:

How will your reserve items will be identified in Evergreen?

Co-op Support recommends setting up course reserves related shelving locations 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 applicable shelving locations will need to be set accordingly, or, your hold policies will have to be adjusted by Co-op Support.

Who will have access to course reserves?

Library staff must have cataloguing permissions in order to use the course reserves module as the module can update item attributes.

To enable the course reserves module in your public catalogue:

1. Go to **Administration →Local Administration → Library Settings Editor**
2. Set the library setting *Opt Org Unit into the Course Materials Module* to TRUE
3. There will now be options for searching and browsing course reserves in the public catalogue.

Chapter 48. Course Reserves Administration

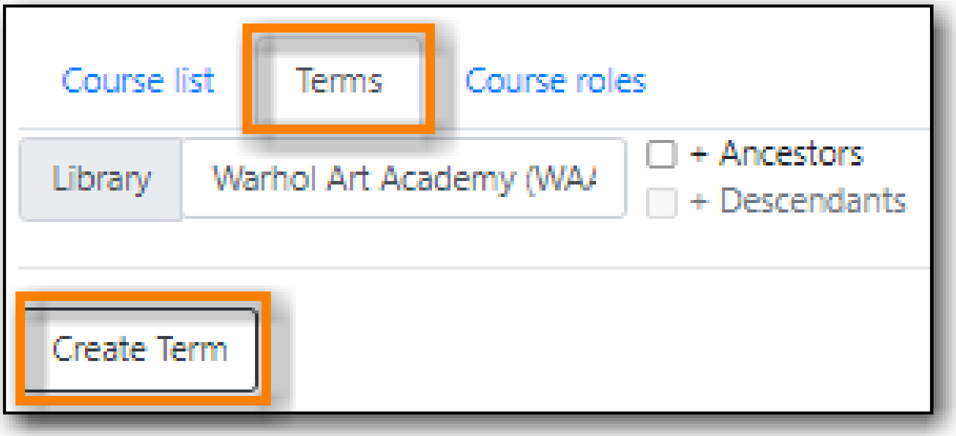
To access the course reserves module go to **Administration** → **Local Administration** → **Course Reserves List**.

48.1. Creating Terms

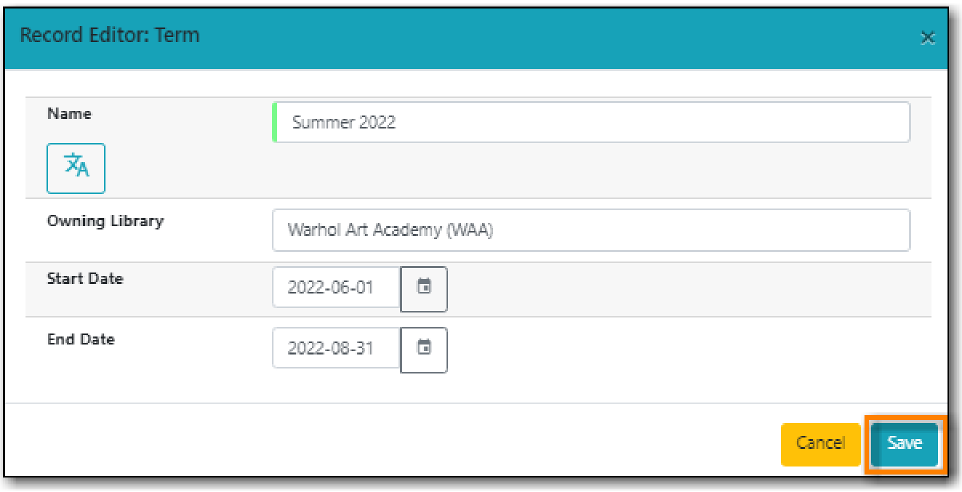
Sitka Snippet Video - Creating Terms (1:06)

You may optionally keep track of your institution’s terms or semesters.

1. Go to **Administration** → **Local Administration** → **Course Reserves List**.
2. Click on the **Terms** tab.
3. Click "Create Term".



4. Enter the name of the term.
5. If you are a multi-branch library you may need to change the owning library to be your system, rather than a particular branch.
6. Enter a start date and an end date for the term.
7. Click **Save**.

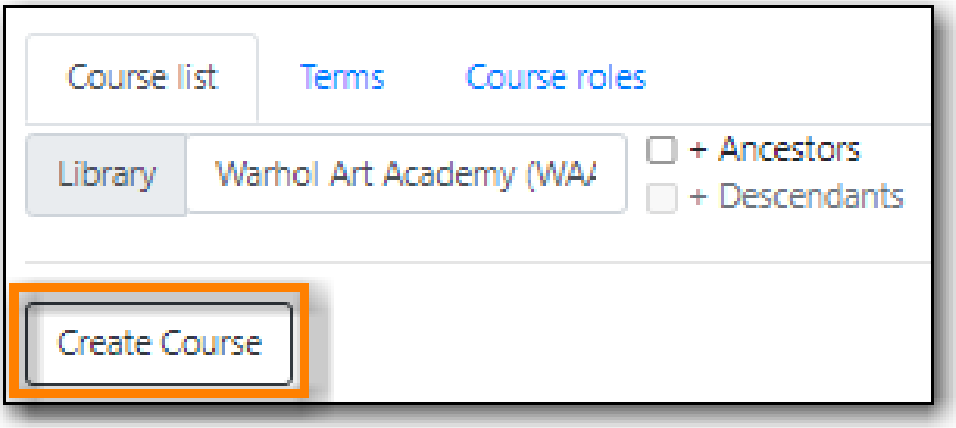


48.2. Creating Courses

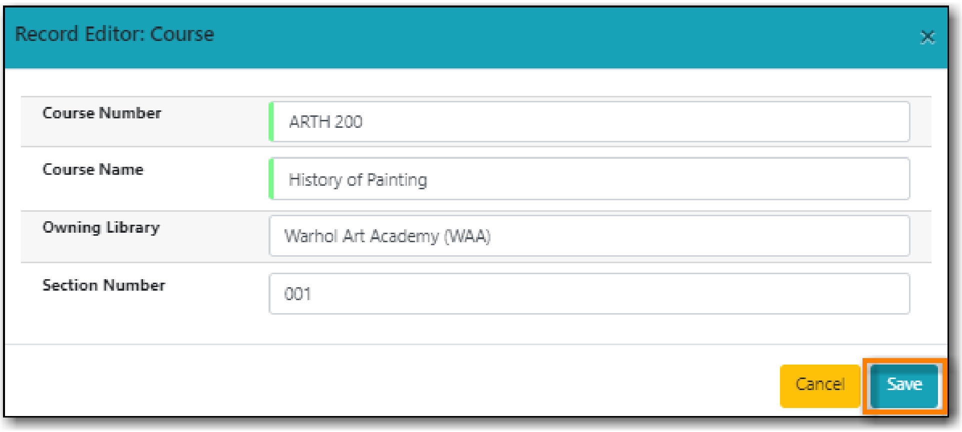
Sitka Snippet Video - Creating Course Reserve Lists (6:29)

Sitka Snippet Video - Creating Courses (0:51)

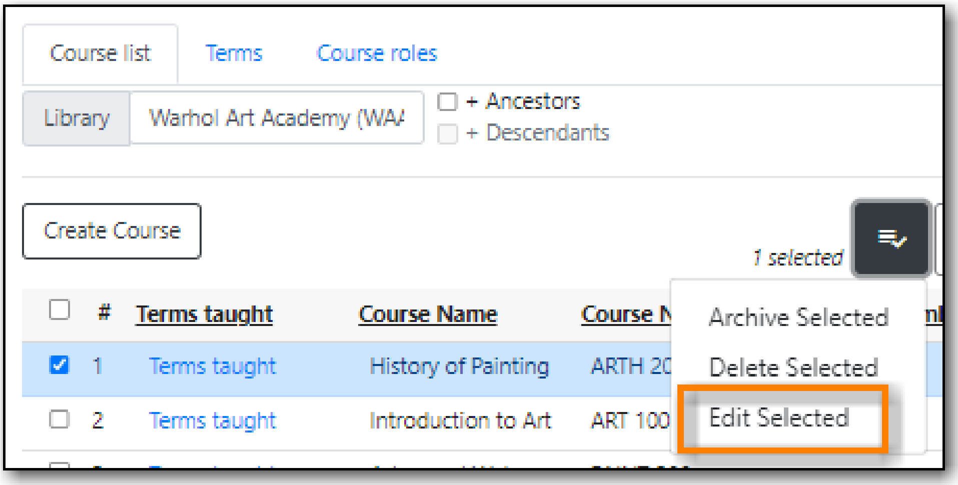
1. Go to **Administration** → **Local Administration** → **Course Reserves List**.
2. The **Course list** tab will open by default.
3. Click **Create Course**.



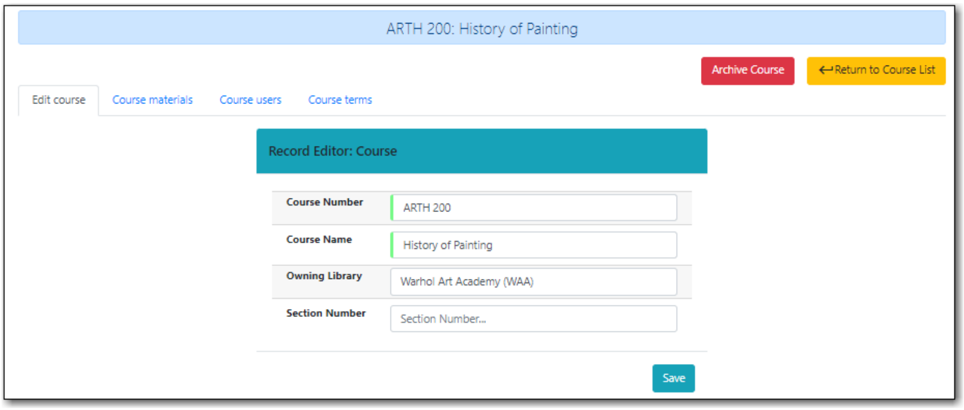
4. Fill out the characteristics of the course. The course's number, name, and owning library are required. The section number is optional.
5. Click **Save**.



6. The course is added to the list.
7. To finish setting up the course, select it and from the **Actions** menu choose **Edit Selected**.



8. From here you can attach terms, associate course materials, and add users to your course as well as editing and archiving the course.

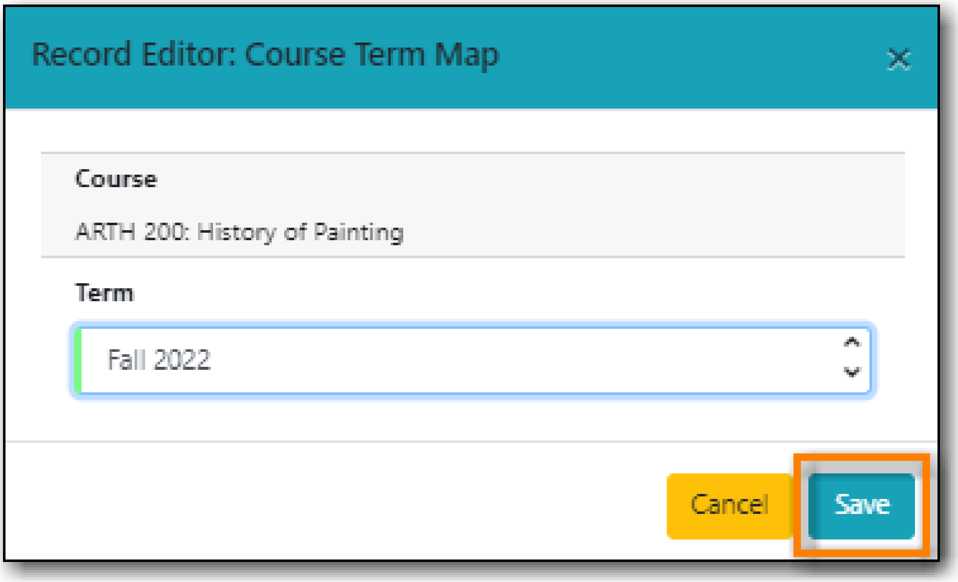


48.3. Attaching a Course to a Term

Sitka Snippet Video - Attaching Terms to a Course (0:46)

1. In the course, click on the **Course terms** tab.
2. Click **Attach course to a term**.

3. Select a term from the drop down menu and click **Save**.



4. Repeat as needed if multiple terms need to be attached to the course.

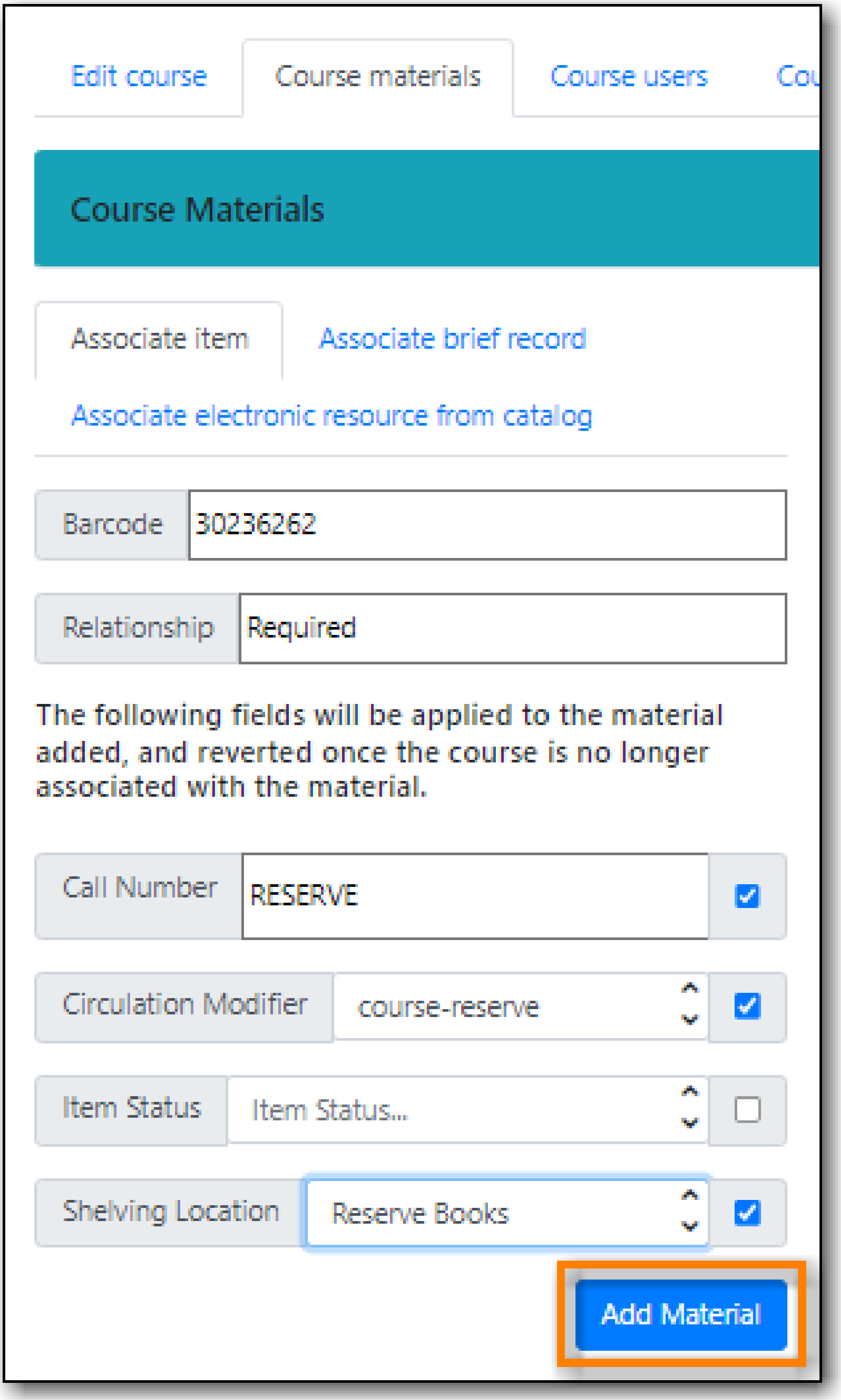
48.4. Associating Materials With a Course

Sitka Snippet Video - Associating Materials with a Course (4:05)

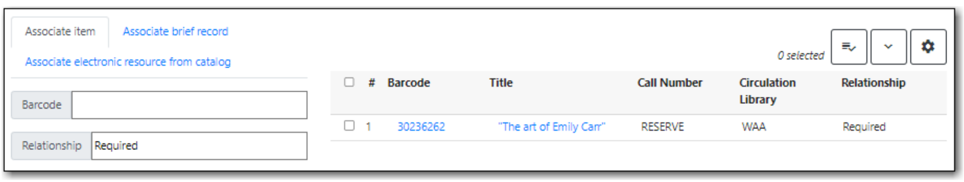
1. In the course, click on the **Course materials** tab.
2. Three types of materials can be associated with a course:
   - Catalogued items from your collection.
   - Brief records for electronic resources that are not part of the library's collection.
   - Electronic resources from your collection.

48.4.1. Associating an Item

1. On the **Course materials** tab, the **Associate item** tab will open by default.
2. Enter the barcode of the item you wish to associate with the course.
3. Enter the relationship the item has with the course. For example, an item may be required reading or be supplemental.
4. A new call number, circulation modifier, and shelving location can be assigned to the item.
   a. These are temporary values. When the course is archived Evergreen will automatically restore the original values.
5. Optionally, enter an item status.
6. Click **Add Material**.

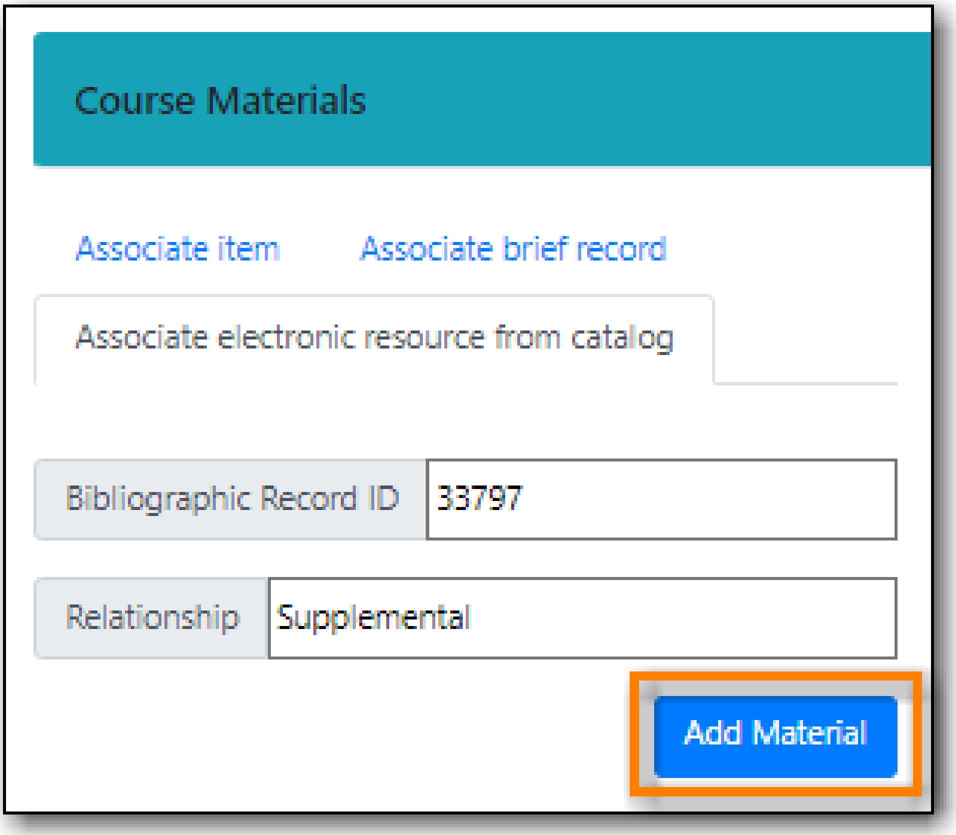


7. The item displays in the list with the updated information.

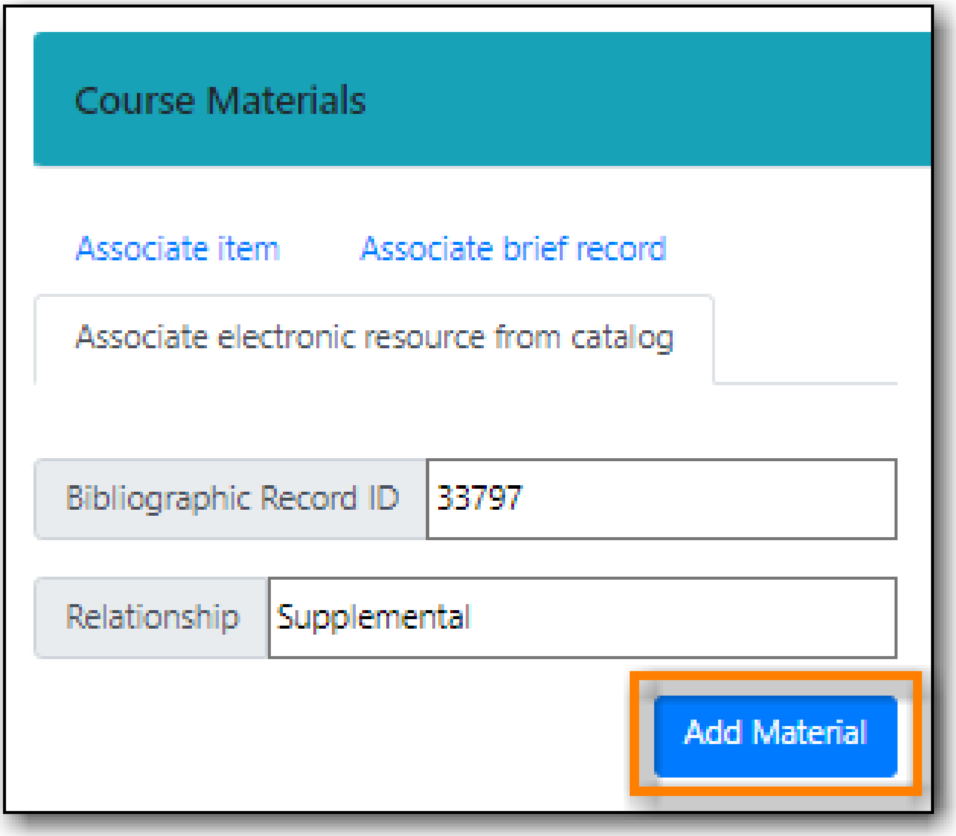


48.4.2. Associating an Electronic Resource from the Catalogue

1. On the **Course materials** tab, click on the **Associate electronic resource from catalog** tab.
2. Enter the record ID for the electronic resource you'd like to add to the course.
3. Enter the relationship the item has with the course. For example, an item may be required reading or be supplemental.
4. Click **Add material**.



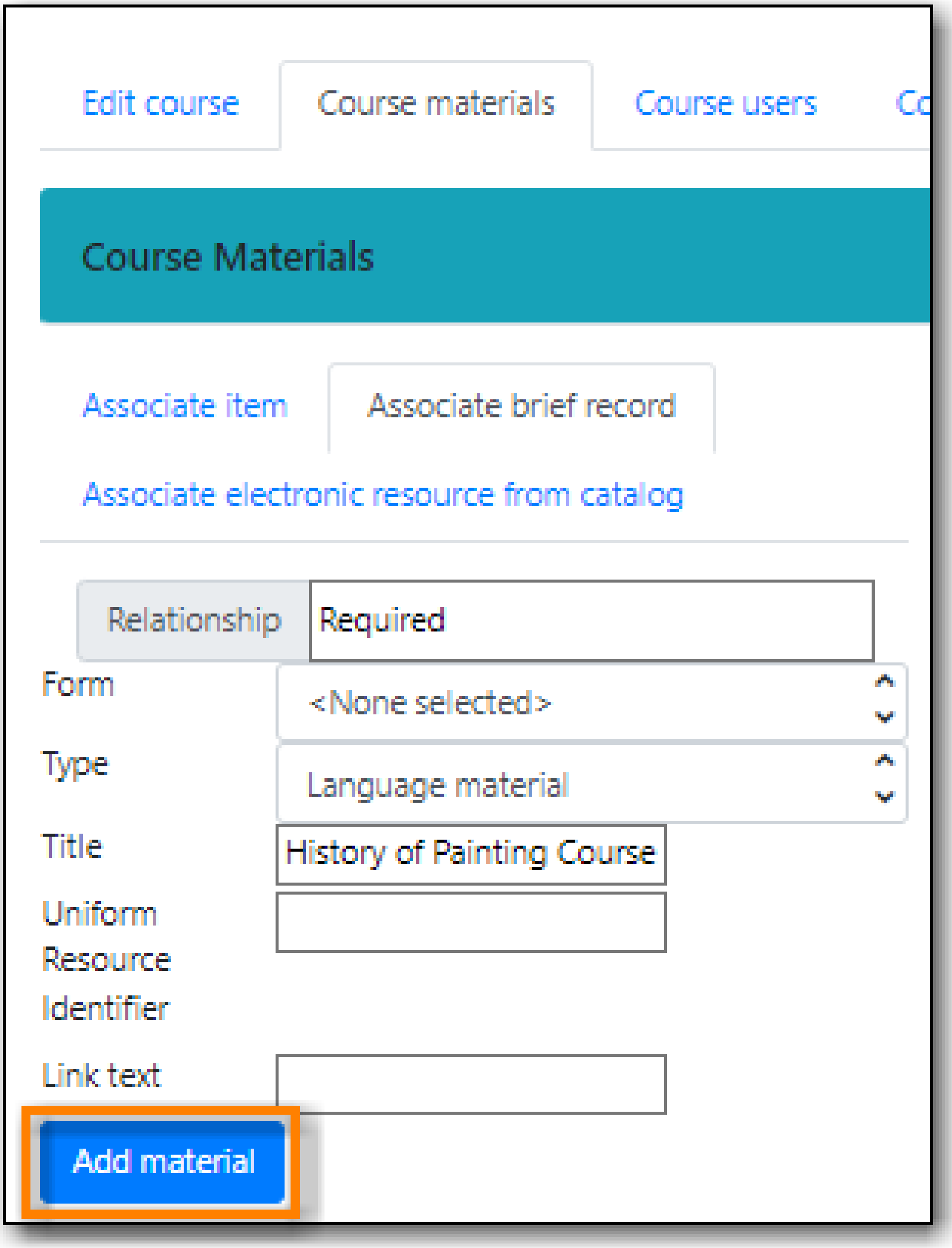
5. The record displays in the list.



NOTE Unlike brief records, detaching this resource from the course or archiving the course will not delete the bibliographic record.

48.4.3. Associating an Electronic Resource Using a Brief Record

1. On the **Course materials** tab, click on the **Associate brief record** tab.
2. Enter the relationship the item has with the course. For example, an item may be required reading or be supplemental.
3. Fill in the relevant fields to create your brief record. You must enter a value for title.
4. Click **Add material**.



5. The record displays in the list.

   [Associating a brief record] | *images/course-reserves/course-reserves-associate-brief-record-2.png*

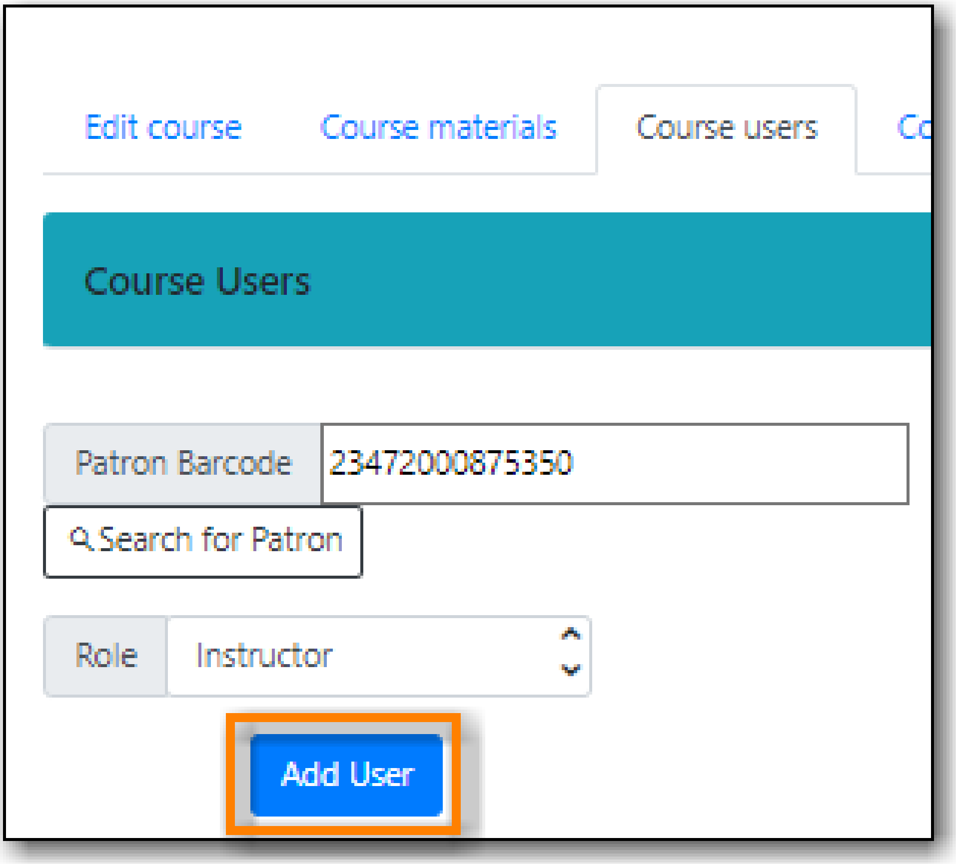
NOTE	After creating a brief record, it is represented as a bibliographic record in your catalogue, which cataloguers may edit and enhance at any time. When the resource is detached from the course or the course is archived, the bibliographic record will be automatically deleted.

48.5. Adding a User to a Course

Sitka Snippet Video - Adding Users to a Course (1:02)

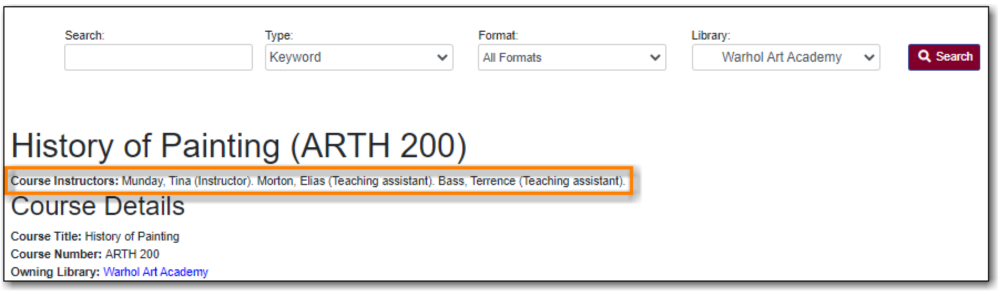
1. In the course, click on the **Course users** tab.
2. Enter the barcode of the patron you'd like to add.
3. Type in the role for the patron. The options are Instructor, Teaching Assistant, and Student.

4. Click **Add User**.



5. The patron will display in the list.

Patrons assigned the role of Instructor or Teaching Assistant will display on the page for their associated course(s) in the the public catalogue.



If you wish users to be able to browse the course list in the public catalogue by instructor set the library setting *Allow users to browse Courses by Instructor* to TRUE.

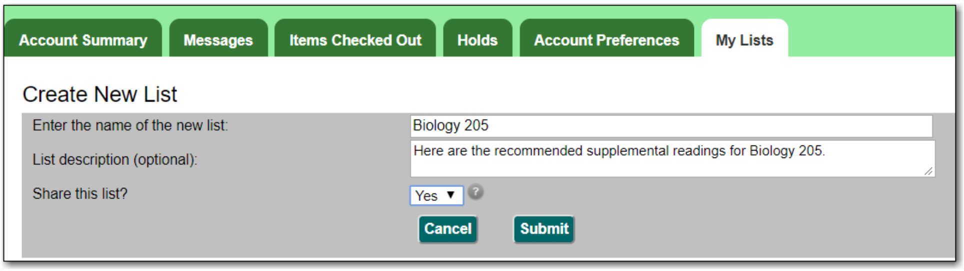
Chapter 49. Old Course Reserves Administration

The old course reserves module has been used by academic libraries for displaying and managing course reserve lists. All libraries using the old module should now move to use the new integrated course reserves module. This documentation will be available until all libraries have made the move.

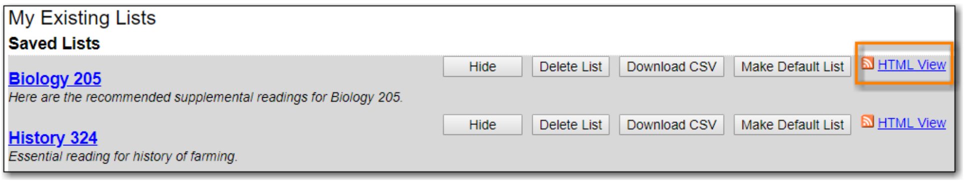
49.1. Creating Course Reserve Lists

Course Reserve lists are created using the My List functionality. Further details can be found in Baskets and Lists.

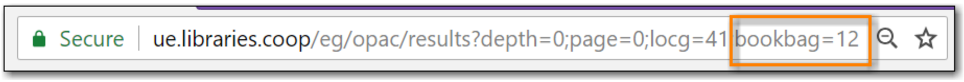
1. Log into your account in the public catalogue.
2. Select the *My Lists* tab at the top of the *My Account* area.
3. In the *My Account* area, click on **My Lists**.
4. In the *Create New List* section, enter a name for your list into the text box.
5. Optional - enter a list description.
6. Set Share this list? to **Yes**.
7. Click **Submit**.



8. Find the course and click **HTML View**.



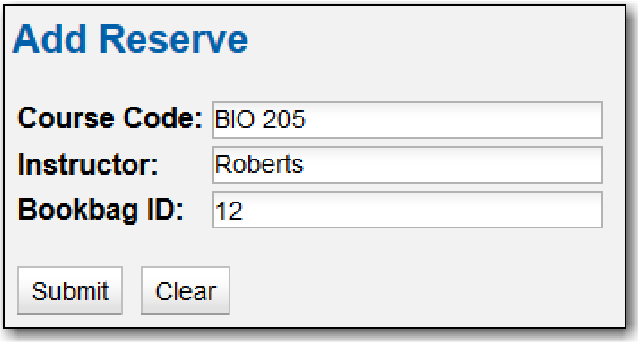
9. Check the URL to find “bookbag=”. This number is required to add the list to Course Reserves.



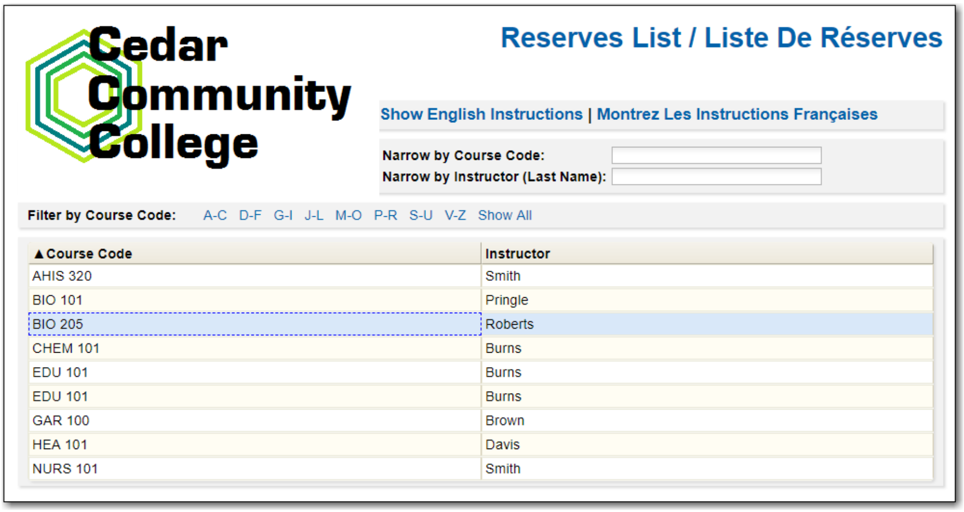
NOTE	The owner of the list can add and remove items from the list as needed and users will always see the current list.

49.2. 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

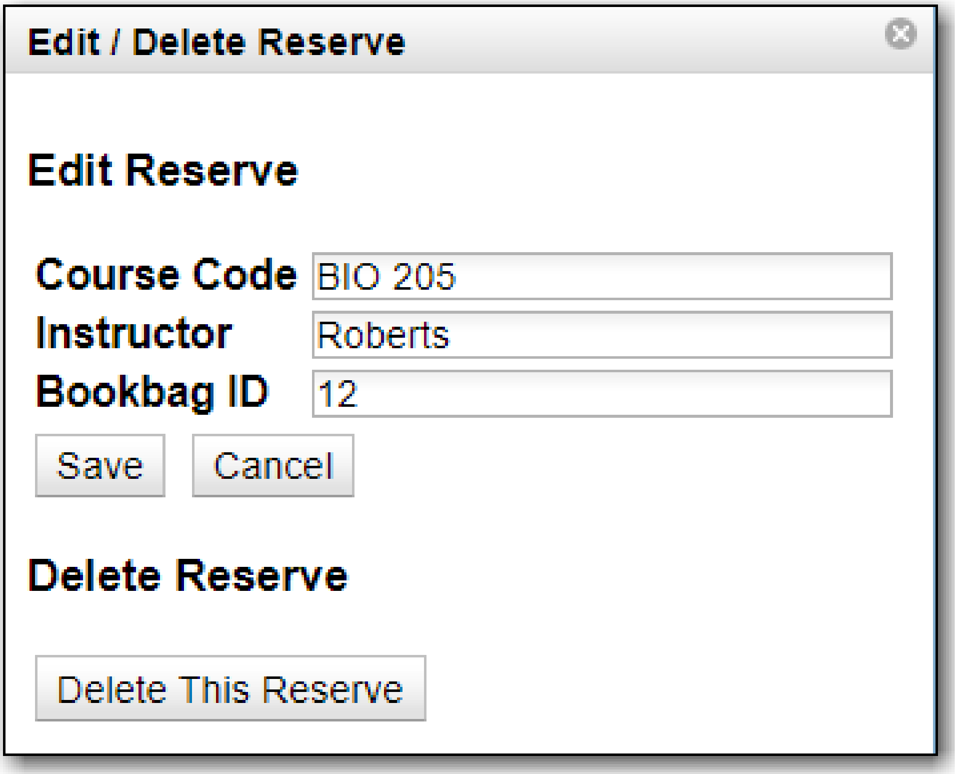


4. Go to the public Course Reserves page and click on the course to make sure the list opens as expected in the public catalogue.



49.3. Editing/Removing Course Reserves

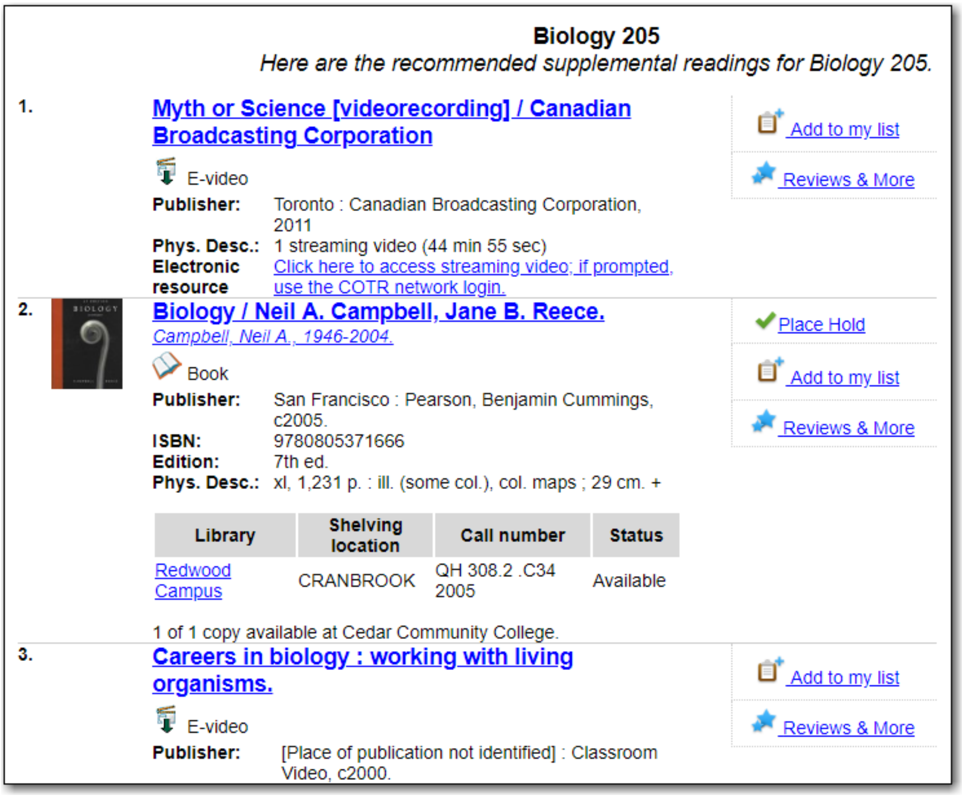
1. Login to the Course Reserves Admin module provided to you by Co-op Support
2. Click on reserve you wish to modify or delete.
3. In the pop-up that appears make the needed edits and click **Save** or click **Delete This Reserve** to remove the reserve.


Edit / Delete Reserve
Edit Reserve
Course Code
BIO 205
Instructor
Roberts
Bookbag ID
12
Save
Cancel
Delete Reserve
Delete This Reserve

Chapter 50. Using the Old 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 51. Booking Module

Sitka Training Video - Booking Module (10:36)

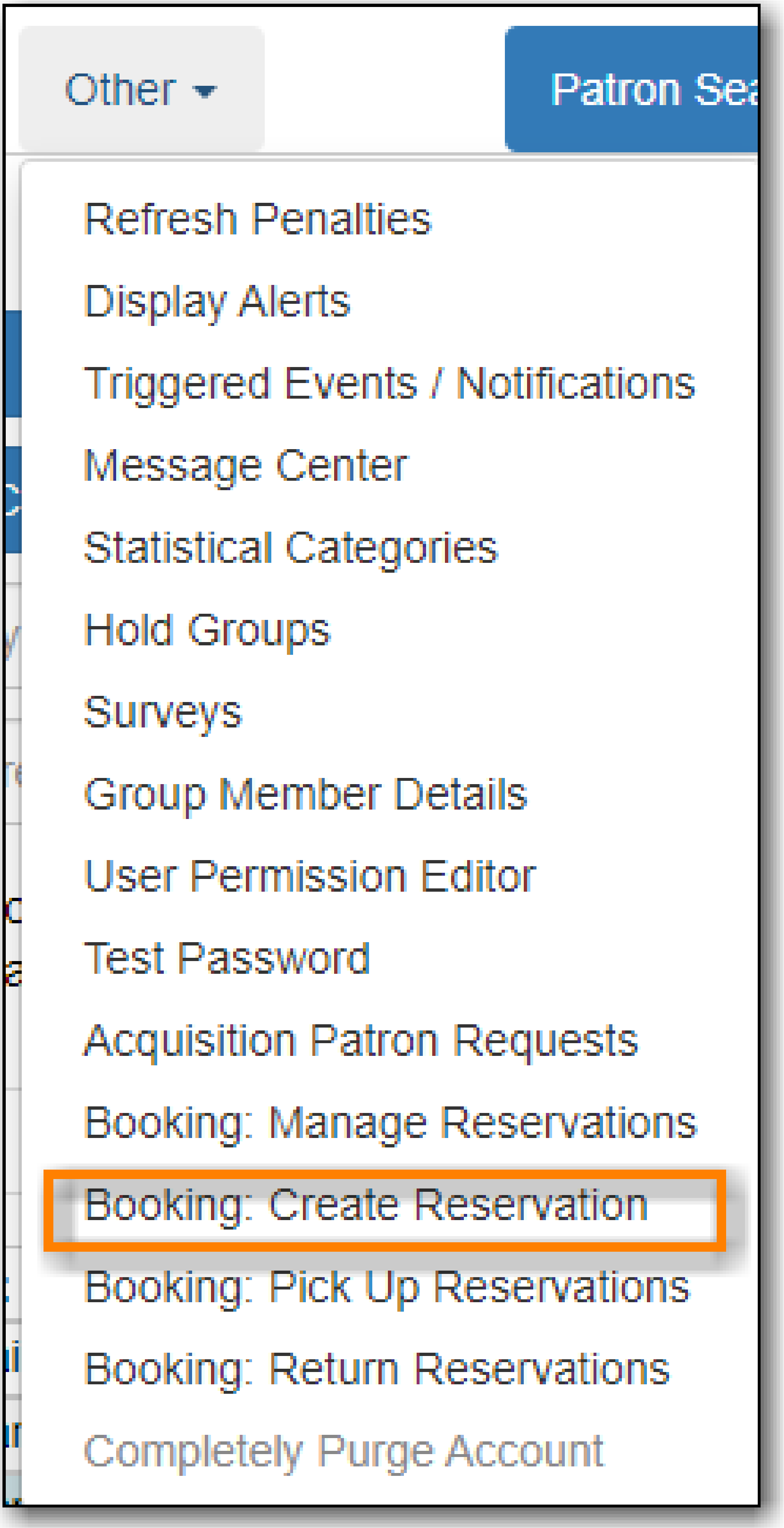
51.1. Create Booking reservations

Sitka Snippet Video - Create Reservations,window=_blank

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.

51.1.1. Create reservations from the patron record

1. Retrieve the patron record.
2. Click **Other** → **Booking: Create Reservation**.

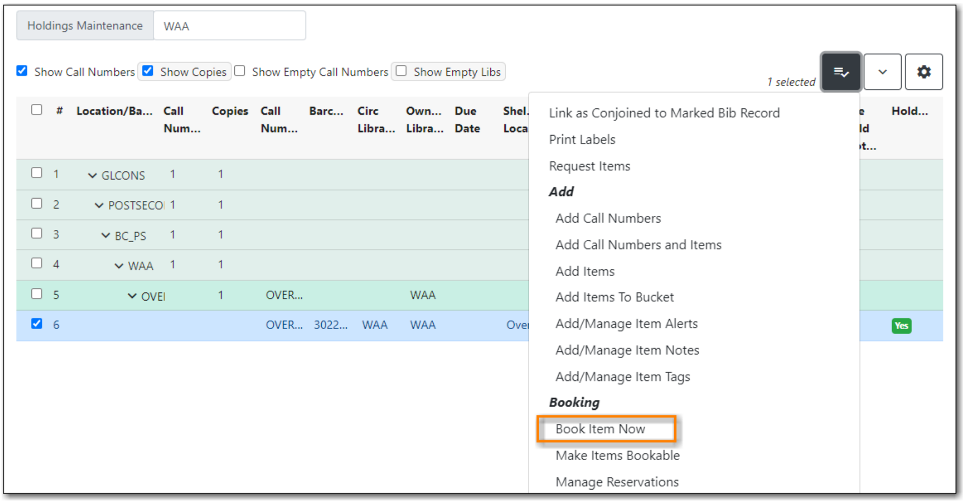


3. This will open the Create Reservations screen.

51.1.2. 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**.

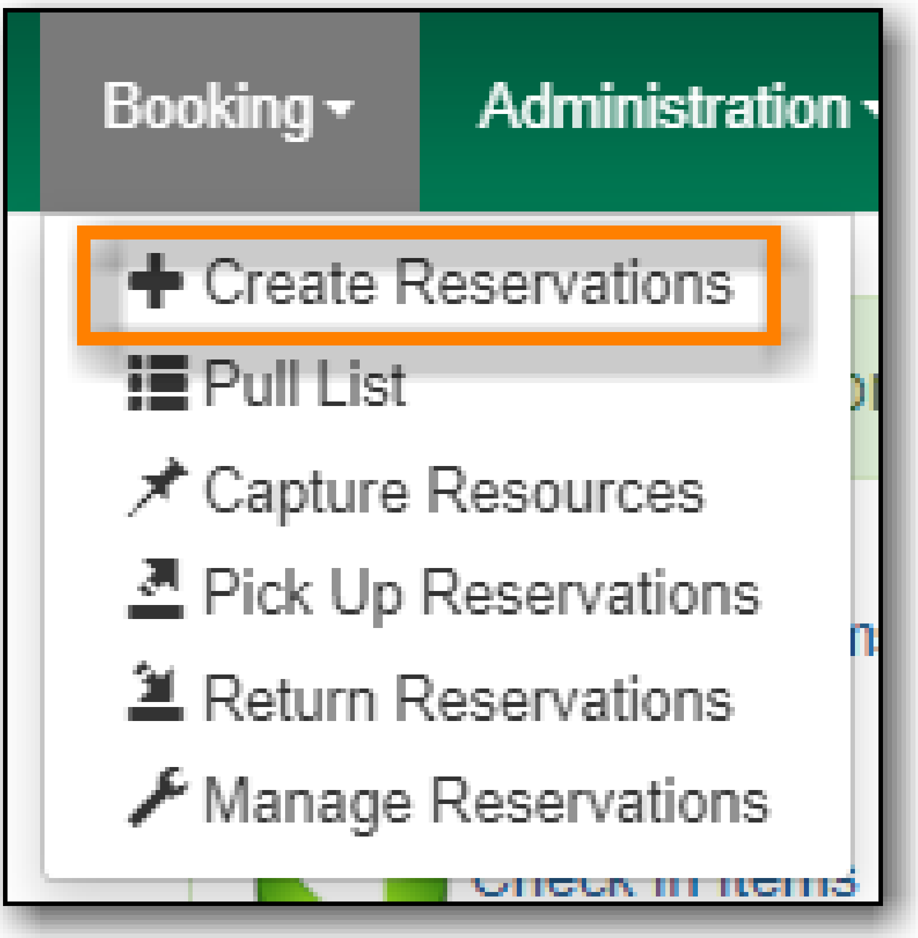


3. This will open the Create Reservations screen.

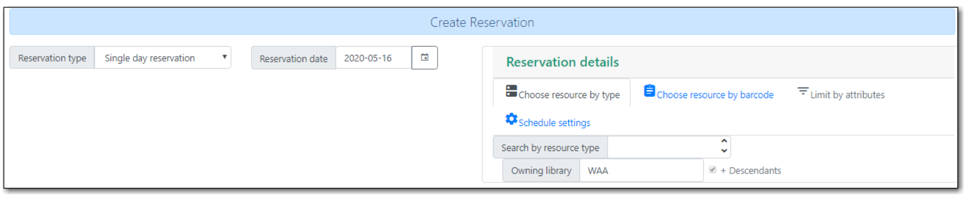
NOTE If you know the catalogued item's barcode a reservation can be created from Item Status (Scan the barcode → **Actions** → **Book Item Now**).

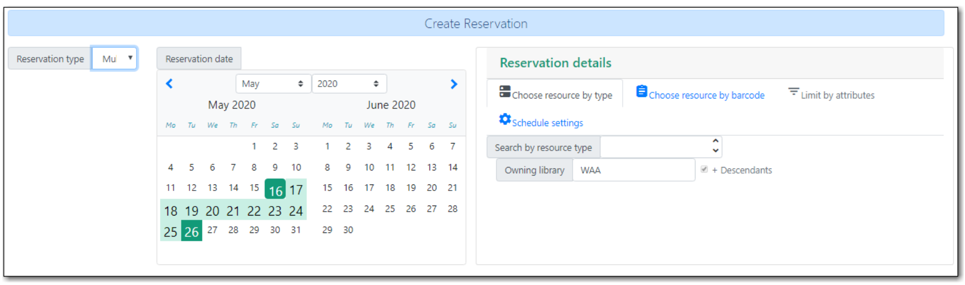
51.1.3. Create reservations

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**.

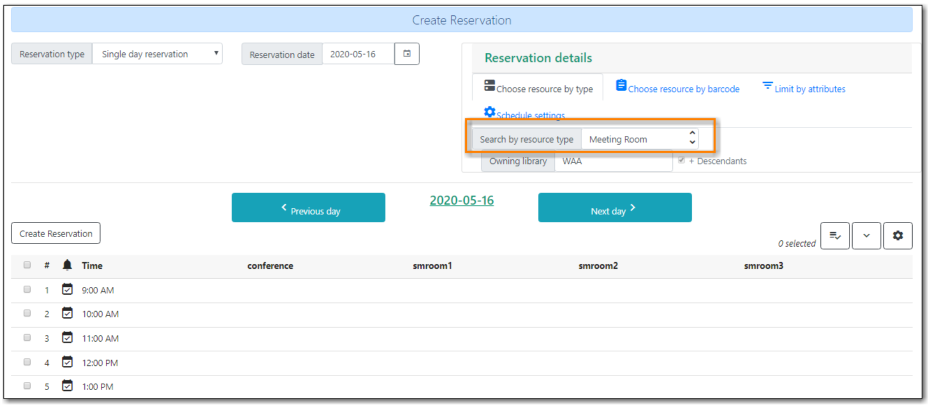


2. **Reservation type** - Choose Single day reservation or Multiple day reservation

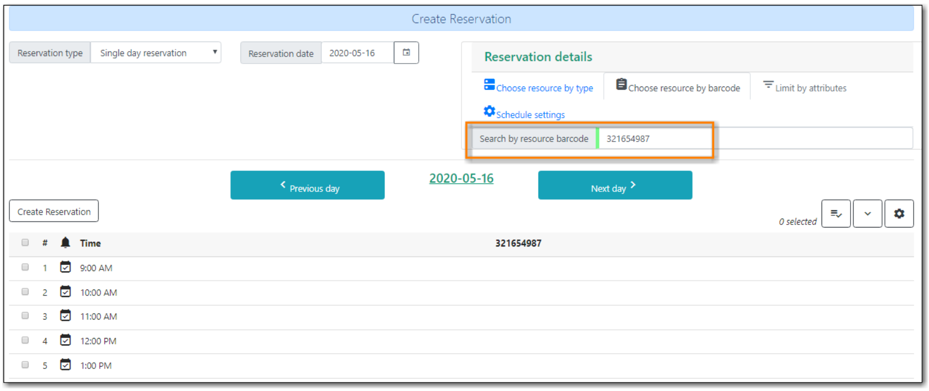




3. **Reservation date** - Enter the reservation date(s)
4. **Reservation details** - use the filters to find a bookable resource
    a. **Choose resource by type** - use this to see all resources of a specific type



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.

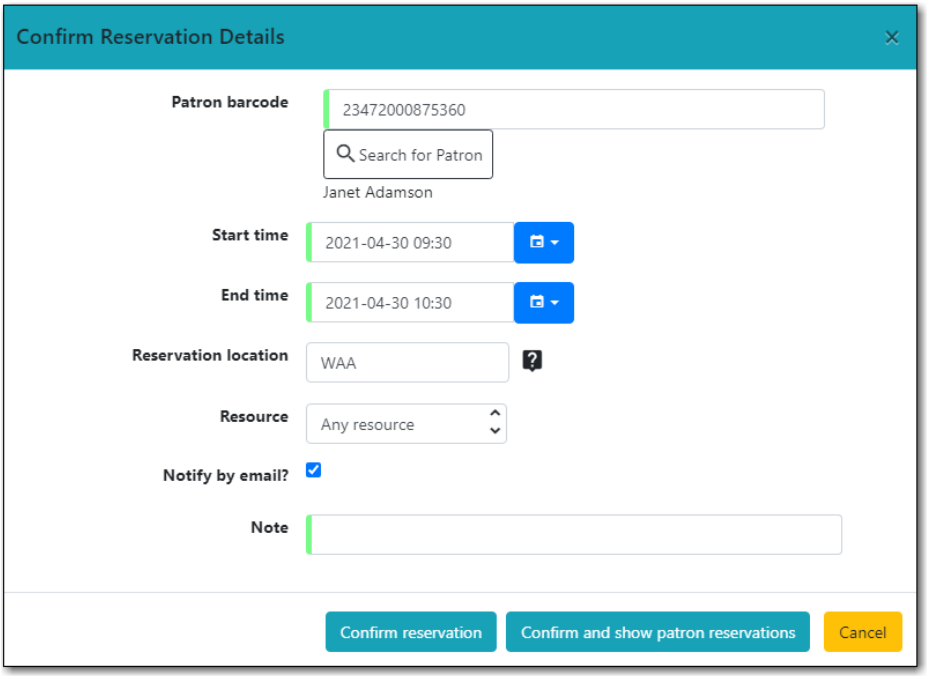
   c. **End time** - choose or confirm the end time for the reservation.

   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)

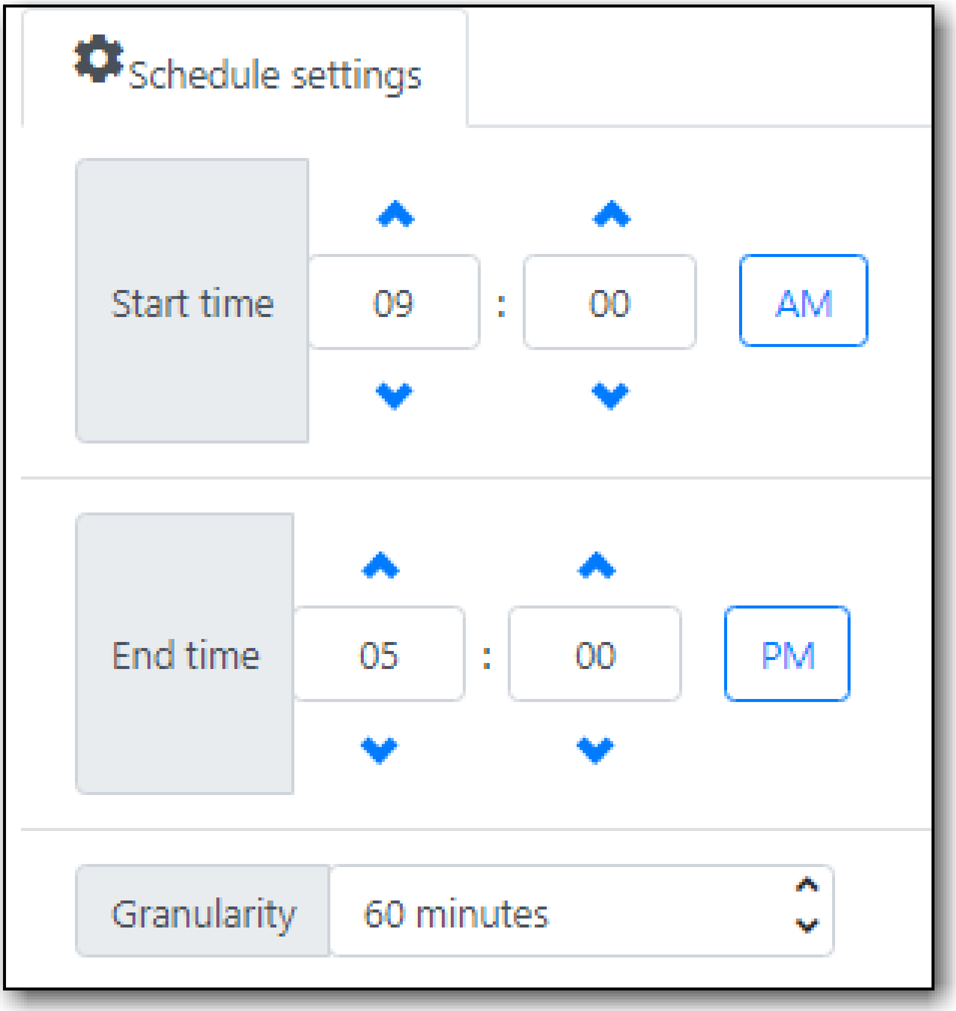


7. Click **Confirm reservation** or **Confirm and show patron reservations** to save the reservation.

Schedule settings

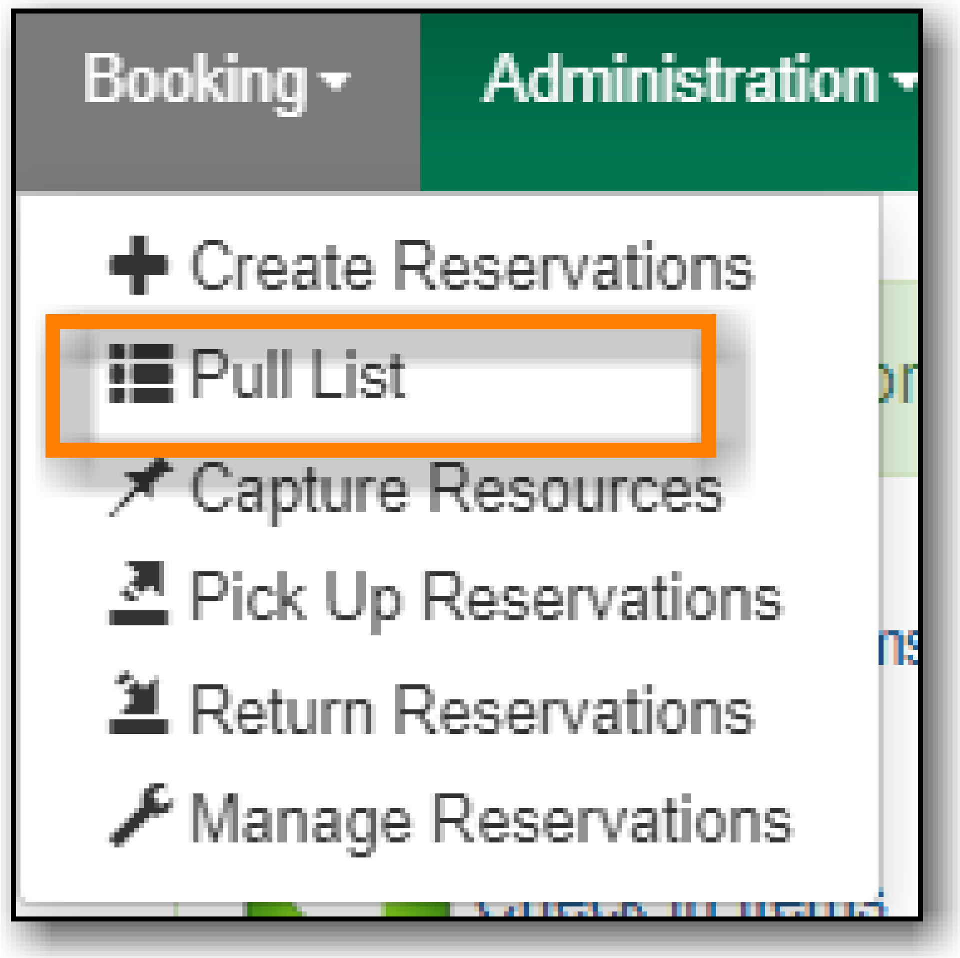
The schedule start time and end time will match your Hours of Operation.

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.

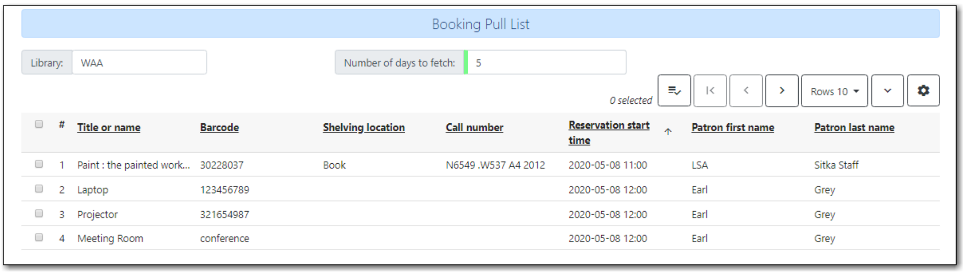


51.2. Reservation Pull List

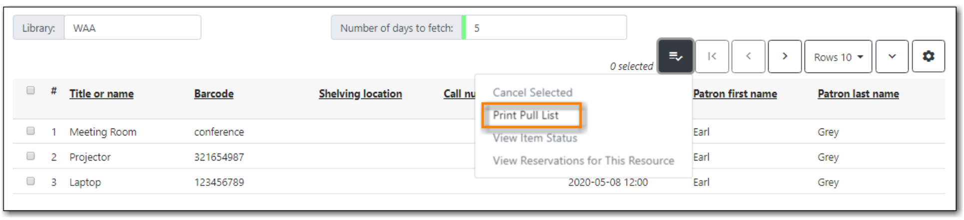
1. Click **Booking** → **Pull List**.



2. The pull list of reserved resources will appear

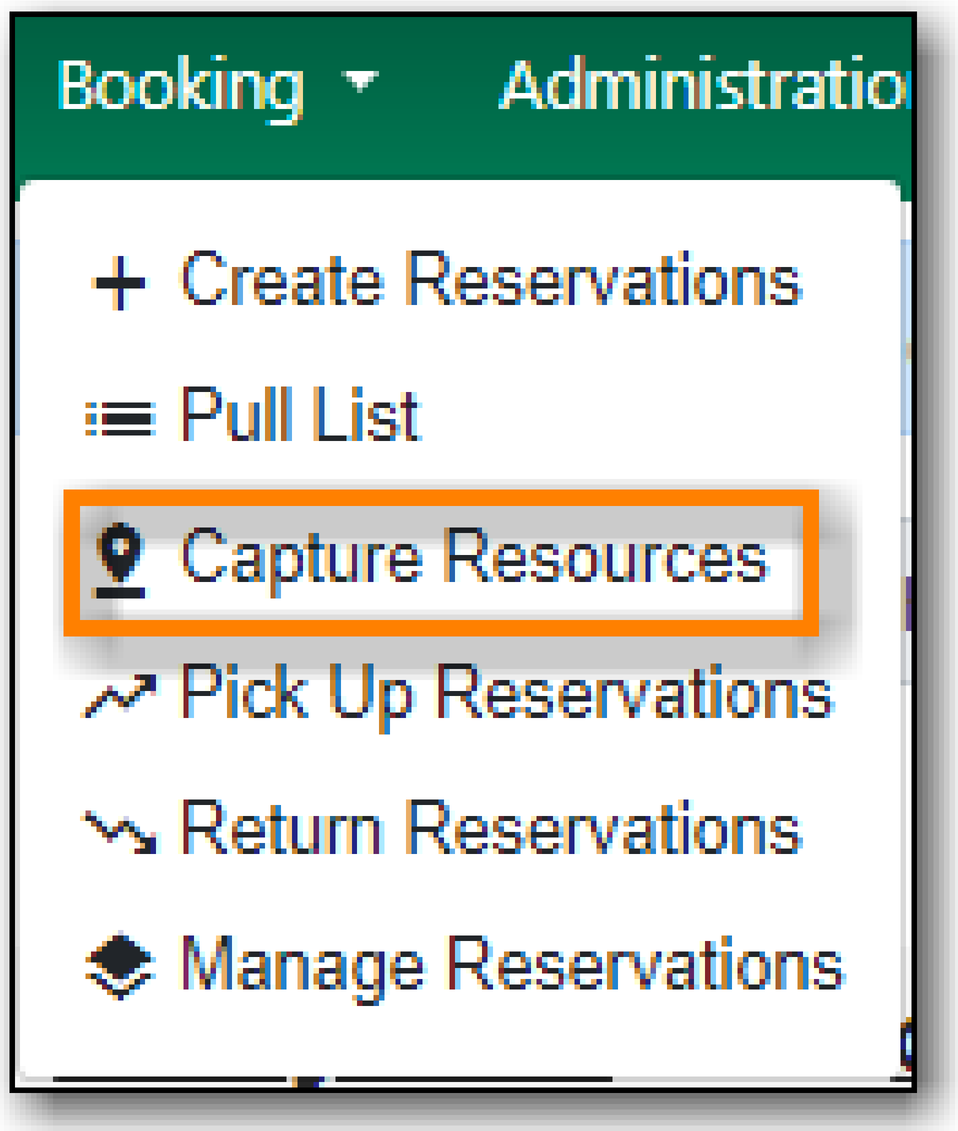


3. Edit the **Number of days to fetch**. For example, if you would like to see only resources that are needed today, enter 1 in the box to retrieve a list of resources with reservations that start today.
4. Click **Actions** → **Print Pull List** to print the pull list.

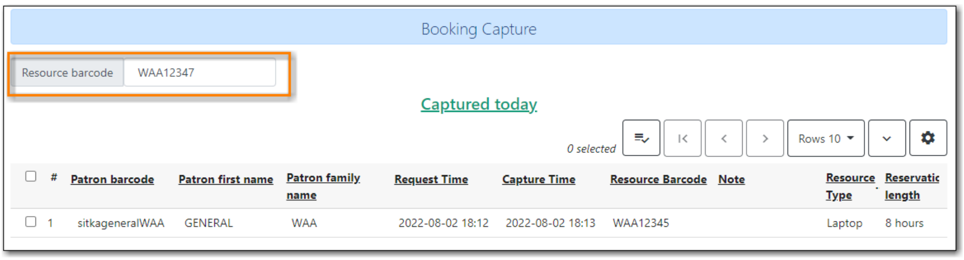


51.3. Capture Resources for Reservations

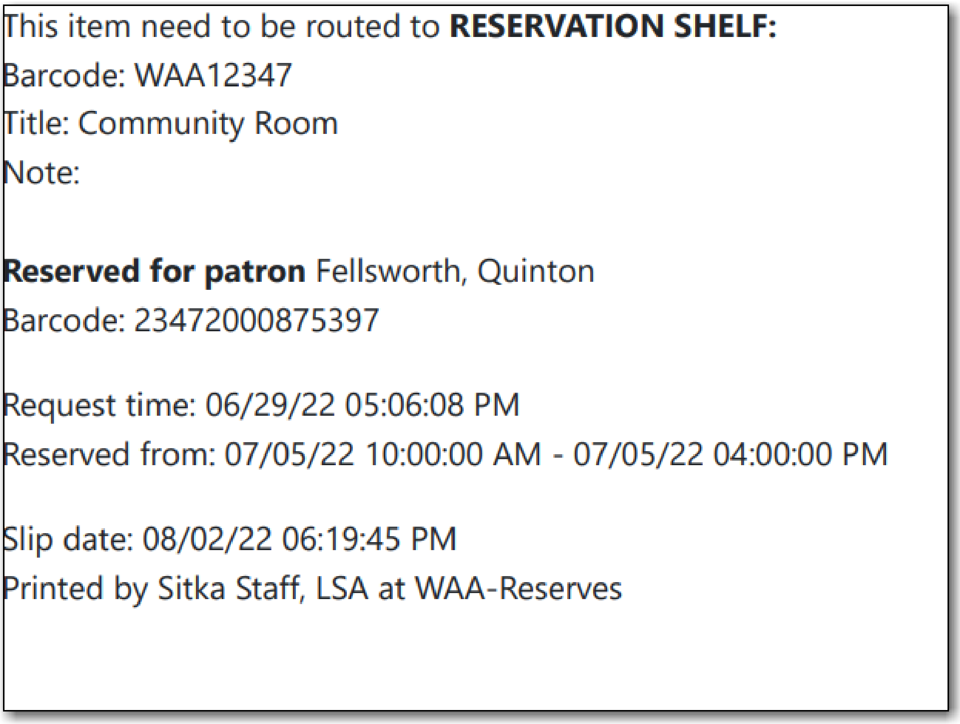
1. Click **Booking** → **Capture Resources**.



2. Enter the resource barcode then press **ENTER**.



3. The Capture succeeded message will appear and you will be prompted to print the reservation slip.


This item need to be routed to **RESERVATION SHELF:**
Barcode: WAA12347
Title: Community Room
Note:

Reserved for patron Fellsworth, Quinton
Barcode: 23472000875397

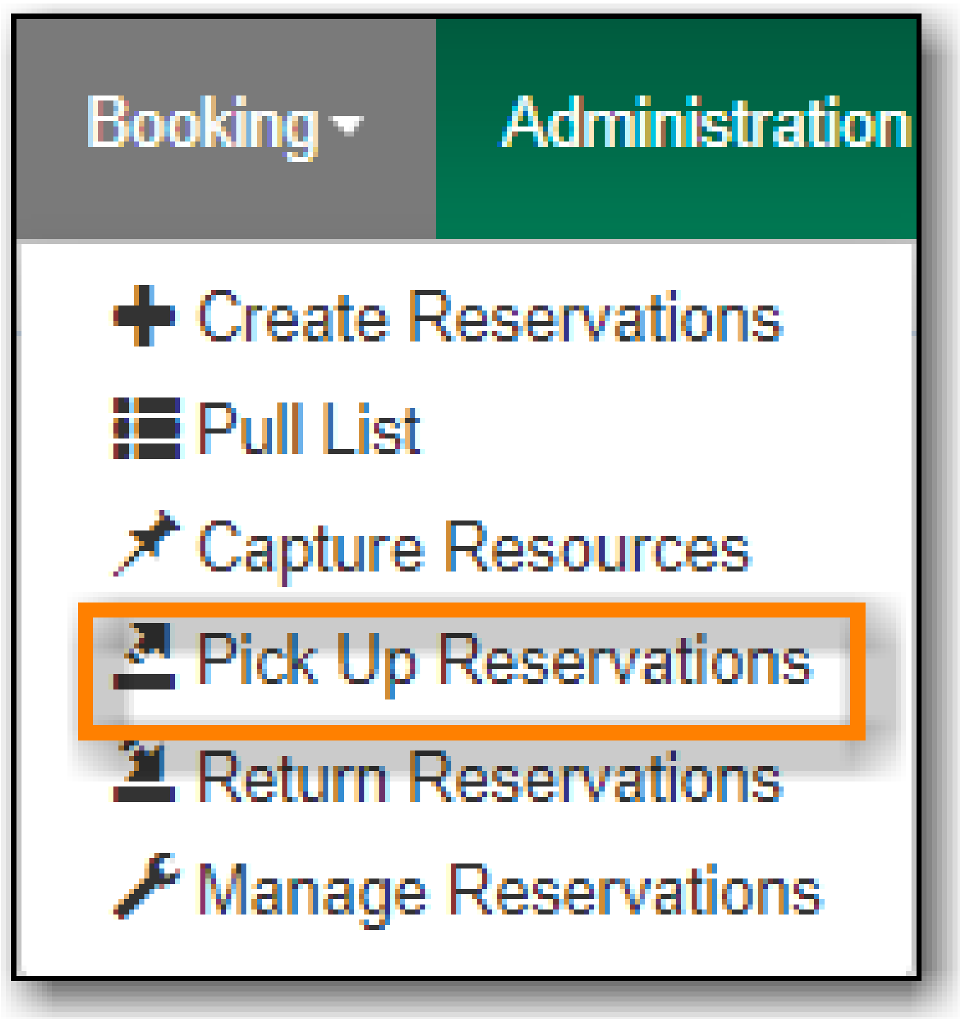
Request time: 06/29/22 05:06:08 PM
Reserved from: 07/05/22 10:00:00 AM - 07/05/22 04:00:00 PM

Slip date: 08/02/22 06:19:45 PM
Printed by Sitka Staff, LSA at WAA-Reserves

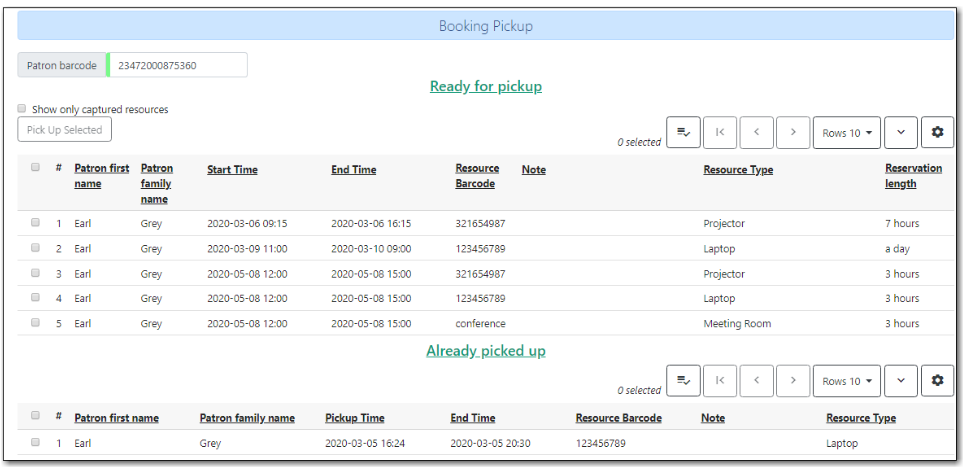
CAUTION Always capture reservations in Booking Module. Check In function in Circulation does not function the same as Capture Resources.

51.4. Pick Up Reservations

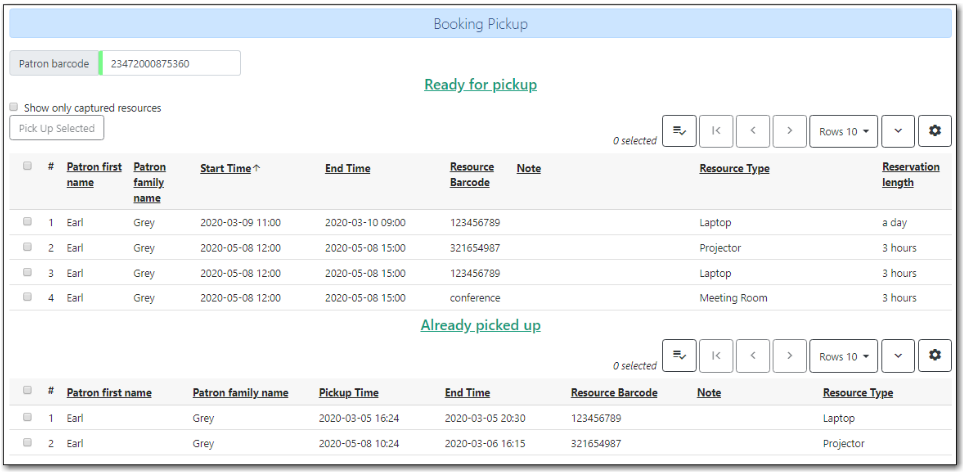
1. Click **Booking** → **Pick Up Reservations**.



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).



#	Patron first name	Patron family name	Start Time	End Time	Resource Barcode	Note	Resource Type	Reservation length
1	Earl	Grey	2020-03-09 11:00	2020-03-10 09:00	123456789		Laptop	a day
2	Earl	Grey	2020-05-08 12:00	2020-05-08 15:00	321654987		Projector	3 hours
3	Earl	Grey	2020-05-08 12:00	2020-05-08 15:00	123456789		Laptop	3 hours
4	Earl	Grey	2020-05-08 12:00	2020-05-08 15:00	conference		Meeting Room	3 hours

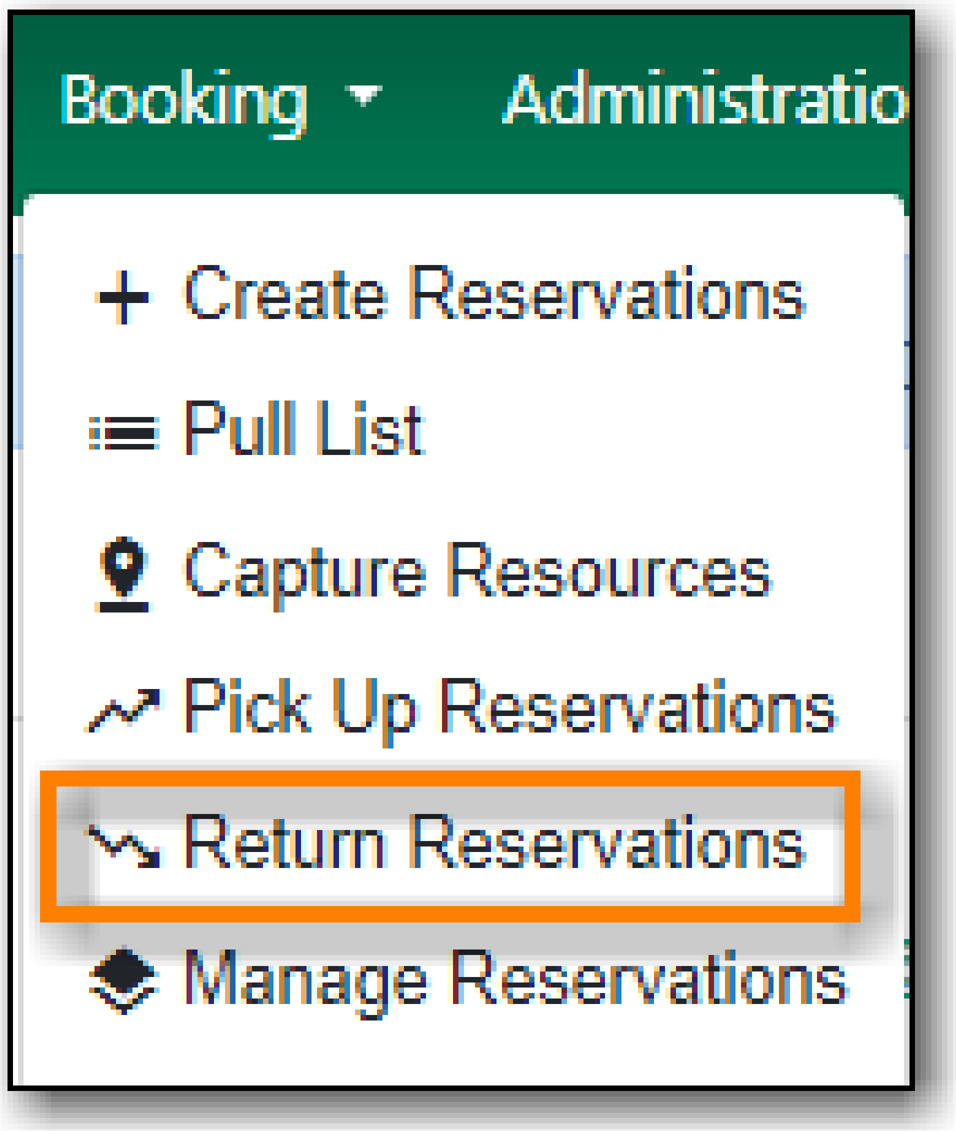
#	Patron first name	Patron family name	Pickup Time	End Time	Resource Barcode	Note	Resource Type
1	Earl	Grey	2020-03-05 16:24	2020-03-05 20:30	123456789		Laptop
2	Earl	Grey	2020-05-08 10:24	2020-03-06 16:15	321654987		Projector

NOTE Reservations can also be picked up from the patron record. Retrieve the patron record → click **Other** → **Booking: Pick Up Reservations**.

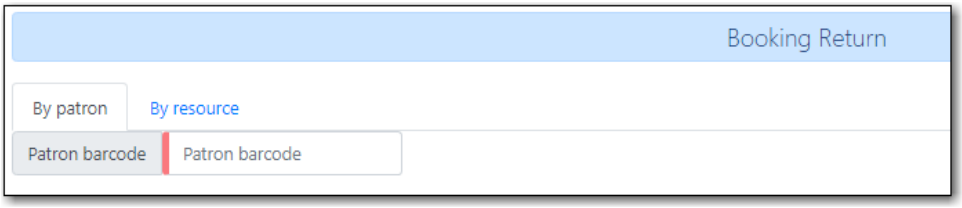
CAUTION Always use the dedicated Booking Module interfaces for tasks related to reservations. Resources that have been captured for a reservation cannot be checked out using the Check Out interface, even if the patron is the reservation recipient.

51.5. Return Reservations

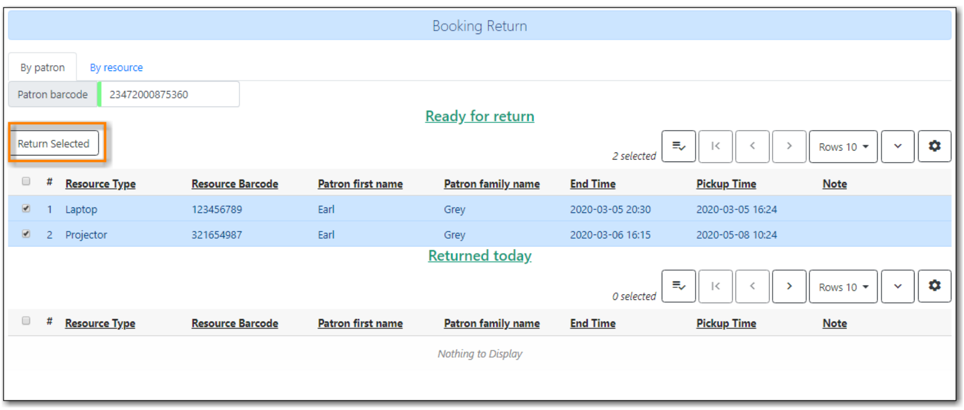
1. Click **Booking** → **Return Reservations**.



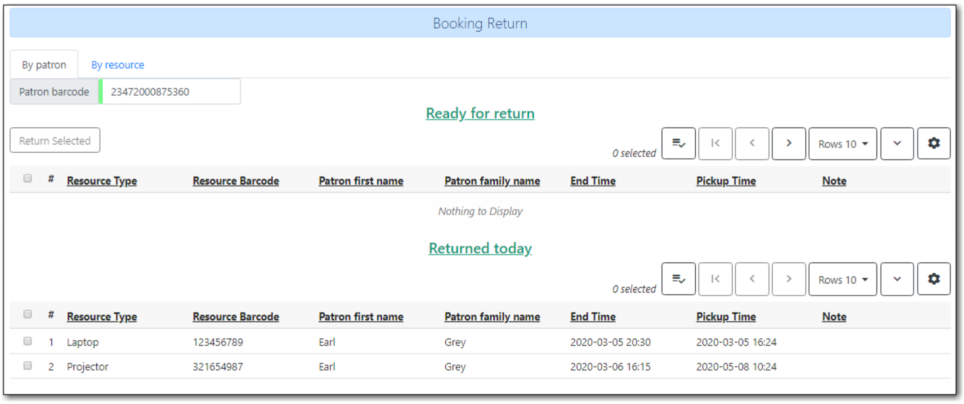
2. You can return the reservation by patron or resource barcode. Scan or enter the barcode.



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.

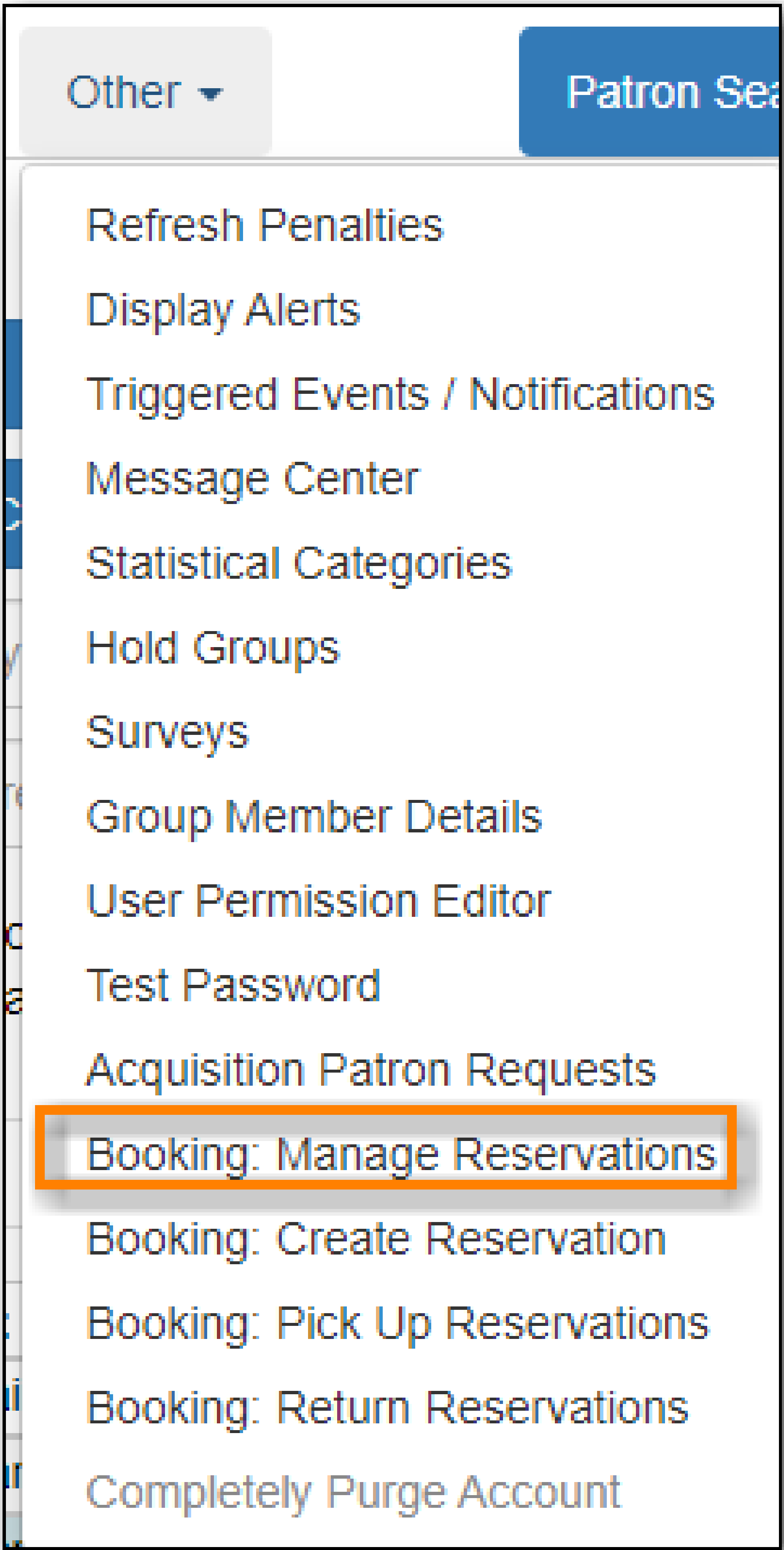
51.6. Manage Reservations

Sitka Snippet Video - Manage Reservations (2:17)

A reservation can be cancelled or edited from the patron's record or from Manage Reservations.

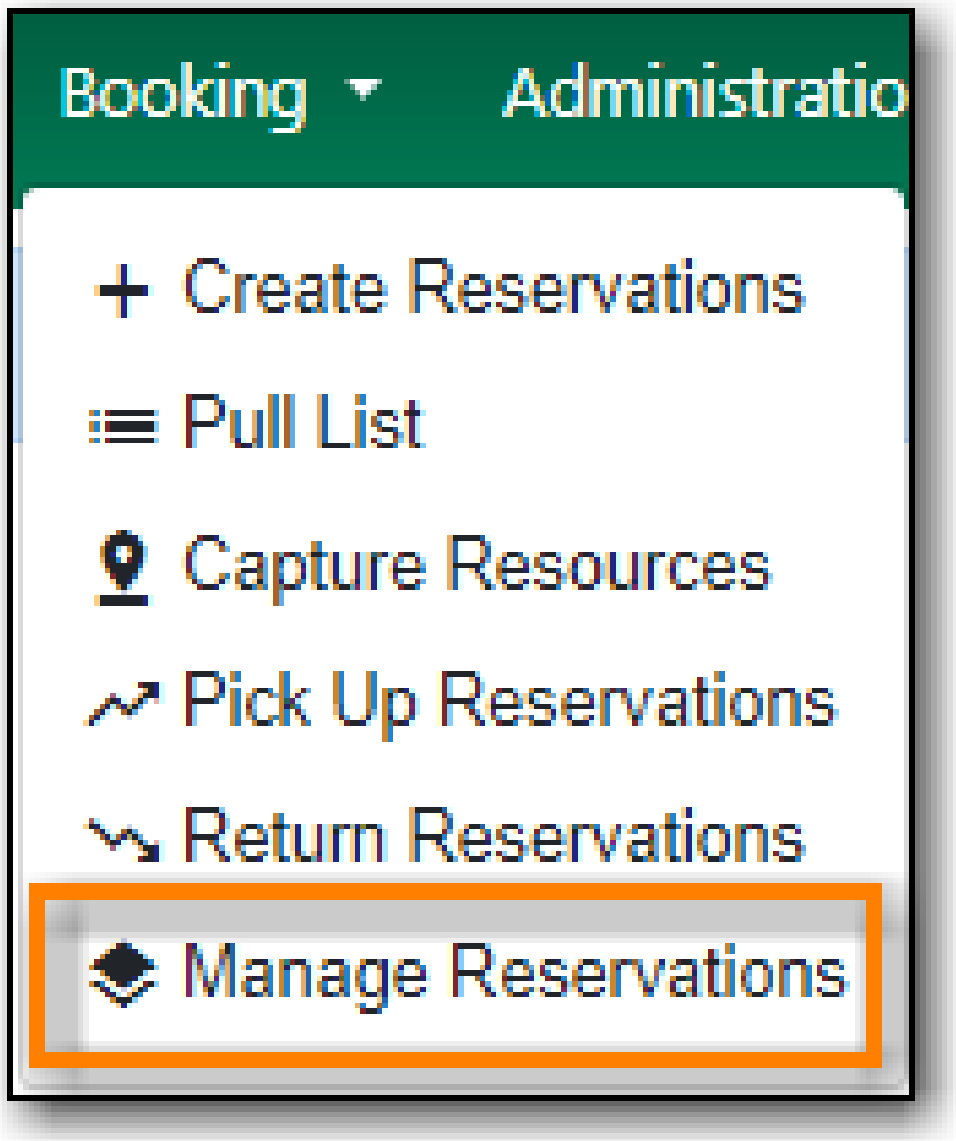
51.6.1. Manage reservations from the patron record

1. Retrieve the patron's record.
2. Click **Other** → **Booking: Manage Reservation**.


Other
Patron Sea
Refresh Penalties
Display Alerts
Triggered Events / Notifications
Message Center
Statistical Categories
Hold Groups
Surveys
Group Member Details
User Permission Editor
Test Password
Acquisition Patron Requests
Booking: Manage Reservations
Booking: Create Reservation
Booking: Pick Up Reservations
Booking: Return Reservations
Completely Purge Account

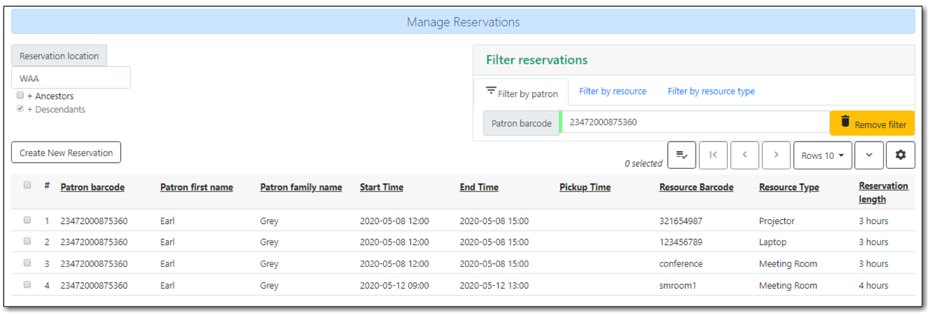
51.6.2. Manage reservations from the Manage Reservations screen

1. Click **Booking** → **Manage Reservations**.

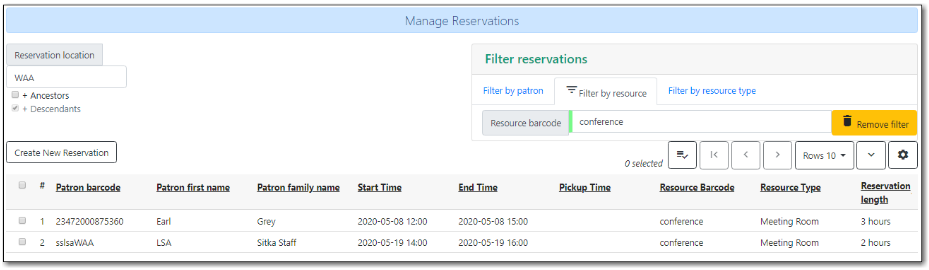


2. Use the filters to find specific reservations

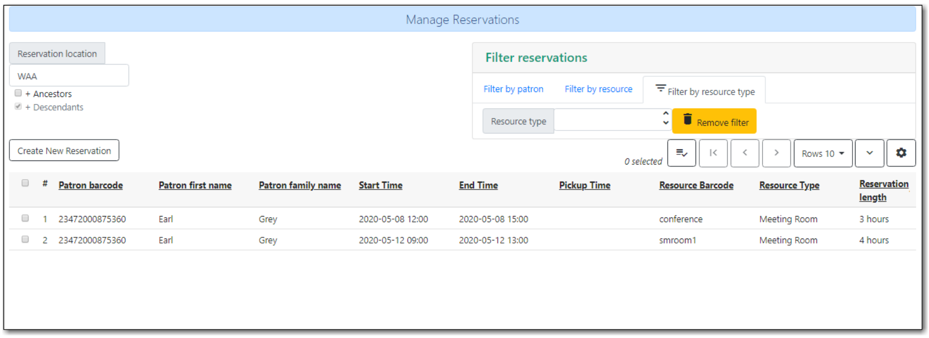
   a. Filter by patron



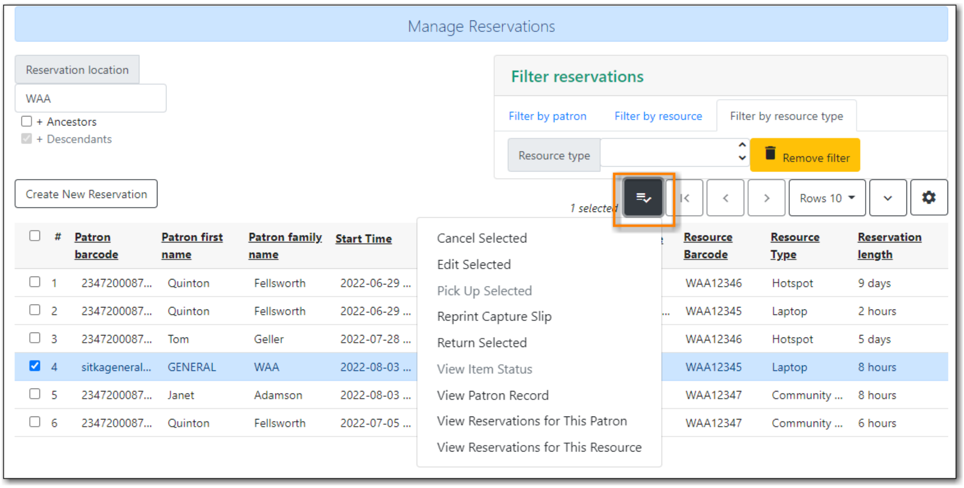
   b. Filter by resource



c. Filter by resource type



3. Select the reservation → Click **Actions** to see a list of available Actions.



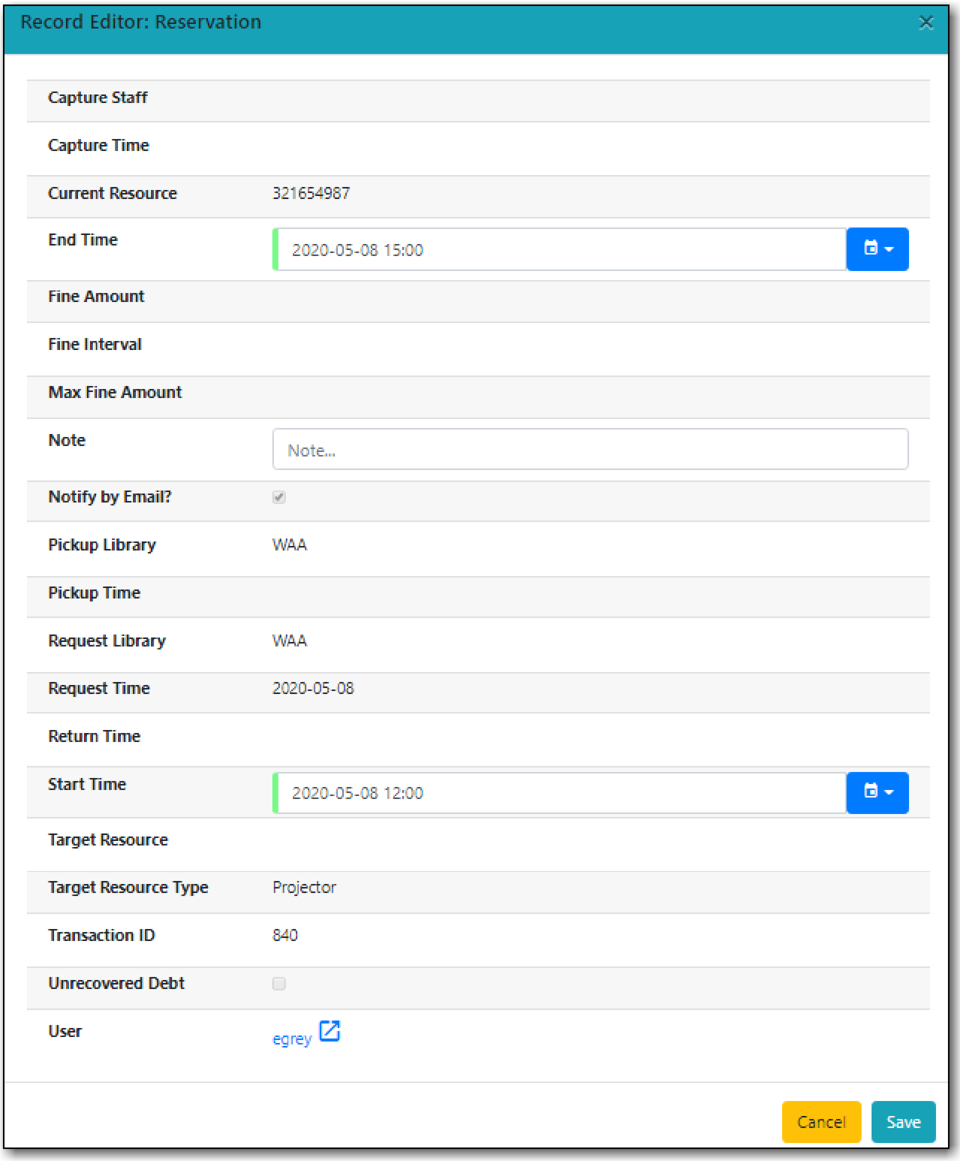
Cancel Reservation

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 52. Booking Module Administration

52.1. 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:

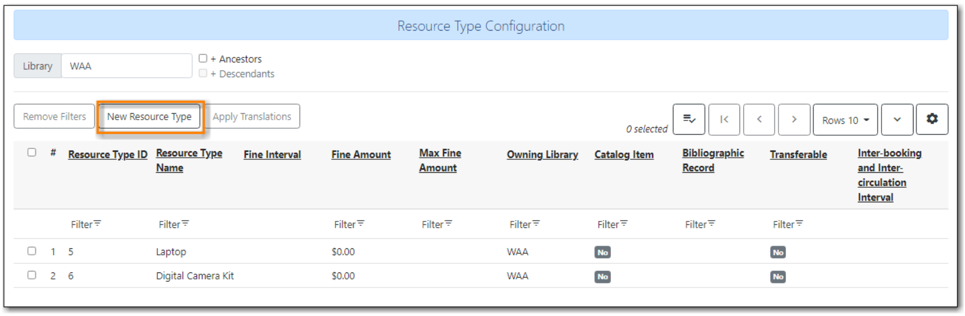
- Resource Type
- Resource
- Resource Attribute
- Resource Attribute Values
- Resource Attribute Map

NOTE

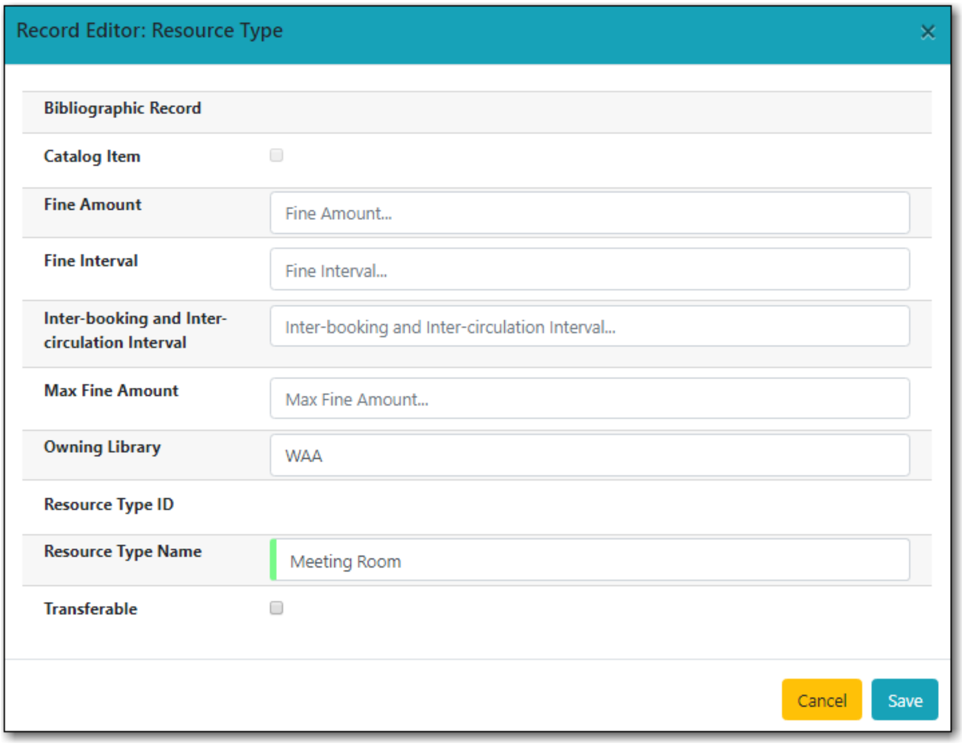
You must create **Resource Types** and add **Resources** (booking items) to individual resource types. **Resource Attributes** are optional. Resource attribute may have multiple values. You need to link the applicable features (resource attributes and values) to individual items (resource) through the **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.

52.1.1. 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.

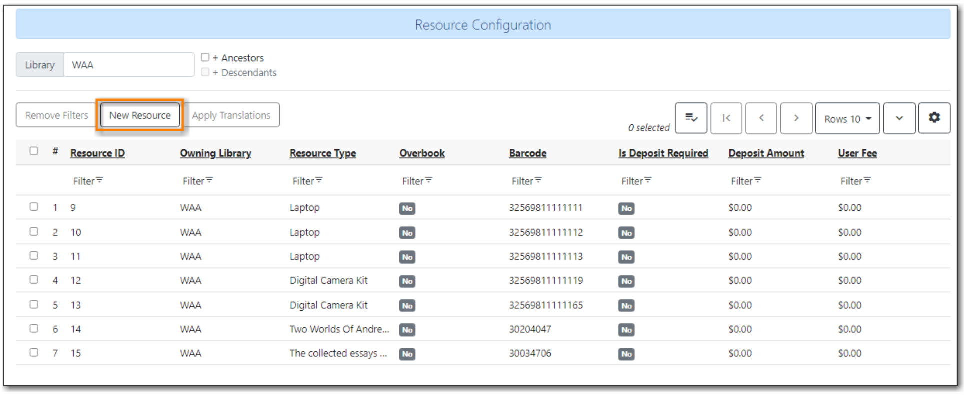


- Catalog Item - (Function not currently available.)
- Fine Amount - The amount that will be charged at each Fine Interval.
- Fine Interval - How often will fines be charged?
  - second(s), minute(s), hour(s), day(s), week(s)
  - 00:00:30, 00:01:00, 01:00:00
- Inter-booking and Inter-circulation Interval - 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.

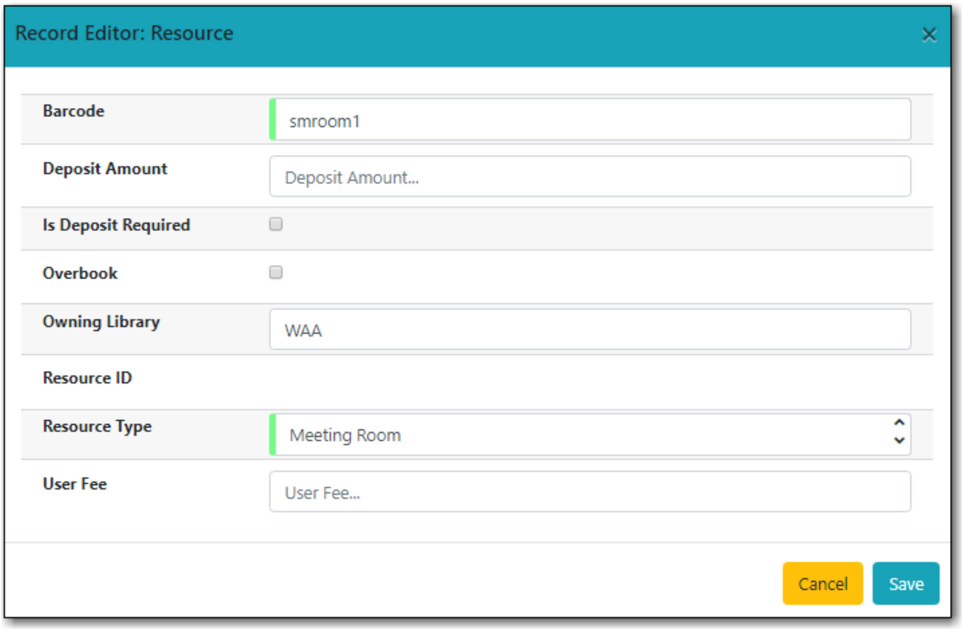
5. Click **Save**.

52.1.2. Create New Resource

1. Click **Administration** → **Booking Administration** → **Resources**.
2. Click **New Resource** in the top right corner.



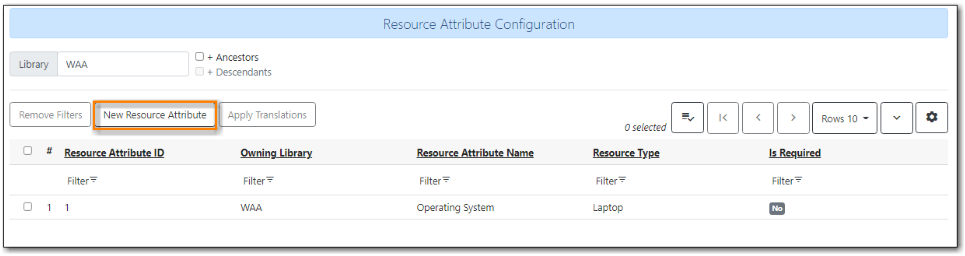
3. A box will appear. Add information for the resource.



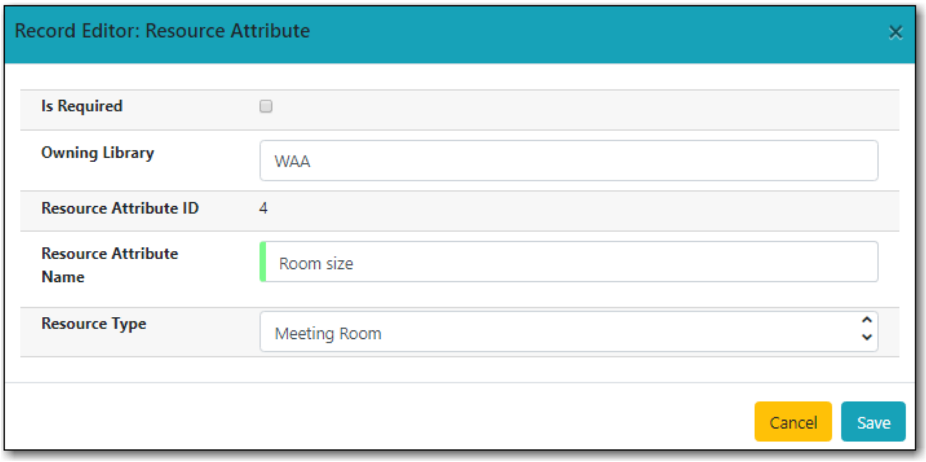
   - Owning Library - The home library of the resource.
   - Resource Type - Type in the first letter of the resource type's name to list then select the resource type for your item.
   - Barcode - Barcode for the resource.
   - Overbook - This allows a single item to be reserved, picked up, and returned by multiple patrons during overlapping or identical time periods.
   - Is Deposit Required
   - Deposit Amount
   - User Fee
4. Click **Save**.

52.1.3. 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.



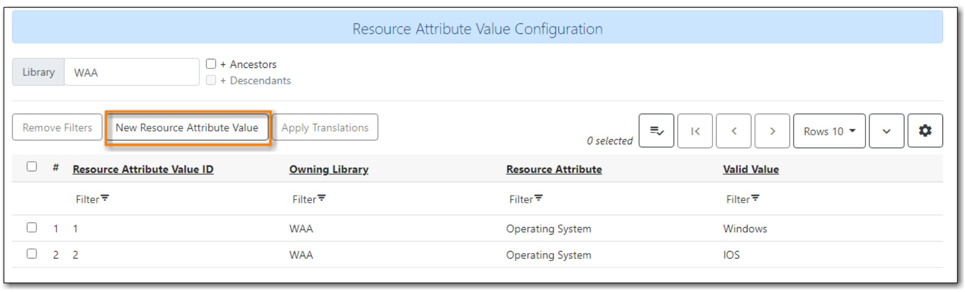
- Resource Attribute Name - Give your attribute a name.
- Owning Library - The home library of the resource.
- Resource Type - Type in the first letter to list then choose the Resource Type to which the Attribute is applicable.
- Is Required - (Function not currently available.)

4. Click **Save**.

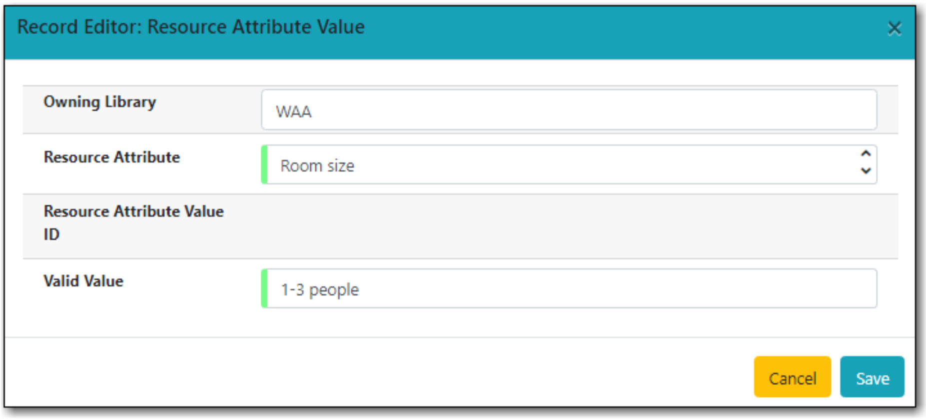
NOTE	One resource type may have multiple attributes. You may repeat the above procedure to add more.

52.1.4. 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.



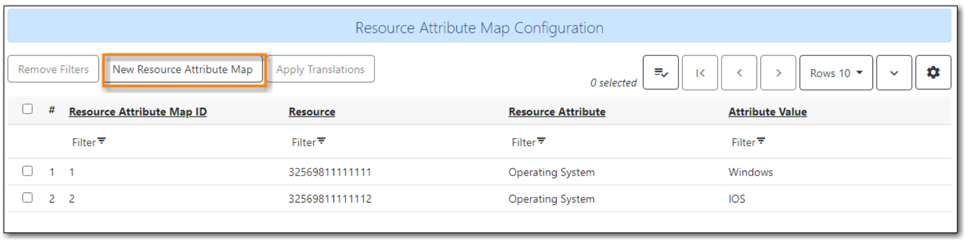
   - Owning Library - The home library of the resource.
   - Resource Attribute - The attribute you wish to assign the value to.
   - Valid Value - Enter the value for your attribute.

4. Click **Save**..
   a. Each attribute should have at least two values attached to it; repeat this process for all applicable attribute values.

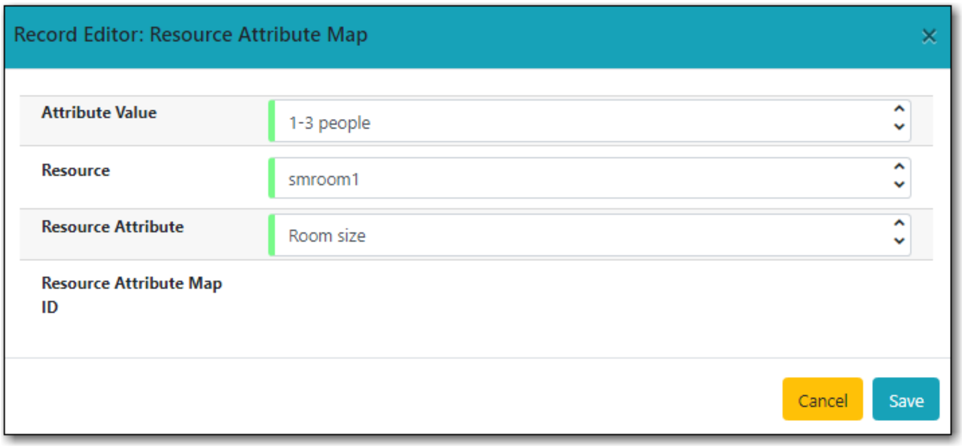
52.1.5. Map Resource Attributes and Values to Resources

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.

52.2. 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.

52.2.1. 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**.

52.3. 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 53. 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.

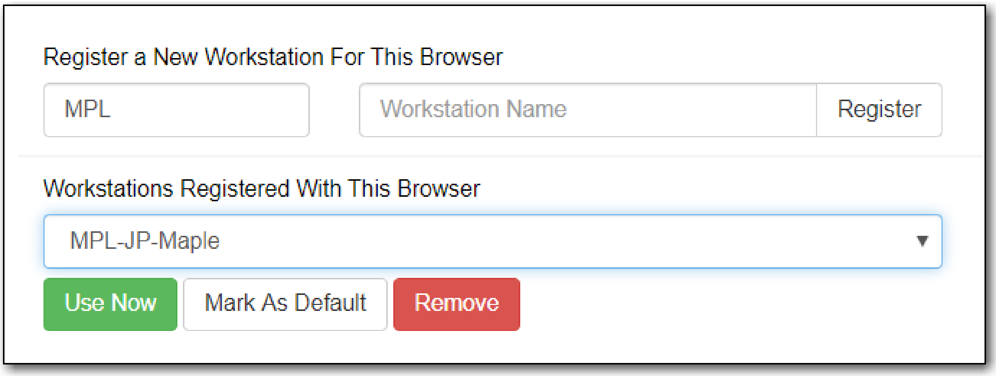
Chapter 54. Workstation Administration

54.1. Registered Workstations

54.1.1. 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.

54.1.2. 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.

54.2. Printer Settings

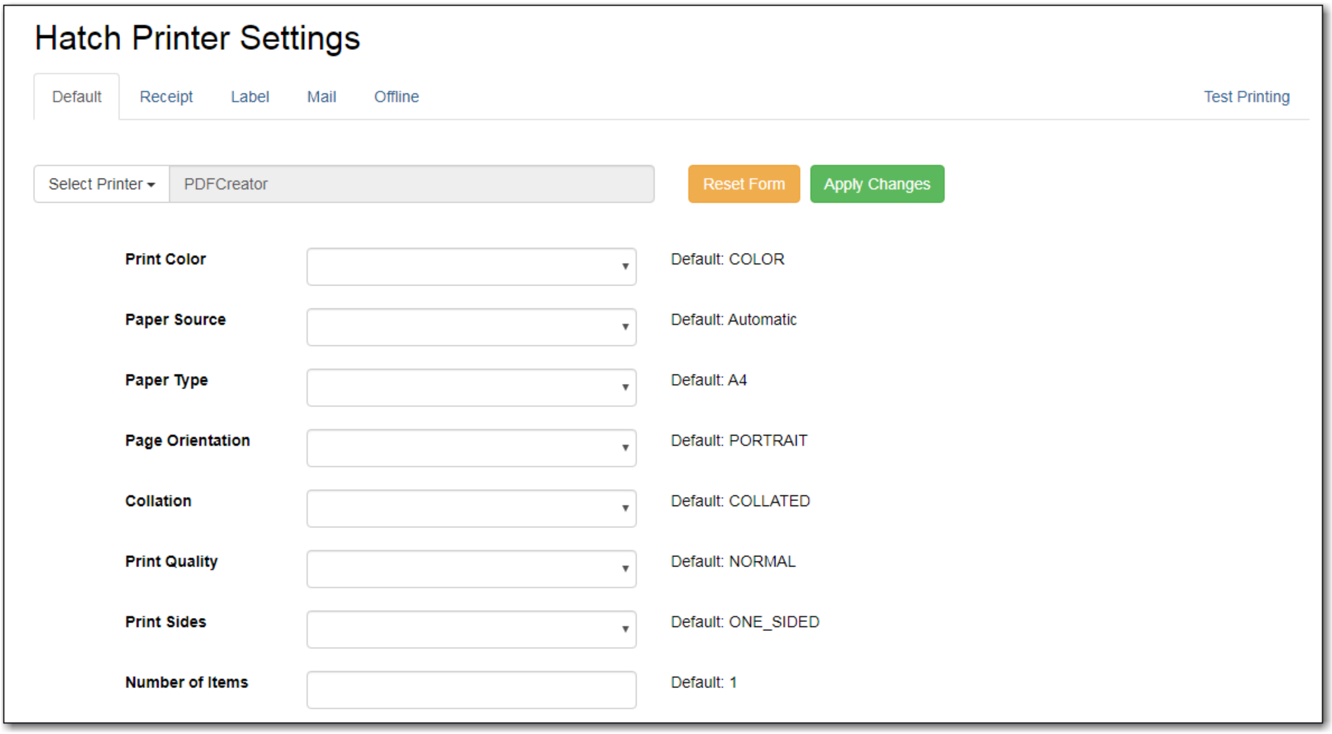
Click **Administration** → **Workstation** → **Printer Settings**

54.2.1. 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."

54.2.2. Printing with Hatch

If Hatch is installed on your computer you will use this screen to setup your printer defaults.



54.3. 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.

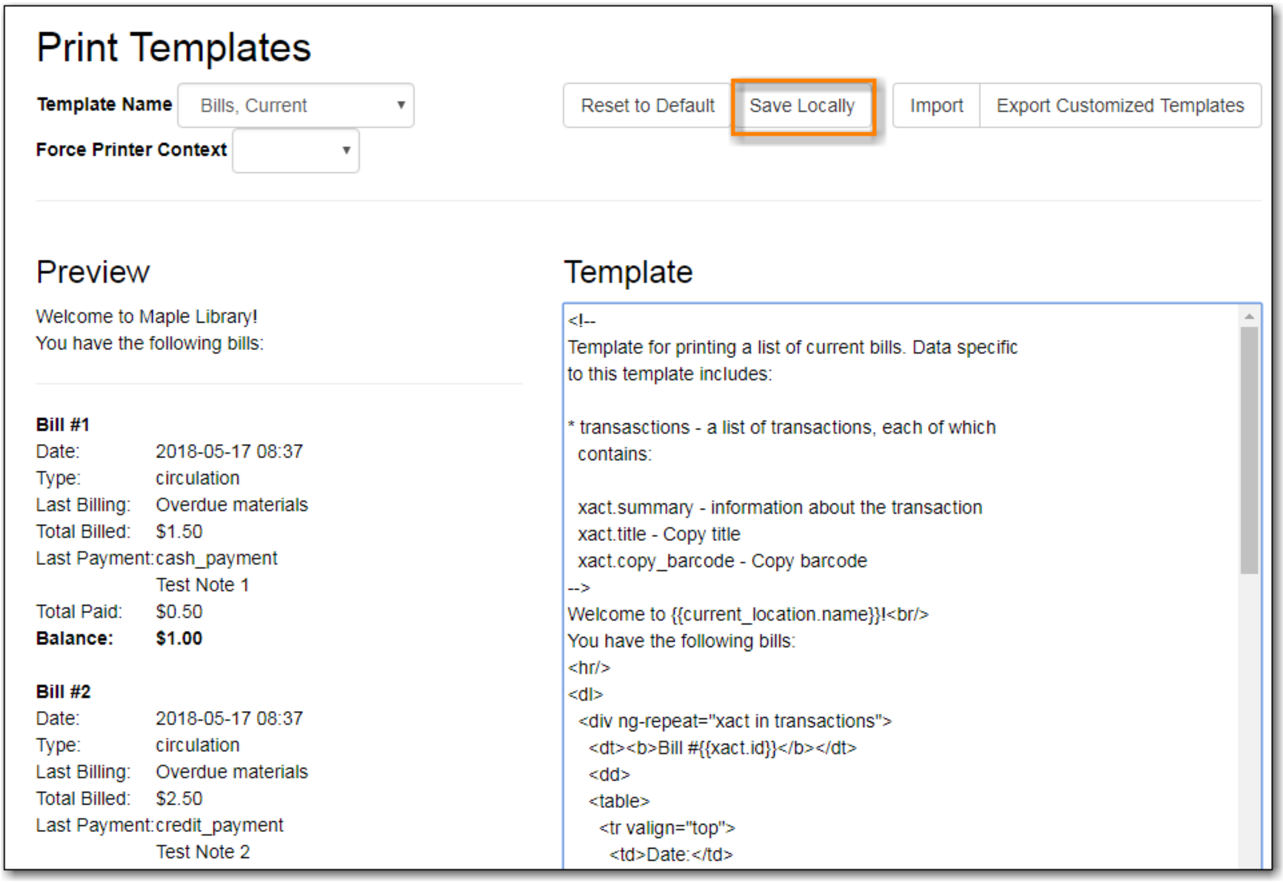
List of Receipts

- **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.

54.3.1. 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	hello	**hello**

Goal	Original	Code	Result
Bold (CSS)	hello	hello	**hello**
Capitalize	circulation	circulation	Circulation
Currency	1	{{1 | currency}}	$1.00

Table 3. Date Formatting

Code	Result
{{today}}	2017-08-01T14:18:51.445Z
{{today | date:'short'}}	8/1/17 10:18 AM
{{today | date:'M/d/yyyy'}}	8/1/2017

Table 4. Currency Formatting

Code	Result
{{xact.summary.balance_owed | currency}}	$2.50

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.

Original	Code	Result
The Sisterhood of the Traveling Pants	{{checkout.title | limitTo:10}}	The Sisterhood of th
123456789	{{patron.card.barcode | limitTo:-5}}	56789

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.**

54.3.2. 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

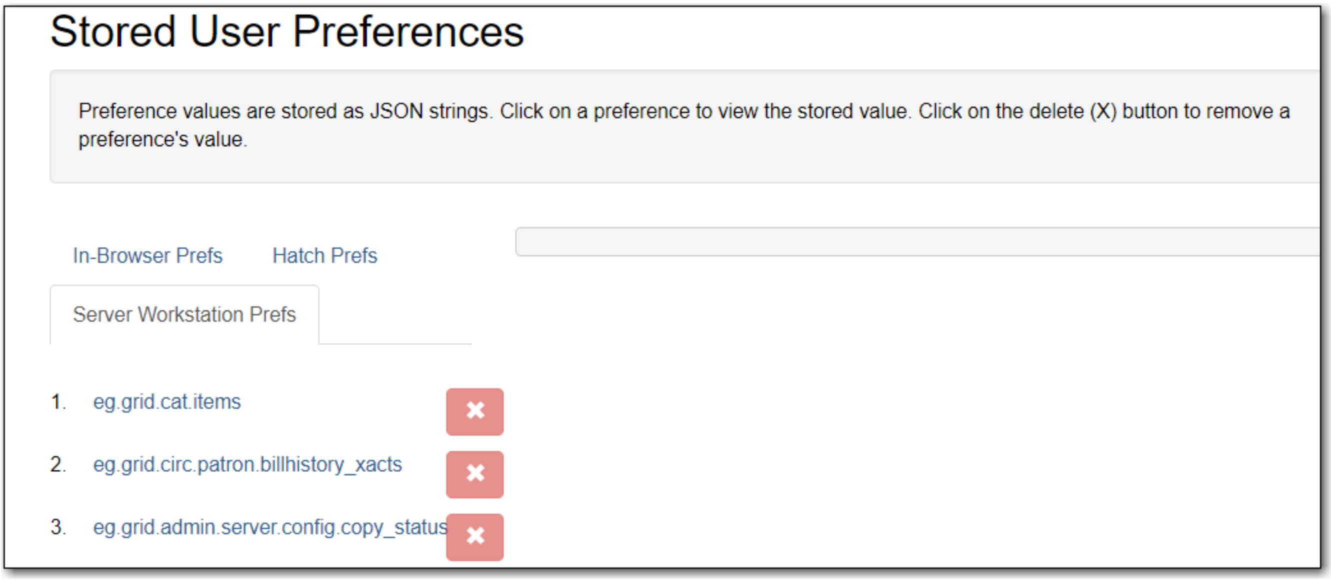
Tag	Notes
{{dest_location.shortname}}	Destination short name
{{dest_address.state}}	Destination state
{{dest_address.street1}}	Destination street address 1
{{dest_address.street2}}	Destination street address 2
{{dest_address.post_code}}	Destination zip code
{{author}}	Item author
{{copy.barcode}}	Item barcode
{{title}}	Item title

54.4. Stored Preferences

Go to **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



54.4.1. In-Browser Prefs

- Saved settings for this workstation only

54.4.2. Hatch Prefs

- Saved settings via Hatch

54.4.3. Server Workstation Prefs

- Saved settings for any workstation registered to your library

54.5. Print Service ("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.

54.5.1. 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

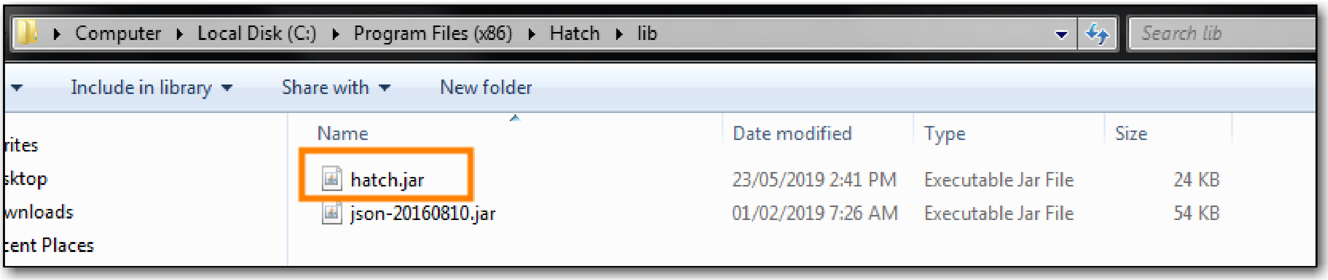
You can also check to be sure that your operating system is able to find the path to Java:

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

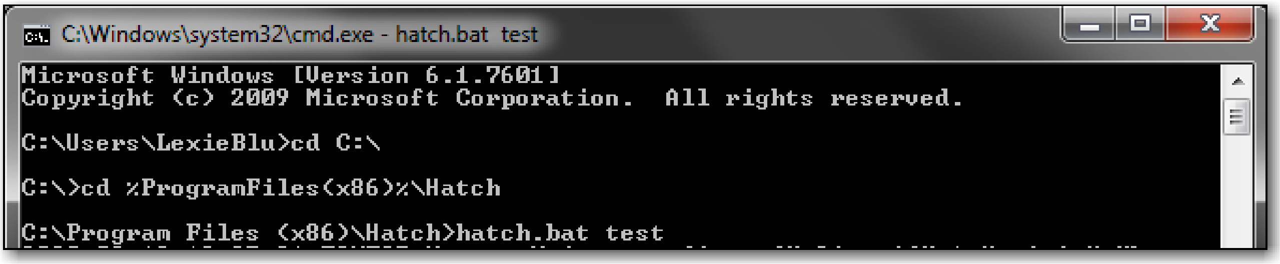
Verify that you are running the correct version of Hatch (0.3.2). You can see this from your computer's list of programs **Control Panel** > **Programs and Features**.

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

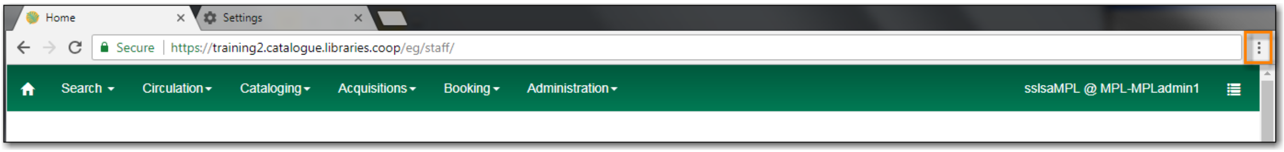


4. Either take a screenshot or copy and paste the text that appears in the command window.

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.

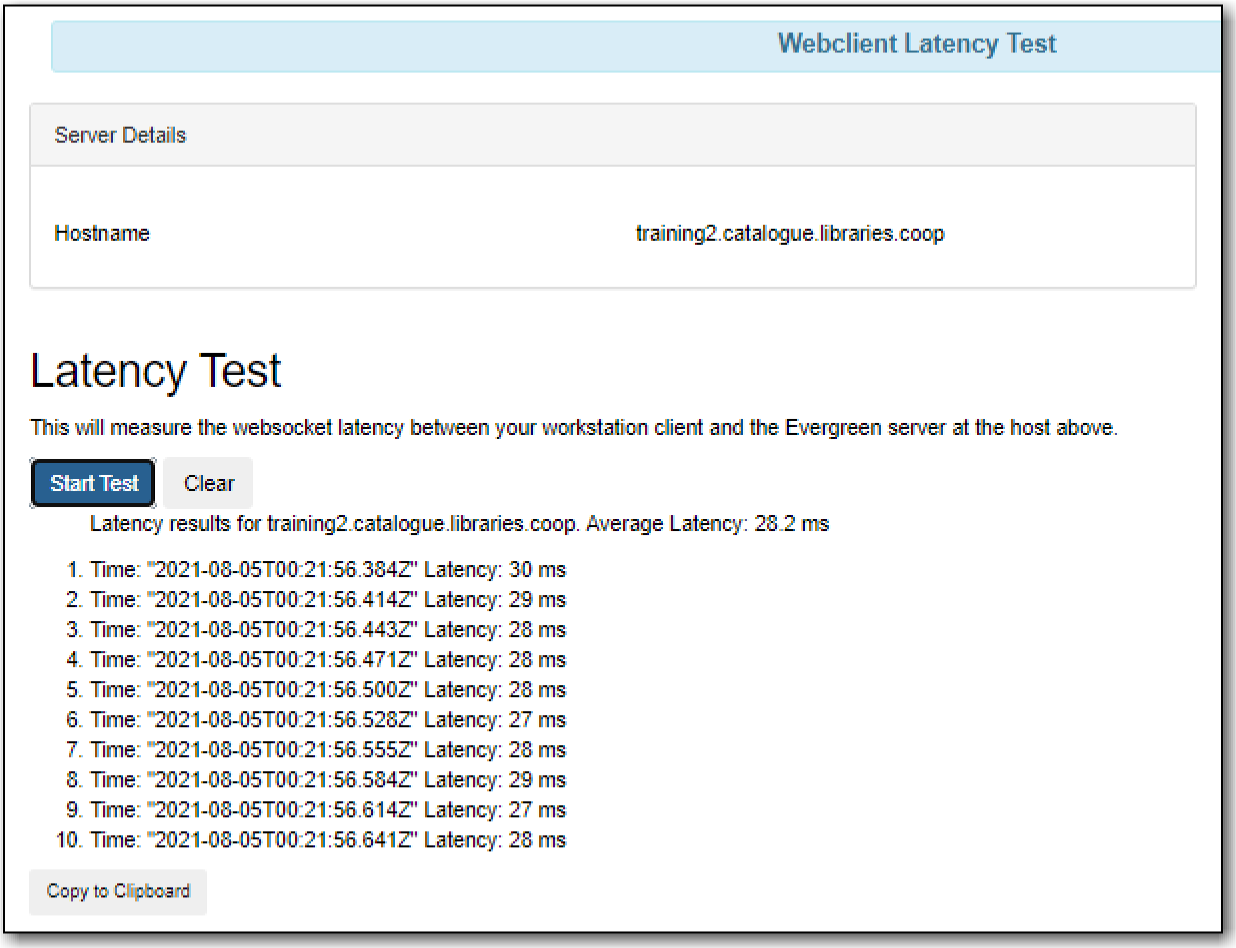
54.6. Tests

Go to **Administration** → **Workstation** → **Tests**

54.6.1. 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.

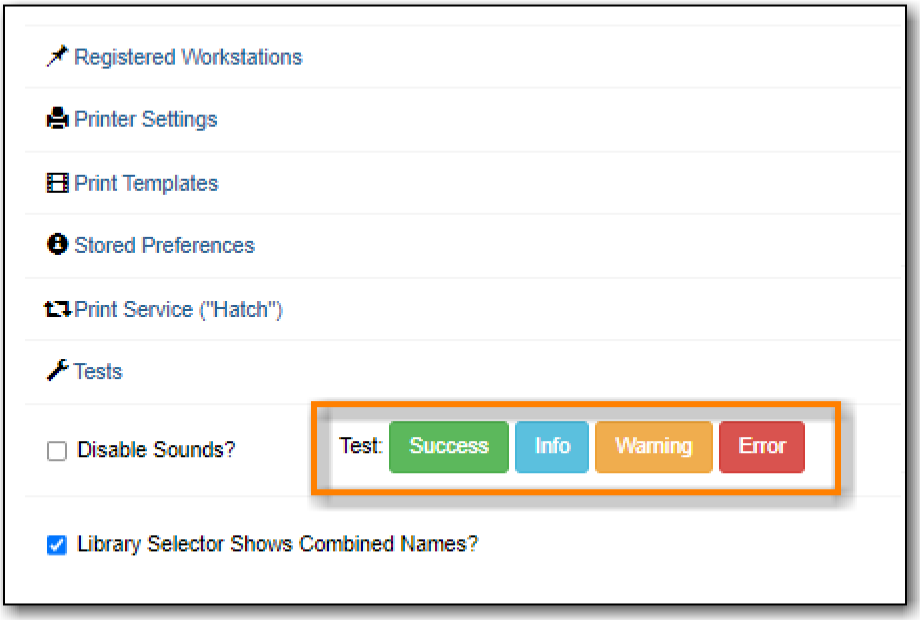
54.7. Sounds

Sound is on by default in the Evergreen staff client. You can test the sounds and disable them if desired.

Go to **Administration** → **Workstation**

Test Sounds

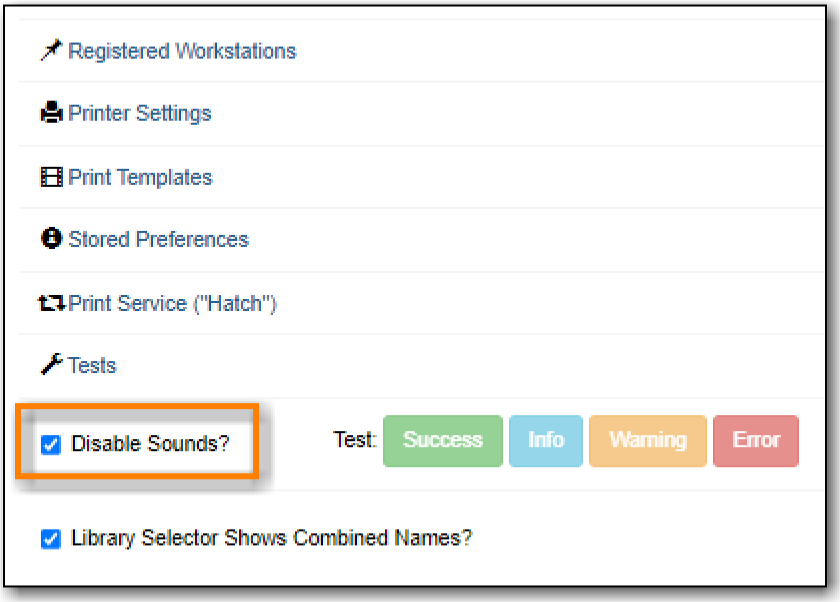
1. Click the buttons to test the staff client sounds.



2. Distinct sounds will be played for each event.
    a. **Success**
    b. **Info**
    c. **Warning**
    d. **Error**

Disable Sounds

1. Check the box for **Disable Sounds** to turn off the staff client sounds.



2. This will also disable the sound test buttons.

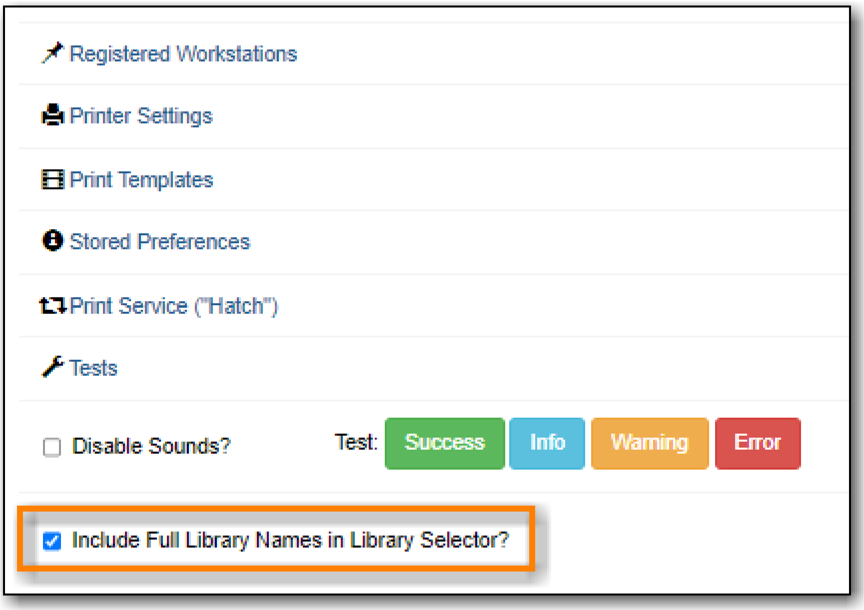
54.8. Include Full Library Names in Library Selector

Sitka Snippet Video - Turning on Full Library Names (1:19)

Go to **Administration** → **Workstation**

Library Selector Shows Combined Names

1. Check the box for **Include Full Library Names in Library Selector** to show the full name, as well as the short code, in library selectors in the staff client.



2. Log out of the staff client.
3. Clear your browser cache. See Clear Cache.
4. Log into the staff client. The full library name will now display in the library selector drop

down.

> **NOTE**
>
> This setting only applies to library selectors written in angular code, such as the staff catalogue. Library selectors in older interfaces, such as most of circulation, will not show the full name.
>
> Libraries can expect to see this setting apply to more interfaces in the future as the older parts of the staff client are re-written in the newer code.

54.9. Search Preferences

Staff should not use the search preferences settings found in Workstation Administration. Instead, search preferences should be set from within the staff catalogue. See Search Preferences.

Chapter 55. Local Administration

55.1. 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
Creating Holdings Templates	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

55.2. Age Overdue Circs to Lost

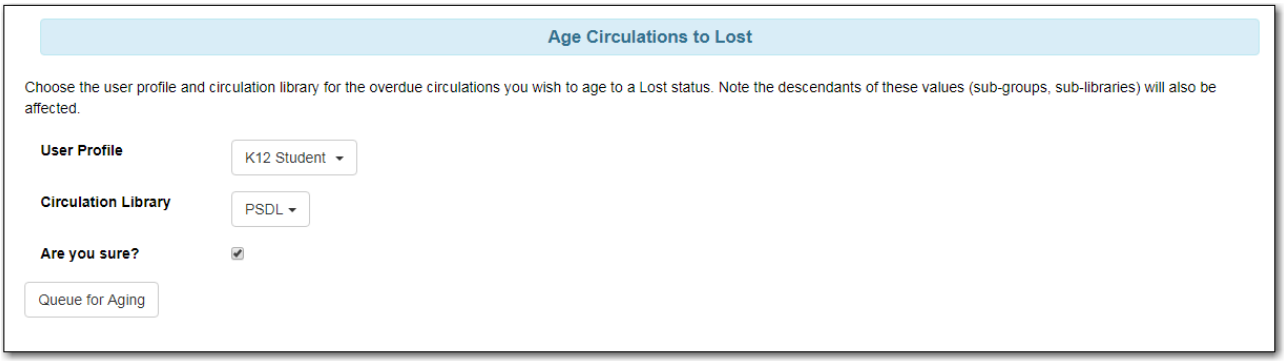
The *Age Overdue Circs to Lost* feature allows you to create a queue of items to be marked lost. **ALL** overdue items by selected patron profiles at selected libraries will be marked Lost.

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.

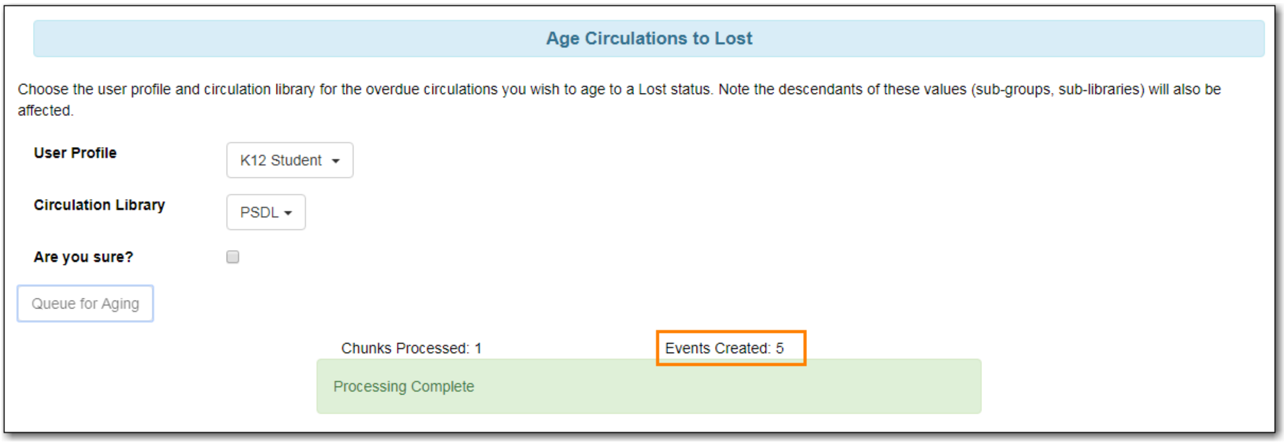
Age Overdue Items to Lost

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.

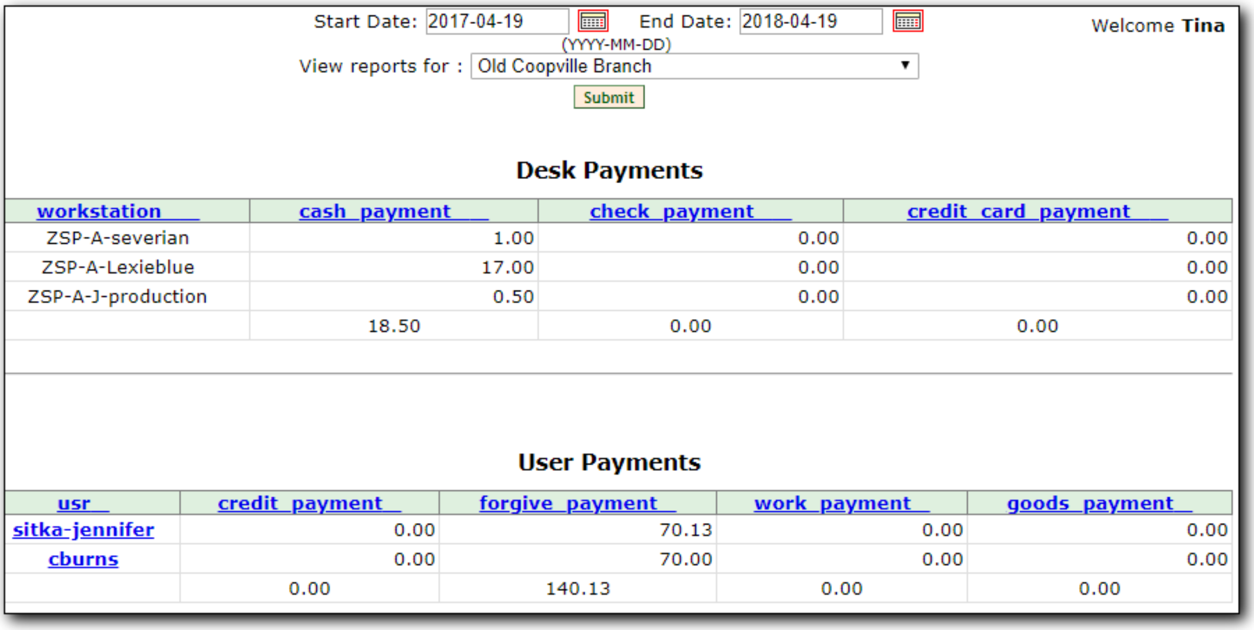
55.3. Carousels

Sitka does not currently use the Carousels feature in the Evergreen public catalogue.

Libraries using LibPress can find information on using carousels in section 5.7 Sitka Carousels in the LibPress manual.

55.4. 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 Welcome **Tina**
(YYYY-MM-DD)
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.

55.5. 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

55.5.1. 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.

55.5.2. 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 profiles. 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 and auto-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 four ways in circulation policies:

- SHORT_NORMAL_LONG_RENEWAL (ie. 3_7_14_100)
- SHORT_NORMAL_LONG_RENEWAL_AR (ie. 3_7_14_100_AR)
- NORMAL_RENEWAL (ie. 21_0) - this is an older naming convention which is being phased out
- NORMAL_RENEWAL_AR (ie. 21_0_AR) - this is an older naming convention which is being phased out

AR indicates that auto-renewals apply to items checked out using the duration rule.

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, an 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.

55.5.3. Troubleshooting Your Circulation Policies

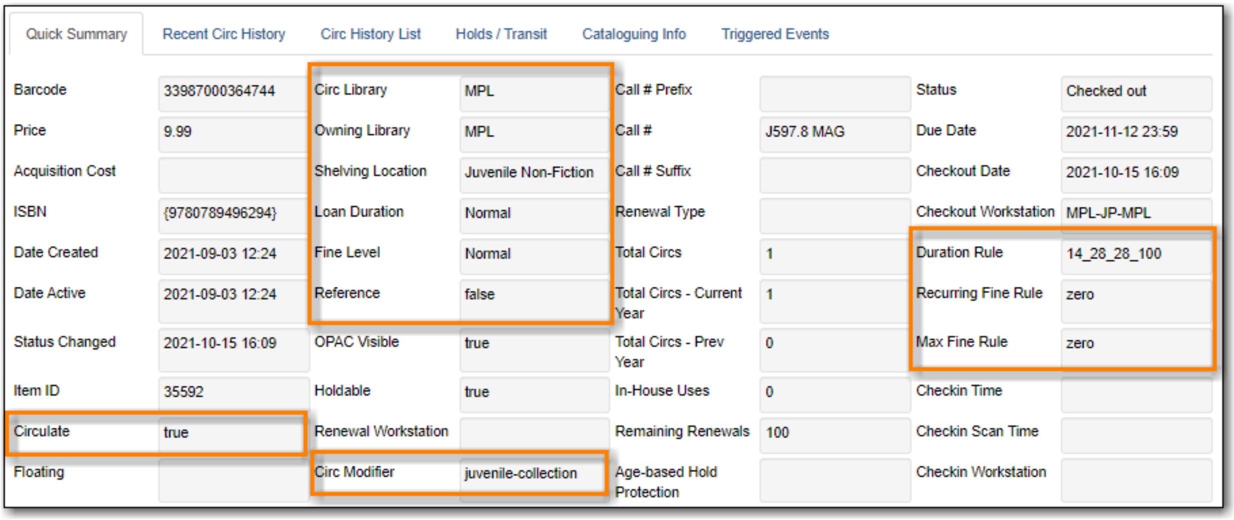
Sitka Training Video - Troubleshooting Your Circulation Policies (3:12)

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.

55.5.4. 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 parameters 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.

55.6. 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).

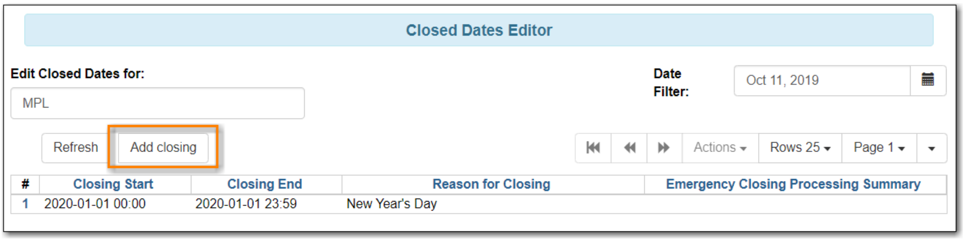
Both regular closed days and those entered in the Closed Dates Editor affect due dates, fines, and targeting for holds.

NOTE The due date for daily loans will fall on a day marked partially closed.

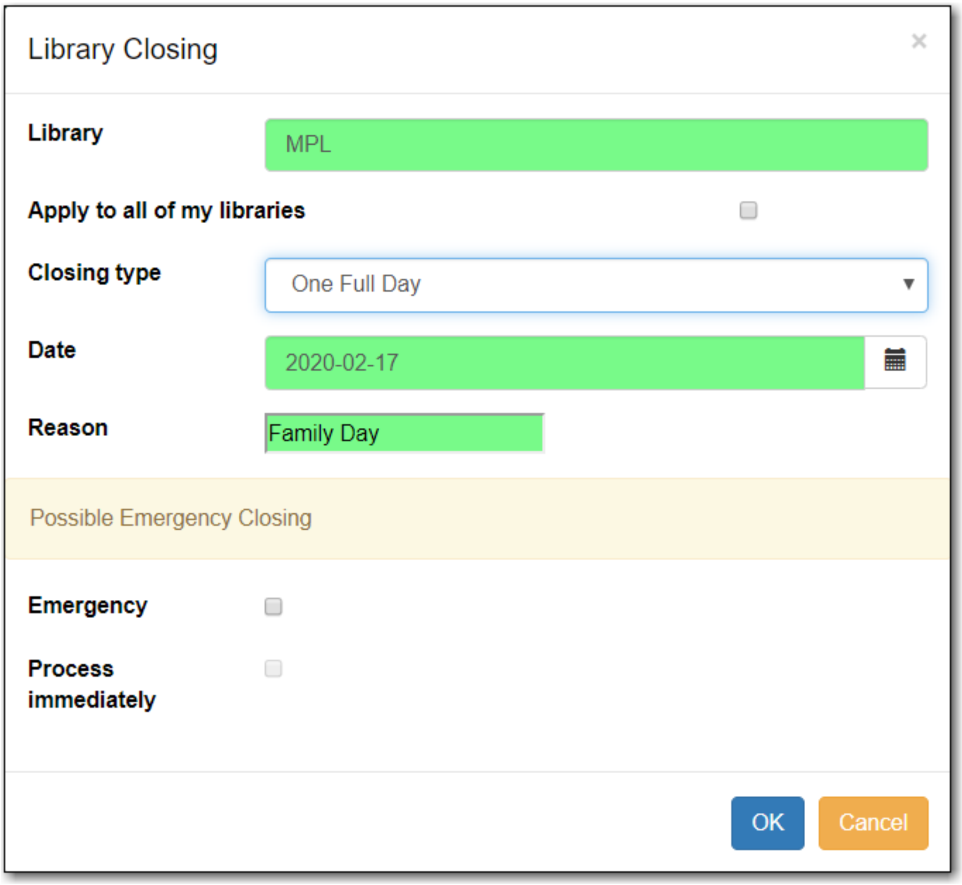
55.6.1. Entering Closed Dates

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.

55.6.2. Emergency Closing

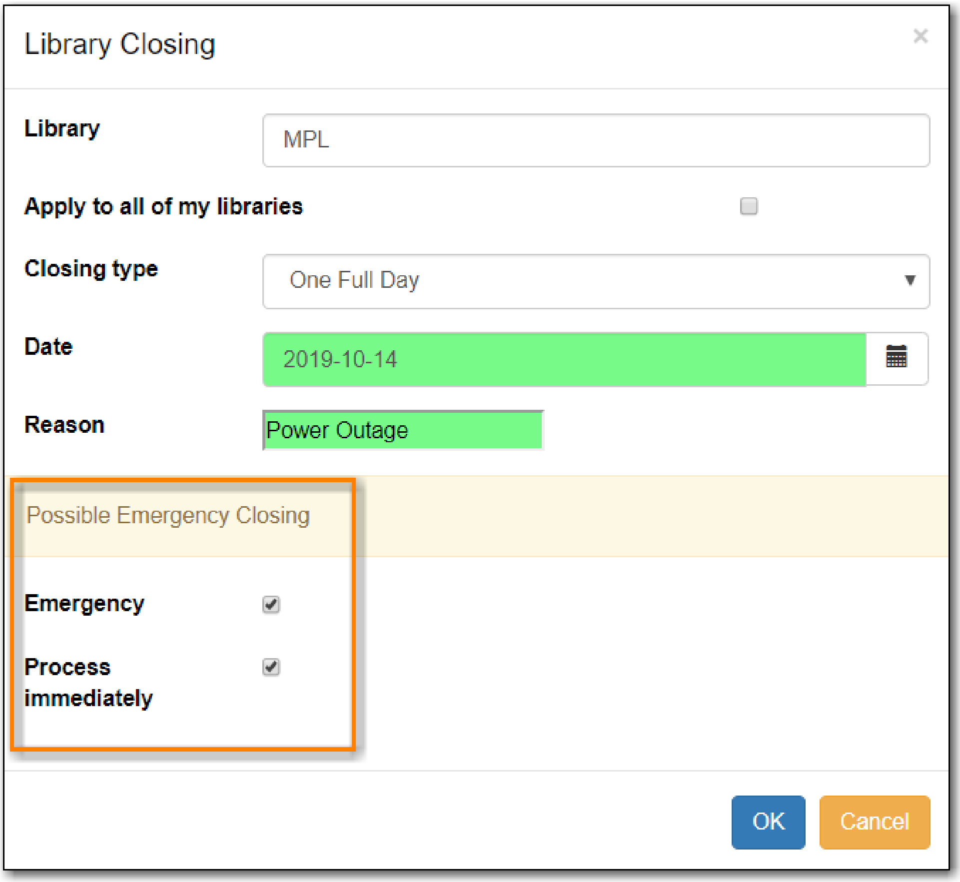
Sitka Snippet Video - Emergency Closures (1:37)

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.

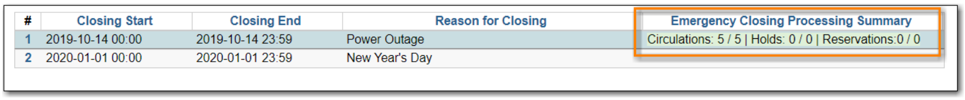
NOTE	The notification email is a global email and cannot be customized for individual libraries.

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	

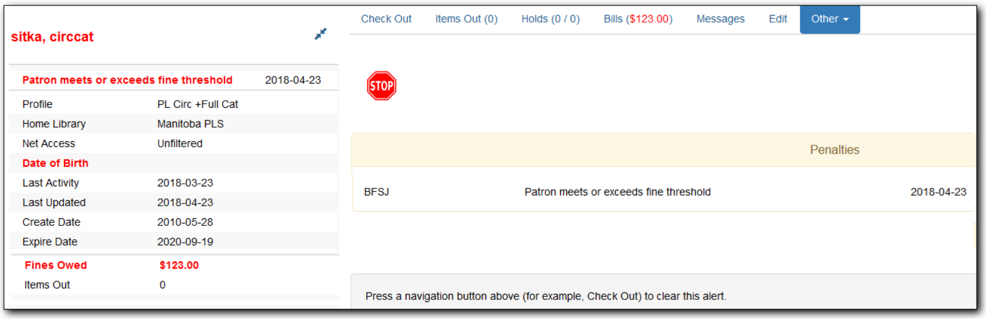
55.7. Group Penalty Thresholds

Group Penalty Thresholds block circulation transactions for users who exceed maximum fine limits, check out limits, number of overdue items, and number of lost items. 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, renewals, and placing of holds if patron exceeds X in fines
- PATRON_EXCEEDS_OVERDUE_COUNT: Blocks new circulations, renewals, and placing of holds 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, renewals, and placing of 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. See System Generated Notes for information on how this displays in a patron account.



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.

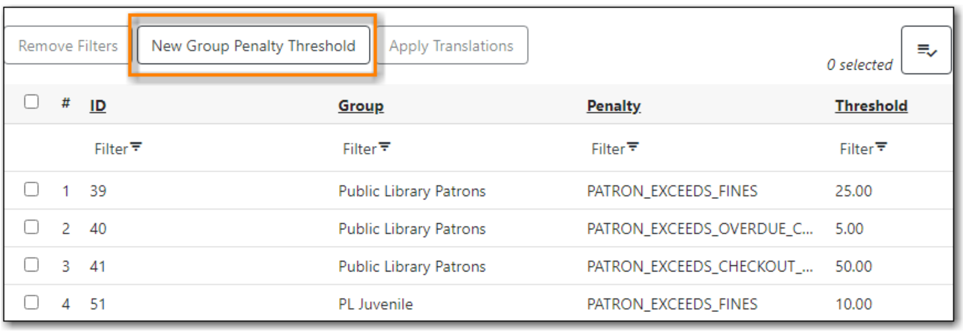
55.7.1. Creating Local Penalty Thresholds

Local System Administrators can create local penalty thresholds.

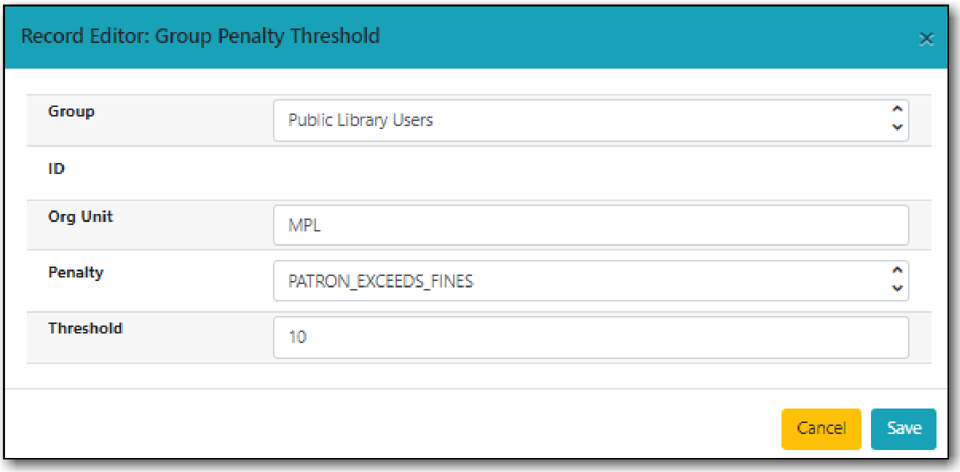
1. Go to **Administration** → **Local Administration** → **Group Penalty Threshold**.

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**.



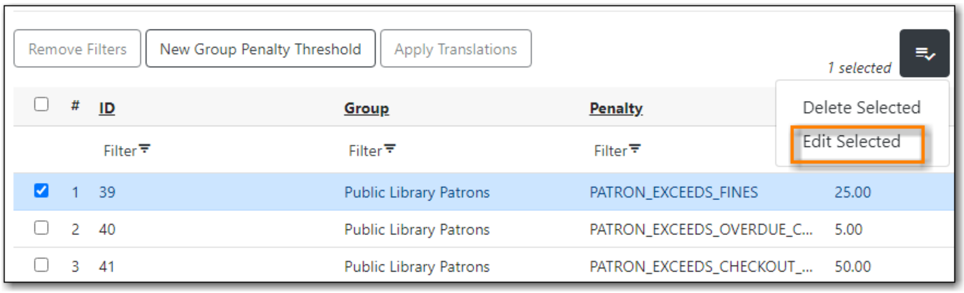
2. Choose or enter the appropriate value for each field.
3. Click **Save**.



TIP You may set up penalties with a too high to reach limit to achieve the no limit effect.

55.7.2. Editing Local Penalty Thresholds

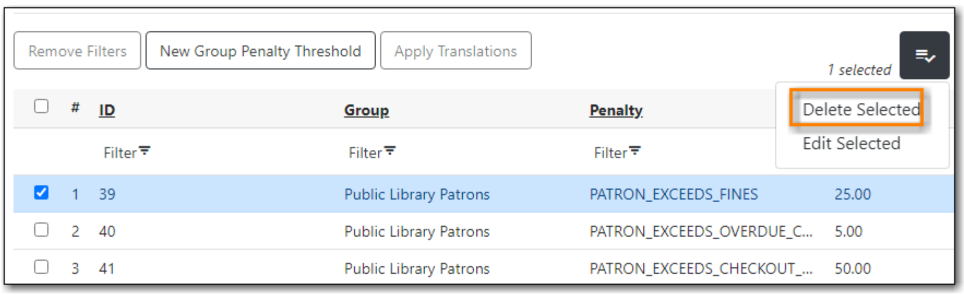
1. Select the penalty you'd like to edit.
2. Click the actions button and select **Edit Selected**.
3. Make your changes and click **Save**.



Double clicking a penalty on the list will open it in editing mode. Edit, then save.

55.7.3. 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.



55.8. Hold Policies

Hold policies defines who can place how many holds on what types of materials. They also defines whether the library's materials can be used to fill holds to be picked up at other libraries.

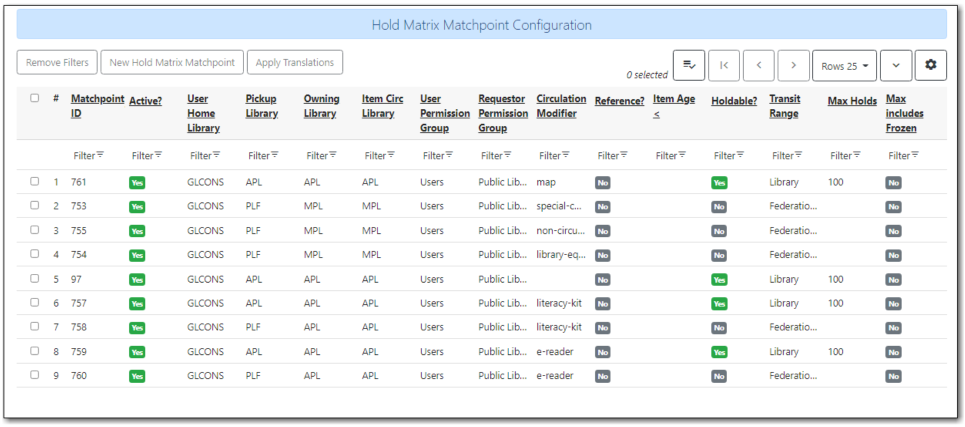
When a hold is initiated Evergreen checks the following to determine if the hold can be placed and if it will be filled:

- Group Penalty Thresholds
- Item's Status
- Holdable flag for the item's Shelving Location
- Holdable flag for the item
- Age based hold protection for the item
- Relevant library setting such as *Has Local Copy Block* and *Block hold request if hold recipient privileges have expired*
- Hold Policies
  - Age based hold protection within the hold policies.

55.8.1. Viewing Your Hold Policies

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.

55.8.2. Changing Your Hold Policies

All changes to your hold policies are made by Co-op Support Staff.

Submit a ticket to Co-op Support to request changes to your hold 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 hold policy you must include:

- Circulation modifier or item age
- What patron group(s) the policy applies to
- The maximum number of holds (if applicable)
- Whether or not interlibrary connect holds can be placed (for libraries participating in reciprocal borrowing)

55.9. Hopeless Holds

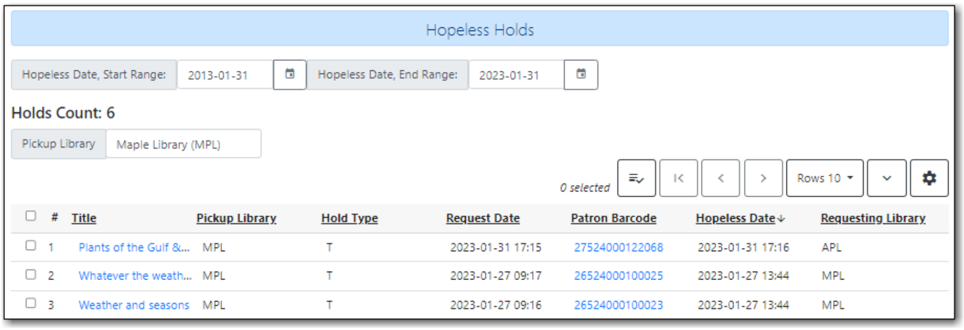
Sitka Snippet Video - Hopeless Holds (1:11)

In Evergreen unfillable holds are called Hopeless Holds. A hold will become hopeless when all of the items that could potentially fill the hold are in a hopeless prone item status or all potential items have been deleted from the database.

The hopeless prone item statuses in Sitka's Evergreen are *Discard/Weed*, *Damaged*, *Lost*, *Lost and Paid*, and *Missing*. This is set globally and cannot be altered for individual libraries.

Libraries should review and resolve hopeless holds on a regular basis.

1. Click **Administration → Local Administration → Hopeless Holds.**
2. A list of holds that are considered unfulfillable is generated.



3. From the **Actions** menu select:
    a. **Cancel Hold** to cancel the patron's hold.
    b. **Transfer to Marked Title** to move the hold to a record with holdable items.
    c. **Add Holdings** to add a new item to the record. This can be temporary on order item while your library waits for a replacement to arrive.
    d. **View/Place Orders** to add a line item to a selection list or purchase order. This will only work for libraries using the acquisitions module.

NOTE

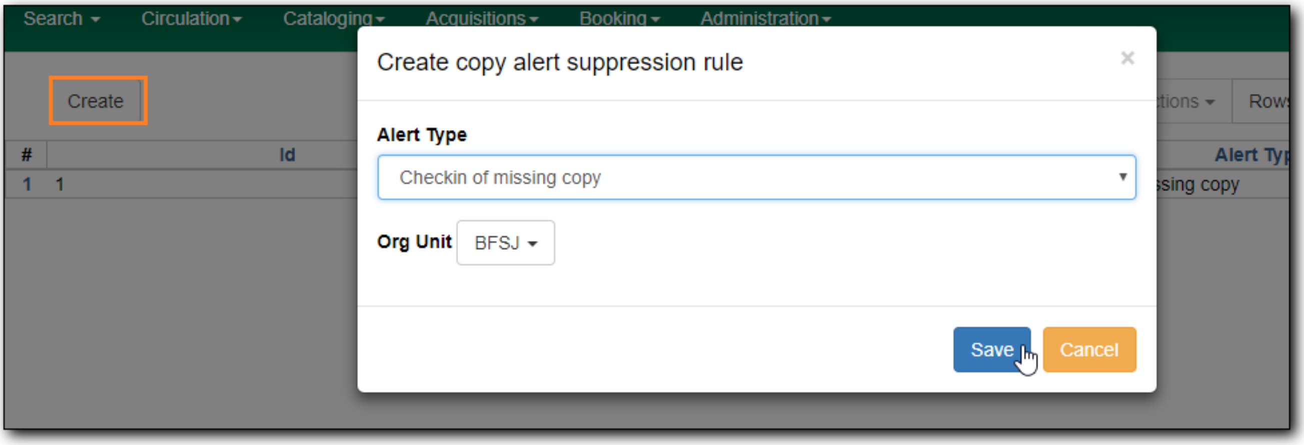
The Hopeless Holds interface displays holds where your library is the pickup library. Multi-branch libraries may wish to adjust the scope to see their whole system.

Libraries participating in interlibrary connect may see holds on your hopeless holds list for titles you've never had in your collection. These are interlibrary connect holds that can no longer be filled by any other library in your zone. Libraries can decide whether to purchase the title, try to fill the hold via your external provincial ILL system, or simply cancel the hold.

55.10. 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**.



55.11. Item Tags

Item tags are not currently used.

55.12. 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.

55.12.1. 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.

55.12.2. 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**.

55.12.3. 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
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

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

Setting	Description	Data type	Notes	Edited by
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

Table 26. Cataloging

Setting	Description	Data type	Notes	Edited by
Default Classification Scheme	Defines the default classification scheme for new call numbers: 1 = Generic; 2 = Dewey; 3 = LC	Number	This library setting is obsolete. Default classification scheme is now set in the Holdings Editor Preferences.	
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

Setting	Description	Data type	Notes	Edited by
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
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

Setting	Description	Data type	Notes	Edited by
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
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

Setting	Description	Data type	Notes	Edited by
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
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

Setting	Description	Data type	Notes	Edited by
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
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

Setting	Description	Data type	Notes	Edited by
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 27. 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

Setting	Description	Data type	Notes	Edited by
Allow users to browse Courses by Instructor	If enabled, users can browse courses by instructor name in the public catalogue.	True/False		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
Bib source for brief records created in the course materials module	The course reserves module will use this bib source for any new brief bibliographic records created by the module.	Text	Set to *Course materials module*.	Sitka
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

Setting	Description	Data type	Notes	Edited by
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
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

Setting	Description	Data type	Notes	Edited by
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
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

Setting	Description	Data type	Notes	Edited by
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
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

Setting	Description	Data type	Notes	Edited by
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
Exclude Courtesy Notices from Patrons Items Out 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

Setting	Description	Data type	Notes	Edited by
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
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

Setting	Description	Data type	Notes	Edited by
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	
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	

Setting	Description	Data type	Notes	Edited by
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	
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

Setting	Description	Data type	Notes	Edited by
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
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
Opt Org Unit into the Course Materials Module	Enables the course reserves module in the public catalogue and allows users to search and browse course lists.	True/False		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

Setting	Description	Data type	Notes	Edited by
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
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

Setting	Description	Data type	Notes	Edited by
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
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

Setting	Description	Data type	Notes	Edited by
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
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

Setting	Description	Data type	Notes	Edited by
Use Item Price or Cost as Backup Item Value	Expects "price" or "cost", but defaults to neither. This refers to the corresponding field on the item record and is used as a second-pass fall-through value when determining an item value. If needed, Evergreen will still look at the "Default Item Price" setting as a final fallback.	Text		LSA
Use Item Price or Cost as Primary Item Value	Expects "price" or "cost" and defaults to price. This refers to the corresponding field on the item record and gets used in such contexts as notices, max fine values when using item price caps (setting or fine rules), and long overdue, damaged, and lost billings.	Text		LSA
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 item deposit fee on checkin	If a deposit was charged when checking out an item, void it when the item is returned	True/False	Default: False	LSA

Setting	Description	Data type	Notes	Edited by
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
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

Setting	Description	Data type	Notes	Edited by
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
Workstation OU is the default for staff-placed holds	For staff-placed holds, regardless of the patron preferred pickup location, the staff workstation OU is the default pickup location	True/False		LSA
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 28. Credit Card Processing

Credit card payment is not currently supported.
All settings can be ignored.

Table 29. Ebook API Integration

Ebook API Integration
All settings are set by Sitka.

Table 30. 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
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

Setting	Description	Data type	Notes	Edited by
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	
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	

Setting	Description	Data type	Notes	Edited by
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
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

Setting	Description	Data type	Notes	Edited by
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
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

Setting	Description	Data type	Notes	Edited by
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 31. 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	

Setting	Description	Data type	Notes	Edited by
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
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

Setting	Description	Data type	Notes	Edited by
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
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

Setting	Description	Data type	Notes	Edited by
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 library setting is obsolete. Item attributes can now be hidden via the Holdings Editor Preferences.	
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
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

Setting	Description	Data type	Notes	Edited by
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
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

Setting	Description	Data type	Notes	Edited by
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
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

Setting	Description	Data type	Notes	Edited by
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
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

Setting	Description	Data type	Notes	Edited by
Regex for Other-phone on patron registration	The Regular Expression on validation on the Other-phone field in patron registration.	Regular expression		LSA
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

Setting	Description	Data type	Notes	Edited by
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
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

Setting	Description	Data type	Notes	Edited by
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
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	This library setting is obsolete. The unified editor is is now set in the Holdings Editor Preferences.	
Work Log: maximum actions logged	Maximum entries for "Most Recent Staff Actions" section of the Work Log interface.	Number		LSA

Setting	Description	Data type	Notes	Edited by
Work Log: maximum patrons logged	Maximum entries for "Most Recently Affected Patrons… " section of the Work Log interface.	Number		LSA

Table 32. 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 33. 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	If there is no value for this setting holds will not have a Hold Shelf Expiry Time and so will not expire.	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

Setting	Description	Data type	Notes	Edited by
Pickup Library Hard stalling interval	When set for the pickup library, this specifies that no items with a calculated proximity greater than 0 from the pickup library can be directly targeted for this time period if there are local available copies. Example "3 days".	Duration		Sitka
Pickup Library Soft stalling interval	When set for the pickup library, this specifies that for holds with a request time age smaller than this interval only items scanned at the pickup library can be opportunistically captured. Example "5 days". This setting takes precedence over "Soft stalling interval" (circ.hold_stalling.soft) when the interval is in force.	Duration		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 34. 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
My Account URL	URL for a My Account link. Use a complete URL, such as "https://example.com/eg/opac/login".			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 35. OPAC

Setting	Description	Data type	Notes	Edited by
Allow Patron Self-Registration	Allow patrons to self-register, creating pending user accounts	True/False		Sitka
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 36. 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 37. 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 38. 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 39. 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

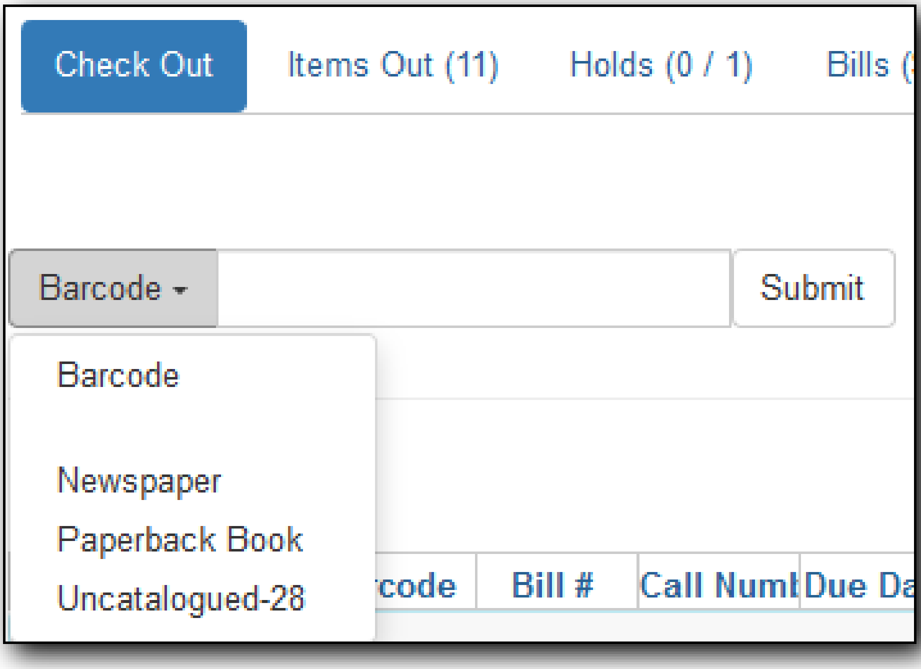
Setting	Description	Data type	Notes	Edited by
circ.renew.check_penalty		True/False		Sitka
global.credit.allow		True/False	Not in use	Sitka
org.opt_out_email_predue		True/False	Not in use	Sitka
ui.network.progress_meter	Switch off/on a bar indicating network in progress	True/False	Not in use anymore	LSA

Table 40. 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

55.13. Non-catalogued Type Editor

Non-catalogued types diplay in a drop down menu on the Check Out and In-House screens.

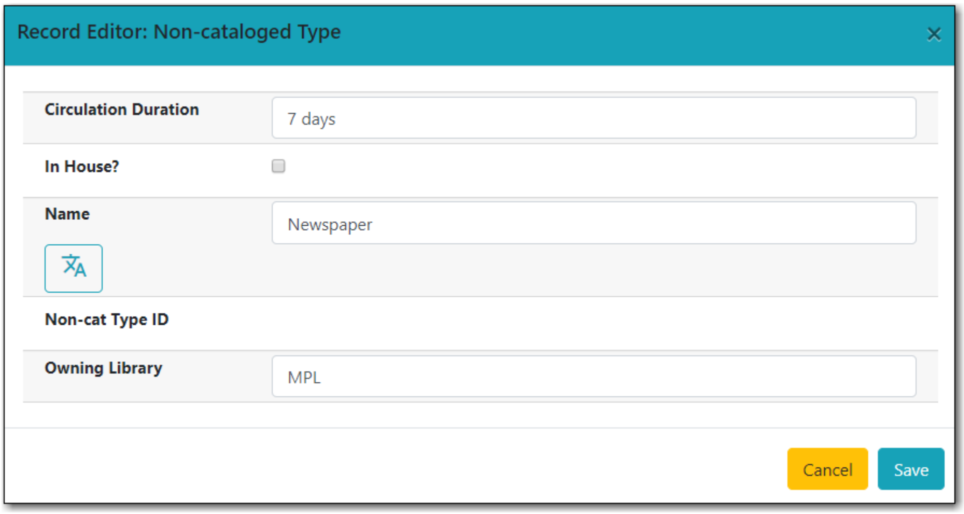


The non-catalogued types can be viewed and configured by going to **Administration** → **Local Administration** → **Non-cataloged Type Editor**.

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.

55.13.1. Create a Non-Catalogued Type

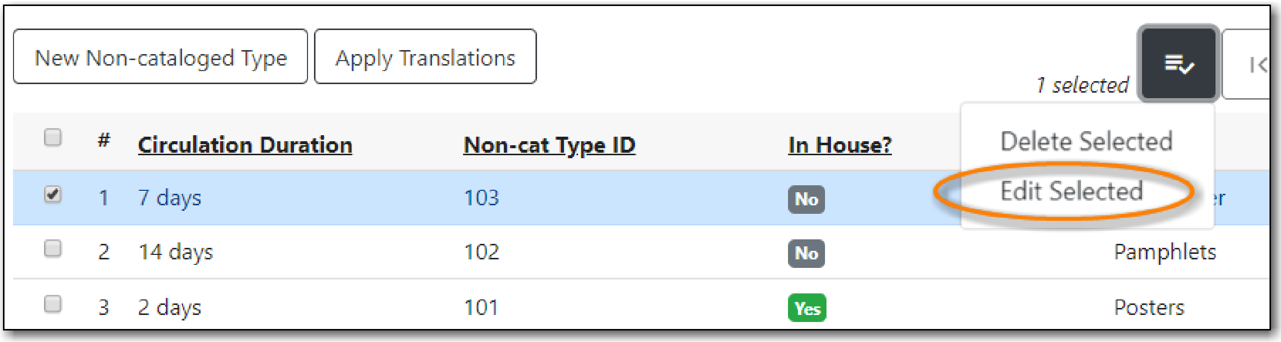
1. Click **New Non-cataloged Type**.
2. Enter the relevant information for your non-catalogued type and click **Save**.



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.

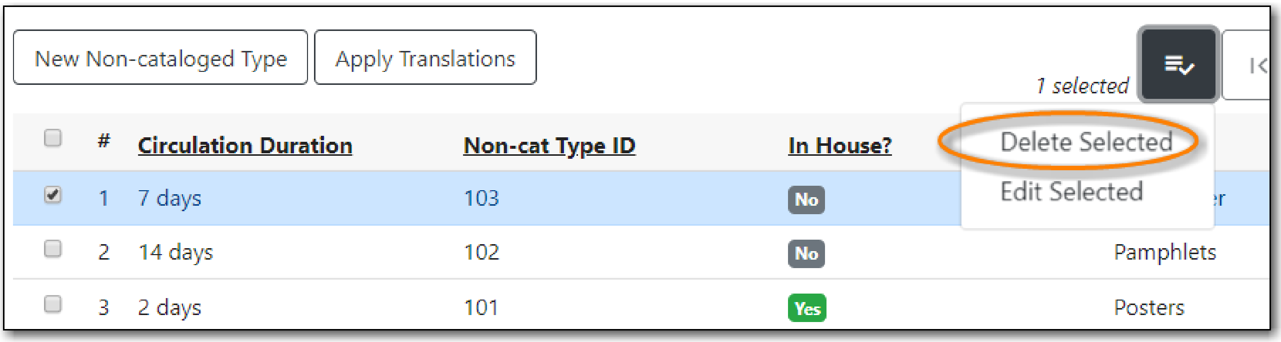
55.13.2. Edit a Non-Catalogued Type

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**.



55.13.3. 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**.



55.14. 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.

55.15. Shelving Location Editor

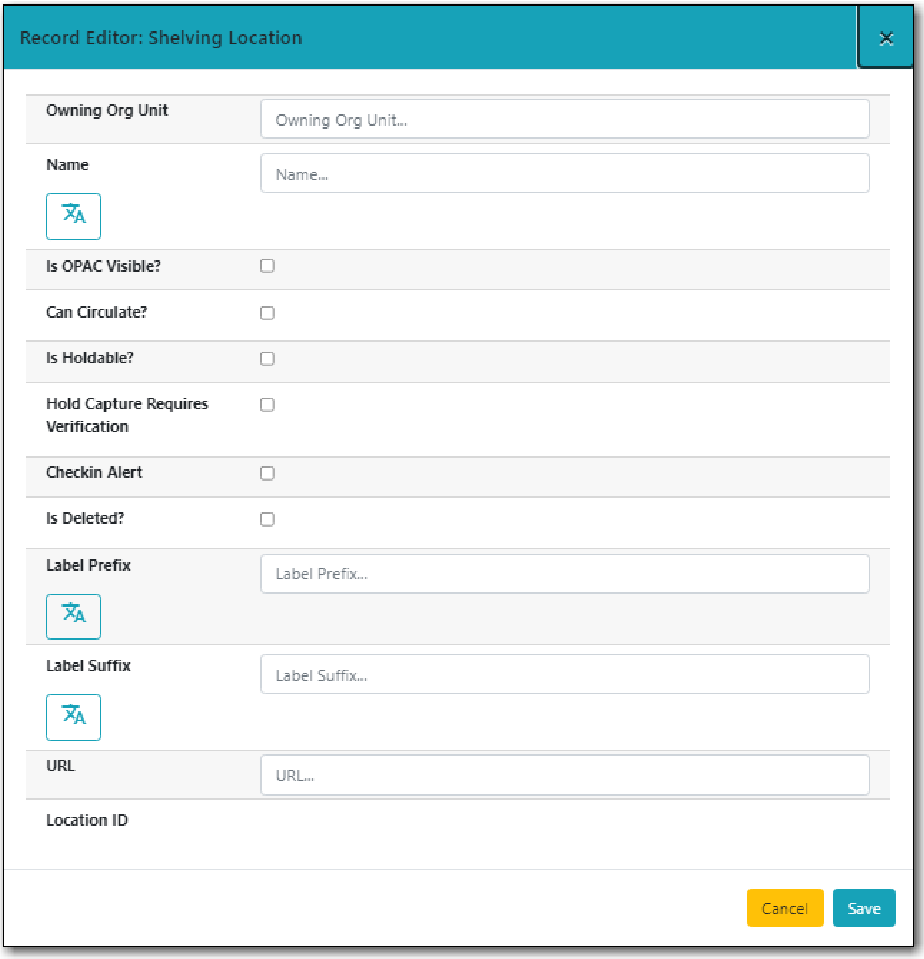
Go to **Administration → Local Administration → Shelving Locations Editor.**

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.

NOTE In order for a library's shelving locations to be translated in the public catalogue the library must first provide Co-op Support with a list of the library's shelving locations with the translations so the translations can be entered into Evergreen.

55.15.1. 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.

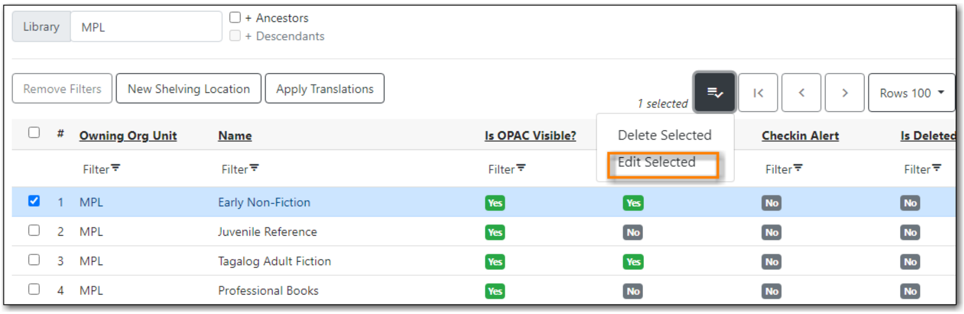


NOTE Text in the Label prefix and Label suffix fields will automatically be added to spine labels printed for items in the selected shelving location. It does not affect OPAC or staff client display.

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.

55.15.2. 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**.

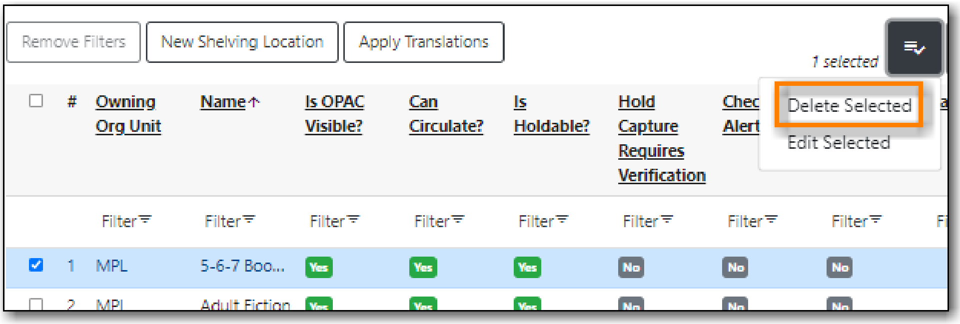


CAUTION	If your library uses the acquisitions module and loads vendor records make sure you let your vendors know about any changes you make to shelving location names that are used in their templates. If the shelving location name doesn't match between Evergreen and the $1 in the templates your MARC records will not load.

55.15.3. Deleting a Shelving Location

Shelving locations containing non-deleted items cannot be deleted in Evergreen. Co-op Support recommends running a report using the Sitka report template *Shelving Location : Copies with Selected Shelving Location* to check for non-deleted item before attempting to delete 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.

55.16. Shelving Location Groups

Shelving location groups are currently not in use.

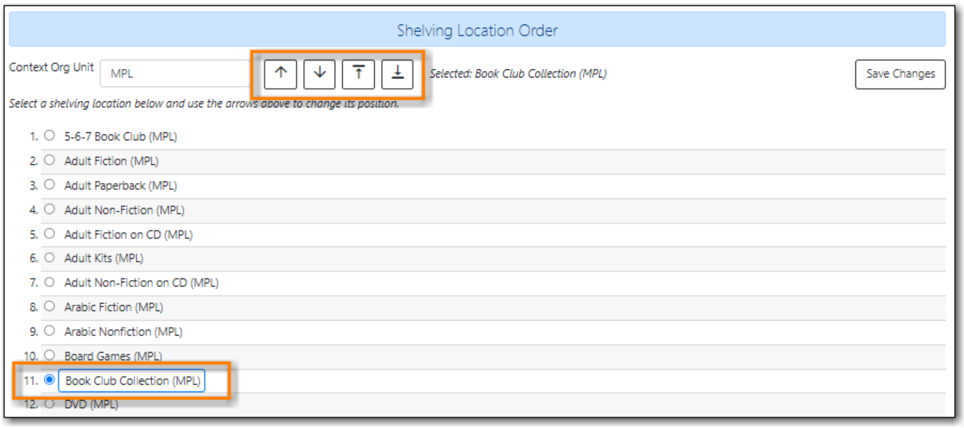
55.17. Shelving Location Order

Sitka Snippet Video - Shelving Location Order (1:22)

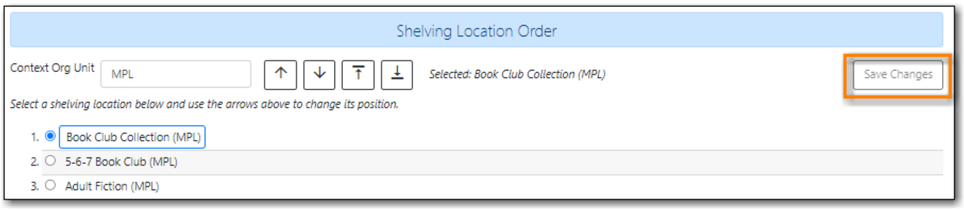
Libraries can specify the order shelving locations should appear on the holds pull list.

Ordering the shelving locations so that locations that are physically close to each other appear together on the list can make it easier for staff pulling holds.

1. Go to **Administration** → **Local Administration** → **Shelving Locations Order.**
2. Select the shelving location you would like to re-order.
3. Use the arrow buttons to move the location up or down the list, or move it to the top or bottom of the list.



4. Once all changes have been made, click **Save Changes**.



5. Items on your holds pull list will now be listed based on this order.

55.18. 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.

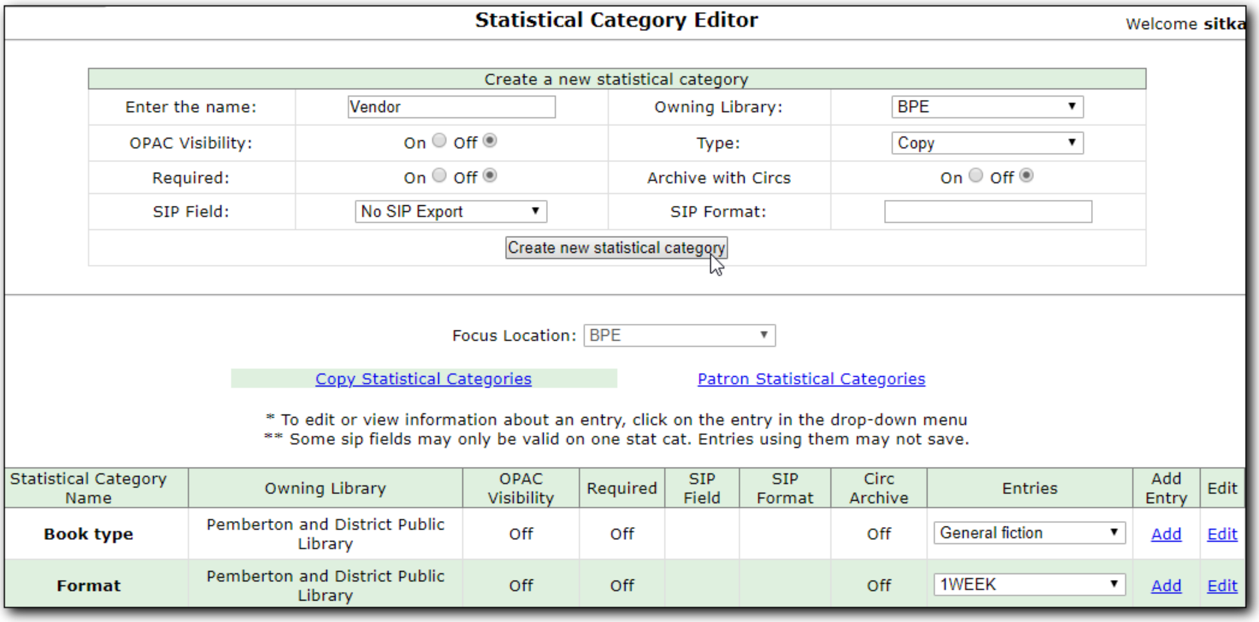
1. Select **Administration** → **Local Administration** → **Statistical Categories Editor**.

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**.

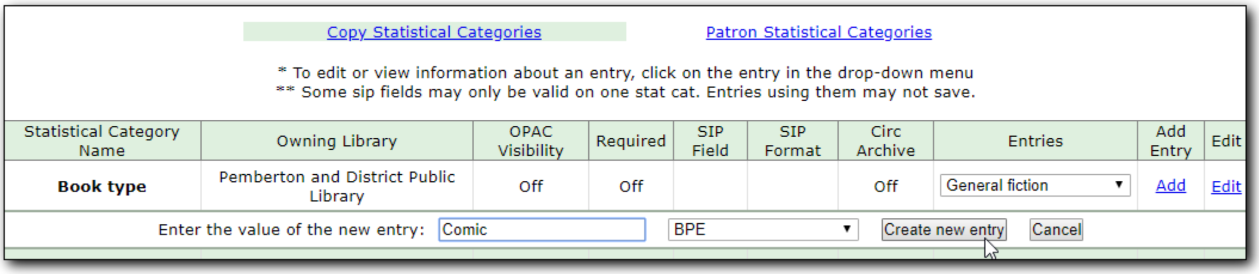
   OPAC Visibility: If On, the stat cat and its value are displayed in Copy Details on OPAC. **This feature is not working. The stat cat and its value will not be displayed in the OPAC.

   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.

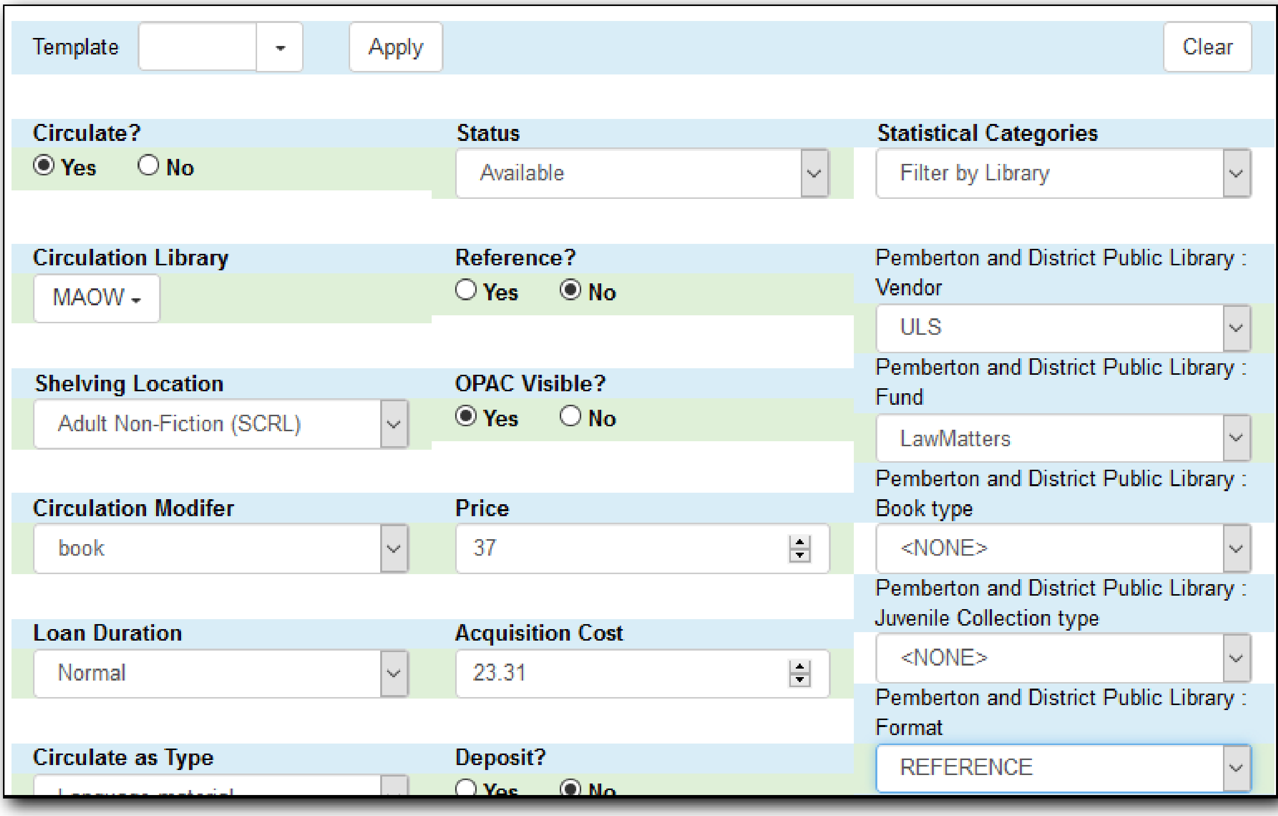


3. To add stat cat values, click **Add** in the line of the stat cat. Type in the value, then click **Create new entry** button. Confirm on the prompt. Repeat these steps if you need to add more values.

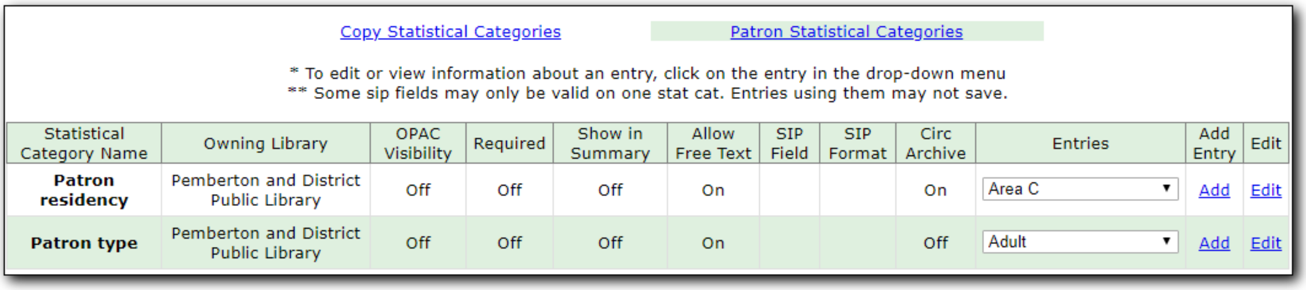


4. Clicking **Edit** on the above screen allows you to change the stat cat name and/or its properties.

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.



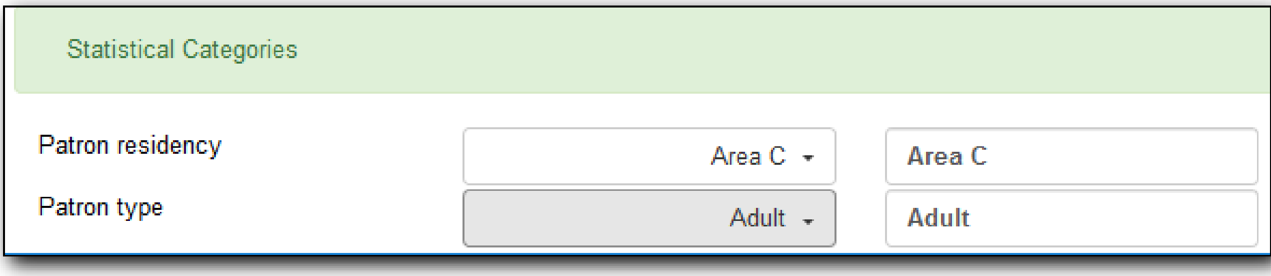
Copy Statistical Categories   Patron Statistical Categories

* To edit or view information about an entry, click on the entry in the drop-down menu
** Some sip fields may only be valid on one stat cat. Entries using them may not save.

Statistical Category Name	Owning Library	OPAC Visibility	Required	Show in Summary	Allow Free Text	SIP Field	SIP Format	Circ Archive	Entries	Add Entry	Edit
Patron residency	Pemberton and District Public Library	Off	Off	Off	On			On	Area C	Add	Edit
Patron type	Pemberton and District Public Library	Off	Off	Off	On			Off	Adult	Add	Edit

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.



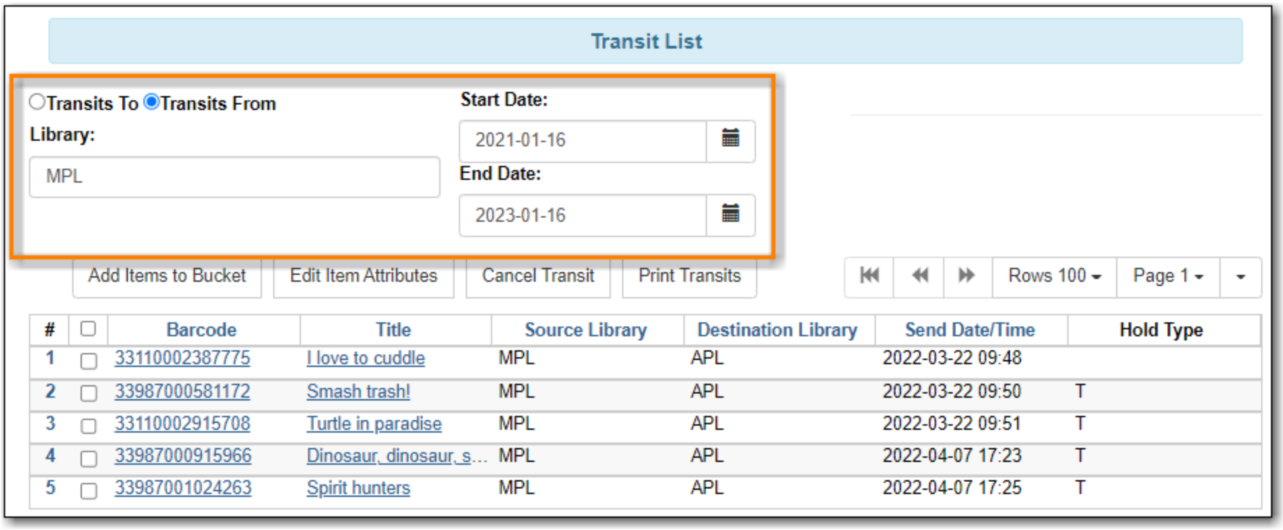
55.19. Surveys

Surveys are not used at this time.

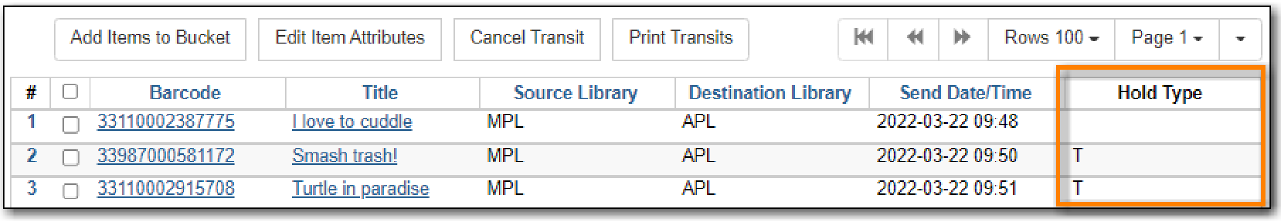
55.20. Transit List

The transit list tracks items that are in transit between libraries. Libraries should check this list on a regular basis for items that have been in transit longer than normal.

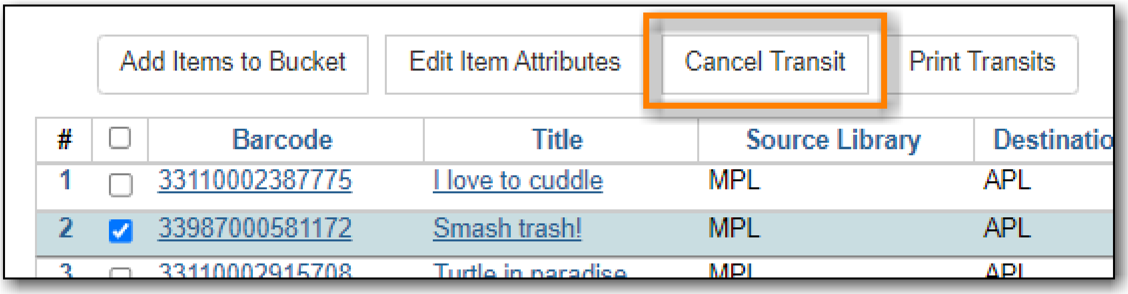
1. Go to **Administration** → **Local Administration** → **Transit List**.
2. Select **Transit To** or **Transit From**.
3. Specify a date range.
4. Multi-branch libraries must select a specific branch to see the items in transit to or from that branch.
5. Items were sent in transit during the date range and are still in transit are listed.



6. Transits with a value in the *Hold Type* column are in transit to fill a hold at another library.



7. Libraries should search for items that have been in transit longer than normal. Libraries may need to search their shelves, contact the library that sent or should have received the item, and/or contact Canada Post or the relevant courier.
8. If you are no longer going to send an item your library owns, select the transit and click the **Cancel Transit** button.



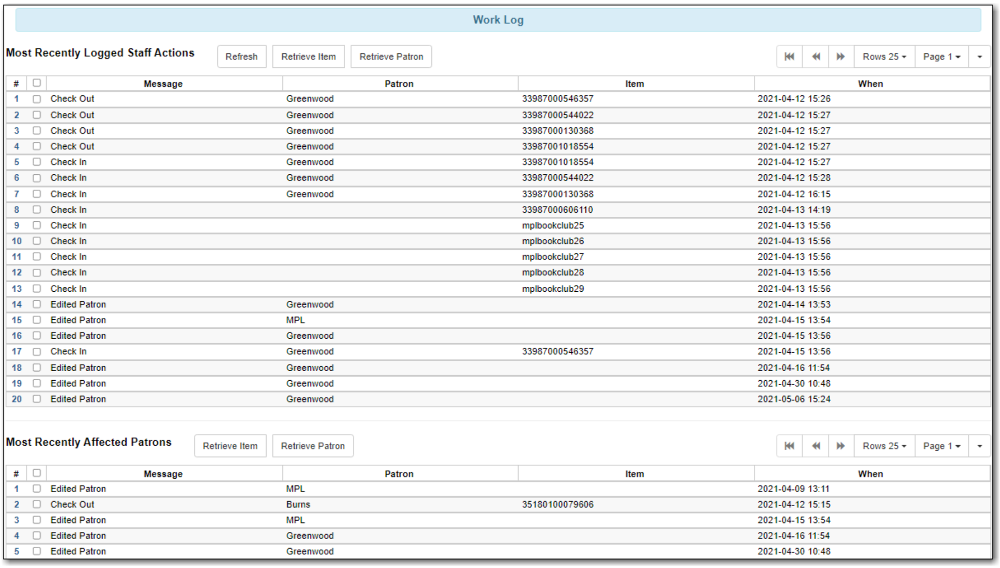
9. If the item cannot be located the owning library should mark it as *Missing*.

55.21. 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.



Chapter 56. Server Administration

Most options under the Server Administration menu are global Sitka settings that cannot be changed locally. The exception includes 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.

56.1. Age Hold Protect Rules

Age based hold protection enables libraries to block holds from being filled for patrons from other libraries or branches until the item has been active for a specified amount of time.

The following age based hold protection rules can be used when applying age based hold protection item attributes.

Item Age	Rule Name	Description
1 month	1_month_among_multi_branch	Block holds from being filled where the pickup library is not the owning library/system for 1 month from the item's active date.
3 months	3_month_among_multi_branch	Block holds from being filled where the pickup library is not the owning library/system for 3 month from the item's active date.
6 months	6_month_among_multi_branch	Block holds from being filled where the pickup library is not the owning library/system for 6 month from the item's active date.
9 months	9_month_among_multi_branch	Block holds from being filled where the pickup library is not the owning library/system for 9 month from the item's active date.
1 year	12_month_among_multi_branch	Block holds from being filled where the pickup library is not the owning library/system for 1 year from the item's active date.

Item Age	Rule Name	Description
1 month	1_month_within_single_branch	Block holds from being filled where the pickup library is not the owning branch for 1 month from the item’s active date.
3 months	3_month_within_single_branch	Block holds from being filled where the pickup library is not the owning branch for 3 month from the item’s active date.
6 months	6_month_within_single_branch	Block holds from being filled where the pickup library is not the owning branch for 6 month from the item’s active date.
9 months	9_month_within_single_branch	Block holds from being filled where the pickup library is not the owning branch for 9 month from the item’s active date.
1 year	12_month_within_single_branch	Block holds from being filled where the pickup library is not the owning branch for 1 year from the item’s active date.

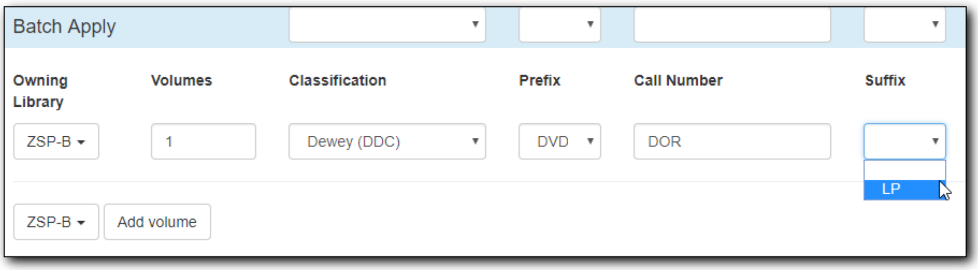
The age based hold protection rules will remain an attribute on the item record after the protection period has passed unless manually removed by library staff via the Holdings Editor.

To see a list of items with the age based hold protection item attribute applied use the report template *Age Based Hold Protection: Items with Age Based Hold Protection* found under in the reporter under *Shared Folders* → *Templates* → *Sitka_templates* → *Collection* → *Copy List by Item Attributes*.

56.2. 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.

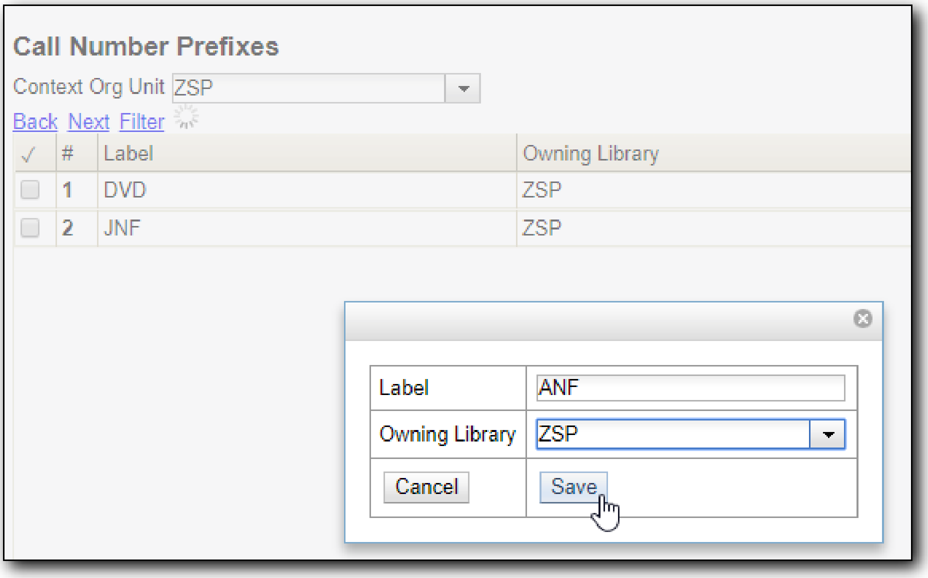
This is how it looks on the call number creating/editing screen.



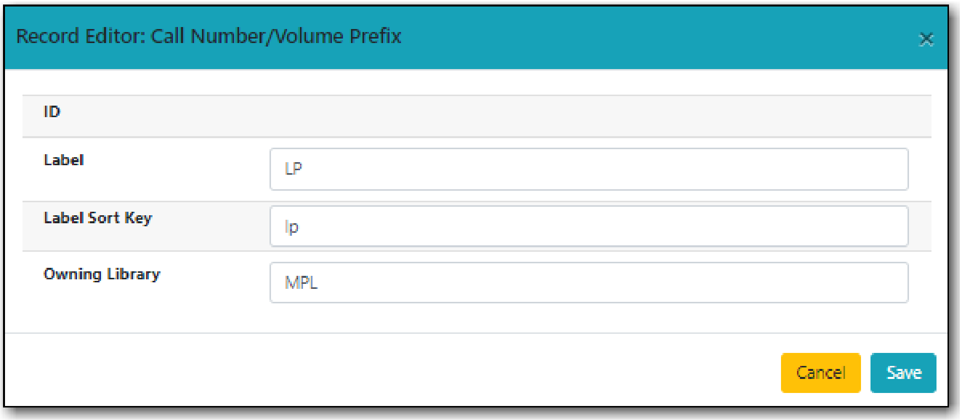
1. To create a call number prefix or suffix, go to **Administration** → **Server Administration- > Call**

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.

56.3. 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
unique-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

56.4. 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.

56.5. 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.

56.6. Item Statuses

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

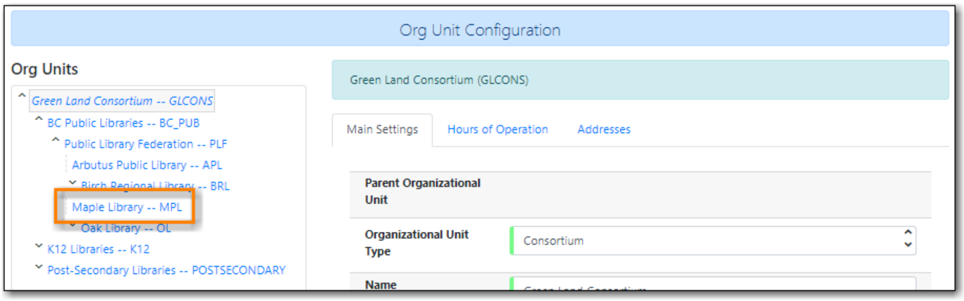
TIP

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.

56.7. Organizational Units

Anyone with access to the staff client may view these settings, but only staff with a local system administrator account can make changes for their library.

1. Go to **Administration** → **Server Administration** → **Organizational Units**.
2. Find your library in the tree on the left side of the screen. You may need to expand the arrows.
3. Click on your library name to open the settings for your library. Multi-branch library systems will see an entry for each branch.

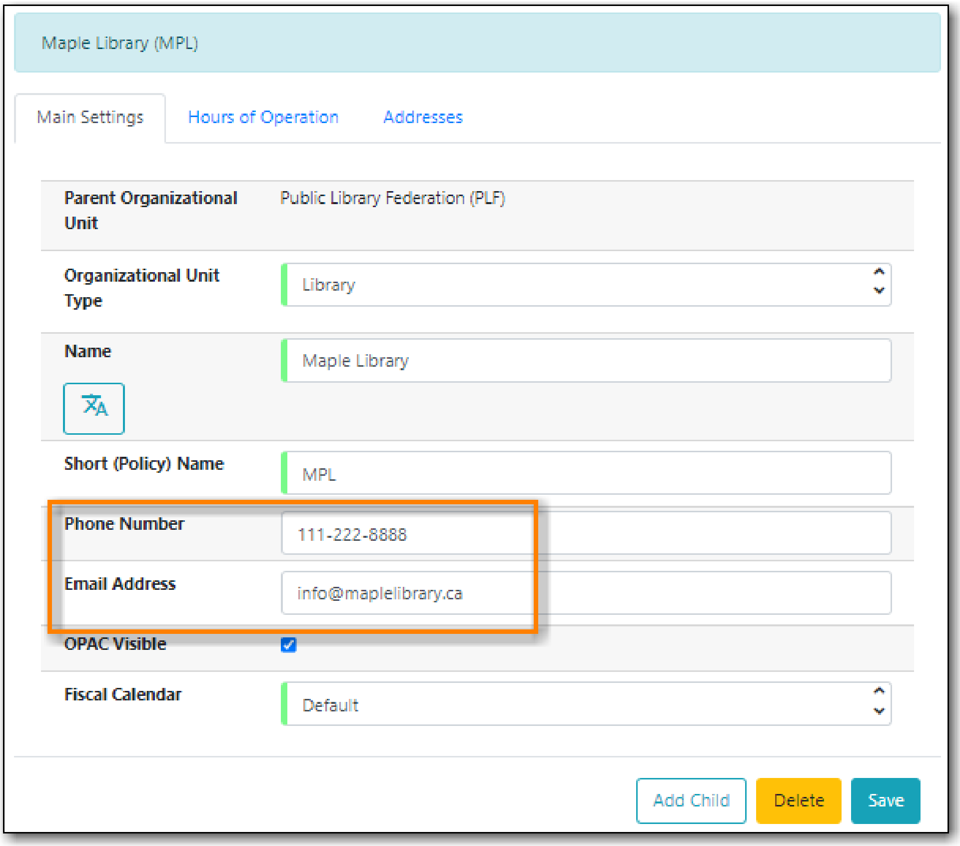


4. Click on the relevant tab to update your main settings, hours of operation, and addresses.

56.7.1. Library Main Settings

Local system administrators can add or update the library's main contact information on the *Main Settings* tab for their library. Multi-branch libraries can enter information at the system level and/or the branch level.

1. Enter or update the information in the *Phone Number* and/or *Email Address* fields.



2. Click **Save**.
3. Evergreen will use this information in notifications that go out to patrons as well as in your public catalogue.

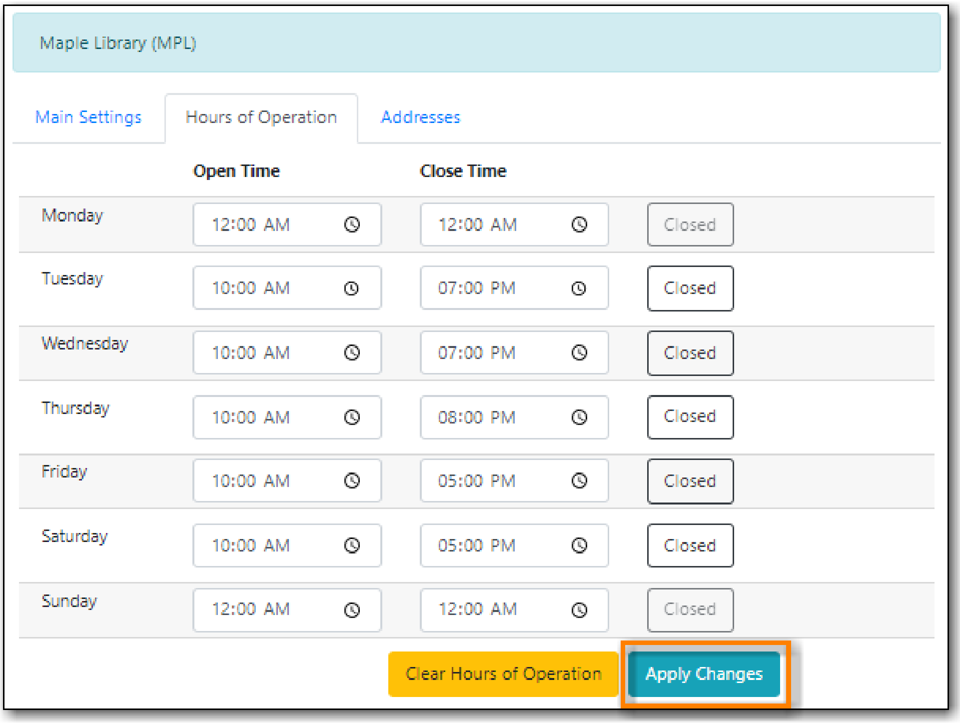
56.7.2. Library Hours of Operation

Local system administrators can add or update the library's hours of operation on the *Hours of Operation* tab. Multi-branch libraries should enter information at the branch level.

These are the library's regular weekly hours; holidays and other closures are recorded in the Closed

Dates Editor.

1. Enter the open and closed times you would like. Click **Closed** for any days where you are closed for the entire day.
2. Click **Apply Changes**.



3. Evergreen will use this information when calculating due dates, overdue fines, and for hold targeting. This information will also display in your public catalogue.

NOTE

Hours of operation and closed dates affect due dates, overdue fines, and hold targeting.

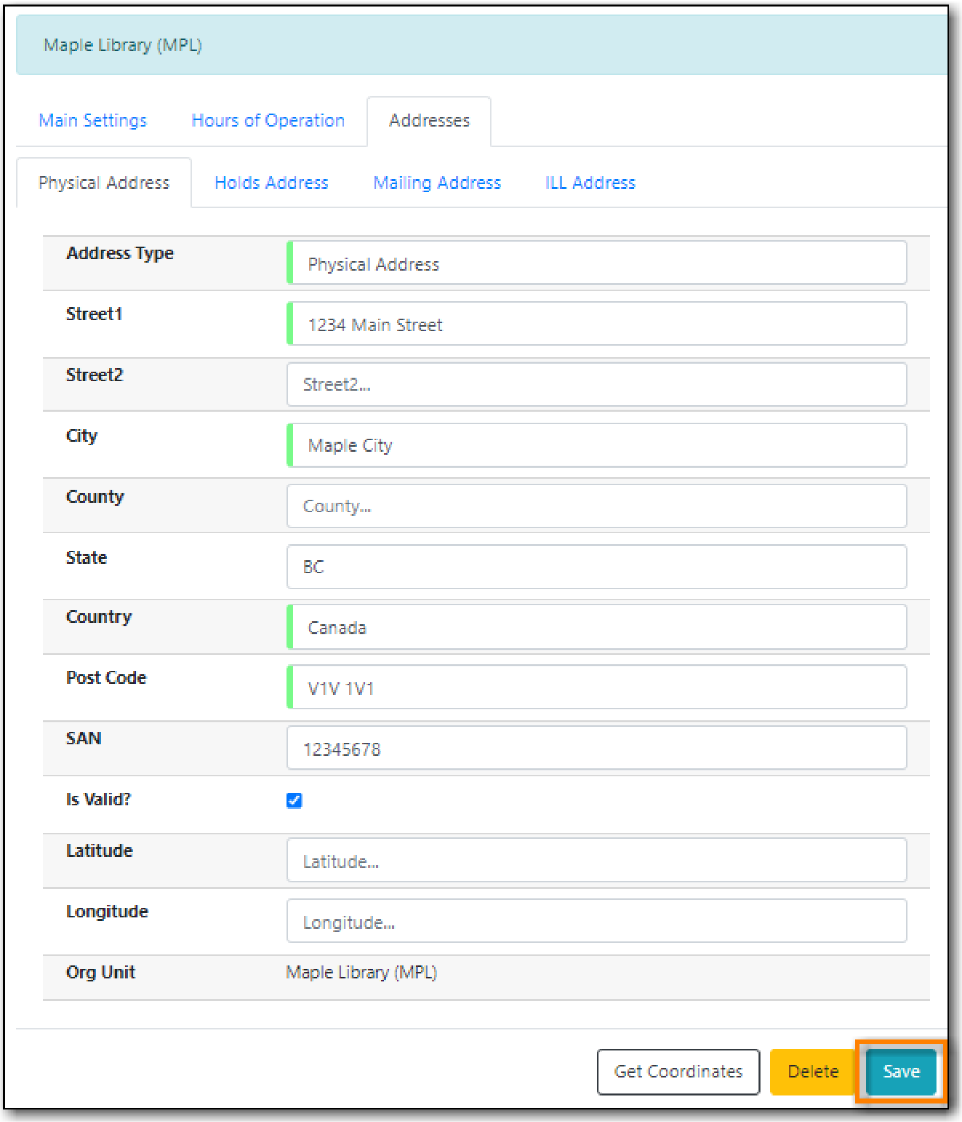
- Due dates: Due dates that would fall on closed days are automatically pushed forward to the next open day.
- Overdue fines: Overdue fines are not charged on days when the library is closed unless the library setting *Charge fines on overdue circulations when closed* is set to TRUE.
- Hold Targeting: Items at a closed library will not be targeted for holds unless the library setting *Target copies for a hold even if copy's circ lib is closed* or *Target copies for a hold even if copy's circ lib is closed IF the circ lib is the hold's pickup lib* is set to TRUE.

56.7.3. Library Addresses

Local system administrators can add or update the library's addresses on the *Addresses* tab. Multi-branch libraries should enter information at the branch level.

1. Enter or update the information on the applicable subtabs on the *Addresses* tab.
2. Ensure *Is Valid?* is checked for all valid addresses.

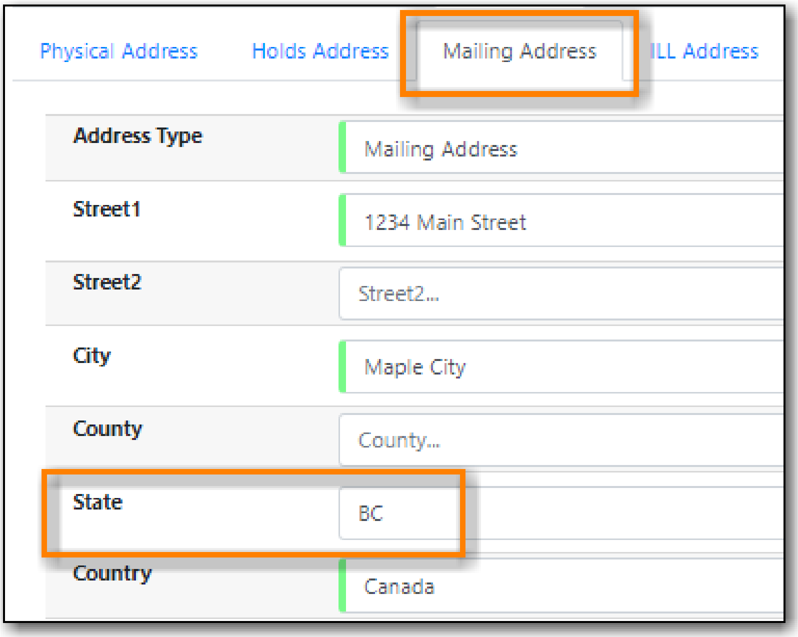
3. Click **Save**.



4. Repeat for additional subtabs.
5. Evergreen will use this information on hold slips, hold transit slips, in notifications sent to patrons, and in your public catalogue. Libraries should ensure information is entered for all four address types as Evergreen uses different addresses for different functions.

CAUTION

The value in the *State* (Province) field on the *Mailing Address* subtab MUST be set to BC for BC libraries, MB for Manitoba libraries, and ON for Ontario libraries. This field is used to generate the URL in email notifications to take patrons to My Account in your public catalogue. If the province is not entered correctly the links sent to your patrons in your email notifications will not work.



Physical Address
Holds Address
Mailing Address
ILL Address
Address Type
Mailing Address
Street1
1234 Main Street
Street2
Street2...
City
Maple City
County
County...
State
BC
Country
Canada

Chapter 57. 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 58. Public Catalogue Customizations

Certain things in your public catalogue can be customized for you by Sitka staff. Making these changes takes time so please ensure you contact Co-op Support with your requested changes at least one week before you want the changes live.

58.1. Appearance

Each library can customize the Evergreen public catalogue with their logo and colours.

The logo should be sent to xref:[Co-op Support] as a .png file.

NOTE	Co-op Support recommends thinking about how your logo will display on different devices. Large or long logos may not display well when the public catalogue is viewed on a mobile device.

There can be separate colours for:

- the header
- the footer
- the buttons (search, clear form, my account)
- the facets (to the left of the search results)

Please provide the colours you want in their hex codes. If you like a colour used on another Sitka library's public catalogue let us know and we can pull the hex code from their site.

By default there are two links in the header - *Library Home* and *My Account*. Additional links can be added to point to other resources and pages the library wishes to include. To have a link added please send both the link and the text to display to Co-op Support.

By default the public catalogue displays just the date for due dates. Libraries that have hourly loans can choose to have the due date time included; the due date time will display for all check outs, not just hourly loans.

A temporary banner with text and links can be applied across the top of your public catalogue. The yearly banner for Sitka's Evergreen upgrade will override local banners.

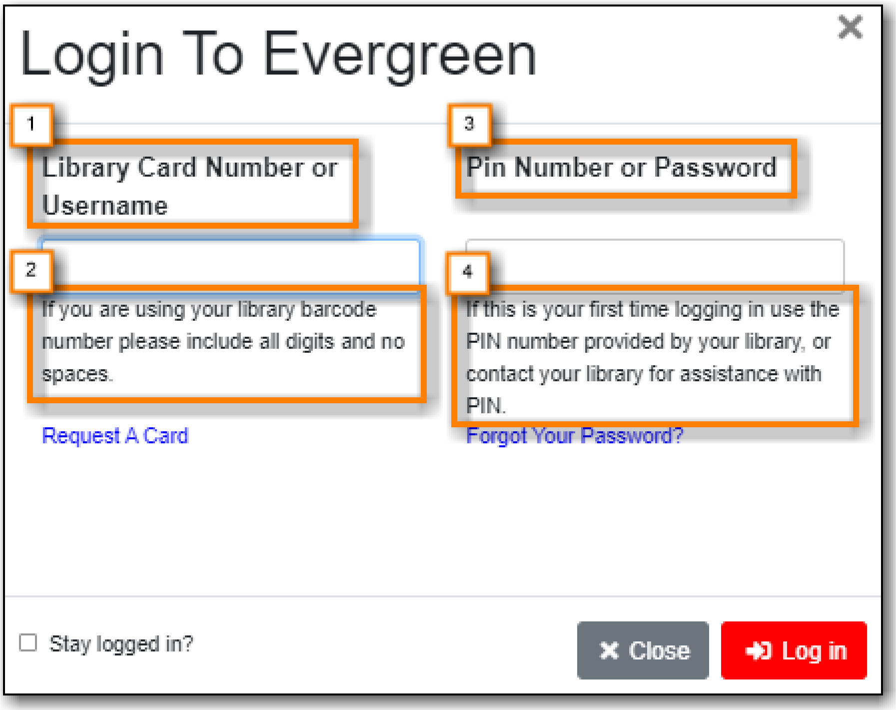
58.2. Search Library Scope

Libraries participating in reciprocal borrowing agreements that allow patrons to place holds, like Interlibrary Connect, have three option for how their public catalogue scopes.

1. Only your library displays in the search library list
2. All libraries in your zone display in the search list and your library is the default
3. All libraries in your zone display in the search list and the top organization in the zone is the default

58.3. My Account Login

The text on the My Account login page can be customized if your library has specific information that patrons need for logging in that isn't covered by the default text.



1. Username Label
    a. This text can be customized.
2. Username Hint
    a. This text can be customized.
3. Password Label
    a. This text can be customized.
4. Password Hint
    a. This text can be controlled by the library setting *uses phone as default pin* which switches the text between wording about a default PIN or using the last 4 digits of the patron's phone number.
    b. This text can also be customized if neither option covers the information your patrons need.

58.4. Patron Settings

The ability for a patron to change their email can be disabled for libraries that require patrons to use an institution issued email address.

The ability for a patron to change their password can be disabled for libraries that use single-sign on or similar products.

The ability for a patron to select hold notification by phone can be disabled for libraries that never contact patrons by phone.

The password strength message can be customized if your library requires different criteria than Evergreen’s default.

Chapter 59. 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.

Staff can only delete cards and accounts for patrons whose home library is their library or one of their branches. In some cases staff may need to update a patron's home library in order for an account to be deleted.

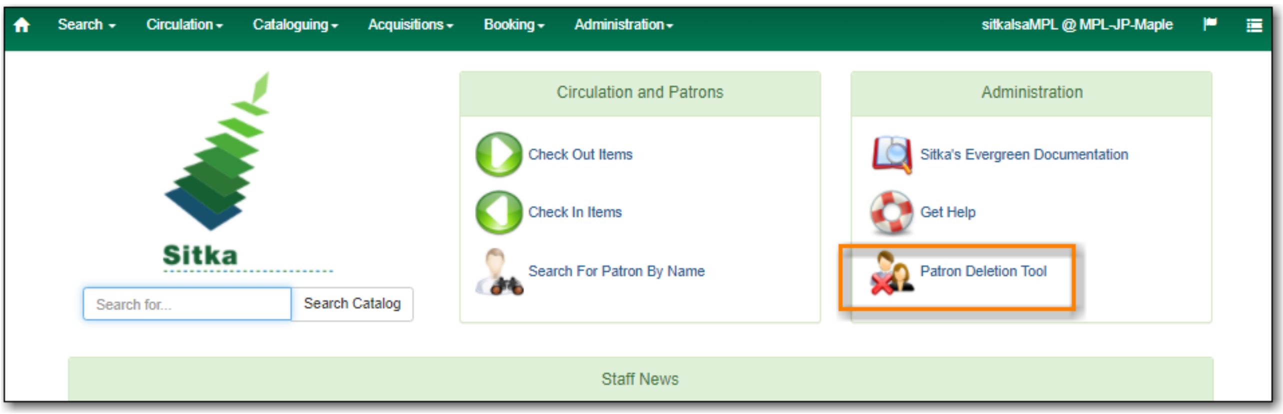
Scenario	Action
An active patron lost a card and was issued a new one (using Replace Barcode)	Delete the lost card (optional)
A patron is no longer active and their account should be removed completely	Delete patron account
An active patron has more than one account	Merge the accounts. Choose the card number that you want to keep as the lead record. See Merging Patron Accounts.

CAUTION	Evergreen checks against all patrons (un-deleted and deleted) to determine whether a username is available to be used. If the patron has not changed the username it will match their barcode. If there is any possibility that the username or barcode will be needed in the future staff should prefix the username on the current account with DELETED before deleting the account.

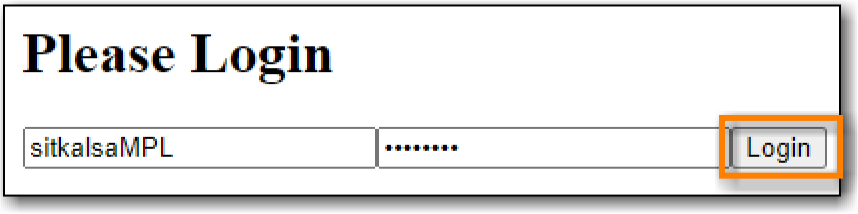
59.1. Accessing the Patron Deletion Tool

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.



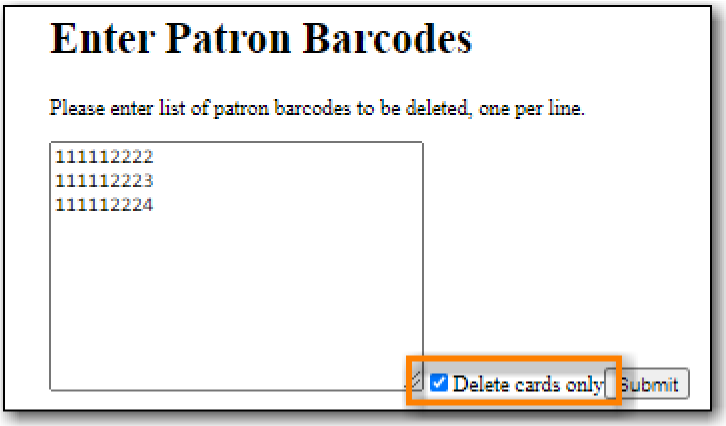
2. The Patron Deletion Tool will open in a new tab. Enter a local system administrator username and password and click **Login**.



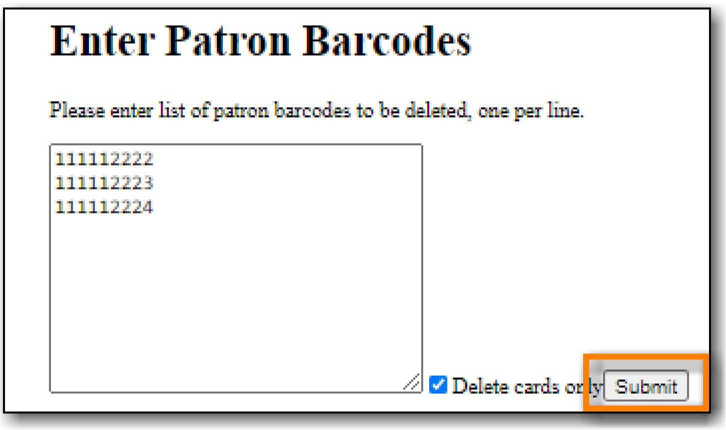
59.2. Deleting Inactive Cards

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.

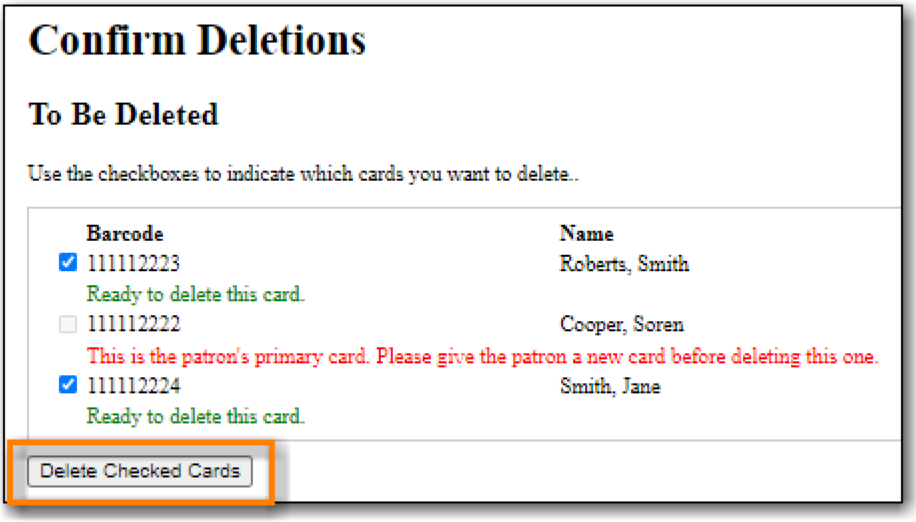
1. In the Patron Deletion Tool enter the barcodes for the cards to be deleted (one barcode per line).
2. Check the box for **Delete cards only**.



3. Click **Submit**.



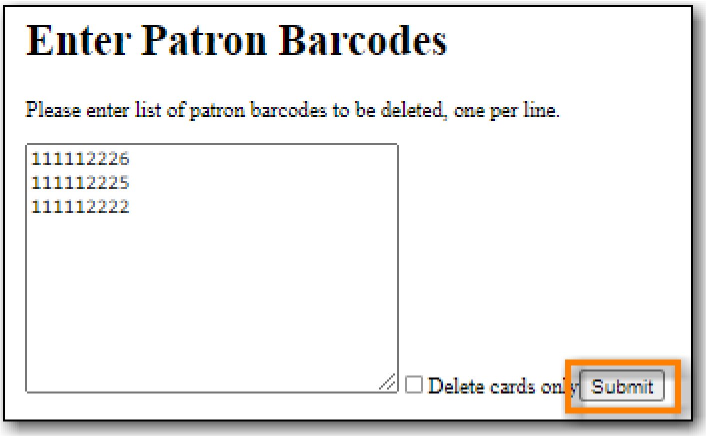
4. The confirmation page will appear. Confirm which cards you'd like to delete and click **Delete Checked Cards**.



5. The deletion report lists successfully deleted cards.

59.3. 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**.



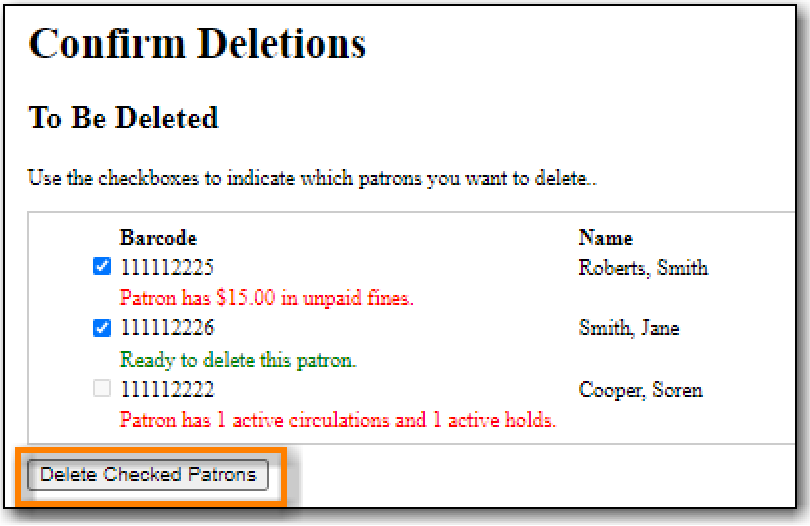
4. The confirmation page will appear.

NOTE

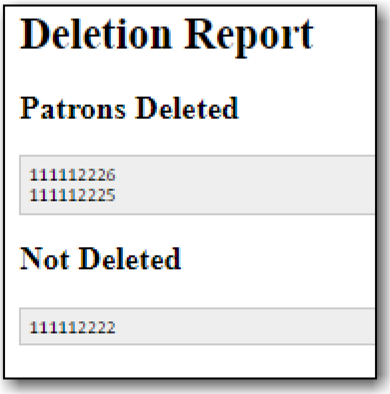
The deletion tool will flag any accounts with the following:

- Unpaid bills - bills are voided if the account is deleted
- Open circulations - account cannot be deleted until open circulations are resolved by staff
- Active holds - account cannot be deleted until holds are cancelled by staff

5. Confirm which patron accounts you'd like to delete and click **Delete Checked Patrons**.



6. 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.

59.4. Undeleting Patron Accounts

Patron accounts CANNOT be undeleted through the Evergreen staff client. Library staff should always double check to ensure they are deleting the correct accounts.

Please contact Co-op Support if an account has been accidentally deleted. You must include the account username in your ticket.

Chapter 60. 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.

60.1. Creating Library Staff Accounts

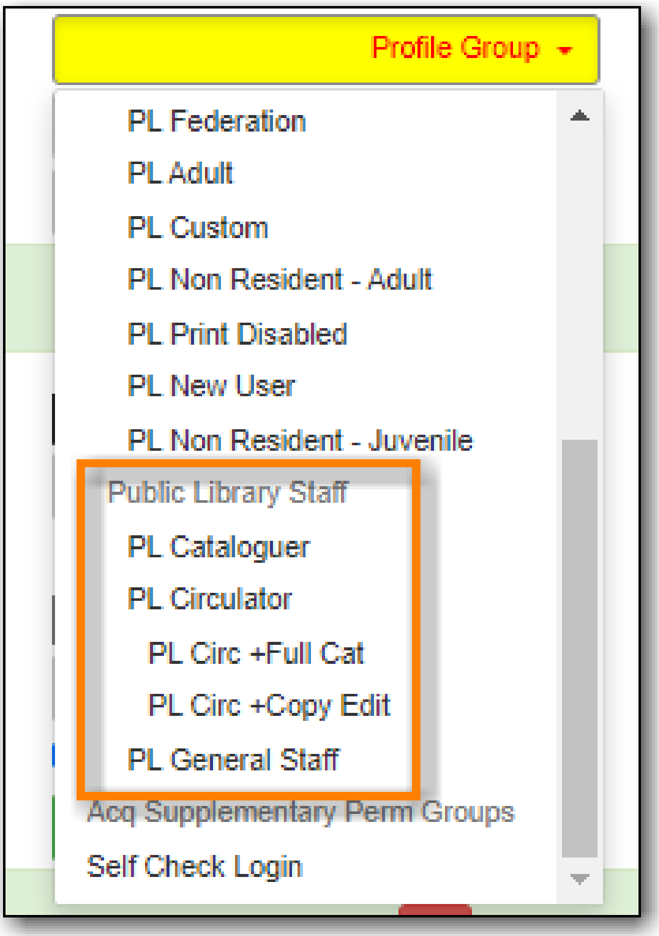
Sitka Training Video - Creating Library Staff Accounts (4:46)

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.



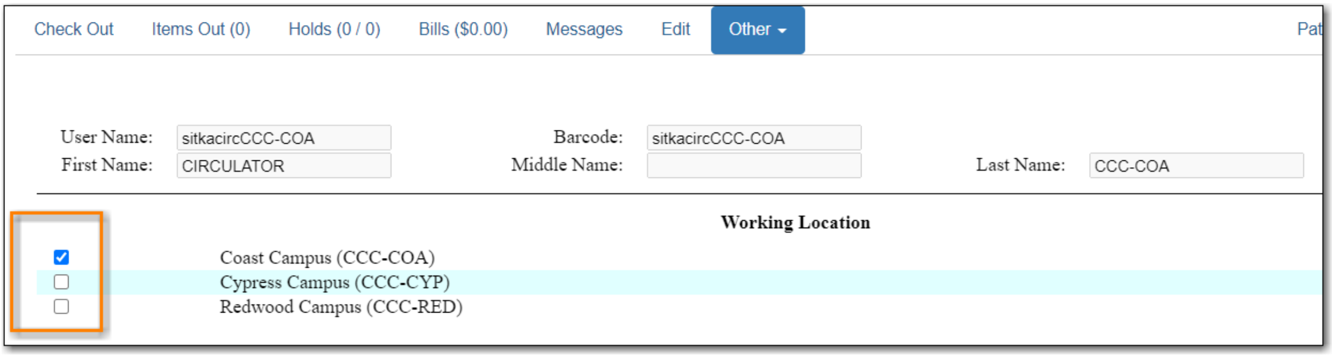
This example shows public library staff permission groups. A similar list of groups is available for each library type.

60.1.1. 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.

60.2. 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.

60.3. Resetting Staff Account Password

Sitka Training Video - Managing Passwords(3:14)

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**.

60.4. 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.

60.5. 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.

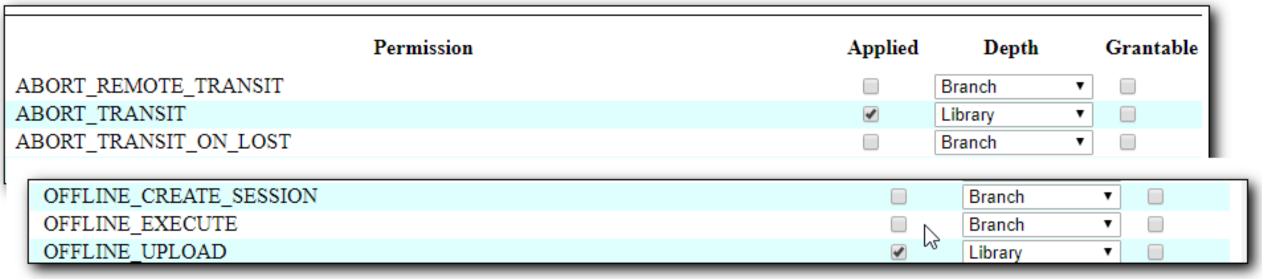
The report template *Staff Assigned to Supplementary Permission Group(s)* can be used to generate a list of staff at your library who have a secondary permission group assigned to their account. This template is found under Shared Folders → Templates → Sitka_templates → Patrons → Others.

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).

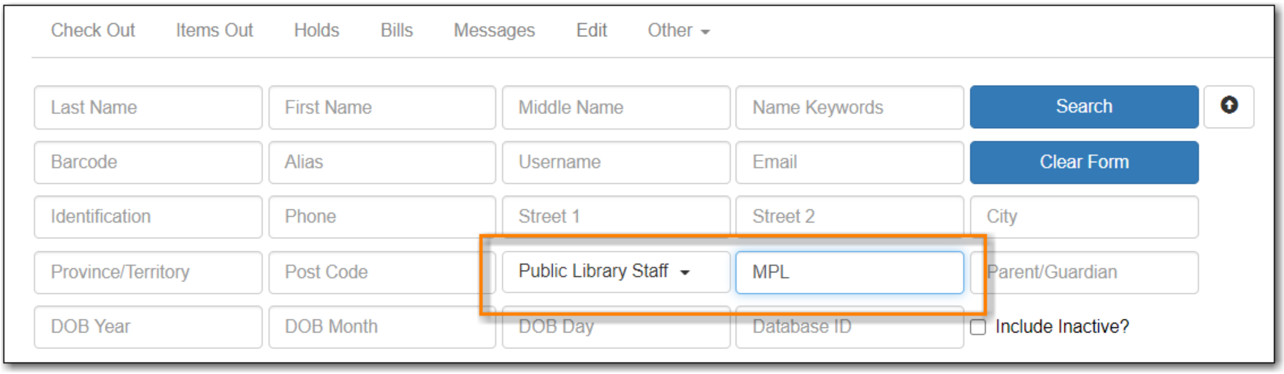
60.6. Searching for Library Staff Accounts

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.

60.7. 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.

Additionally, if the staff member had access to any other library accounts, such as generic accounts, those staff accounts must have their passwords updated.

60.7.1. 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 61. 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

61.1. 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.

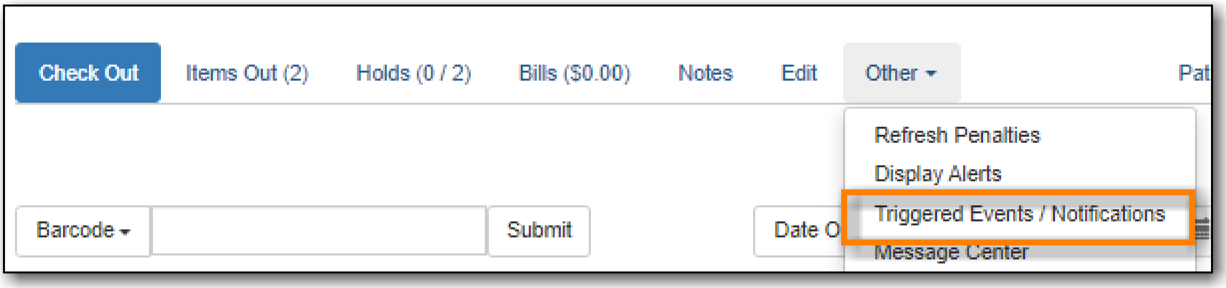
Email notifications from Sitka's Evergreen are not spam and should not be marked as spam by either patrons or staff. If patrons do not wish to receive them they can opt out of receiving most notification emails through the Notification Preferences in *My Account*. When this box is unchecked patrons will not receive courtesy, overdue, autorenew, emergency closing, new patron, patron account expiration, or fine limit exceeded notifications.

61.2. Checking for Notifications

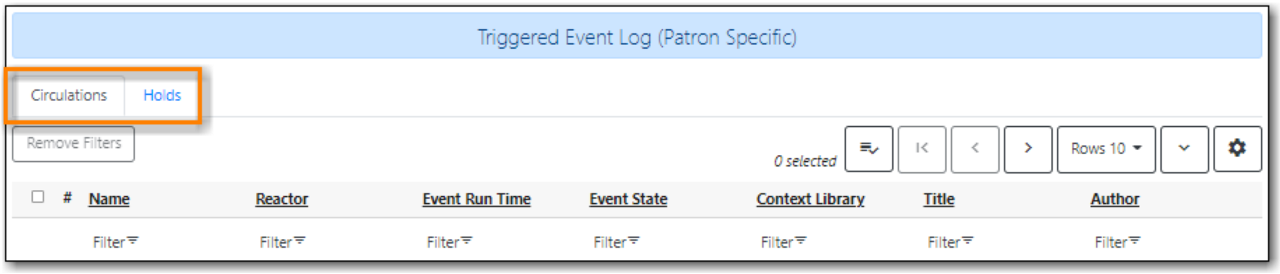
Evergreen keeps a record, called a triggered event, of courtesy, overdue, and hold notifications sent out via email and SMS text message. You can check to see whether or not a notification was generated.

These records are kept for 3 to 6 months, depending on the type of notification.

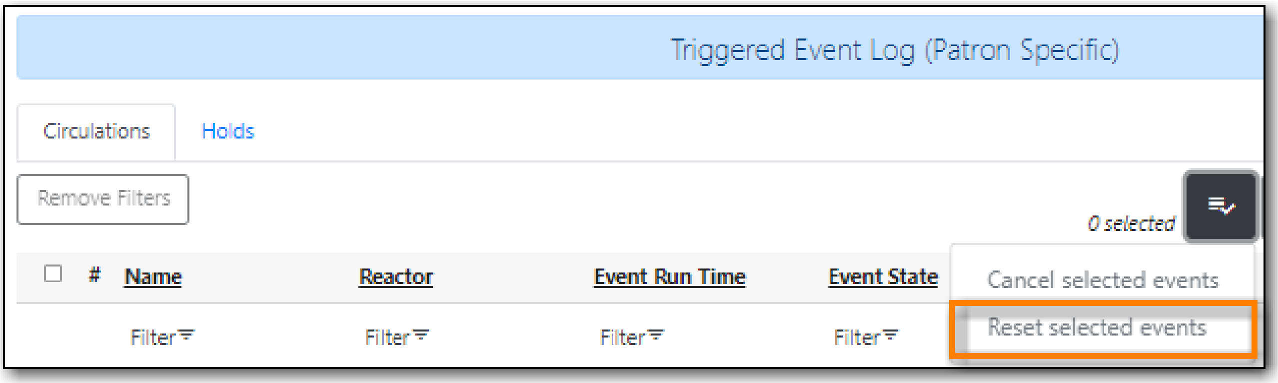
1. To view notifications in the patron account, select **Other** → **Triggered Events/Notifications**.



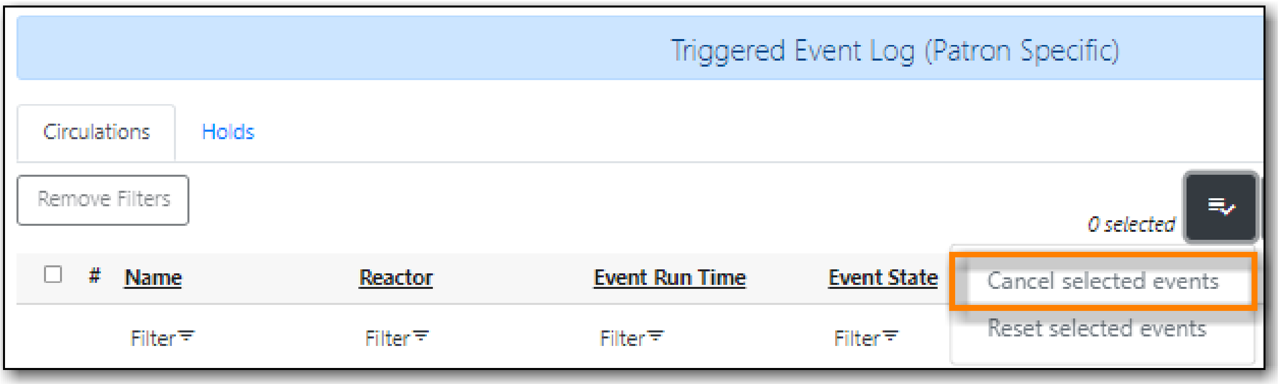
2. By default completed courtesy and overdue notifications are displayed with the oldest notifications listed first.
3. You can use the tabs to switch between circulation and hold events.



4. You can re-send a completed notification by selecting it and clicking **Reset selected events**.



5. You can cancel a pending notificiation by selecting it and clicking **Cancel selected events**.



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.

61.3. 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 receive 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.

61.3.1. 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.

61.3.2. 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.

61.4. 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.

61.4.1. 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.

61.4.2. 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.

61.4.3. 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.

61.4.4. 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.

61.5. Circulation Notifications

61.5.1. 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.

61.5.2. 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.

61.5.3. 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.

61.6. 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.

61.6.1. 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.

61.6.2. 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.

61.6.3. 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.

61.6.4. 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.

61.6.5. 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.

61.7. Patron Account Related Notifications

61.7.1. 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.

61.7.2. 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.

61.7.3. 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.

61.7.4. 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.

61.7.5. 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 62. 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 41. 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

Appendix B: Character Codes for Leader and 008 Field Grid

This table lists the abbreviations used in Evergreen's Leader and 008 Field Grid for the characters of the Leader and 008. Please refer to MARC 21 Format for Bibliographic Data/ Normes MARC 21 for more information on particular characters.

Evergreen Code	Field	Character(s)	Name
AccM	008	24-29	Accompanying Matter
Alph	008	33	Original Alphabet or Script of Title
Audn	008	22	Target Audience
Biog	008	34	Biography
BLvl	Leader	07	Bibliographic Level
Comp	008	18-19	Form of Composition
Conf	008	29	Conference Publication
Cont	008	24-27	Nature of Contents
CrTp	008	25	Type of Cartographic Material
Ctrl	Leader	08	Type of Control
Ctry	008	15-17	Place of Publication, Production or Execution
Date1	008	07-10	Date 1
Date2	008	11-14	Date 2
Desc	Leader	18	Descriptive Cataloguing Form
Dtst	008	06	Type of Date/Publication Status
ELvl	Leader	17	Encoding Level
EntW	008	24	Nature of Entire Work
Fest	008	30	Festschrift
File	008	26	Type of Computer File
Fmus	008	20	Format of Music
Form	008	23 or 29	Form of Item
Freq	008	18	Frequency

Gpub	008	28	Government Publication
Ills	008	18-21	Illustrations
Indx	008	31	Index
Lang	008	33-37	Language
LitF	008	33	Literary Form
LTxt	008	30-31	Literary Text for Sound Recordings
MRec	008	38	Modified Record
Orig	008	22	Form of the Original Item
Part	008	21	Music Parts
Proj	008	22-23	Projection
Regl	008	19	Regularity
Relf	008	18-21	Relief
SpFm	008	33-34	Special Format Characteristics
Srce	008	39	Cataloging Source
SrTp	008	21	Type of Continuing Resource
Tech	008	34	Technique
Time	008	18-20	Running Time for Motion Pictures and Videorecordings
TMat	008	33	Type of Visual Material
TrAr	008	33	Transposition and Arrangement
Type	Leader	06	Type of Record

Appendix C: Report Definition Examples

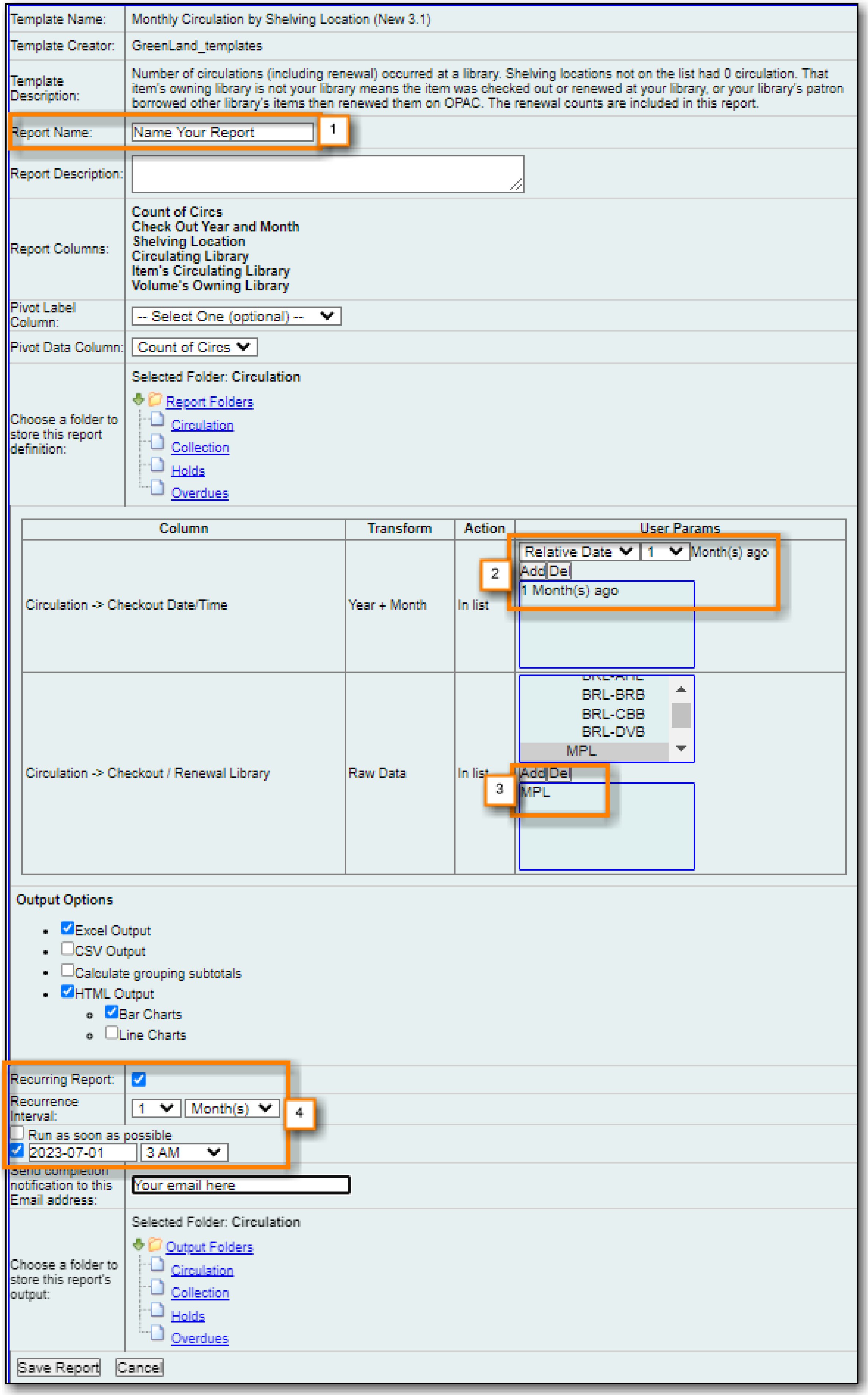
C.1. Circulation Related Statistics

C.1.1. Monthly Circulation by Shelving Location (New 3.1)

Found under Shared Folders → Templates → Sitka_templates → Circulation → Monthly Circulation Stats.

Recommended Recurrence Interval: **Monthly**

1. Enter a name that doesn’t include a specific date as this report will run every month. For example, "Monthly Circulation by Shelving Location", not "January Circulation by Shelving Location".
2. Choose **Relative Date** and add **1 Month(s) ago**.
3. Add your library or your branch(es).
4. Check the box for Recurring Report.
    a. Set the **Recurrence Interval** to 1 Month(s).
    b. Check the box beside the date and set the date to the first of the next month.
    c. Set the time to between 1:00am PT and 4:00am PT.

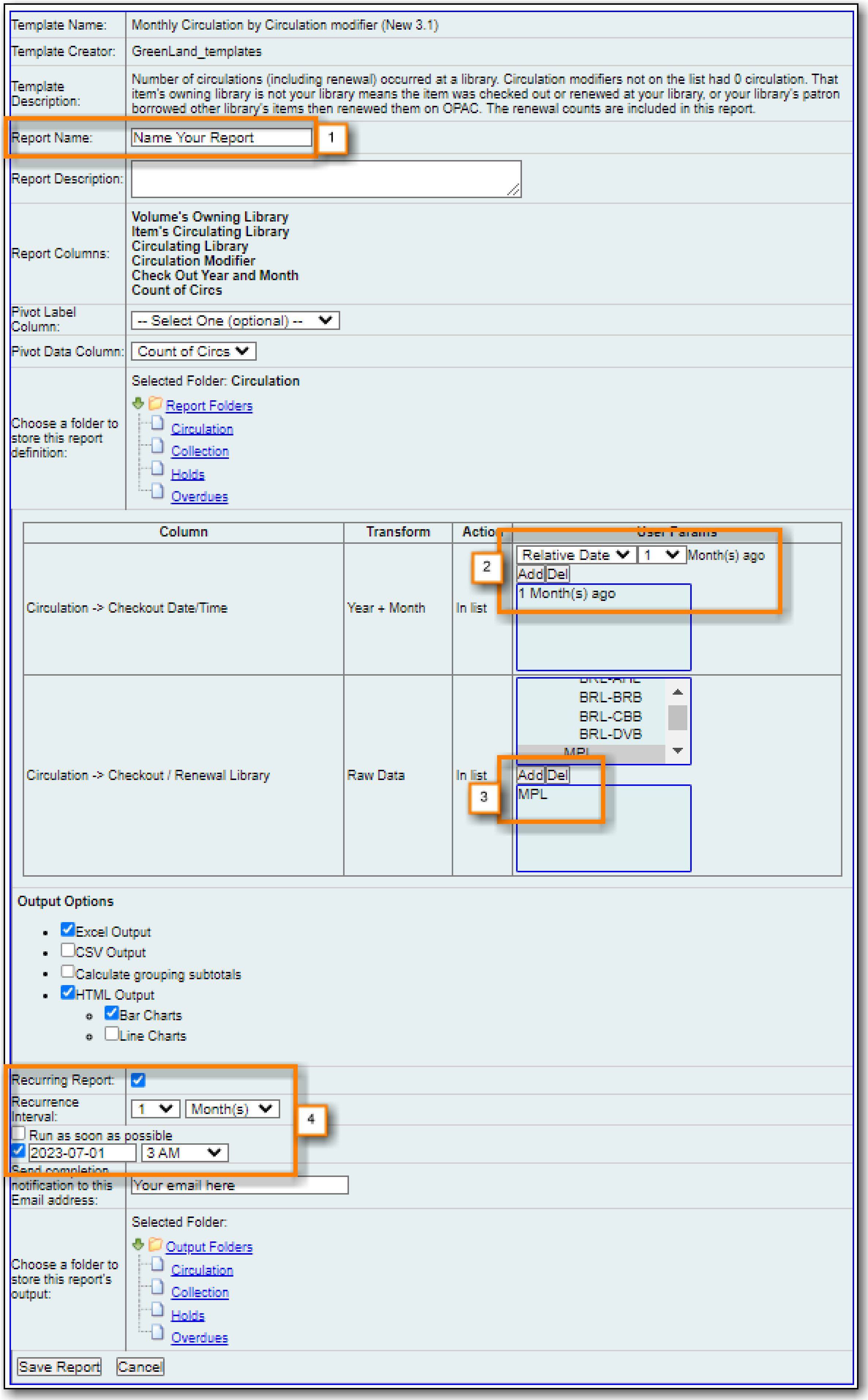

Template Name:
Monthly Circulation by Shelving Location (New 3.1)
Template Creator:
GreenLand_templates
Template Description:
Number of circulations (including renewal) occurred at a library. Shelving locations not on the list had 0 circulation. That item's owning library is not your library means the item was checked out or renewed at your library, or your library's patron borrowed other library's items then renewed them on OPAC. The renewal counts are included in this report.
Report Name:
Name Your Report
1
Report Description:
Report Columns:
Count of Circs
Check Out Year and Month
Shelving Location
Circulating Library
Item's Circulating Library
Volume's Owning Library
Pivot Label Column:
-- Select One (optional) --
Pivot Data Column:
Count of Circs
Choose a folder to store this report definition:
Selected Folder: Circulation
Report Folders
Circulation
Collection
Holds
Overdues
Column
Transform
Action
User Params
Circulation -> Checkout Date/Time
Year + Month
In list
Relative Date
1
Month(s) ago
Add
Del
2
1 Month(s) ago
Circulation -> Checkout / Renewal Library
Raw Data
In list
BRL-BRB
BRL-CBB
BRL-DVB
MPL
Add
Del
3
MPL
Output Options
Excel Output
CSV Output
Calculate grouping subtotals
HTML Output
Bar Charts
Line Charts
Recurring Report:
Recurrence Interval:
1
Month(s)
4
Run as soon as possible
2023-07-01
3 AM
Send completion notification to this Email address:
Your email here
Choose a folder to store this report's output:
Selected Folder: Circulation
Output Folders
Circulation
Collection
Holds
Overdues
Save Report
Cancel

C.1.2. Monthly Circulation by Circulation modifier (New 3.1)

Found under Shared Folders → Templates → Sitka_templates → Circulation → Monthly Circulation Stats.

Recommended Recurrence Interval: **Monthly**

1. Enter a name that doesn't include a specific date as this report will run every month. For example, "Monthly Circulation by Circ Modifier", not "January Circulation by Circ Modifier".
2. Choose **Relative Date** and add **1 Month(s) ago**.
3. Add your library or your branch(es).
4. Check the box for Recurring Report.
   a. Set the **Recurrence Interval** to 1 Month(s).
   b. Check the box beside the date and set the date to the first of the next month.
   c. Set the time to between 1:00am PT and 4:00am PT.



Template Name:	Monthly Circulation by Circulation modifier (New 3.1)
Template Creator:	GreenLand_templates
Template Description:	Number of circulations (including renewal) occurred at a library. Circulation modifiers not on the list had 0 circulation. That item's owning library is not your library means the item was checked out or renewed at your library, or your library's patron borrowed other library's items then renewed them on OPAC. The renewal counts are included in this report.
Report Name:	Name Your Report
Report Description:	
Report Columns:	**Volume's Owning Library** **Item's Circulating Library** **Circulating Library** **Circulation Modifier** **Check Out Year and Month** **Count of Circs**
Pivot Label Column:	-- Select One (optional) --
Pivot Data Column:	Count of Circs
Choose a folder to store this report definition:	Selected Folder: **Circulation** Report Folders Circulation Collection Holds Overdues

Column	Transform	Action	User Params
Circulation -> Checkout Date/Time	Year + Month	In list	Relative Date 1 Month(s) ago Add Del 1 Month(s) ago
Circulation -> Checkout / Renewal Library	Raw Data	In list	BRL-BRB BRL-CBB BRL-DVB MPL Add Del MPL

1

2

3

4

Output Options

- Excel Output
- CSV Output
- Calculate grouping subtotals
- HTML Output
  - Bar Charts
  - Line Charts

Recurring Report:	
Recurrence Interval:	1 Month(s)
Run as soon as possible	
2023-07-01	3 AM
Send completion notification to this Email address:	Your email here
Choose a folder to store this report's output:	Selected Folder: Output Folders Circulation Collection Holds Overdues

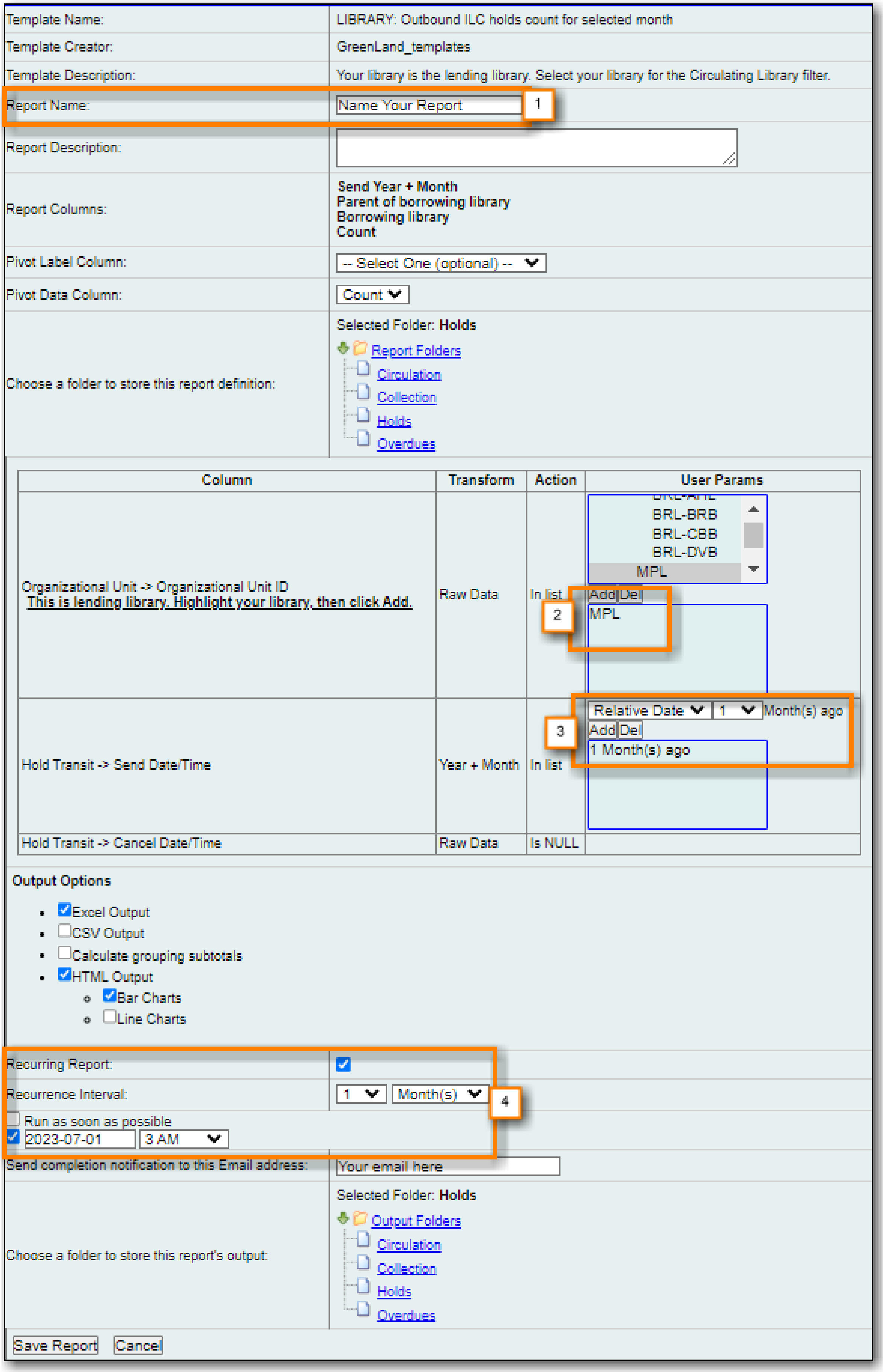
Save Report Cancel

C.1.3. LIBRARY: Outbound ILC holds count for selected month

Found under Shared Folders → Templates → Sitka_templates → Intra-federation ILL stats.

Recommended Recurrence Interval: **Monthly**

1. Enter a name that doesn’t include a specific date as this report will run every month. For example, "Monthly Outbound ILC", not "January Outbound ILC".
2. Add your library.
3. Choose **Relative Date** and add **1 Month(s) ago**.
4. Check the box for Recurring Report.
   a. Set the **Recurrence Interval** to 1 Month(s).
   b. Check the box beside the date and set the date to the first of the next month.
   c. Set the time to between 1:00am PT and 4:00am PT.

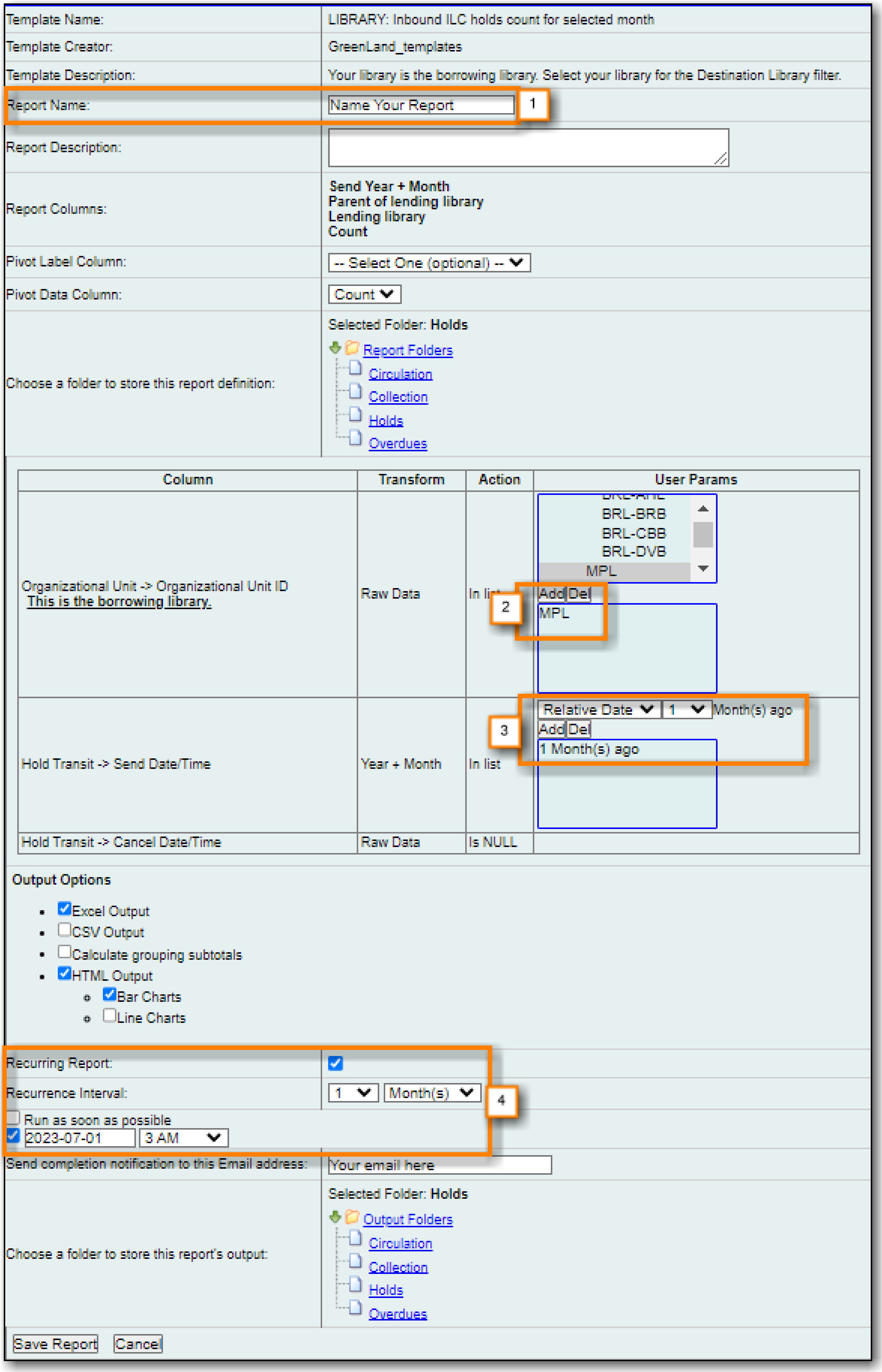


C.1.4. LIBRARY: Inbound ILC holds count for selected month

Found under Shared Folders → Templates → Sitka_templates → Intra-federation ILL stats.

Recommended Recurrence Interval: **Monthly**

1. Enter a name that doesn’t include a specific date as this report will run every month. For example, "Monthly Inbound ILC", not "January Inbound ILC".
2. Add your library.
3. Choose **Relative Date** and add **1 Month(s) ago**.
4. Check the box for Recurring Report.
   a. Set the **Recurrence Interval** to 1 Month(s).
   b. Check the box beside the date and set the date to the first of the next month.
   c. Set the time to between 1:00am PT and 4:00am PT.



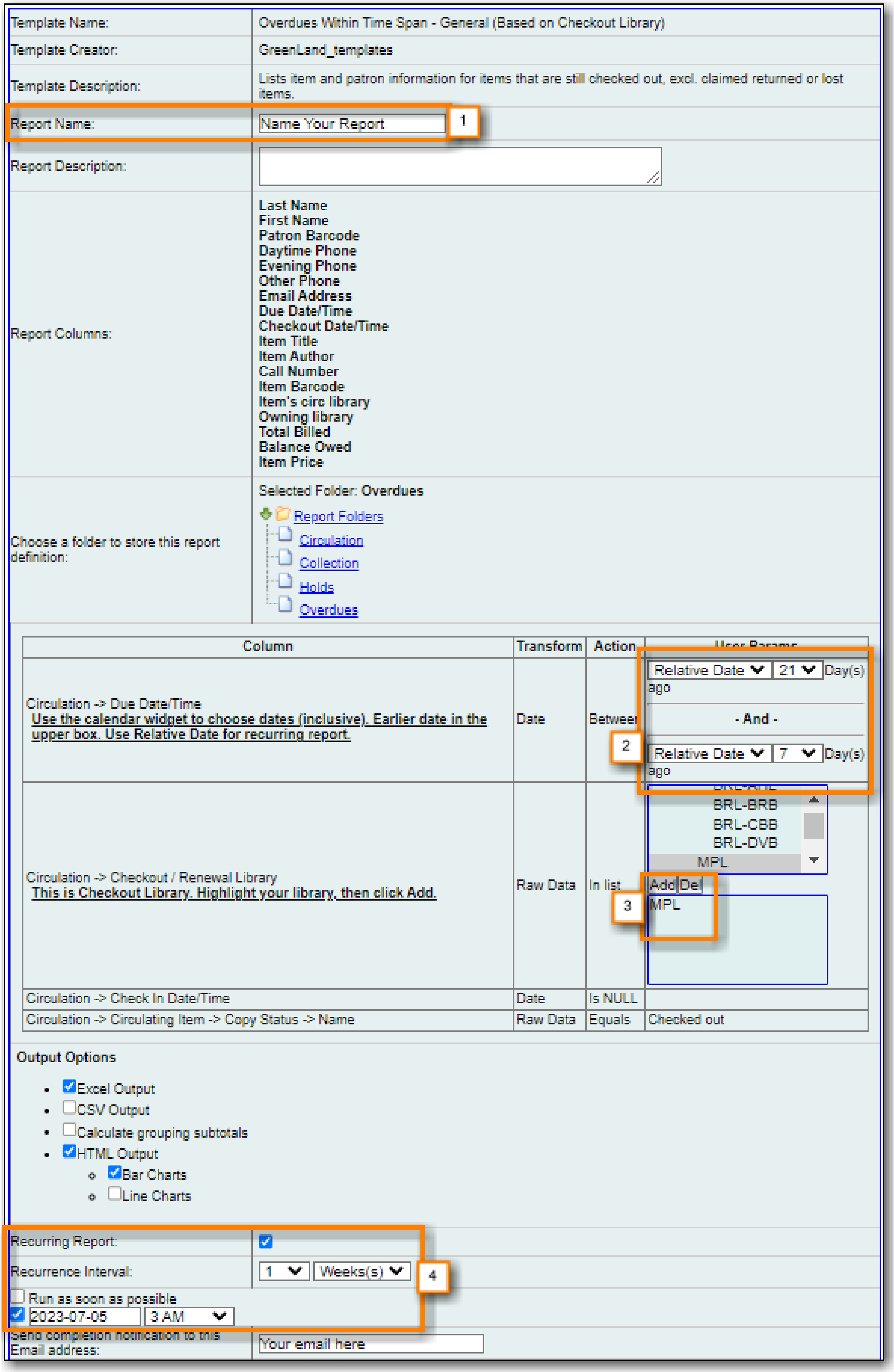
C.2. Collection Management

C.2.1. Overdues Within Time Span - General (Based on Checkout Library)

Found under Shared Folders → Templates → Sitka_templates → Circulation → Overdue and others.

Recommended Recurrence Interval: **Weekly**

1. Enter a name that doesn’t include a specific date as this report will run every week. For example, "Items 7 to 21 Days Overdue" , not "Overdues for January 9th to 23rd".
2. Choose **Relative Date**.
   a. Enter the time period you would like to report on. The earliest date (bigger number) goes first.
   b. If running as a weekly report it can be handy to use increments of 7.
3. Add your library or your branch(es).
4. Check the box for Recurring Report.
   a. Set the **Recurrence Interval** to **1 Week(s)**.
   b. Check the box beside the date and set the date to the first time you want the report to run. The report will run on the same day of the week every week; the example report will run every Wednesday.
   c. Set the time to between 1:00am PT and 4:00am PT.

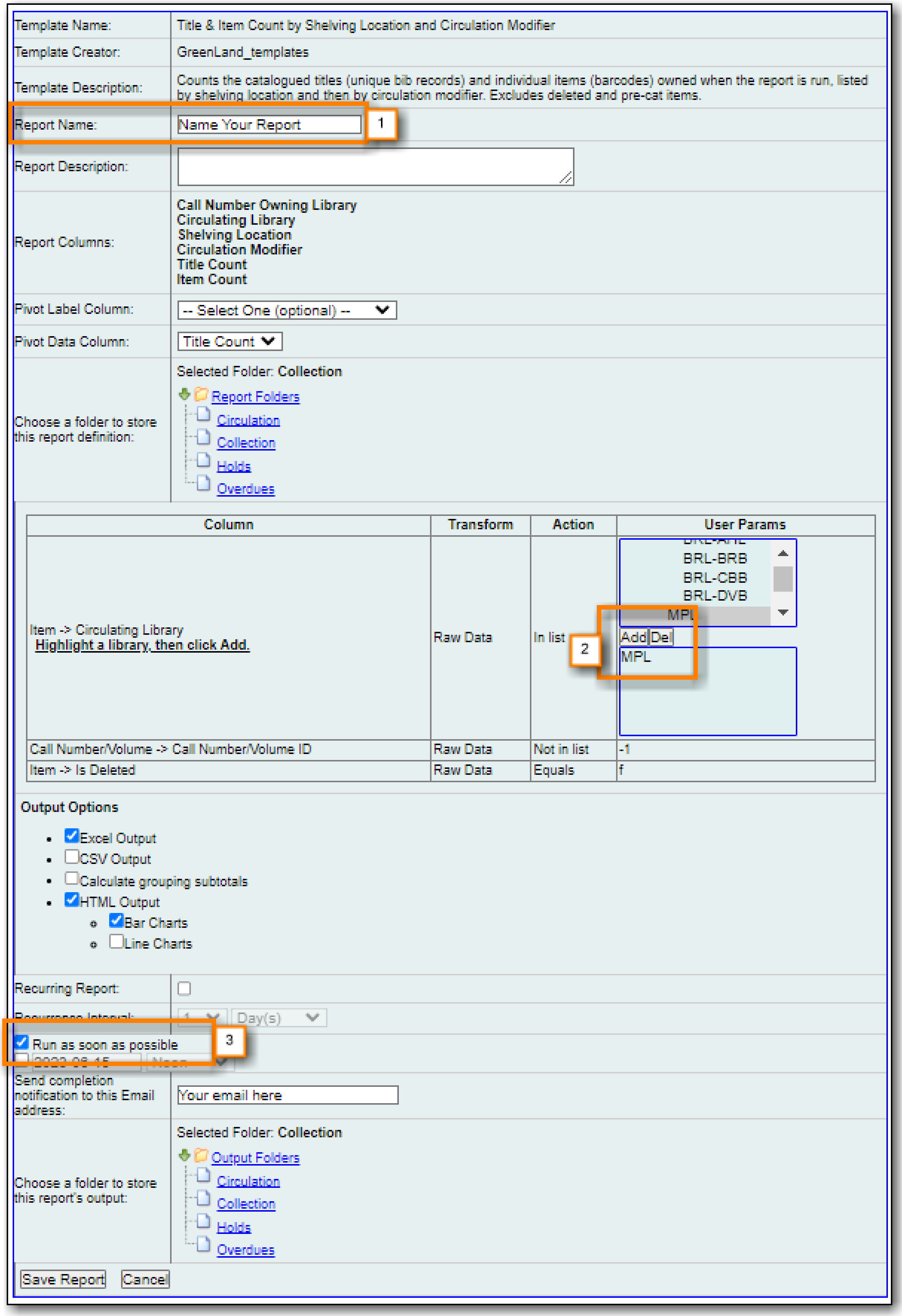


C.2.2. Title & Item Count by Shelving Location and Circulation Modifier

Found under Shared Folders → Templates → Sitka_templates → Collection → Item and Title Count.

Recommended Recurrence Interval: **None, run as needed**

1. Enter a name that includes a specific date as this report will show a snapshot of your collection at the moment the report is run.
2. Add your library or your branch(es).
3. Ensure the box is checked for **Run as soon as possible**.

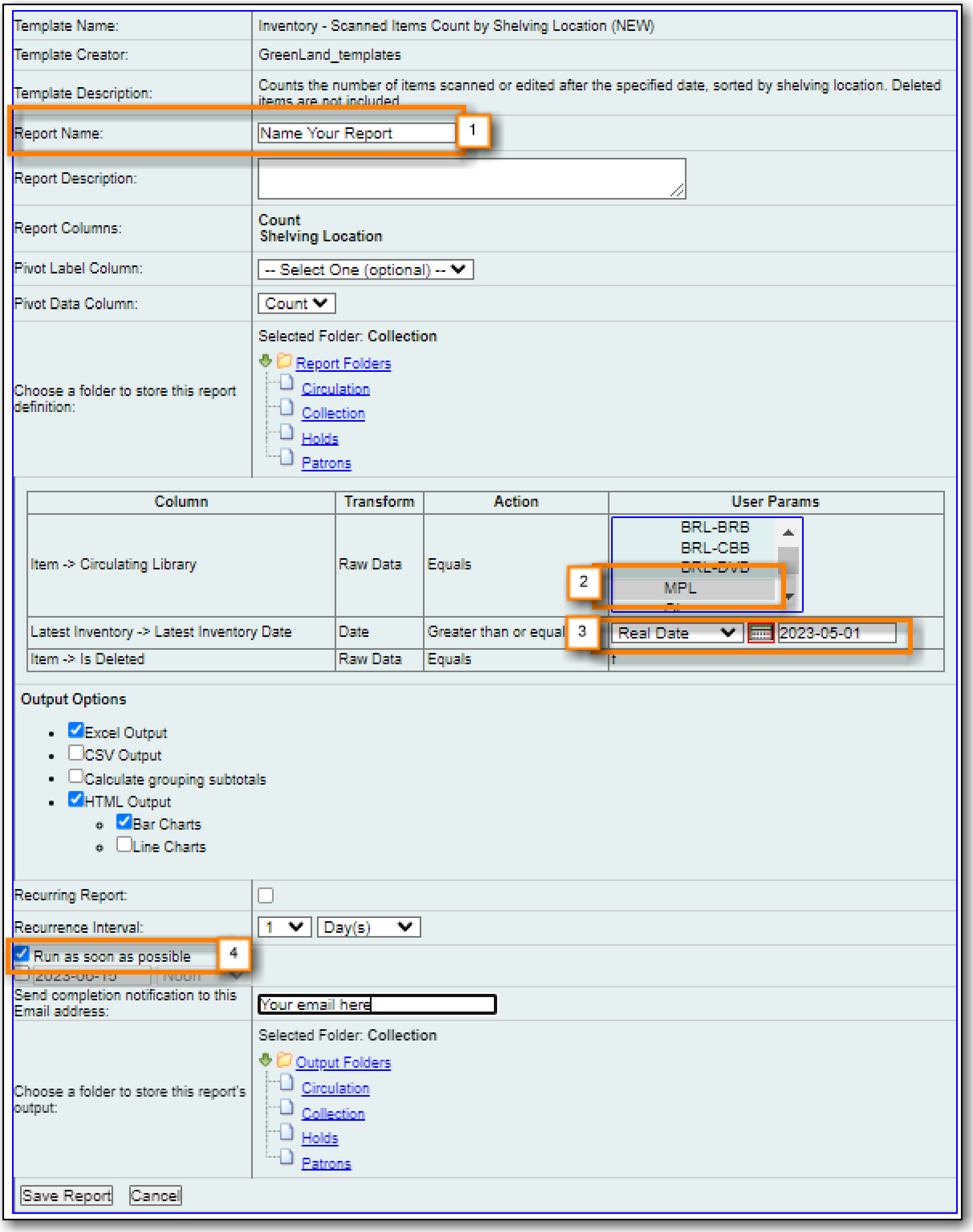


C.2.3. Inventory - Scanned Items Count by Shelving Location (NEW)

Found under Shared Folders → Templates → Sitka_templates → Inventory.

Recommended Recurrence Interval: **None, run as needed**

1. Enter a descriptive name that includes the date on which you ran the report. You will likely run this report several times over the course of performing inventory.
2. Select your library.
3. Enter the date on which you started doing inventory.
4. Ensure the box is checked for **Run as soon as possible**.



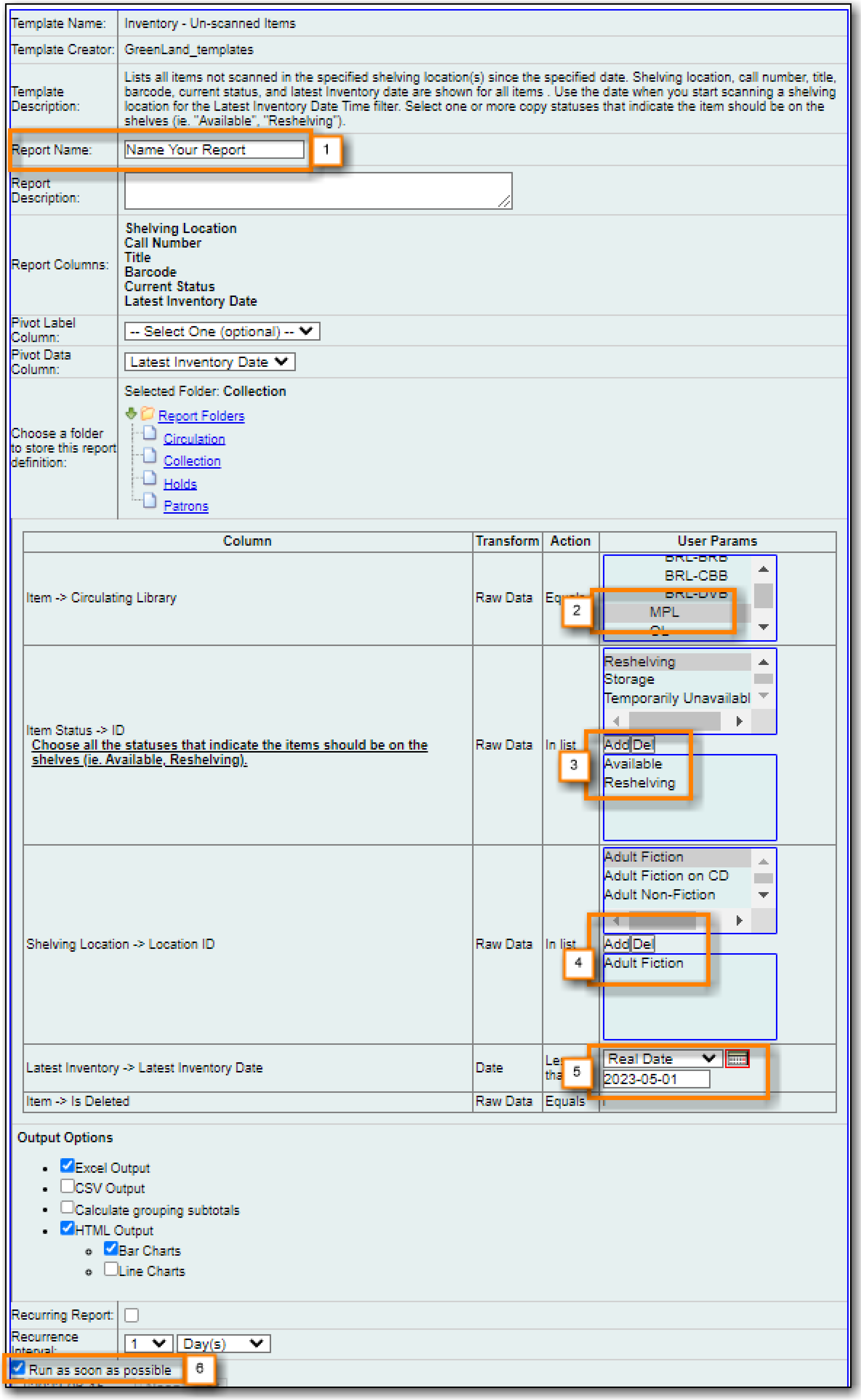
C.2.4. Inventory - Un-scanned Items

Found under Shared Folders → Templates → Sitka_templates → Inventory.

Recommended Recurrence Interval: **None, run as needed**

1. Enter a descriptive name.
2. Select your library.
3. Add the on-shelf statuses for your library such as *Available* and *Reshelving*. With this report you are looking for items in these statuses that should have been on the shelf and scanned for inventory but were not.
4. Add the shelving location(s) you want included in your report.
5. Enter the date on which you started doing inventory.
6. Ensure the box is checked for **Run as soon as possible**.

Found under Shared Folders → Templates → Sitka_templates → Inventory.


Template Name:
Inventory - Un-scanned Items
Template Creator:
GreenLand_templates
Template Description:
Lists all items not scanned in the specified shelving location(s) since the specified date. Shelving location, call number, title, barcode, current status, and latest Inventory date are shown for all items . Use the date when you start scanning a shelving location for the Latest Inventory Date Time filter. Select one or more copy statuses that indicate the item should be on the shelves (ie. "Available", "Reshelving").
Report Name:
Name Your Report
1
Report Description:
Report Columns:
Shelving Location
Call Number
Title
Barcode
Current Status
Latest Inventory Date
Pivot Label Column:
-- Select One (optional) --
Pivot Data Column:
Latest Inventory Date
Choose a folder to store this report definition:
Selected Folder: Collection
Report Folders
Circulation
Collection
Holds
Patrons
Column
Transform
Action
User Params
Item -> Circulating Library
Raw Data
BRL-CBB
MPL
2
Item Status -> ID
Choose all the statuses that indicate the items should be on the shelves (ie. Available, Reshelving).
Raw Data
In list
Reshelving
Storage
Temporarily Unavailabl
Add
Del
Available
Reshelving
3
Shelving Location -> Location ID
Raw Data
In list
Adult Fiction
Adult Fiction on CD
Adult Non-Fiction
Add
Del
Adult Fiction
4
Latest Inventory -> Latest Inventory Date
Date
Real Date
2023-05-01
5
Item -> Is Deleted
Raw Data
Equals
Output Options
Excel Output
CSV Output
Calculate grouping subtotals
HTML Output
Bar Charts
Line Charts
Recurring Report:
Recurrence Interval:
1
Day(s)
Run as soon as possible
6

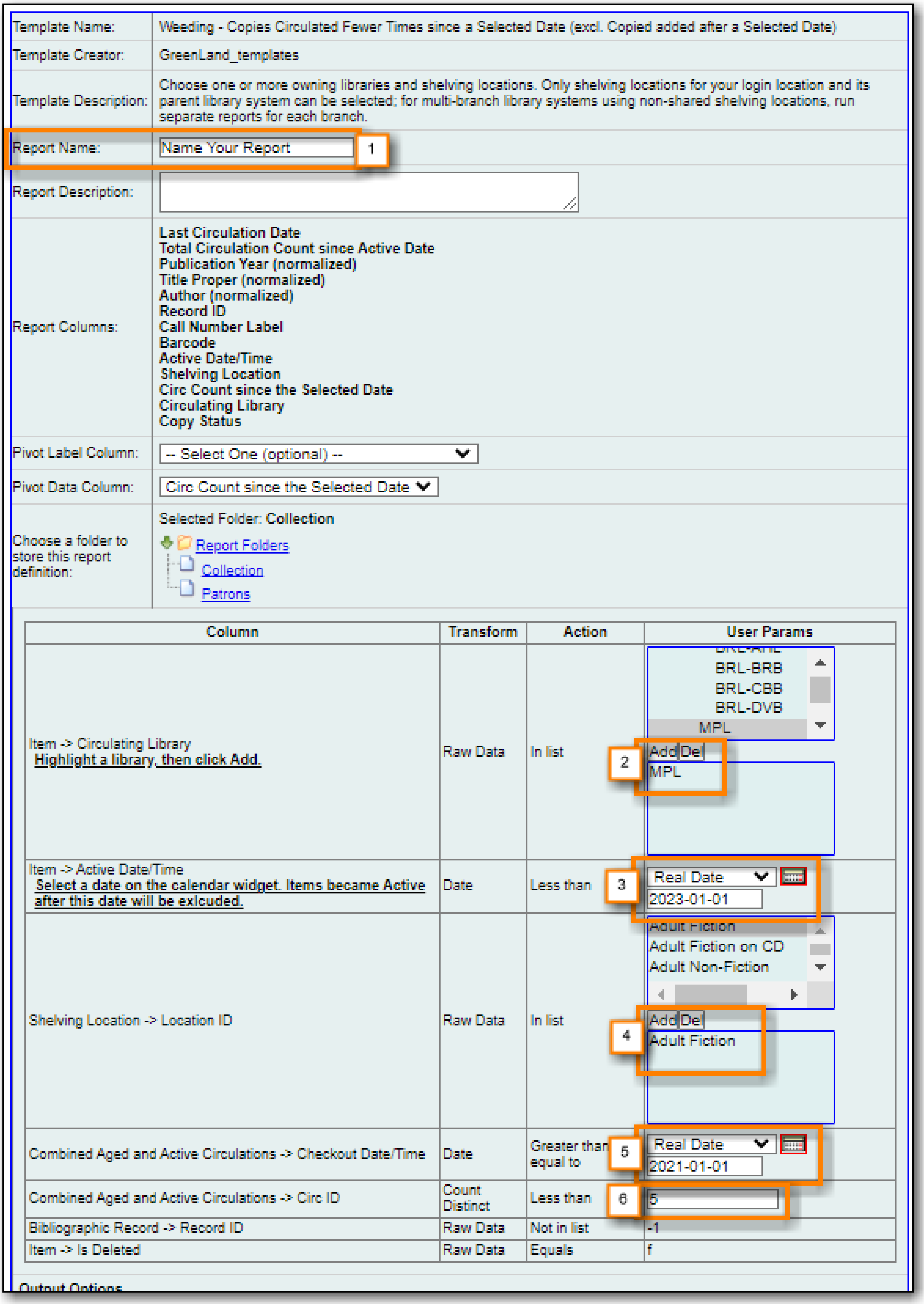
C.2.5. Weeding - Copies Circulated Fewer Times since a Selected Date (excl. Copied added after a Selected Date)

Found under Shared Folders → Templates → Sitka_templates → Collection → Others.

Recommended Recurrence Interval: **None, run as needed**

1. Enter a descriptive name.
2. Add your library.
3. Add the date after which new items should be excluded. If you don’t want to include items catalogued in the current calendar year enter January 1st of the current year.
4. Add the shelving location(s) in which items should be included.
5. Add a date after which to count circulations. Circulations before this date will not be used to calculate whether an item meets the threshold entered in the next filter.
6. Enter a threshold. Items that have circulated fewer times than the threshold, after the date selected for Checkout Date/Time, will be included in your report output.
7. Ensure the box is checked for **Run as soon as possible** (not shown in the screenshot)

NOTE	For this example, the items that will be included in the report output are items catalogued before January 1st 2023 (Active Date/Time), that have the shelving location Adult Fiction, and have circulated fewer than 3 times since January 1st 2021.



C.2.6. Weeding -Copies Never Circulated after a Selected Date (clone)

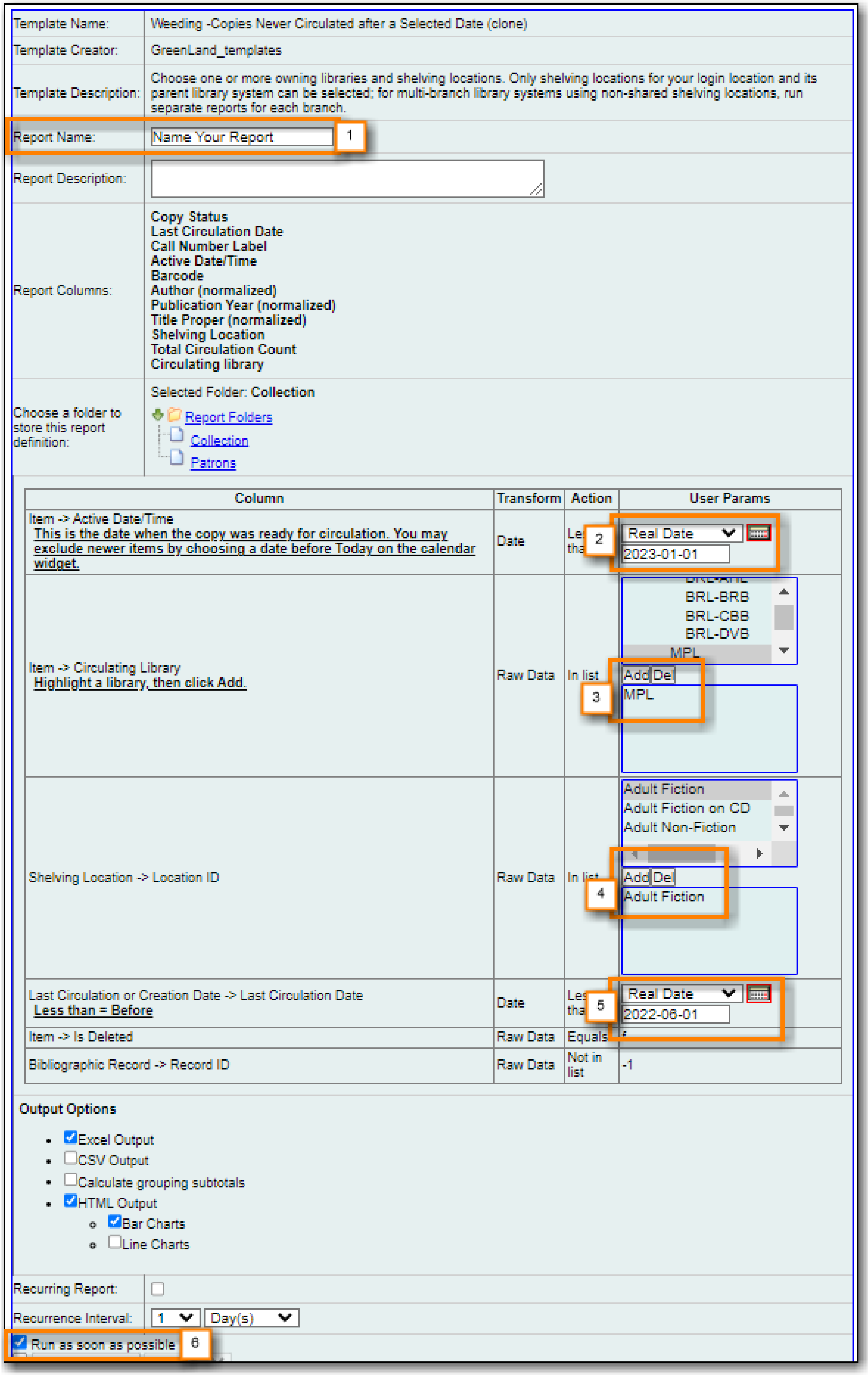
Found under Shared Folders → Templates → Sitka_templates → Collection → Others.

Recommended Recurrence Interval: **None, run as needed**

1. Enter a descriptive name.

2. Add the date after which new items should be excluded. If you don’t want to include items catalogued in the current calendar year enter January 1st of the current year.
3. Add your library.
4. Add the shelving location(s) in which items should be included.
5. Add a date for last checkout. Items that have not been checked out since this date will be included in your output.
6. Ensure the box is checked for **Run as soon as possible**

NOTE	For this example, the items that will be included in the report output are items catalogued before January 1st 2023 (Active Date/Time), that have the shelving location Adult Fiction, and have not circulated since June 1st 2022 (Last Circulation Date).


Template Name:
Weeding -Copies Never Circulated after a Selected Date (clone)
Template Creator:
GreenLand_templates
Template Description:
Choose one or more owning libraries and shelving locations. Only shelving locations for your login location and its parent library system can be selected; for multi-branch library systems using non-shared shelving locations, run separate reports for each branch.
Report Name:
Name Your Report
1
Report Description:
Report Columns:
Copy Status
Last Circulation Date
Call Number Label
Active Date/Time
Barcode
Author (normalized)
Publication Year (normalized)
Title Proper (normalized)
Shelving Location
Total Circulation Count
Circulating library
Choose a folder to store this report definition:
Selected Folder: Collection
Report Folders
Collection
Patrons
Column
Transform
Action
User Params
Item -> Active Date/Time
This is the date when the copy was ready for circulation. You may exclude newer items by choosing a date before Today on the calendar widget.
Date
2
Real Date
2023-01-01
Item -> Circulating Library
Highlight a library, then click Add.
Raw Data
In list
BRL-BRB
BRL-CBB
BRL-DVB
MPL
Add
Del
3
MPL
Shelving Location -> Location ID
Raw Data
Adult Fiction
Adult Fiction on CD
Adult Non-Fiction
Add
Del
4
Adult Fiction
Last Circulation or Creation Date -> Last Circulation Date
Less than = Before
Date
5
Real Date
2022-06-01
Item -> Is Deleted
Raw Data
Equals
Bibliographic Record -> Record ID
Raw Data
Not in list
-1
Output Options
Excel Output
CSV Output
Calculate grouping subtotals
HTML Output
Bar Charts
Line Charts
Recurring Report:
Recurrence Interval:
1
Day(s)
Run as soon as possible
6

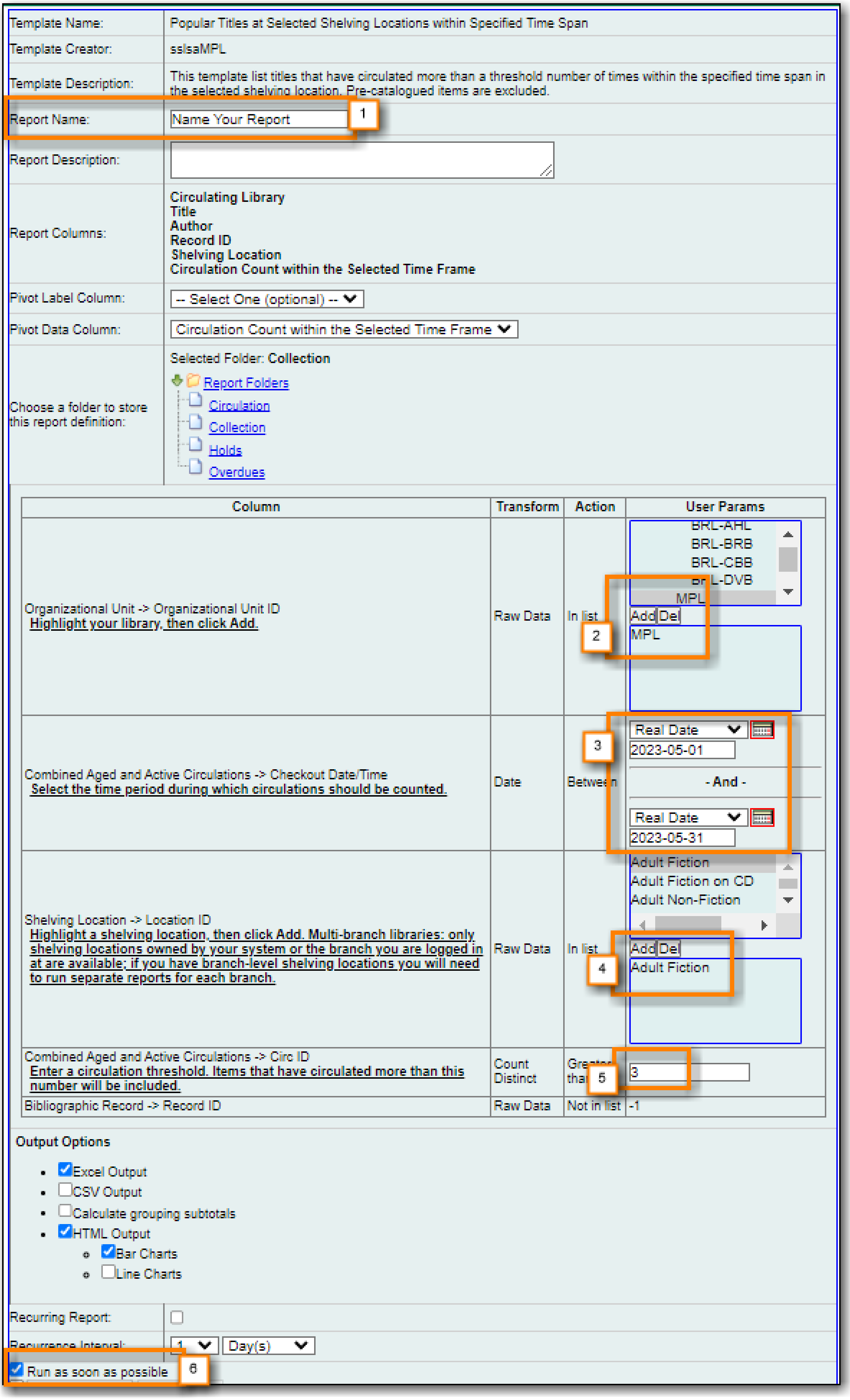
C.3. Collection Promotion

C.3.1. Popular Titles at Selected Shelving Locations within Specified Time Span

Found under Shared Folders → Templates → Sitka_templates → Collection → Others.

Recommended Recurrence Interval: **None, run as needed**

1. Enter a name. You may wish to include the period for which you are counting circulations.
2. Add your library.
3. Enter the time period you would like to report on. The earliest date goes first.
4. Pick the shelving location(s) to be included. Your output will only include items in the selected shelving location(s).
5. Enter a number for the circulation threshold. Your output will only include items that have circulated more times than your threshold. If nothing is included in your output try lowering the threshold.
6. Ensure the box is checked for **Run as soon as possible**.


Template Name:
Popular Titles at Selected Shelving Locations within Specified Time Span
Template Creator:
sslsaMPL
Template Description:
This template list titles that have circulated more than a threshold number of times within the specified time span in the selected shelving location. Pre-catalogued items are excluded.
Report Name:
Name Your Report
1
Report Description:
Report Columns:
Circulating Library
Title
Author
Record ID
Shelving Location
Circulation Count within the Selected Time Frame
Pivot Label Column:
-- Select One (optional) --
Pivot Data Column:
Circulation Count within the Selected Time Frame
Choose a folder to store this report definition:
Selected Folder: Collection
Report Folders
Circulation
Collection
Holds
Overdues
Column
Transform
Action
User Params
BRL-AHL
BRL-BRB
BRL-CBB
MPL
Organizational Unit -> Organizational Unit ID
Highlight your library, then click Add.
Raw Data
In list
Add
Del
2
MPL
3
Real Date
2023-05-01
- And -
Real Date
2023-05-31
Combined Aged and Active Circulations -> Checkout Date/Time
Select the time period during which circulations should be counted.
Date
Adult Fiction
Adult Fiction on CD
Adult Non-Fiction
Shelving Location -> Location ID
Highlight a shelving location, then click Add. Multi-branch libraries: only shelving locations owned by your system or the branch you are logged in at are available; if you have branch-level shelving locations you will need to run separate reports for each branch.
Raw Data
In list
Add
Del
4
Adult Fiction
Combined Aged and Active Circulations -> Circ ID
Enter a circulation threshold. Items that have circulated more than this number will be included.
Count Distinct
5
3
Bibliographic Record -> Record ID
Raw Data
Not in list
-1
Output Options
Excel Output
CSV Output
Calculate grouping subtotals
HTML Output
Bar Charts
Line Charts
Recurring Report:
Recurrence Interval:
1
Day(s)
Run as soon as possible
6

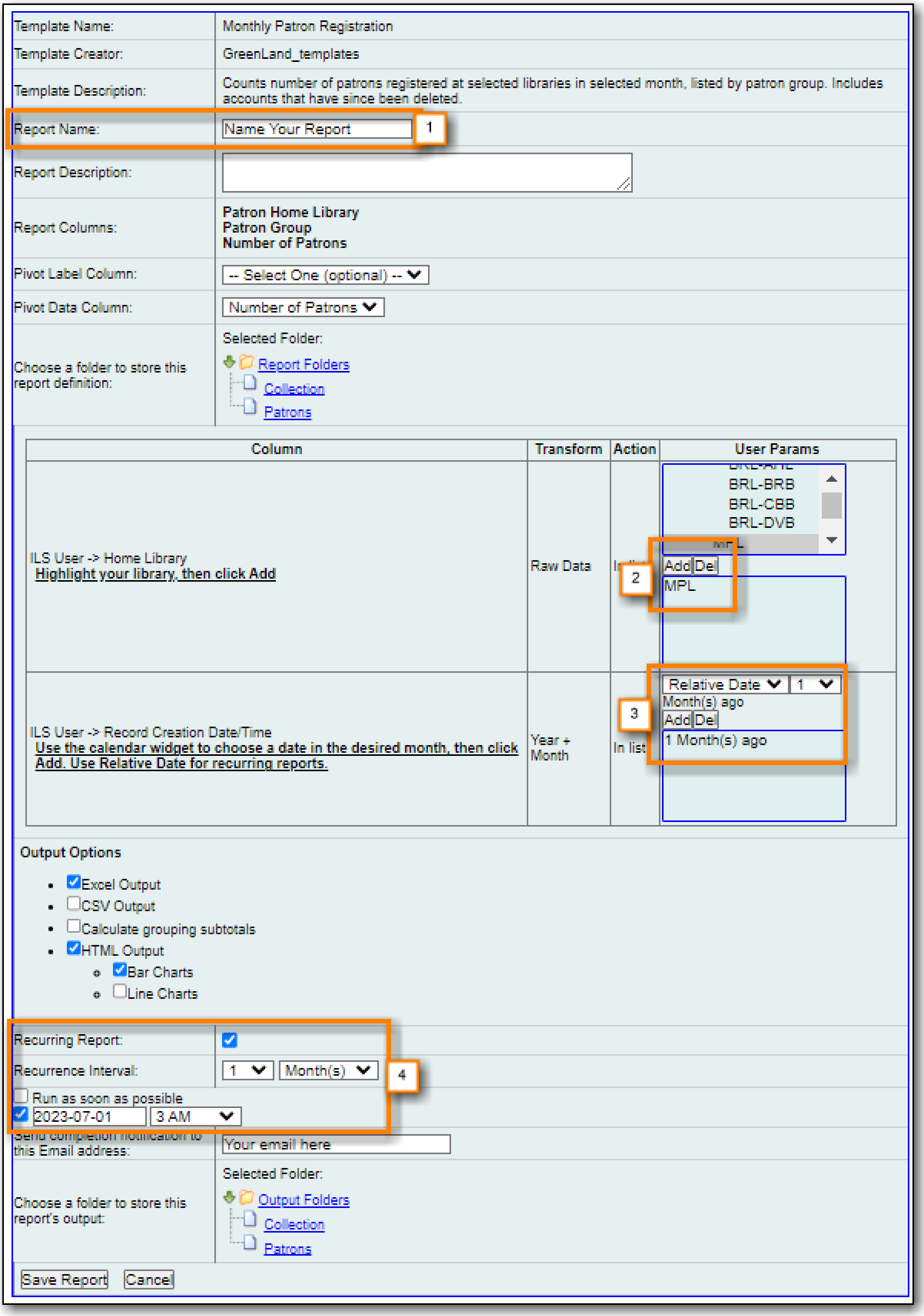
C.4. Patron Management

C.4.1. Monthly Patron Registration

Found under Shared Folders → Templates → Sitka_templates → Patrons → Newly Registered/Opted-in Patrons.

Recommended Recurrence Interval: **Monthly**

1. Enter a name that doesn’t include a specific date as this report will run every month. For example, "Monthly Count of Patron Registrations", not "January Patron Registrations".
2. Add your library.
3. Choose **Relative Date** and add **1 Month(s) ago**.
4. Check the box for Recurring Report.
    a. Set the **Recurrence Interval** to 1 Month(s).
    b. Check the box beside the date and set the date to the first of the next month.
    c. Set the time to between 1:00am PT and 4:00am PT.

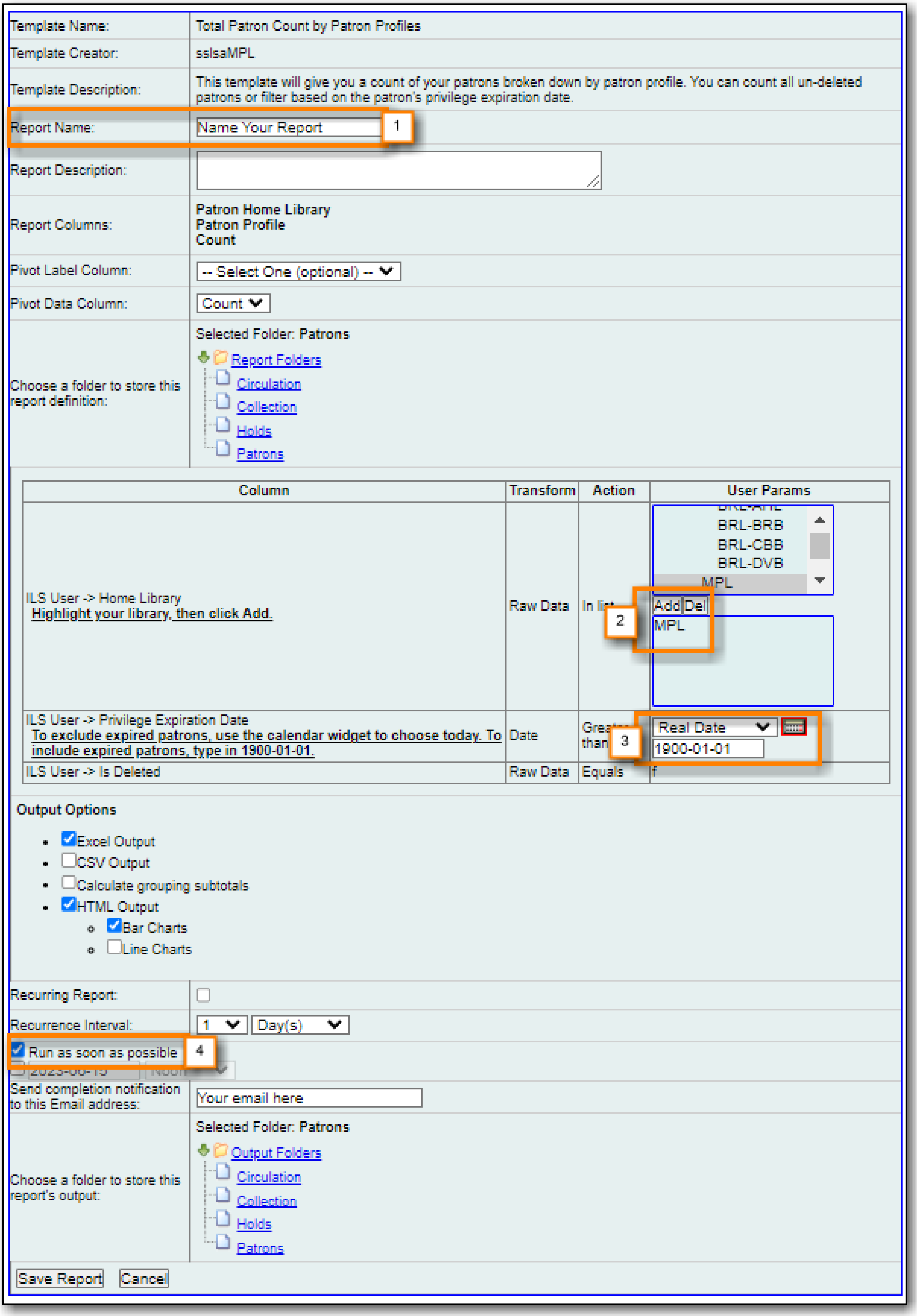


C.4.2. Total Patron Count by Patron Profiles

Found under Shared Folders → Templates → Sitka_templates → Patrons → Patron Count.

Recommended Recurrence Interval: **None, run as needed**

1. Enter a name that includes a specific date as this report will show a snapshot of your patrons at the moment the report is run.
2. Add your library.
3. Enter a date for patron expiration. To count all patrons enter 1900-01-01 as the date. To only count unexpired patrons enter today’s date.
4. Ensure the box is checked for **Run as soon as possible**.


Template Name:
Total Patron Count by Patron Profiles
Template Creator:
sslsaMPL
Template Description:
This template will give you a count of your patrons broken down by patron profile. You can count all un-deleted patrons or filter based on the patron's privilege expiration date.
Report Name:
Name Your Report
1
Report Description:
Report Columns:
Patron Home Library
Patron Profile
Count
Pivot Label Column:
-- Select One (optional) --
Pivot Data Column:
Count
Choose a folder to store this report definition:
Selected Folder: Patrons
Report Folders
Circulation
Collection
Holds
Patrons
Column
Transform
Action
User Params
ILS User -> Home Library
Highlight your library, then click Add.
Raw Data
In list
BRL-BRB
BRL-CBB
BRL-DVB
MPL
Add
Del
MPL
2
ILS User -> Privilege Expiration Date
To exclude expired patrons, use the calendar widget to choose today. To include expired patrons, type in 1900-01-01.
Date
Greater than
Real Date
1900-01-01
3
ILS User -> Is Deleted
Raw Data
Equals
f
Output Options
Excel Output
CSV Output
Calculate grouping subtotals
HTML Output
Bar Charts
Line Charts
Recurring Report:
Recurrence Interval:
1
Day(s)
Run as soon as possible
4
Send completion notification to this Email address:
Your email here
Selected Folder: Patrons
Choose a folder to store this report's output:
Output Folders
Circulation
Collection
Holds
Patrons
Save Report
Cancel

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