

Sitka's Evergreen Documentation

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Evergreen 3.1

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Introduction

Chapter 1. New Features in Evergreen Version 3.1

1.1. Circulation

1.1.1. Email Checkout Receipts

This feature allows patrons to receive checkout receipts through email at the circulation desk and in the Evergreen self-checkout interface. Patrons need to opt in to receive email receipts by default, and must have an email address in their account. Opt in can be staff mediated at the time of account creation or in existing accounts. Patrons can also opt in directly in their OPAC account or through patron self-registration. This feature does not affect the behavior of checkouts from SIP2 devices.

1.1.2. Patron Buckets

Patron Buckets allow staff to batch delete and make batch modifications to user accounts in Evergreen.

1.1.3. Clickable Patron Email Address

Patron's email address is a mailto link in the profile, so it can be clicked to send an email to the patron.

1.1.4. New Notice Columns in Items Out Screen

Two new columns indicating the number of circulation notifications generated for a given loan and the date of the most recent notification are added to Items Out screen in patron record. These columns will allow circulation staff to better respond to patron questions about whether they were sent a notification about an overdue item.

A new library setting, "Exclude Courtesy Notices from Patrons Itemsout Notices Count", is added to allow libraries to choose whether to exclude courtesy notices in these fields.

1.1.5. Honour Time Zone of the Acting Library

Display day-granular due dates in the circulating library's time zone, which means libraries in non-Pacific time zone will see due date ending at 23:59PM.

A whole day (or days) of the client time is (are) marked closed when marking a single or multiple dates closed on Closed Dates Editor. Libraries in non-Pacific time zone no longer need to adjust computer time to server time zone. Time portion is no longer displayed for such closed dates.

1.1.6. Scope Holds by Pickup Library on View Holds

Staff can choose to view holds picked up at all branches of a library system, or all libraries in a federation. Previously staff could only choose to view holds picked up at a selected library/branch

or all Sitka libraries.

1.1.7. Option to Suspend Holds at the Time They are Placed

Users now have the option to suspend a hold at the same time they place the hold. The Place Hold screen has a checkbox that can be enabled for users who want to suspend a hold at the time it is placed. There is also an option to set the activation date at the same time. This option is also available when placing holds on a batch of titles from My List and will apply to all the titles in the batch.

1.1.8. Patron Search from Place Hold

There is a Patron Search link for staff to retrieve patrons via names and other information, rather than relying on barcode alone, on the Place Hold screen in the catalogue.

1.1.9. Place Multiple Holds at Once

Staff can place multiple title/metarecord holds at once. This feature is especially beneficial for book clubs and reading groups, which need to place holds on multiple copies of a title.

In order to use the feature, libraries need to set up a new library setting: Maximum number of duplicate holds allowed to a number higher than 1.

When placing a title or a metarecord hold, a **Number of copies** field will display. This field is not available when placing volume or copy holds.

This feature does not change the way in which the system fills holds. The multiple holds will fill in the same way that they would if the user had placed multiple holds separately.

1.1.10. Alternate Patron Hold Pickup

When an on-hold item is being checked out to another patron, not the requester, on the prompt there is a new checkbox allowing staff to cancel the hold during the checking out. If the borrower is picking up the item on behalf of the requester, you can select the checkbox to cancel the hold. However, such cancelled holds are not counted as fulfilled. If you track fulfilled holds statistics, Co-op Support suggests you check out the item to the requester only.

There is a new library setting, Clear Hold When Other Patron Checks Out Item, to allow libraries to choose whether the cancel hold checkbox is selected by default.

1.1.11. Retrieve Recent Patrons

Libraries may choose to allow staff to retrieve a few recently accessed patron accounts. To do so, libraries need to set up a new library setting, Number of Retrievable Recent Patrons. Once done, an entry called "Retrieve Recent Patrons" will show up on the Circulation menu.

1.1.12. Patron Search by Birth Date

Now you can include the patron birth year and/or birth month and/or birth day when searching for

patrons.

Day and month values are exact matches. E.g. month "1" (or "01") matches January, "12" matches December. Year searches are "contains" searches, i.e. year "15" matches 2015, 1915, 1599, etc. For exact matches use the full 4-digit year.

1.1.13. Copy Alerts and Suppression of Copy Alerts

Copy alerts can be added via the volume/copy creator and the check in, check out, and renew pages. Copy alerts can also be managed at the item status page.

Copy Alerts types are added to allow library staff to add alerts appearing when a specific event takes place, such as when the copy is checked in, checked out, or renewed.

Libraries may choose to suppress certain types of copy alerts via the Copy Alert Suppression page under Local Administration.

1.1.14. Patron Billing Statement on Full Details

A patron billing statement, which summarizes a patron's bills, credits and payments, is added to Full Details screen. There are two tabs on the screen: Statement and Details.

1.1.15. Enhanced Billing Timestamp

More timestamps are added to billing records indicating the create date, a fine period start, and a fine period end.

1.2. Catalogue

1.2.1. Copy Location Filter Displays for System Level Searches

The Shelving Location filter now displays on the advanced search page when a search is scoped to a library system, not just to an individual branch. If a library system is selected as the Search Library, the shelving location limiter will display any shelving location that is owned by the selected system or by the consortium. It will NOT display shelving locations owned by child branches.

1.2.2. Search Term Highlighting

Evergreen now highlights search terms on the public catalogue's main search results page, the record detail page, and intermediate pages such as metarecord grouped results page. Highlighting search terms will help the user determine why a particular record (or set of records) was retrieved.

1.2.3. Clickable Copy Locations

You may add a URL to a shelving location on Copy Locations Editor. The shelving location will display as a link in the public catalogue summary display. This link can be useful for retrieving maps or other directions to the copy location to aid users in finding material.

1.2.4. Multilingual Search

Search for multilingual materials is possible now by combining language attributes, e.g. keyword: piano item_lang(eng) item_lang(ita). Attribute values are from tag 008 and 041.

NOTE

This is different from selecting multiple entries in the Language filter on Advanced Search, which searches for materials in any of the selected languages.

1.3. Serials

1.3.1. Web Client Serials Module

The web client serials module has a new unified interface that combines ideas from both the serial control view and alternate serials control view from the old staff client.

In addition to carrying over functionality that was available in the old staff client, several new features are included:

- A more streamlined interface for managing subscriptions, distributions, and streams
- A new **Serials Administration** page where prediction pattern and serial copy templates can be managed.
- Prediction pattern codes can be saved as templates.
- The new serials interfaces can be accessed from the record details page via a Serials drop-down button.

1.4. Reports

1.4.1. Report Template Searching

A new form appears along the top of the reports interface for searching report templates. Once found, typical template actions (e.g. clone or create new report) are available from within the results interface.

Searches may be performed across selected folders or all folders owned by or shared with the logged in user.

Chapter 2. New Behaviour in Evergreen 3.1

2.1. New Web Staff Client (Web Client)

- Sitka's new Evergreen web client is accessed, in the internet browser Chrome, at <https://catalogue.libraries.coop/eg/staff/login>.
- Sitka's new Evergreen web client is only supported in Chrome. You must use Chrome to login to Evergreen.
- Workstations have to be registered the first time you access the new staff URL, and you must be an Evergreen Local System Administrator (LSA) to register workstations. All existing staff logins will work once a workstation is registered.
- Hatch can be installed to print and to manage local settings. Use of Hatch is optional. See [Hatch](#)
- The new web client looks and functions very similar to the old staff client. Menus, and some workflows, are somewhat consistent with prior versions. There are changes to cataloguing procedures, and changes to local preferences configuration, with modern browser functionality incorporated into all aspects of Evergreen.
- The new web client is responsive to device and to screen size, and can look different on different devices.

2.2. Patron Accounts

- Patron account status is now indicated with coloured text.
- Patrons can choose to receive emailed check-out receipts.
- Batch edit patron accounts with the new Patron Buckets feature.

2.3. Catalogue

- Search patron by name and other values from Place Hold screen.
- Option to suspend holds at time of placement is back.
- Highlighted search terms in public and staff catalogue.

2.4. Library Settings

- Setting the Number of Retrievable Recent Patrons enables the new Circulation menu choice, Retrieve Recent Patrons.

2.5. Serials

- A more streamlined interface for managing serials.
- It is no longer necessary to create a starting issue in order to predict a run of issues; the dialog box for generating a set of predicted issues now lets you specify the starting point directly.

Chapter 3. Revisions to Version 3.1 and Attributions to Contributors

Version 3.1 of this manual was published May 22, 2018. Below are subsequent content changes in reverse chronological order. Minor changes including spelling corrections, formatting changes, and cosmetic screenshot updates are excluded.

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

Chapter 4. Sitka and Evergreen Resources

Sitka policy

- The Sitka Evergreen Policy Manual contains policy and best-practice documents supporting Sitka's consortial installation of the Evergreen ILS. See <http://docs.sitka.bclibraries.ca/Policy/current/html/> for html and pdf versions.

Websites

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

Listservs

- Join the Sitka Group on the BC Libraries Cooperative website where current member libraries discuss Sitka's implementation of Evergreen.
- Any library specific questions including patron information should be directed to Co-op Support.
- <http://evergreen-ils.org/communicate/mailling-lists/>: multiple lists for discussions of Evergreen. 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 5. 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)**.

5.1. How to Contact Support

There are four ways to contact Co-op Support for 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.
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**, with **emergency after hours support 7 days a week**. Call our toll free number during regular hours to speak with support staff, or after hours to leave a message or request emergency server support. 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 and email address can be found on the Sitka Support page. This information is also given to libraries during migration.

You can check on the status of Co-op supported services at: <http://status.libraries.coop/>

5.2. Guidelines for Support Requests

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 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 the section called “Submitting Images 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.
- **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.

5.2.1. Submitting Images to Support

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

- Save 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.
- 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.

5.3. 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.

5.3.1. Access RT Self Service

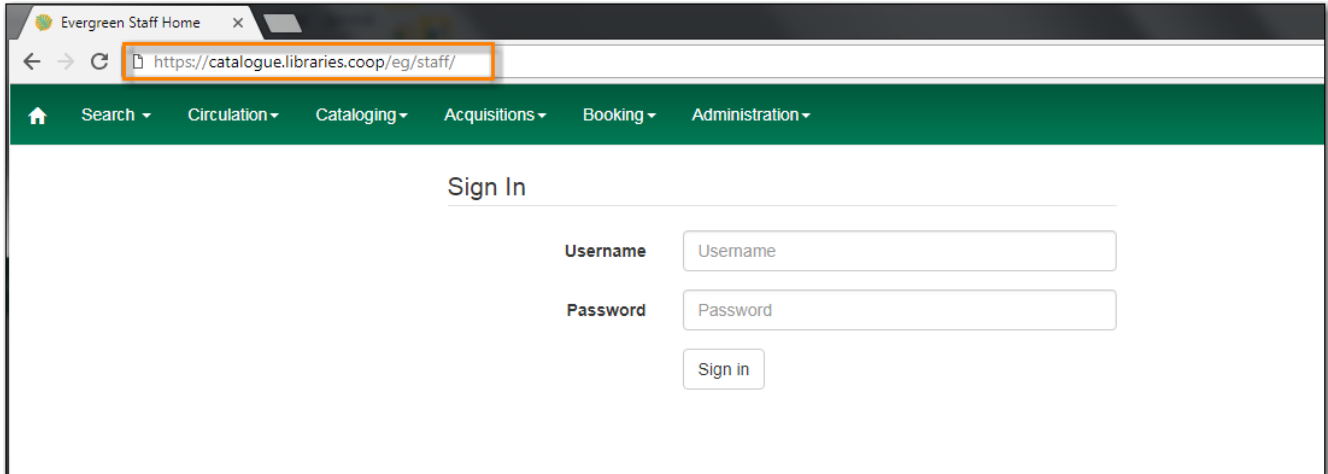
Through the RT website <https://support.libraries.coop/rt/>

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 6. Getting Started

6.1. Accessing the Evergreen Staff Client

The default URL to log into the client is <https://catalogue.libraries.coop/eg/staff/>



6.2. Register Staff Workstation

[Sitka Snippet Video - Register Workstation \(1:36\)](#)

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

1. Navigate to the web client log in page.
2. Enter **Username** and **Password** → Click **Sign In**



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

Please register a workstation.

Register a New Workstation For This Browser

MPL ▼ Workstation Name Register

Workstations Registered With This Browser

Use Now Mark As Default Remove

5. Enter a unique workstation name → Click **Register**.

Please register a workstation.

Register a New Workstation For This Browser

MPL ▼ MPLcirc1 Register

Workstations Registered With This Browser

Use Now Mark As Default Remove

6. The new workstation is listed in the **Workstations Registered With This Browser** menu → click **Use Now** to return to the login page.

Register a New Workstation For This Browser

MPL ▼ MPLcirc1 Register

Workstations Registered With This Browser

MPL-MPLcirc1 (Default) ▼

Use Now Mark As Default Remove

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

Sign In

Username Username

Password Password

Workstation MPL-MPLcirc1 ▼

Sign in

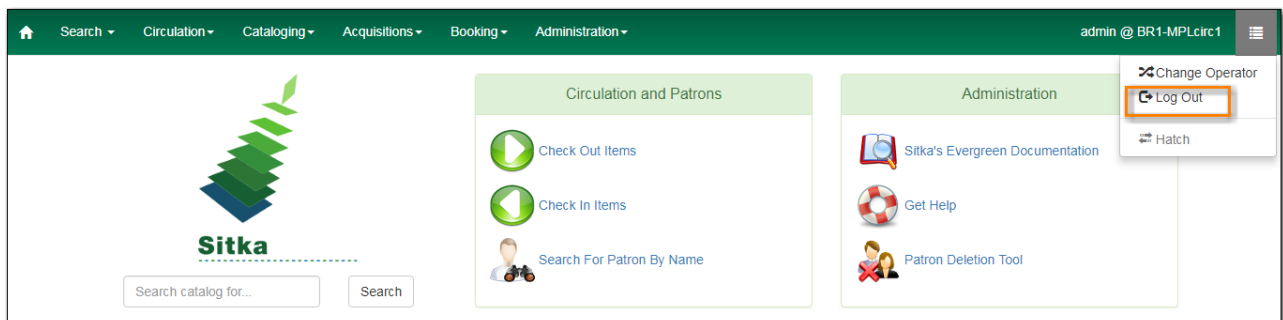
NOTE Local System Administrator permissions are required to register a new workstation.

6.2.1. Logging into Evergreen

1. The default URL to log into the 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**.

6.2.2. Logging Out of Evergreen

1. Click **Menu** → Click **Log Out**

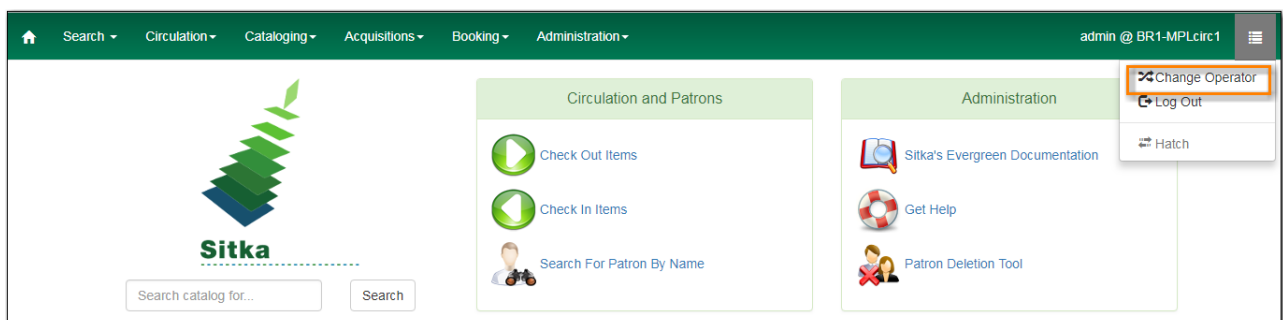


CAUTION

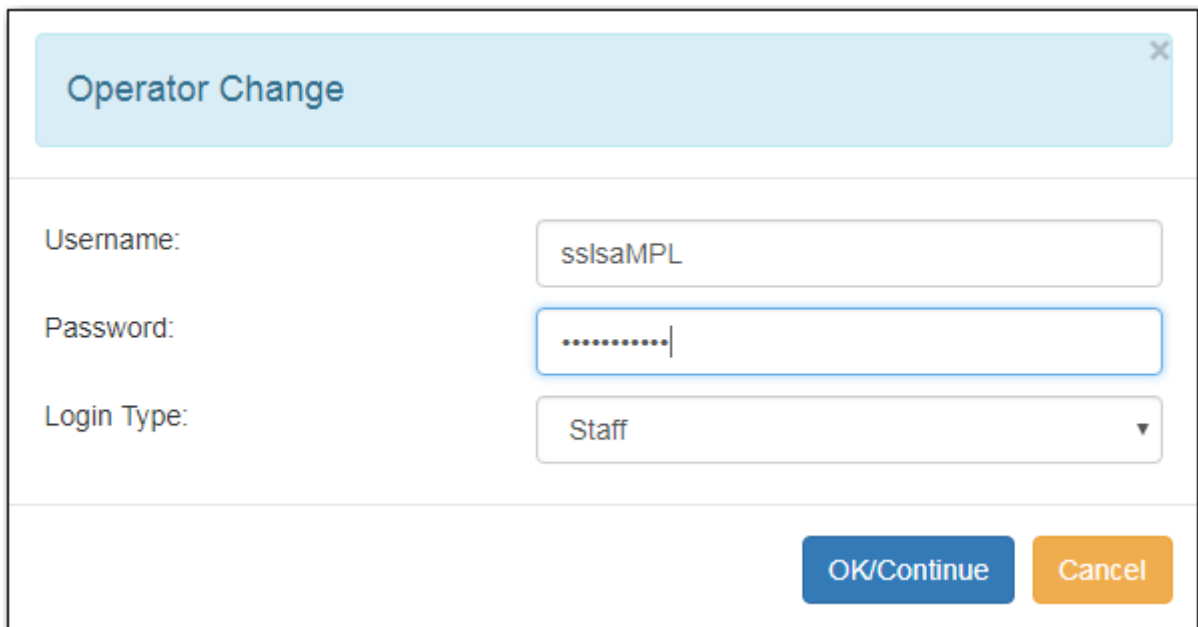
Exiting all browser windows will automatically log you out of the web client. If you only close the tab where the web client is loaded, you will remain logged in.

6.2.3. Change Operator

1. Click **Menu** → Click **Change Operator**



2. Enter the **Username** and **Password**.
3. Choose Login Type from the drop down menu.
 - a. **Temporary** -
 - b. **Staff** -
 - c. **Persistent** -

A screenshot of a web application dialog box titled "Operator Change" with a close button (X) in the top right corner. The dialog contains three input fields: "Username:" with the text "sslsaMPL", "Password:" with masked characters ".....", and "Login Type:" with a dropdown menu showing "Staff". At the bottom right, there are two buttons: "OK/Continue" (blue) and "Cancel" (orange).

Operator Change

Username: sslsaMPL

Password:

Login Type: Staff

OK/Continue Cancel

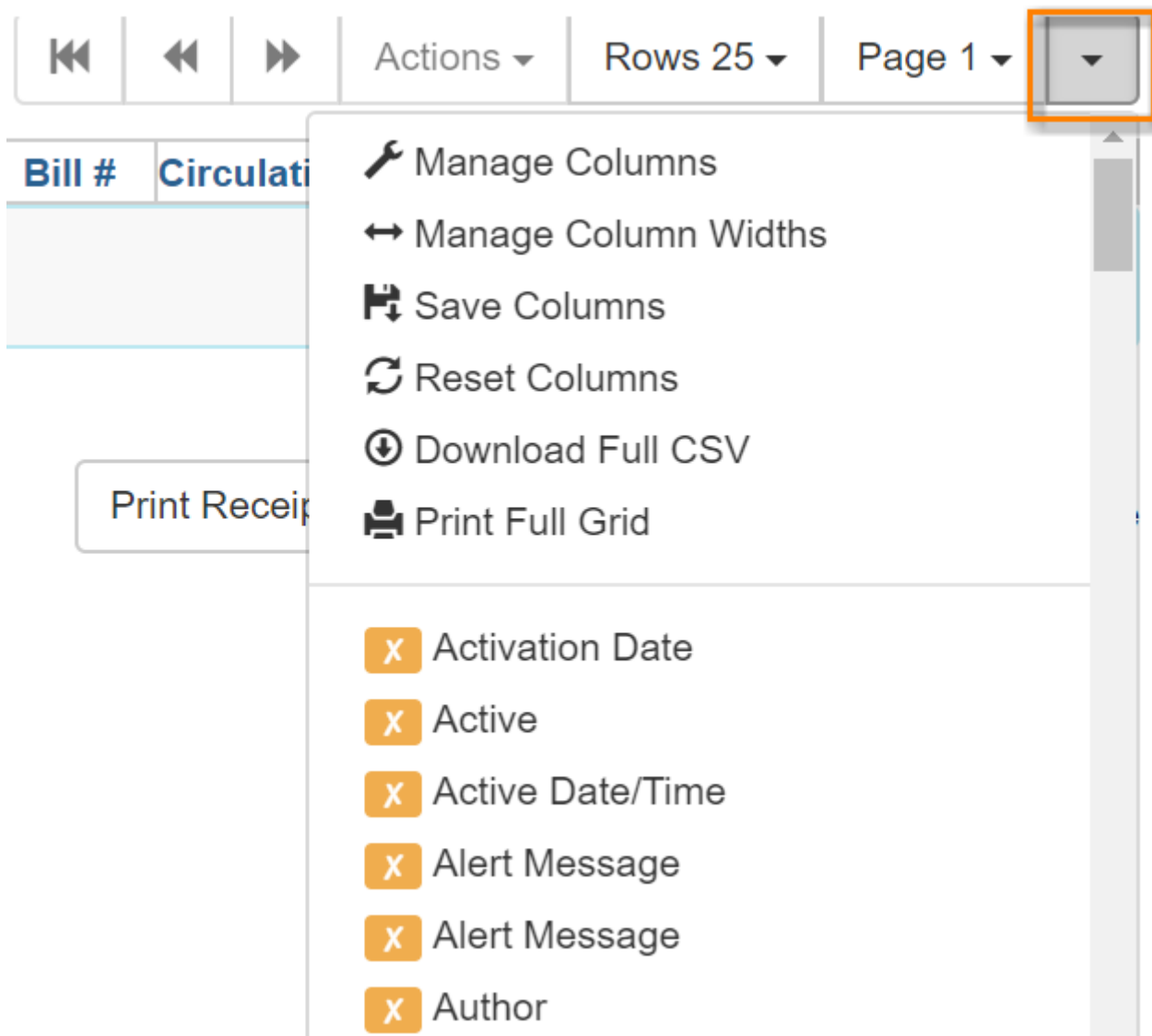
4. Click **OK/Continue**

6.3. 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, Dob, 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 at the top-right of the results table.



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.)

Grid Columns Configuration

Visible	Column Name	Move Up	Move Down	First Visible	Last Visible	Sort Priority	Sort Visible Columns To Top
☒	Balance Owed	↑	↓	⬆	⬇	0	
☒	Barcode	↑	↓	⬆	⬇	0	
☒	Title	↑	↓	⬆	⬇	0	
☒	Route To	↑	↓	⬆	⬇	0	
☒	Circulation Library	↑	↓	⬆	⬇	0	
☒	Circulation Modifier	↑	↓	⬆	⬇	0	
☒	Family Name	↑	↓	⬆	⬇	1	
☒	Location	↑	↓	⬆	⬇	0	
☒	Finish	↑	↓	⬆	⬇	0	
☒	Bill #	↑	↓	⬆	⬇	0	
☒	Author	↑	↓	⬆	⬇	0	

Close

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

Items Checked In

⏮ ⏪ ⏩ ⏭

Actions ▾

Rows 25 ▾

Page 1 ▾

#		Balance Owed	Barcode	Title	Route To	Circulation Library	Circulation Modifier	Family Name	Location	Finish
Expand		↗	↗	↗	↗	↗	↗	↗	↗	↗
Shrink		↘	↘	↘	↘	↘	↘	↘	↘	↘

5. Click **Save columns**.

⏮ ⏪ ⏩ ⏭

Actions ▾

Rows 25 ▾

Page 1 ▾

↗

↘

Manage Columns

↔ Manage Column Widths

💾 Save Columns

↻ Reset Columns

⬇ Download Full CSV

🖨 Print Full Grid

6.4. 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) and store local settings (such as column configurations and custom print templates).

. 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](#).

1. Install Hatch from [Hatch](#)
2. 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](#)

6.4.1. Enable Hatch in Evergreen

1. Log into Evergreen as LSA.
2. Click **Administration** → **Workstation**.
3. Click **Print/Storage Service (Hatch)**
4. Make sure that you see that Hatch is available. Click **Use Hatch For Printing, Store Local Settings in Hatch**, and **Store Offline Transaction Data in Hatch**.
5. Click **Copy Local Storage Settings To Hatch**.
6. Log out. Preferences will now be stored in Hatch. This will enable you to clear your browser settings and not lose your staff preferences .

Refer to [\[hatch-troubleshooting\]](#) if you are having issues with Hatch.

6.5. Set Search Preferences

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

Registered Workstations

Printer Settings

Print Templates

Stored Preferences

Print/Storage Service ("Hatch")

Tests

☐ Disable Sounds?

Test:

Success

Info

Warning

Error

Default Search Library

The default search library setting determines what library is searched from the advanced search screen and portal page by default. Manual selection of a search library will override it. One recommendation is to set the search library to the highest point you would normally want to search.

Select...

Preferred Library

The preferred library is used to show copies and URIs regardless of the library searched. One recommendation is to set this to your workstation library so that local copies show up first in search results.

Select...

Advanced Search Default Pane

Advanced search has secondary panes for Numeric and MARC Expert searching. You can change which one is loaded by default when opening a new catalog window here.

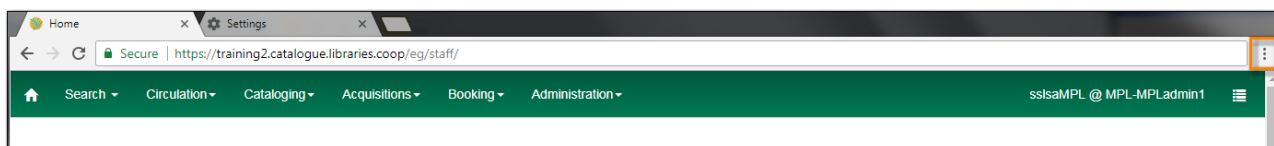
Chapter 7. Best Practices for Using the Browser

7.1. Setting Browser Defaults for Web Client

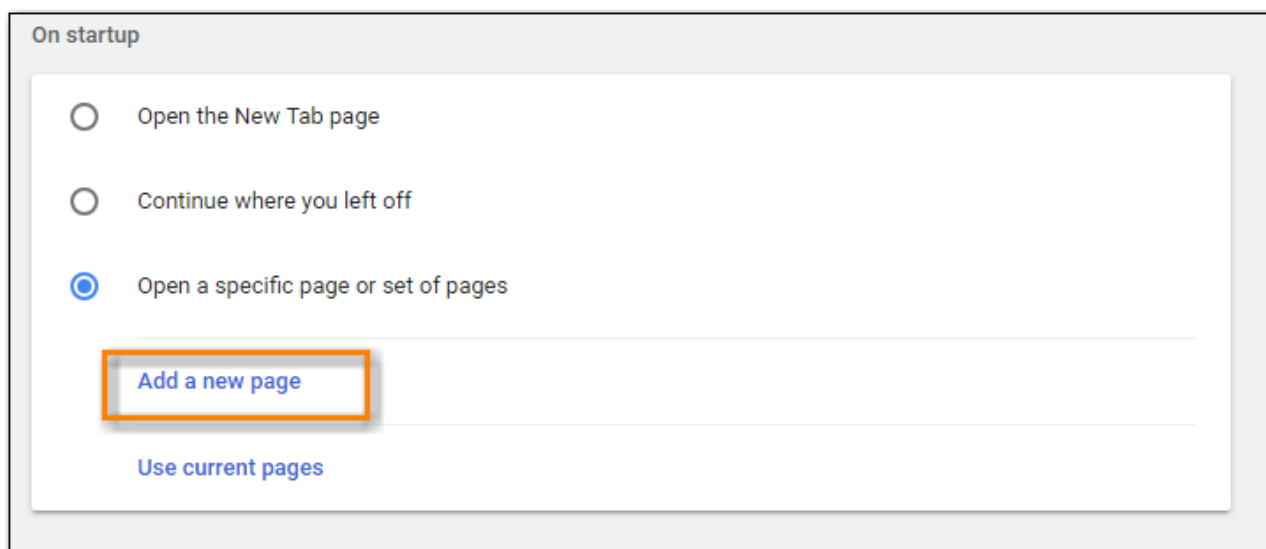
To ensure that staff can easily get to the web client portal page on login without additional steps, you can set the browser's home page to default to the web client.

Setting the Web Client as the Home Page in Chrome

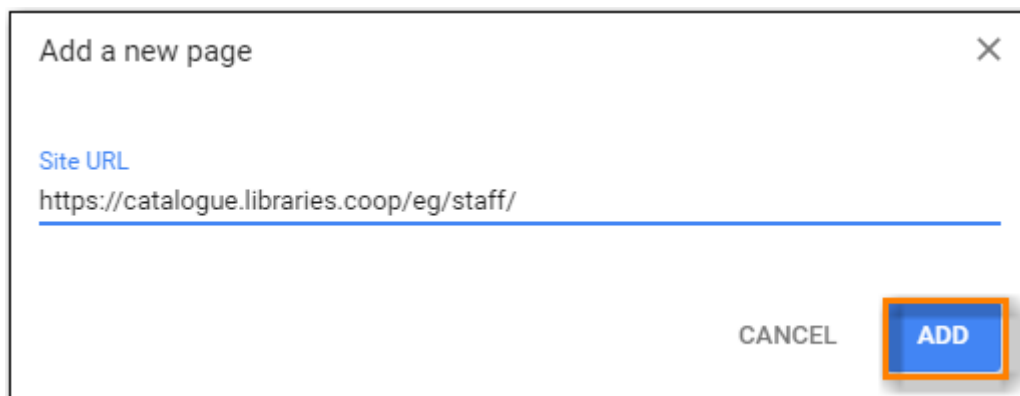
1. Click **Menu**. (three vertical dots in the upper-right corner).



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**.



7.2. Bookmarks and Shortcuts

7.2.1. 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](#)

7.2.2. Tab Buttons and Keyboard Shortcuts

Now that the client will be loaded in a web browser, users 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

- 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**.
- 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

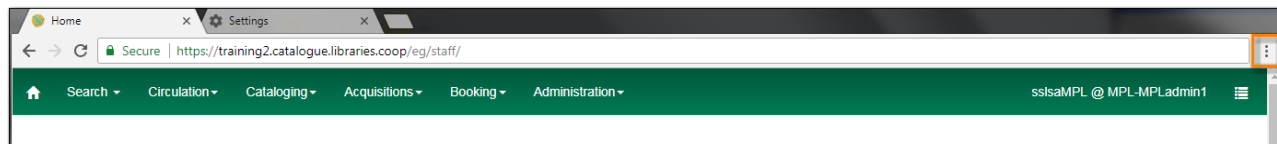
Some users may want to automatically open the web client's portal page in a new tab. Chrome will not open your home page by default when you open a new tab. However, optional add-ons will allow you to set the browsers to automatically open the home page whenever open opening a new tab. These add-ons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

7.3. Browser Configuration

7.3.1. Update browser

Make sure your browser is up to date

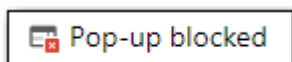
1. Click **Menu**.



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

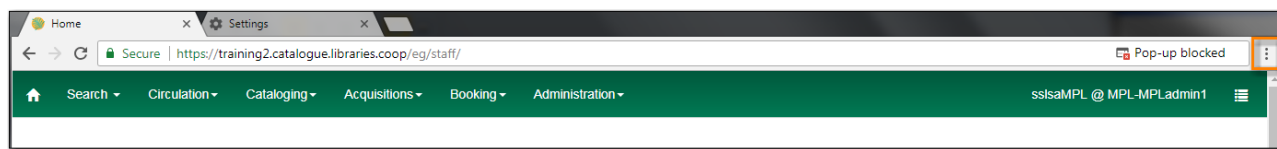
7.3.2. Allow Pop-ups

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

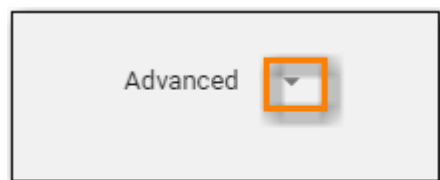


Allow Pop-ups

1. Click **Menu**.



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



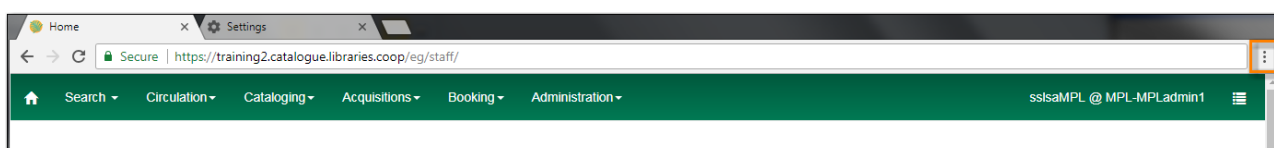
4. Under *Privacy and Security* click **Content settings**.
5. Click **Pop-ups**.
6. Click **Add**.
7. Site: <https://catalogue.libraries.coop>.
8. Click **Add**.



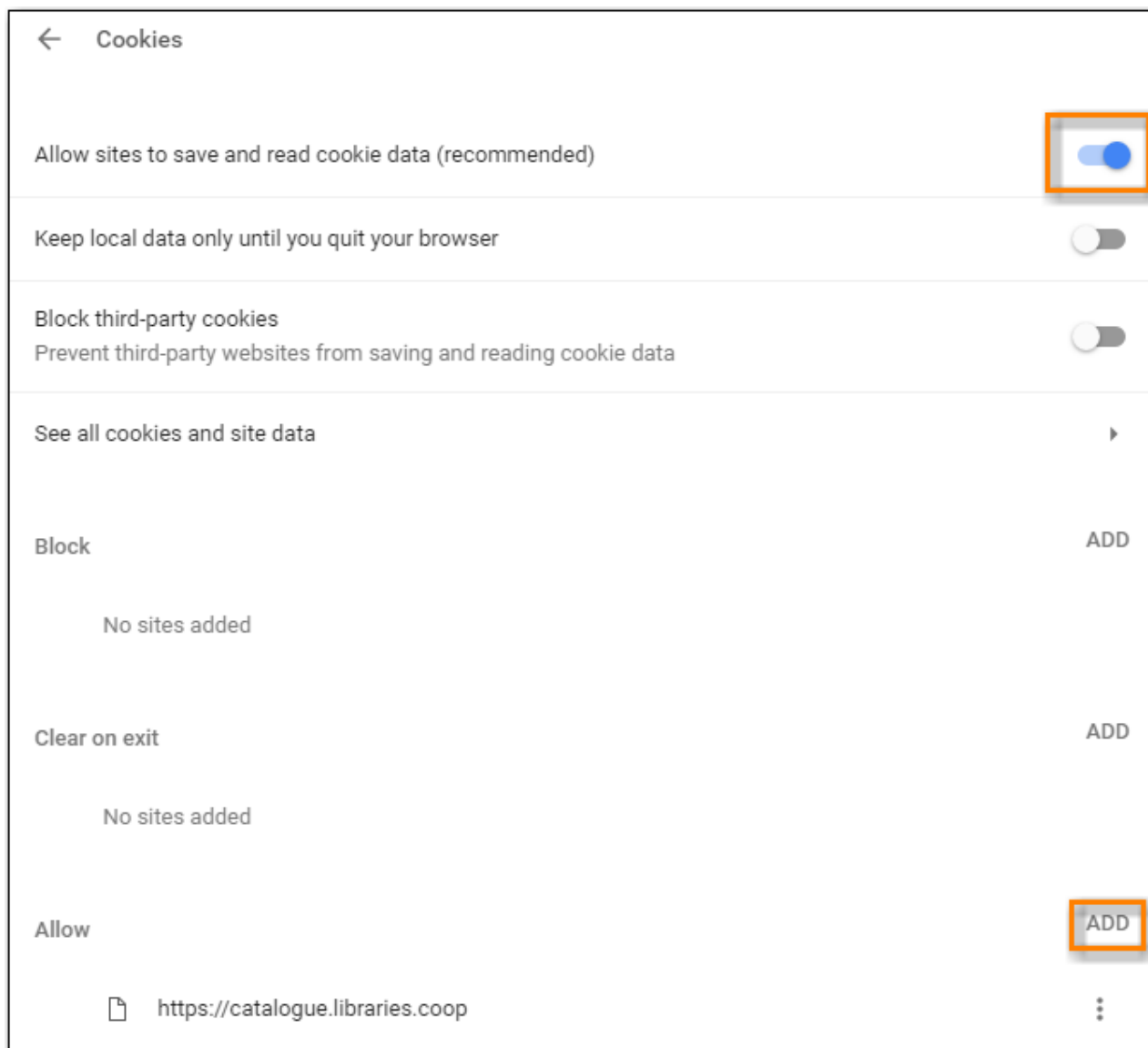
7.3.3. Allow Cookies

Allow Cookies

1. Click **Menu**.



2. Click **Settings**.
3. Scroll down to the bottom and click **Advanced**.
4. Under *Privacy and Security* click **Content settings**.
5. Click **Cookies**.
6. *Allow sites to save and read cookie data* should be on.
7. *Keep local data only until you quit your browser* should be off.
8. Click **Add**.
9. Site: <https://catalogue.libraries.coop/eg/staff/>
10. Click **Add**.



Security Software and Cookies

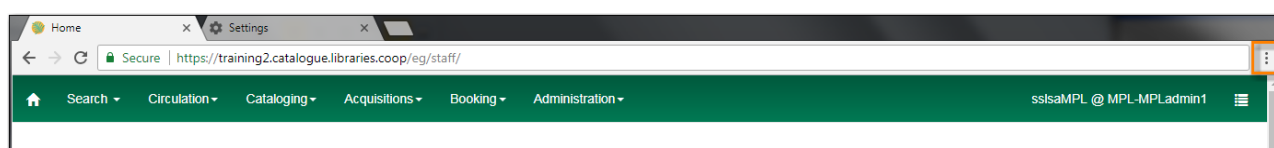
If you have cookies enabled in your browser, but they are disappearing, check your computer's security or antivirus software to see if it may be deleting your cookies on a regular basis.

7.4. Troubleshooting

7.4.1. Clear Cache

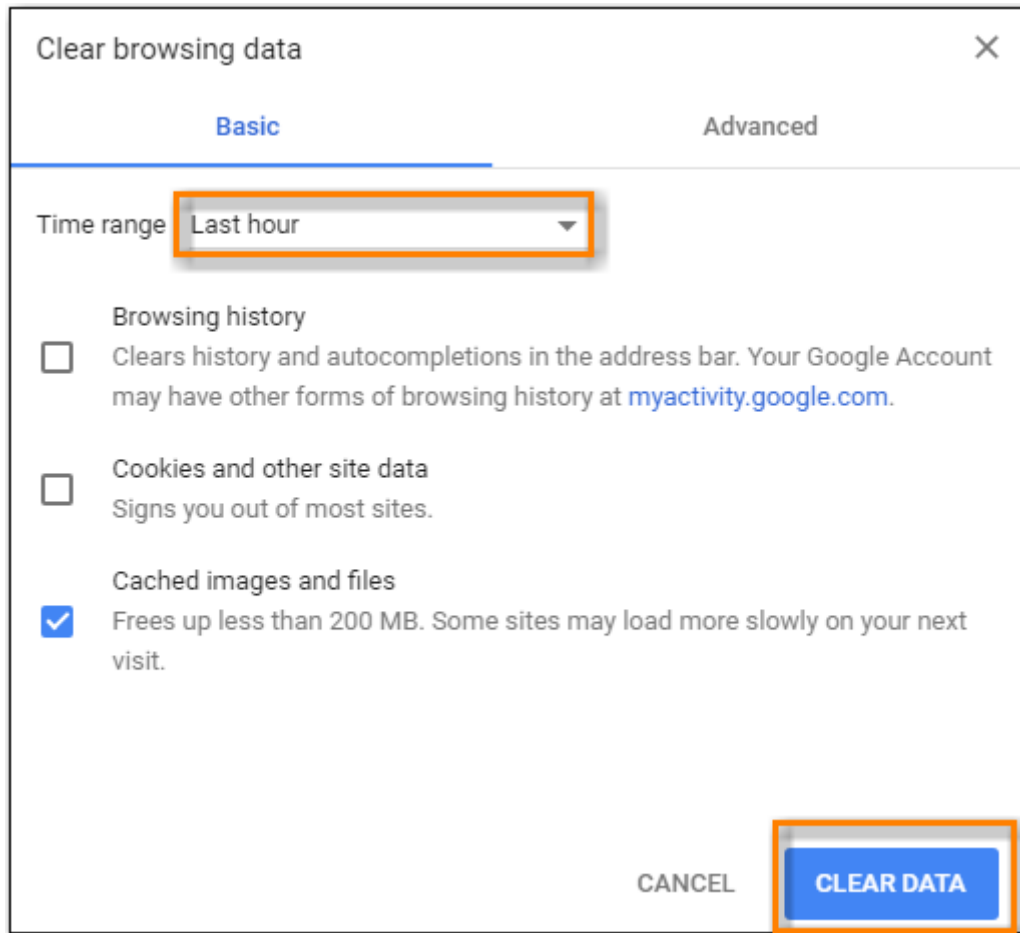
Clear Cache

1. Click **Menu**.



2. Click **History**.
3. Click **History** (on flyout menu).

4. Click **Clear Browsing Data**.
5. Set Time Range
 - a. **All time**
6. Check the box next to *Cached images and files* (other boxes can be left unchecked).
7. Click **Clear Data**.



7.4.2. Clear Cookies

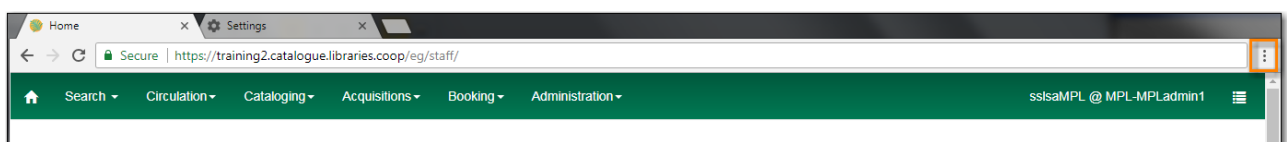
If you log in and see a blank page with the green bar across the top (aka, the “white screen of death”), but nothing else will load, you may need to clear your browser’s cache and cookies.

CAUTION

Before you clear cookies, be aware that clearing cookies will cause you to lose your registered workstations and local settings unless you are using Hatch to store those settings.

Clear Cookies

1. Click **Menu**.



2. Click **History**.
3. Click **History** (on flyout menu).
4. Click **Clear Browsing Data**.
5. Check the box next to *Cookies and other site data*.
6. Check the box next to *Cached images and files*.
7. Set Time Range
 - a. **Last hour** (recommended)
8. Click **Clear Data**.
9. Return to <https://catalogue.libraries.coop/eg/staff>

If you have Hatch installed, use these directions to reconnect your browser to Hatch:

Reconnect your browser to Hatch

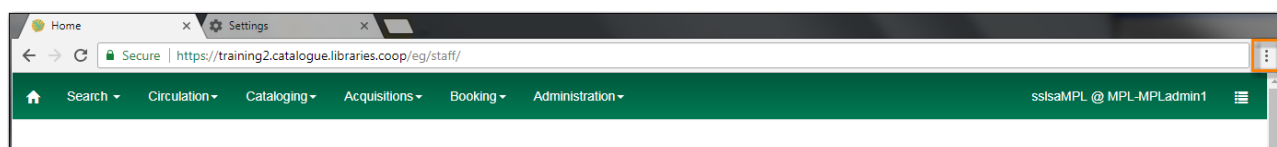
1. Log in with a Local System Administrator account.
2. Register workstation and click **Use Now** to log in again.
3. Navigate to **Administration** → **Workstation** → **Print/Storage Service (“Hatch”)**.
4. Check all three boxes.
5. Click on the Home icon.
6. You will be returned to the workstation registration screen again - click **Use Now** to log in again.
7. Your local settings should now be restored.

7.4.3. 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

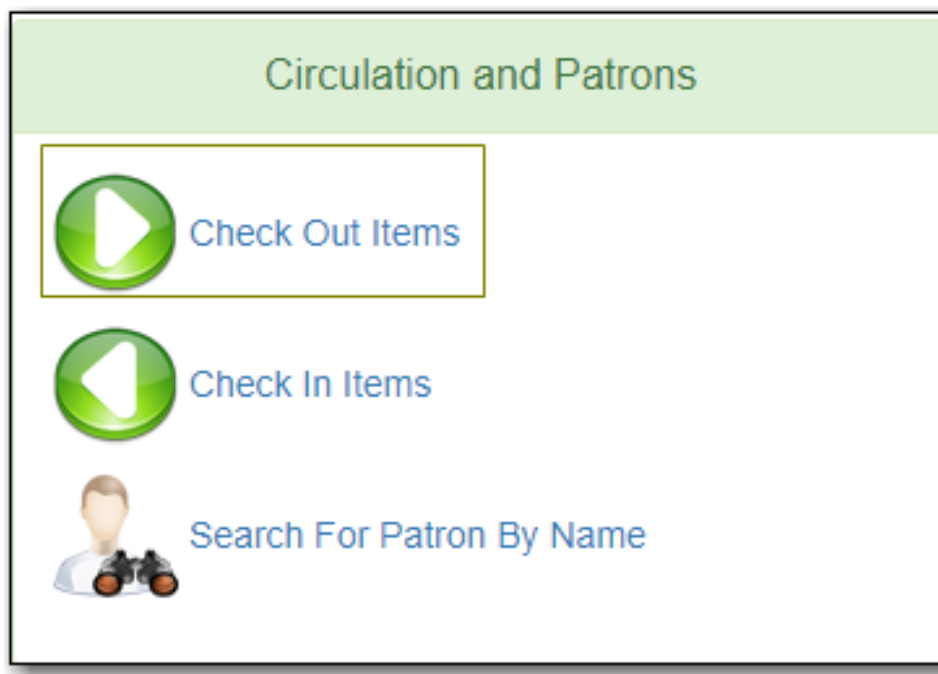
Chapter 8. Patron Records

8.1. Patron Search

Patron accounts are retrieved by barcode scan or name search.

Barcode scan is the recommended method if you have the patron's barcode: it is faster and can retrieve accounts from any Sitka library. It is also Sitka policy. Patrons from other Sitka libraries must present their library card to scan, and must "opt in" and consent to share their personal information with your library, before their account can be used at your library. Once opted in to your library, their account can also be retrieved by a name search.

1. Click **Check Out Items** or select **(F1)** to scan patron's barcode.



For patron search, we recommend you set search scope to Sitka, in order to search all opted in patrons at your library, and to select **Include Inactive?**, in order to search expired patrons. These selections are "sticky" and should be left on.

1. Click **Search For Patron By Name**, or select **Search** → **Search for Patrons** or **(F4)**.
2. Click the up or down arrow button on right to show or hide more search fields.
3. Enter your search terms and click **Search**.

Last Name	First Name	Middle Name	Search	Clear Form	ⓘ
Barcode	Alias	Username	Email	Identification	
Database ID	Phone	Street 1	Street 2	City	
State	Post Code	Profile Group ▾	SITKA ▾	☒ Include Inactive?	
DOB Year	DOB Month	DOB Day			

8.2. Register New Patrons

Before you register a new patron, you need to ensure the person does not have an account in Sitka's Evergreen. Recommended practice is to ask the patron if they have a library card from another library in BC or MB, and scan that card in **Check Out Items**. If an account exists, you must ask the patron if they agree to share their personal information with your library before using the card. If changes to patron information are required, you should modify the existing patron account, instead of creating a new one.

1. Select **Circulation** → **Register Patron**.
2. Enter required information, based on your library guidelines. This screen can look different depending on your library's choices regarding required and suggested fields, and whether or not you are displaying all fields, required fields, or suggested fields.
3. Click **Save** at top-right of screen.

The screenshot shows the 'Register Patron' form with the following fields and values:

- Barcode: 301XXXXX
- OPAC/Staff Client User Name: 301XXXXX
- Password: 5785
- First Name: (highlighted in yellow)
- Middle Name: (highlighted in yellow)
- Last Name: (highlighted in yellow)
- Date of Birth: (highlighted in yellow)
- Primary Identification Type: Other
- Secondary Identification Type: (dropdown menu)
- Email Address: (highlighted in yellow)
- Email checkout receipts by default?: (checkbox)
- Daytime Phone: (highlighted in yellow)
- Home Library: MPL
- Main (Profile) Permission Group: Profile Group
- Privilege Expiration Date: (highlighted in yellow)

Buttons: Save, Save & Clone, Generate Password, Secondary Groups, Update Expire Date.

NOTE

The patron account record is composed of required and optional fields, and some fields are editable by your patrons via the **My Account** feature on your online catalogue. It is good practice to familiarize your self with the basic functions and features of the patron record as described below.

- All fields highlighted in yellow are mandatory.
- Blank mandatory fields and fields with a value in the wrong format will result in a "Form is invalid" error.
- **Juvenile flag.** This flag is optional. Each library can determine an age threshold of juvenile patrons. The checkbox must be manually de-selected, there is no automated process to update the record.
- **Receive Overdue and Courtesy Emails** checkbox allows patrons to opt-in or opt-out of receiving courtesy and overdue email notifications. Patrons can also set this in **My Account** on your online catalogue.
- If you do not record the address, you need to delete the fields by clicking the red cross sign beside **Address**. Blank address fields result in an error.
- **Main (Profile) Permission Group.** Sitka's Evergreen has a shared list of patron profile groups,

but individual libraries choose which profiles to use, and how to configure chosen profiles to suit local policy.

- **Privilege Expiration Date.** There is a Sitka default of 3 years for all profile groups except PL New User, which has an expiration of 3 months. The expiry date can be edited on all profile groups.
- **Is Group Lead Account** should always be unchecked.
- Statistical categories are used to further group patrons by categories not in the profile groups. Individual libraries can create their own patron statistical categories.
- **Save and Clone** will save the patron record and open a new patron record. Phone numbers will be copied into the new record. Depending on your library's setting, addresses may also be linked from original record.

8.3. Update Patron Account

Routine maintenance of your patron accounts includes updating patrons' contact information, renewing expired library cards, marking library cards lost, re-setting patrons' passwords, inserting notes or alert messages, and so on. It is good practice to understand how the patron account record functions.

1. Scan the patron barcode or search for patron by name.
2. Once the patron record is loaded, **Check Out** is the default tab.
3. Click **Edit** to retrieve patron information.
4. Make required edits and click **Save** at top right of screen.

Check Out	Items Out (0)	Holds (0 / 0)	Bills (\$0.00)	Messages	Edit	Other ▾

8.3.1. Renew Library Card

1. Click **Update Expire Date** or use the calendar widget to renew a card.
2. Click **Save** at top right of screen.

Privilege Expiration Date	2021-02-09		Update Expire Date

8.3.2. Mark Library Card Lost

1. Click **Replace Barcode**
2. If the username is still the original barcode, replace it with the new barcode number.
3. Click **Save** at top right of screen.

Patron Edit

Barcode

OPAC/Staff Client User Name

Once a library card is marked lost, Evergreen marks the card inactive and keeps it in the database. If the patron has lost a library card before, the **See All** button shows up.

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

Patron Barcodes ×

Barcode	Active	Primary
23121518191214	☐	☐
23121518191219	☒	☒
	☐	☐

8.3.3. Re-set Patron Password

1. Click **Reset Password** or enter a new password and click **Save**.
2. If your library uses the last 4 digits of phone number as default password, please do not use **Reset Password** button. Instead, enter the new phone number, and click **Save**.

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

8.3.4. Invalidate Email Address or Phone Number

It is good practice to keep patron email addresses current to ensure service from Evergreen's automated messaging features. The **Invalidate** option alerts staff that a new email address is required, and removes the invalid address.

NOTE

Accumulated bounced back emails may result in courtesy and notice 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.

8.3.5. 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**.

8.3.6. 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. Click **New Address** button.
2. Click **Mailing** and **Physical** address and click **Save**.
3. The linked address is replaced.

8.4. Patron Alerts, Notes, Messages, and Notifications

8.4.1. Patron Alerts

If a patron's account has an alert, a red **Stop** sign is displayed when the account is retrieved. There are three types of alerts in Evergreen: staff-generated, system-generated, and standing penalties.

Staff-generated Alerts

Staff-generated alerts are created by staff, and must be removed by staff.

System-generated Alerts

System-generated alerts are automatically inserted on some conditions, such as the patron account is expired, patron has a ready-for-pickup hold, etc. Once the cause is resolved, these messages disappear automatically.

Standing penalties

Standing penalties are inserted when a patron's circulation condition meets criteria set up by your library for the maximum fine threshold, maximum number of items allowed out, and the maximum number of overdue items allowed. If a patron exceeds any of these limits, an alert will block their account. Standing penalties are removed once the cause is resolved.

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

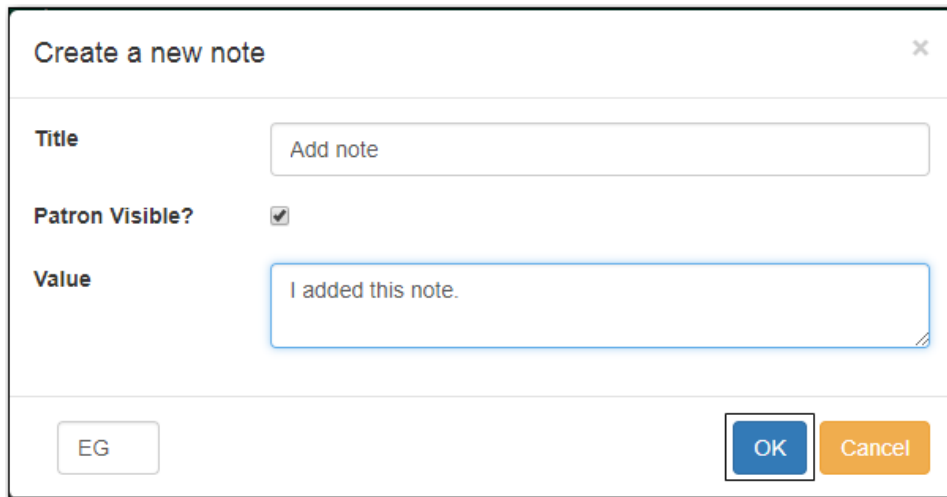
1. To remove standing penalties from a patron account, go to **Messages**.

2. Highlight the penalties. Click **Actions** → **Remove Penalty/Message**.

8.4.2. Patron Notes

You can add notes to patron accounts that can be viewed by staff, and can be shared with patrons in the My Account feature on your online catalogue.

1. To insert or remove a note, retrieve patron account and click **Other** → **Notes**.
2. Click **Add New Note**
3. Enter note and click **OK**.



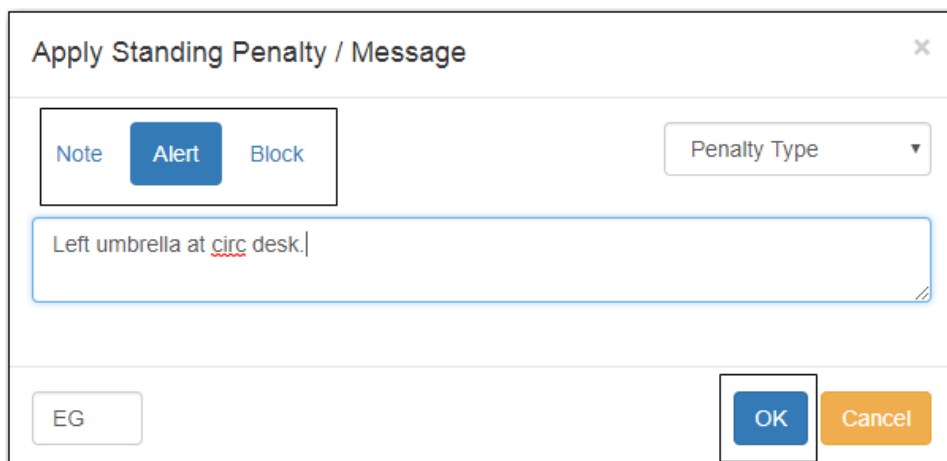
The screenshot shows a dialog box titled "Create a new note" with a close button (X) in the top right corner. It contains three fields: "Title" with a placeholder "Add note", "Patron Visible?" with a checked checkbox, and "Value" with a text area containing "I added this note.". At the bottom left is an "EG" button, and at the bottom right are "OK" and "Cancel" buttons.

The patron account will display a **Notes** icon while the note is present.

8.4.3. Patron Messages

You can also enter Alerts, Notes, and Blocks on the **Messages** tab.

1. Click **Messages** tab.
2. Click **Apply Penalty/Message**.
3. Select **Note**, **Alert**, or **Block**, enter text, and click **OK**.



The screenshot shows a dialog box titled "Apply Standing Penalty / Message" with a close button (X) in the top right corner. It features three tabs: "Note", "Alert" (which is selected and highlighted in blue), and "Block". To the right of the tabs is a "Penalty Type" dropdown menu. Below the tabs is a text area containing "Left umbrella at circ desk.". At the bottom left is an "EG" button, and at the bottom right are "OK" and "Cancel" buttons.

To edit, remove, or archive messages, select the message and click **Actions** and follow the on screen

prompts.

NOTE

Alerts and blocks created on the Messages screen are displayed on the Alert screen. System-generated standing penalties are displayed on the Messages screen. Based on your library's setting, staff initials may be required when creating a Note/Alert/Block.

8.4.4. Patron Notifications

Evergreen sends various email and SMS (text) messages to patrons via **Action Triggers**. Triggered events are viewable on the staff client in patron or item records.

1. To view notifications in the patron account, select **Other** → **Triggered Events/Notifications**.
2. Completed pre-due and overdue notifications are displayed by default. You can change the filters for **Core Type** or **Event State**, on the right, to view any or all notifications.
3. To re-send a completed notice, select the notice, and click **Reset Selected Event** at top right of screen.
4. To cancel a pending notice, select the notice, and click **Cancel Selected Event** at top right of screen.

NOTE

Action Triggers are used for, but not limited to, pre-due, overdue, and hold notification generation. You may see other triggered events in a patron or item record, but not all events generate notices. Events with status of Invalid or Error encountered problems during the process. No notices were generated for such events. Pending and some statuses other than complete, error, or invalid, may last for a short period of time while the event is being processed.

8.5. 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.

8.5.1. 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.

8.5.2. 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.

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.

8.5.3. Batch Delete Users

1. Go to **Circulation** → **User Buckets** and select the **Bucket View** tab.
2. Click on **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 **Delete all users**. A dialogue box will appear.
4. Assign a *Name for delete set*. This name will allow staff to identify the batch deletion for future verification or rollbacks.
5. Click **Apply Changes**. All users in the bucket will be marked as deleted.

NOTE

Batch deleting patrons from a user bucket does not use the Purge User functionality, but instead marks the users as deleted.

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.

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.

8.5.4. 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.

8.6. Merge Patrons

8.6.1. Merge Patrons

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 need to update the home library in one of the accounts before merging.

1. Click **Search for Patron by Name**.
2. Search by the terms shared by the two accounts, such as name or phone number.
3. Select the two accounts you want to merge and click **Merge**.
4. Select the lead account to keep, and check the radio button **Use as lead**.
5. Click **Merge** at bottom right of screen.

Merge patrons?	
☒ Use as lead	☐ Use as lead
Profile PL Adult	Profile PL Adult

8.6.2. Inactive Card

Once the two accounts have been merged, the notes, bills, holds, and outstanding items on the non-lead card are transferred to the lead account, and the non-lead card is marked inactive.

It is good practice to delete the inactive card. Your library can also choose to automatically delete the inactive card by configuring the Library Setting Patron Merge Barcode Delete to True.

NOTE

If you scan such an inactive card on Check Out screen, Evergreen retrieves the active account, and provides an informative message. The situation can be managed as per local policy.

Chapter 9. Circulation

9.1. Check Out

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

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

9.1.1. Regular Items

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

#	Remaining Renewals	Circulation Modifier	Family Name	Balance Owed	Due Date
1	2	book	sitka		4/6/2018

9.1.2. Pre-catalogued Items

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

Barcode "circprecat" was mis-scanned or is a non-cataloged item. ✕

Title

Author

ISBN

Circulation Modifier

NOTE

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

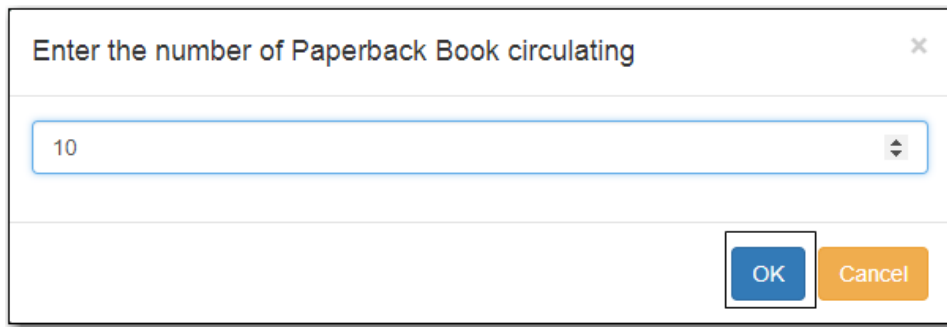
9.1.3. Non-catalogued Items

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

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

Items Out (2) Holds (1 / 2) Bills (\$0.00)

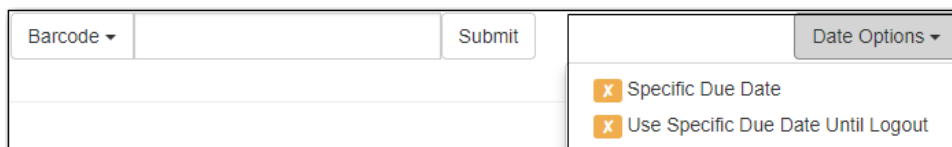
3. Enter the number of items and click **OK**.



9.1.4. Due Dates

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

1. Before you scan the item, click the drop down arrow in **Date Options**.
2. Select **Specific Due Date** or **Use Specific Due Date Until Logout**.
3. Use calendar widget or enter date.
4. Scan item barcode.



9.2. Check In

9.2.1. Regular Check In

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

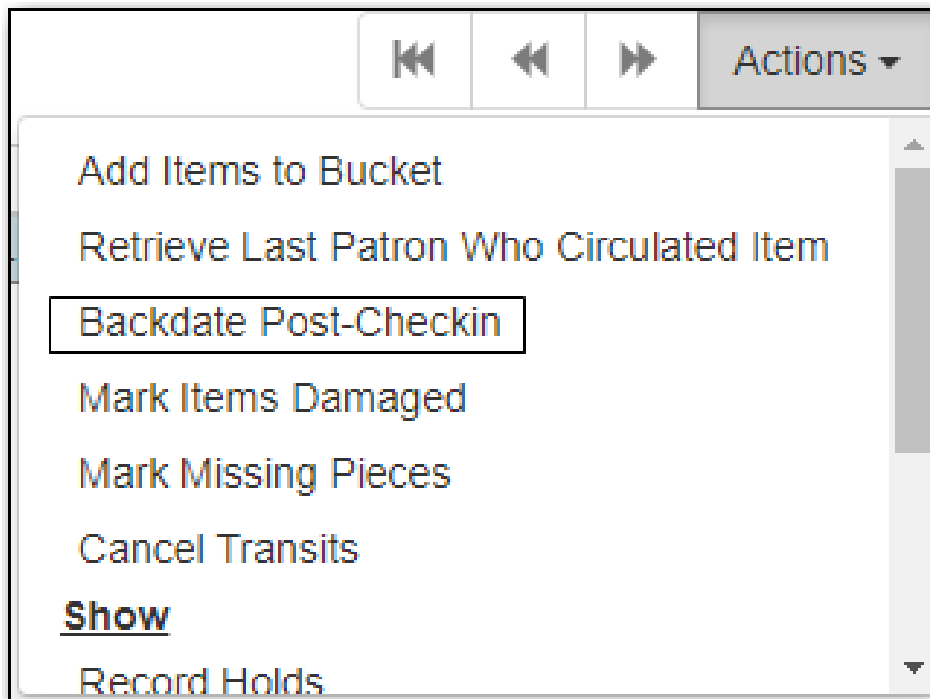
9.2.2. Backdated Check In

This is useful for clearing a book drop.

1. Click the calendar widget and set date, or edit date in **Effective Date** field.
2. Scan barcodes. The new effective date is now displayed in the header.
3. Edit **Effective Date** when backdated check in is complete.

9.2.3. 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.

9.2.4. 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.

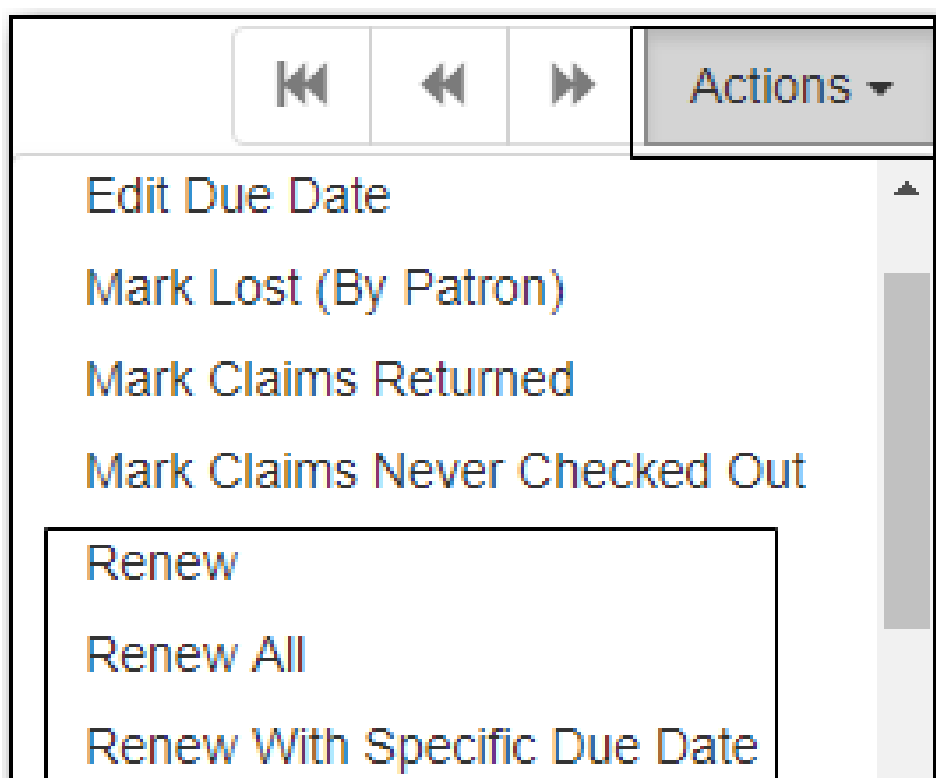
- Ignore Pre-cat Items: no prompt when checking in a pre-cat item. Item will be routed to Cataloguing with Cataloguing status.
- Suppress Holds and Transit: item will not be used to fill holds or sent in transit. Item has Reshelving status.
- Amnesty Mode/Forgive Fines: overdue fines will be voided or 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.

9.3. Renewal and Edit Due Date

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

9.3.1. Renewal

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



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

9.3.2. Edit Due Date

NOTE

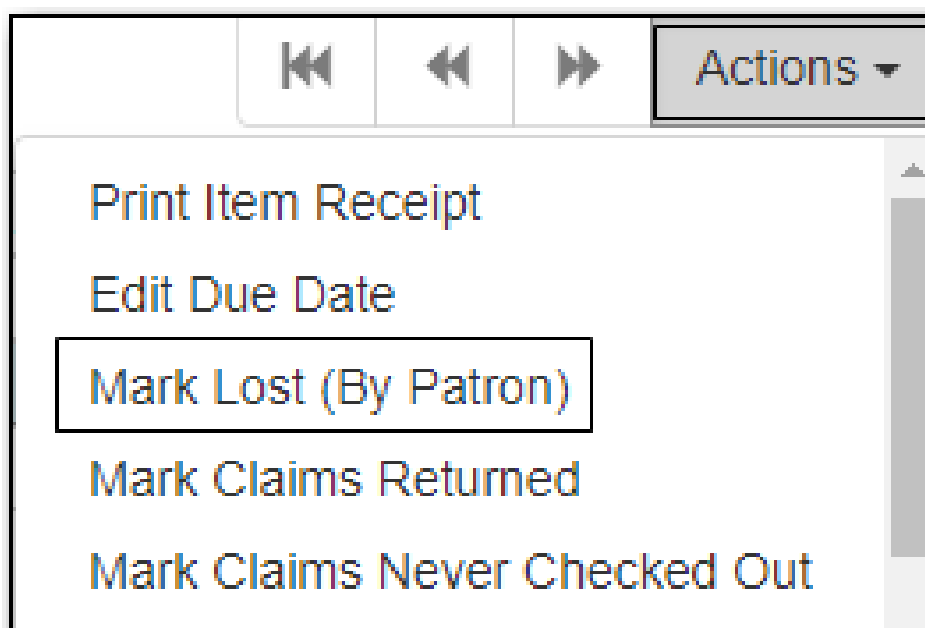
Edit Due Date changes the due date in the existing circulation record without reducing remaining renewals, or creating a new circulation record. It does not generate new circulation statistics, and no new notices are generated. For example, editing the due date will not generate a new pre-due notice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

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

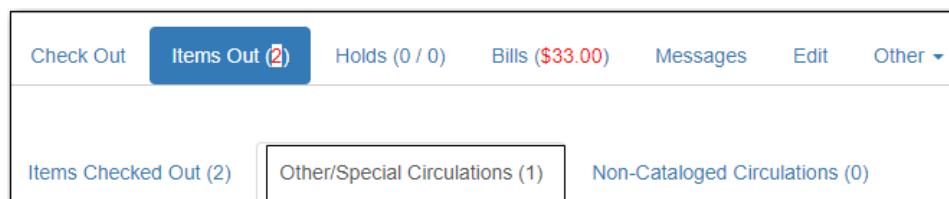
9.4.1. Lost

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

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



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



NOTE

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

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

- Always void lost charges.
- Void lost charges if the item is returned within a specified time period, e.g. within 6 months since the due date.

- Generate a refund if payment has been made.
- Generate a refund only if the item is returned within a specified time period since the payment date.
- Restore existing overdue fines.
- Generate new overdue fines based on the check in date.

9.4.2. Claims Returned

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

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

9.4.3. Claims Never Checked Out

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

9.5. In-House Use

In-house use can be recorded for catalogued and non-catalogued items. The statistics for in-house use are separate from regular circulation statistics. The in-house use count of catalogued items is not included in the items' total use count.

9.5.1. Catalogued Items

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

# of Uses:	5		Barcode ▾	FRE400001062		Submit
In-House Use						

9.5.2. Non-catalogued Items

1. Click on **Circulation** → **Record In-House Use**.
2. Enter the number of uses.

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



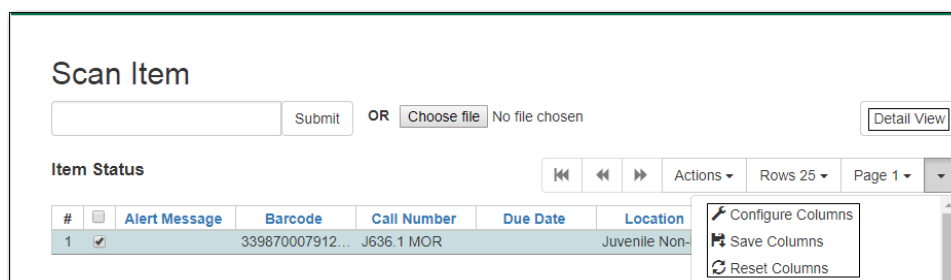
A horizontal bar with a text input field containing "# of Uses: 10", a dropdown menu set to "Western", and a "Submit" button.

9.6. Item Status

The **Item Status** screen is very useful to circulators and cataloguers at your library. Many daily workflows are performed from this screen. It is good practice to familiarize yourself with the functions and features of Evergreen's **Item Status**.

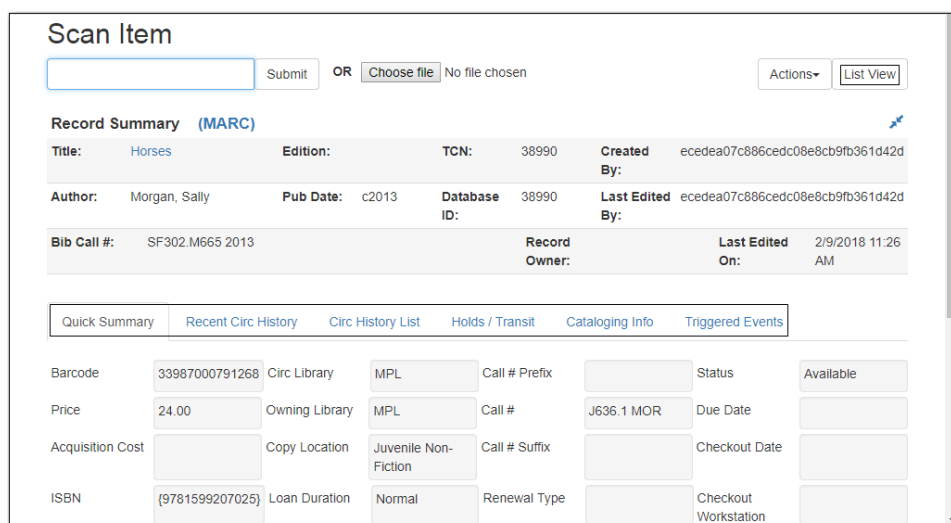
9.6.1. List View and Detail View

- To check an item's status click **Circulation** → **Item Status**, or **Search** → **Search for Copies by Barcode**, or press **F5**.
- Scan or enter the item barcode.
- The current status of the item is displayed. Configure columns to select more fields to view.



The "Scan Item" interface shows a search bar with "Submit" and "Choose file" buttons. Below is a table with columns: #, Alert Message, Barcode, Call Number, Due Date, Location. A row is visible with barcode 339870007912... and location Juvenile Non-Fiction. A "Detail View" button is in the top right. A configuration menu is open showing "Configure Columns", "Save Columns", and "Reset Columns".

- Click **Detail View** to see item summary, circulation history, and other useful information.



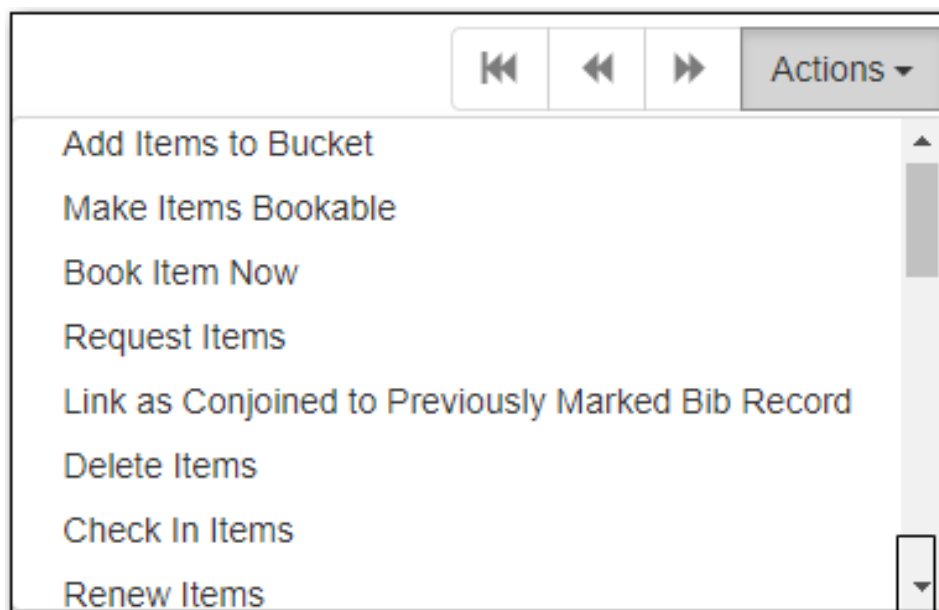
The "Detail View" for the item shows a "Record Summary (MARC)" section with fields like Title (Horses), Author (Morgan, Sally), Pub Date (c2013), and Bib Call # (SF302.M665 2013). Below this is a table with tabs: Quick Summary, Recent Circ History, Circ History List, Holds / Transit, Cataloging Info, Triggered Events. The table displays various item details including Barcode, Price, Acquisition Cost, ISBN, Circ Library, Owing Library, Copy Location, Loan Duration, MPL, Call # Prefix, Call #, Call # Suffix, Renewal Type, Status, Due Date, Checkout Date, and Checkout Workstation.

- Click **List View** to revert.

9.6.2. Item Status Actions Menu

Many circulation functions are available under the **Actions** menu. Common tasks are view last few circulations, retrieve last few patrons, mark item damaged or missing, insert item alert messages, check in items, renew items, request items, and so on.

1. Select item and click **Actions** to make choice.
2. Click on down arrow to scroll through options.



9.6.3. Upload from File (Choose file)

This feature uploads multiple item barcodes saved in a text file on your local computer. To ensure smooth uploading and further processing of the items, it is recommended that the list contain no more than 100 items.

1. Click **Choose File** and follow on screen prompts.

A screenshot of a web form titled 'Scan Item'. The form has a light gray background and a dark border. It contains a text input field, a 'Submit' button, and a 'Choose file' button. The 'Choose file' button is highlighted with a dark gray background and a white border. To the right of the 'Choose file' button, the text 'No file chosen' is displayed. The form is styled with a clean, modern look.

9.7. Barcode Completion

Barcode completion is sometimes used in Sitka's Evergreen to handle duplicate item or patron barcodes. It adds a prefix or a suffix to the physical barcode scanned. For example, all barcodes at a library may be prefixed in Evergreen with their Library and Archives Canada code MPL, to read MPL12345 in the database, but the physical barcode on the item or patron card is 12345. When barcode completion is in use, Evergreen will add MPL to every barcode scanned, matching the

physical barcode with the correct saved record. Staff have to read the screen, and make correct choice, for barcode completion to work as designed. Co-op Support recommends you consider re-barcoding to better manage duplicate barcodes in Sitka's Evergreen.

9.7.1. Multiple Matches

1. Scan a barcode. If matches are found, a pop-up will appear listing the possible barcodes.
2. Select the required barcode and title, or barcode and name, and continue.

9.7.2. Patron Barcodes

The patron barcode completion pop-up appears when a patron barcode is scanned in the following places:

- Check Out
- Place hold for patron by barcode in the web client catalogue.

9.7.3. Item Barcodes

The item barcode completion pop-up appears when an item barcode is scanned in the following places:

- Check Out
- Check In
- Item Status

Chapter 10. Bills and Payments

10.1. Circulation vs. Grocery Bills

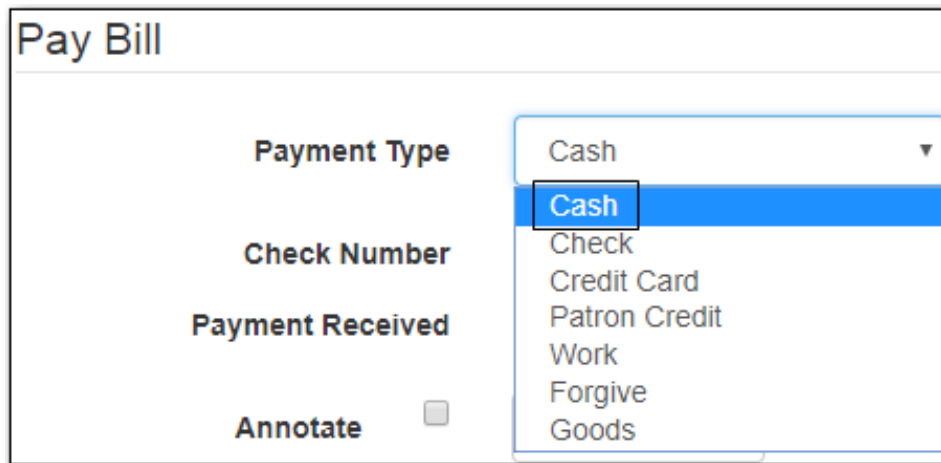
There are two types of bills in Sitka's Evergreen: **Circulation** bills and **Grocery** bills.

- Circulation bills are system-generated charges such as overdue fines, lost item costs, and processing fees. The fine rates, replacement costs, and processing fees are determined by each library.
- Grocery bills are manually created by staff. Grocery bill types can be shared by all Sitka libraries or created by an individual library. Default price can be attached to each bill type.

10.2. Making Payments

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

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



The screenshot shows a web form titled "Pay Bill". It has several input fields: "Payment Type" (a dropdown menu), "Check Number", "Payment Received", and "Annotate" (with a checkbox). The "Payment Type" dropdown is open, showing a list of options: "Cash", "Check", "Credit Card", "Patron Credit", "Work", "Forgive", and "Goods". The "Cash" option is highlighted with a blue background.

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

Pay Bill

Payment Type

Cash

Check Number

Payment Received

5.00

Annotate

☐

Apply Payment

6. Details of the transaction are displayed.

Total Owed: \$5.00

Total Billed: \$10.00

Total Paid: \$5.00

Refunds Available: \$0.00

Credit Available: \$0.00

Session Voided: \$0.00

Pay Bill

Payment Type

Cash

Check Number

Payment Received

Annotate

☐

Apply Payment

Owed for Selected: \$0.00

Billed for Selected: \$0.00

Paid for Selected: \$0.00

Pending Payment: \$0.00

Pending Change: \$0.00

Bill Patron

History

Check All Refunds

⏮

⏪

⏩

⏭

Actions

Rows 25

Page 1

#	☐	Balance	Payment	Barcode	Start	Last Bill	Total Paid	Type	Total Bill	Bill #	Title	Location
1	☐	\$5.00	\$0.00		3/20/...	Fee f...	\$5.00		\$10.0...	12		MPL

☐ Receipt On Payment

Copies

1

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

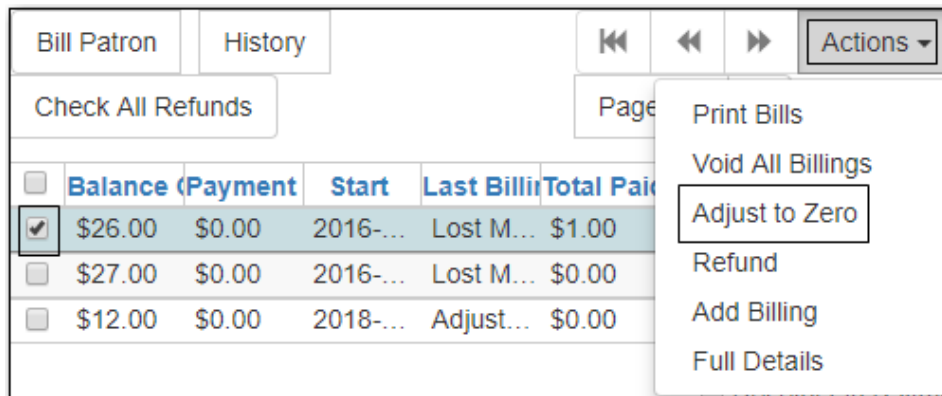
10.3. Patron Credit

BC Libraries Cooperative Support advises that the optional Patron Credit function is not working correctly in version 3.1 of Sitka's Evergreen, effective May 22, 2018. This page will be updated when the functionality changes. Libraries that have disabled this feature in the library setting, Disable Patron Credit, are not affected

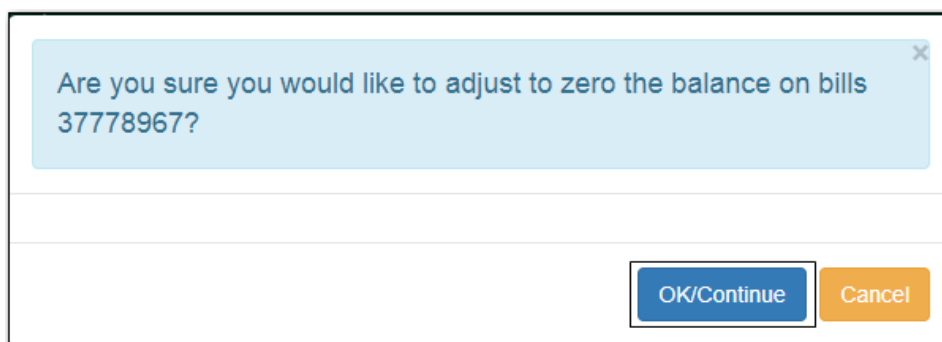
10.4. Adjust Bill Balance to Zero

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

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



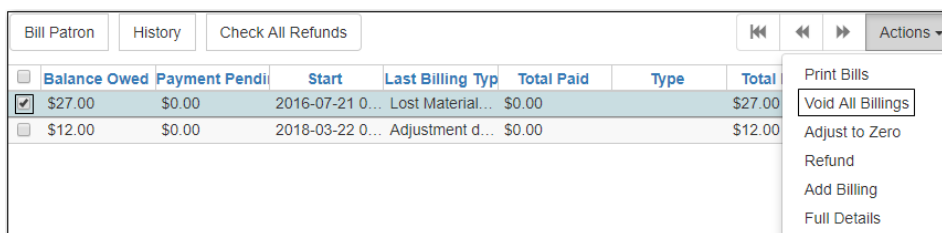
3. Click **OK/Continue**.



10.5. Void Bills

Local System Administration staff can void bills, either entirely or in part. Co-op Support recommends you use **Adjust Bill to Zero** in most cases.

1. Click **Bills** in patron account.
2. Select bill line and click **Actions** → **Void All Billings**.



3. To void a partial amount, select the bill, click **Actions** → **Full Details**.
4. Select line item and click **Actions** → **Void Billings**.

Bills							⏮ ⏪ ⏩ ⏭ Actions ▾	
#	☐	Amount	Billing Title	Legacy Bill	Billing ID		Void Billings Edit Note	
1	☐	\$25.00	2016-...	Lost M...	26705...	S		
2	☒	\$2.00	2016-...	Lost M...	26705...	SYST...	false	

- Click **OK/Continue**.

10.6. Adding New "Grocery" Bills

10.6.1. Create New Bill

- Click **Bills** in patron account.
- Click **Bill Patron**

[Check Out](#)
[Items Out \(0\)](#)
[Holds \(0 / 0\)](#)

Bills (\$0.00)

Messages

Edit

Other ▾

Patron Search

Total Owed:

Refunds Available:

\$0.00

Total Billed:

Credit Available:

\$0.00

Total Paid:

Session Voided:

\$0.00

Owed for Selected:

\$0.00

Pending Payment:

\$0.00

Billed for Selected:

\$0.00

Pending Change:

\$0.00

Paid for Selected:

\$0.00

Pay Bill

Payment Type

Cash ▾

Check Number

Payment Received

Annotate

☐

Apply Payment

Bill Patron

History

Check All Refunds

⏮

⏪

⏩

⏭

Actions ▾

Rows 25 ▾

Page 1 ▾

#	☐	Balance	Payment Barcode	Start	Last Bill	Total Paid	Type	Total Bill	Bill #	Title	Location
No Items To Display											

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

Location: MPL

Billing Type:

Amount:

Note:

10.6.2. Add Charge to Existing Bill

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

Owed for: \$5.00 Pending: \$0.00 Check Number:

Selected: \$5.00 Payment: \$0.00 Payment Received:

Billed for: \$5.00 Pending Change: \$0.00

Selected: \$0.00

Paid for Selected: \$0.00

Annotate: ☐

Page: **Actions**

#	☐	Balance	Payment	Barcode	Start	Last Bill Total	Bill #	Title	Location
1	☒	\$5.00	\$0.00		3/23/2...	Fee fo...	25		MPL

ment # Copies 1

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

10.7. Bill History

10.7.1. Bill History

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

Bill History

Transactions
Payments

Selected Billed: \$16.00
Selected Paid: \$7.00

Apply
Start Date: 2017-03-23
End Date: 2018-03-23

Actions Rows 25 Page 1

#		Balance Ow	Total Paid	Total Billed	Start	Bill #	Title	Type	Finish
1	☐	\$0.00	\$12.50	\$12.50	2017-06-...	41284062		circulation	2018-03-...
2	☐	-1.00	\$1.00	\$0.00	2017-04-...	40852370		circulation	
3	☐	\$0.00	\$27.50	\$27.50	2017-04-...	40855794		circulation	2017-04-...
4	☐	-2.50	\$2.75	\$0.25	2017-04-...	40855964		circulation	

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

Selected Billed: \$16.00
Selected Paid: \$7.00

Apply
Start Date: 2017-03-23
End Date: 2018-03-23

Actions Rows 25 Page 1

#		Balance Ow	Total Paid	Total Billed	Start	Bill #	Title	Type	Finish
1	☐	\$0.00	\$12.50	\$12.50	2017-06-...	41284062		circulation	2018-03-...
2	☐	-1.00	\$1.00	\$0.00	2017-04-...	40852370		circulation	
3	☐	\$0.00	\$27.50	\$27.50	2017-04-...	40855794		circulation	2017-04-...
4	☐	-2.50	\$2.75	\$0.25	2017-04-...	40855964		circulation	
5	☒	\$9.00	\$7.00	\$16.00	2017-06-...	41284079		circulation	
6	☐	\$52.50	\$52.50	\$105.00	2017-06-...	41284687	game of t...	circulation	

Add Billing
Full Details
Print Bills

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

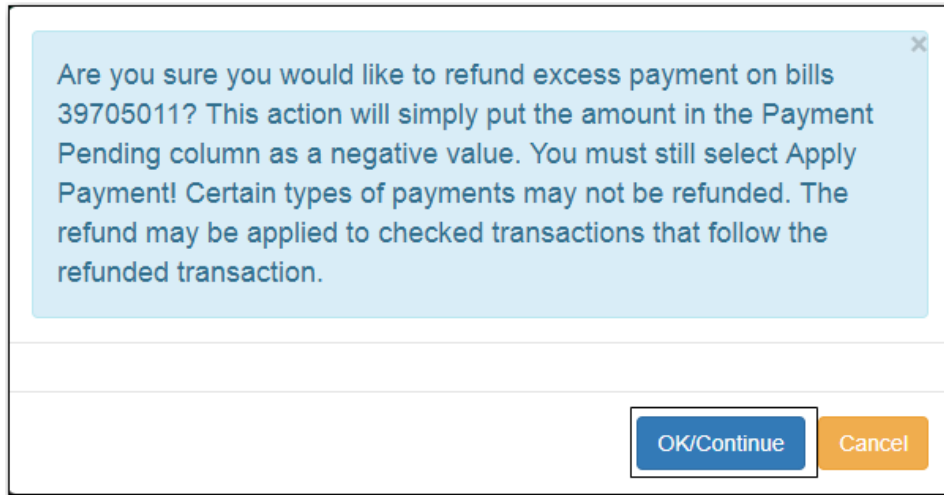
10.7.2. Payment History

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

10.8. Refund

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

1. Select the bill on the **Bills** screen and click **Actions** → **Refund**.
2. Read the instructions and confirm.



3. Select payment type and click **Apply Payment**.

Unresolved directive in circ/circ-billing.adoc - include::billing/billing-conditional-negative-balances.adoc[Conditional Negative Balances]

Chapter 11. Holds

11.1. Placing Holds

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

11.1.1. Hold Levels

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

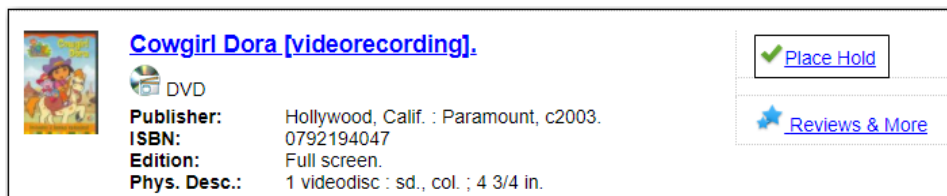
The chart below summarizes the four levels of holds.

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

Hold level	Abbreviation	When to use How to use	Who can use	Hold tied to
Volume	V	Patron wants the first available copy of a specific volume (call number) of a title. Staff or patron click Volume in Holdable? column on the record summary screen.	Patron or staff	Call number specific volume record (local call number resides in volume record)
Copy	C	Patron or staff want a specific copy of a title. Staff click Copy hold in Holdable? column on the record summary screen.	Staff	Item barcode

11.1.2. Title Level Hold

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 **Submit**.

Place Hold

☐ Place hold for patron by barcode: **Patron Search**

☐ Place this hold for me (LSA MPL)

Cowgirl Dora [videorecording].

[Advanced Hold Options](#)

Pickup location:

Notify when hold is ready for pickup?

☐ Yes, by Email
 Email Address:

☒ Yes, by Phone
 Phone Number:

☐ Yes, by Text Messaging
 Mobile carrier: Note: carrier charges may apply
 Mobile number: Hint: use the full 10 digits of your phone #, no spaces, no dashes

Suspend this hold? [?](#)

☐ Yes [Set activation date](#)

Submit **Cancel**

- Click **Continue** to go back to search results, or click **Place another hold for this title**.

Place Hold

Cowgirl Dora [videorecording].

☐

Hold was successfully placed

[Continue](#) [Place another hold for this title](#)

11.1.3. Meta-record Level Hold

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

Advanced Hold Options

- Click **Place Hold** to the right of the record on the search result list, or on the record summary screen.
- Click **Advanced Hold Options** under the title.

Harry Potter and the Deathly Hallows : #7 Harry Potter / J.K. Rowling.

[Advanced Hold Options](#)

3. If meta-record data is available, the different formats and languages display. Select the acceptable formats and languages.

4. Edit patron hold notification methods and pickup location, if required.
5. Click **Submit**.

Group Formats and Editions Search

1. On the **Advanced Search** screen, click **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 and click **Submit**.

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

If no format is selected all available formats are hold targets. 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.

11.1.4. Volume and Copy Level Hold

1. To place a volume or copy level hold, retrieve and display the record.
2. Select record in holdings grid and click **Volume hold** or **Copy hold** in **Holdable?** column.

Location	Call Number / Copy Notes	Barcode	Shelving Location	Circulation Modifier	Age Hold Protection	Active/Create Date	Holdable?	Status	Due Date
Maple Library	DVD ACT HAR (Text)	33987000802511 view edit	DVD	dvd	None	02/09/2018	Copy hold / Volume hold	On holds shelf	-

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

11.1.5. Placing Holds in Patron Records

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

3. The catalogue is displayed in the **Holds** screen.
4. Search for the titles, and place holds as described above.
5. Click the **Holds** tab to go back to the patron's **Holds** screen.

11.2. Managing Holds

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

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

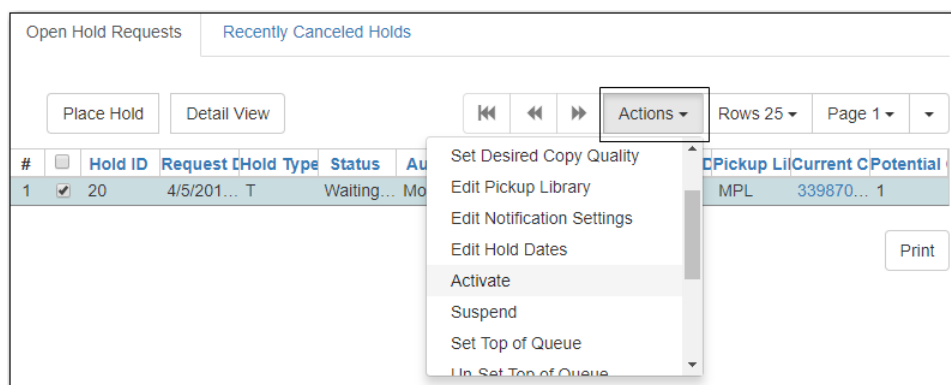
11.2.1. Hold Statuses

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

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

11.2.2. Managing Holds in Patron Records

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



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

11.2.3. Cancel Holds

1. Click **Cancel Hold** from the **Actions** menu.
2. Enter a reason if required and click **Cancel Hold**.

The screenshot shows the 'Cancel 1 Hold(s)' dialog box. It has a title bar with a close button. Inside, there is a 'Cancel Reason:' label followed by a dropdown menu showing 'Staff forced'. Below that is a 'Note:' label followed by a text area containing 'Note...'. At the bottom right, there are two buttons: 'Cancel Hold' (green) and 'Exit' (orange).

3. If item was on holds shelf, check it in to change its status.

TIP

A captured hold with a status of **On Holds Shelf** or **Ready for Pickup** can be cancelled by staff or patrons. The item must be checked in to update its status.

11.2.4. Suspend, Activate, and Modify Holds Dates

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

Modify Dates for 1 Hold(s) ×

Check the checkbox next to each field you wish to modify.

☐	Hold Activate Date	2018-04-06	
☐	Hold Request Date	2018-04-06	
☐	Hold Expire Date	2018-04-06	
☐	Shelf Expire Date	2018-04-06	

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

TIP

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

11.2.5. Edit Holds Notification Settings

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

11.2.6. Edit Pickup Library

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

TIP

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

11.2.7. Edit Hold Queue Position

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

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

TIP

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

TIP

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

11.2.8. Cancelled Holds

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

11.2.9. View Hold Details

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

TIP

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

11.2.10. Managing Holds in Title Records

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

11.3. Pull List for Hold Requests

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

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

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

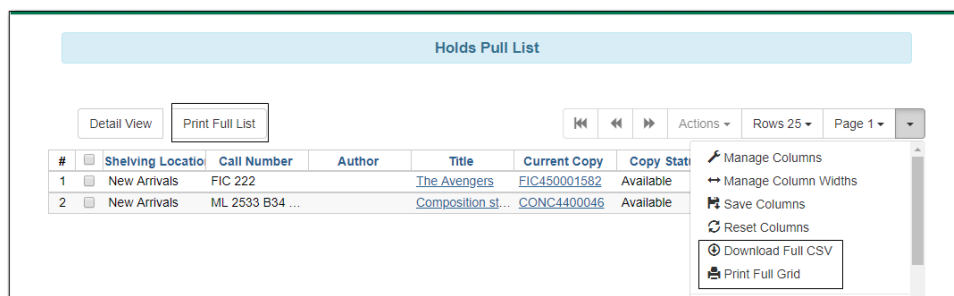
Holds Pull List							
Detail View		Print Full List		⏮ ⏪ ⏩ ⏭ Actions ▾ Rows 25 ▾ Page 1 ▾ ▾			
#	☐ Shelving Location	Call Number	Author	Title	Current Copy	Parts	Potential Copies
1	☐ New Arrivals	FIC 222		The Avengers	FIC450001582	Available	16
2	☐ New Arrivals	ML 2533 B34 ...		Composition st...	CONC4400046	Available	25

TIP

The order of shelving locations can be adjusted on **Administration** → **Local Administration** → **Copy Location Order**.

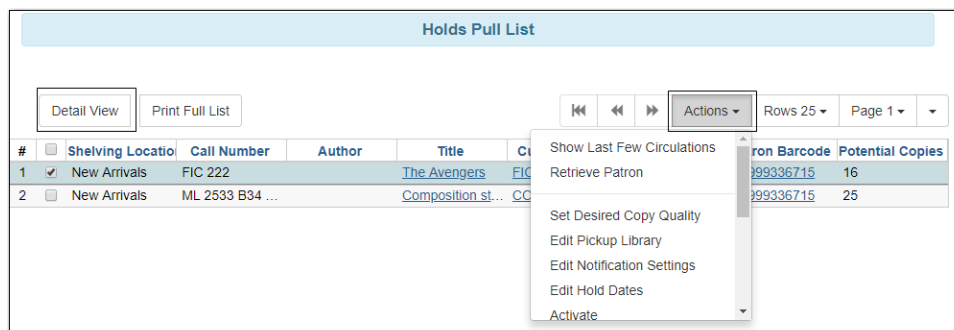
11.3.1. Print or Export Pull List for Hold Requests

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



11.3.2. Hold Management from the Holds Pull List

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



11.4. Transferring Title Holds

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

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

Mark for: ▼

Other Actions: ▼

Conjoined Items *(Currently 11)*

Overlay Target

Title Hold Transfer *(Currently 68)*

Volume Transfer

Reset Record Marks

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

Pickup Library BR1 ▼

Detail View

#		Hold ID	Potential C	Author	Capture Da	Patron Bar	Request Da	Ava
1	☒	264	16	Chechik,...	9999933...	2018-04-...		

⏮

⏪

⏩

Actions ▼

⏮

⏪

⏩

⏭

Activate

Suspend

Set Top of Queue

Un-Set Top of Queue

Transfer To Marked Title

Find Another Target

Cancel Hold

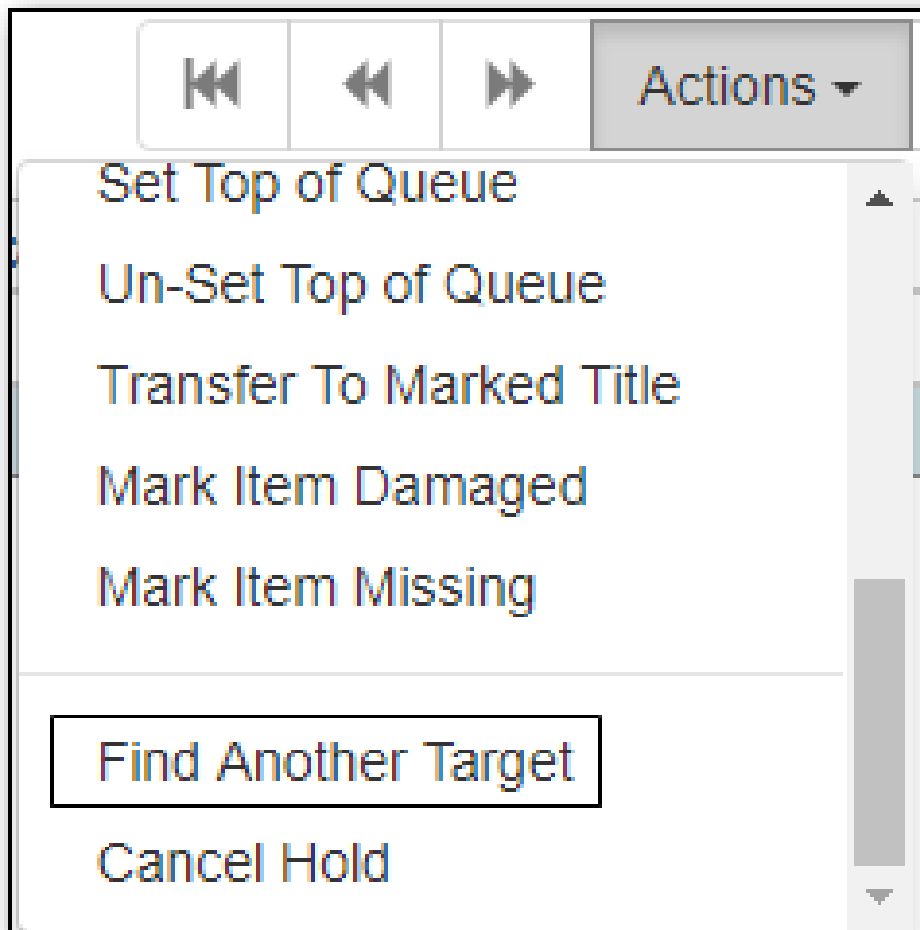
- Click **OK/Continue**.

11.5. Re-targeting Holds

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

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

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



TIP

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

11.6. Capturing Holds

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

1. Select **Circulation** → **Capture Holds** or **Circulation** → **Check In**.
2. Scan or enter barcode and click **Submit**.
3. Patron contact information and any routing information for the hold is captured.
4. The hold or hold transit slip is automatically printed on **Hold Capture** screen by default.
5. On **Check In** screen, select **Checkin Modifiers** → **Auto-Print Hold and Transit Slips** to print hold slips automatically.

TIP

Patron contact information on the slip may differ from what is in their patron account record. Patrons have the option to enter different information when placing a hold, and Evergreen will print information from the hold record, rather than from the patron record.

11.7. Holds Shelf List and Clearing Shelf-Expired Holds

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

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

11.7.1. Holds Shelf List

1. Select **Circulation** → **Holds Shelf**.
2. The **Holds Shelf** list is displayed.
3. Select a hold, click **Actions**, and make appropriate selection.

11.7.2. Clearable Holds

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

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

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

TIP

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

11.8. Holds Filling Explained

11.8.1. Selection Depth

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

Based on current Sitka settings, you will see either 1 or 2 in **Selection Depth**. 2 means only holdable copies of a library, or of a multi-branch library system, will be used to fill the hold. 1 means all holdable copies within a library federation, such as BC InterLibrary Connect (BC_ILC) or Spruce, are the hold's potential targets. The depth setting is not editable on the staff client, nor does Evergreen re-assess or update the setting when holdings change under a title. If **Selection Depth** needs to be changed, staff have to manually cancel, then re-place the hold.

11.8.2. Holds Targeter and Potential Targets

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

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

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

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

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

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

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

11.8.3. Holds Queue and Filling Sequence

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

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

For resource-sharing libraries, you may see selection depth 1 and 2 holds. Selection depth 2 holds have a separate queue based on the pick-up library, since they target a separate set of copies. This means each library or system has its own queue if it has holdable copies.

Selection depth 1 holds are queued together with all holds (selection depth 1 and 2) targeting all copies that the selection depth 1 hold may target. The queue number may be big when a few libraries have a few selection depth 2 holds. Selection depth 1 holds take a position in each selection depth 2 holds queue under the title. You may see missing queue numbers in selection depth 2 holds queues, which are taken by selection depth 1 holds.

To view selection depth 2 holds queue, simply filter the holds by pickup library, then follow the request time. A missing queue number means there is a selection depth 1 hold placed between the surrounding two holds' request time.

Chapter 12. Items in Transit

12.1. When Will An Item Go In Transit?

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**.

12.2. 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.

12.3. 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.

12.4. 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**.

The screenshot shows the 'Transit List' interface. At the top, there's a header 'Transit List'. Below it, there are two radio buttons: 'Transits To' (selected) and 'Transits From'. A 'Library:' dropdown menu is set to 'MPL'. To the right, there are 'Start Date:' and 'End Date:' fields, both with calendar icons. The 'Start Date' is set to '2018-03-01' and the 'End Date' is set to '2018-04-20'. Below these fields are four buttons: 'Add Items to Bucket', 'Edit Item Attributes', 'Cancel Transit', and 'Print Transits'. To the right of these buttons are navigation icons and a 'Rows 25' dropdown. At the bottom, there is a table with the following columns: '#', 'Barcode', 'CN Prefix', 'CN Suffix', 'Title', 'Source Library', 'Destination Libr', 'Send Date/Time', and 'Hold Type'. The table contains one row with the following data: '# 1', 'Barcode 33987000855...', 'CN Prefix', 'CN Suffix', 'Title Dora the Expl...', 'Source Library BRL-AHL', 'Destination Libr MPL', 'Send Date/Time 4/6/2018 9:05 ...', and 'Hold Type'.

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.

12.5. Cancel Transits

NOTE

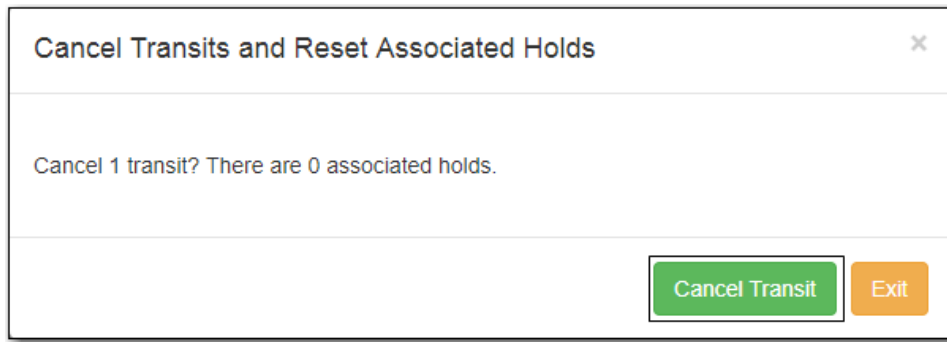
Under certain circumstances cancelling a transit may be required, but it effectively cancels the previous check in. Cancelling a transit affects data integrity and the accuracy of circulation statistics. Co-op Support strongly recommends that only sending libraries ever cancel a transit, and only before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

12.5.1. Cancel a Transit from Transit List

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

This screenshot is identical to the one above, but the 'Cancel Transit' button is highlighted with a red rectangle, indicating it is the button to be clicked to cancel a transit.

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 13. Self Check

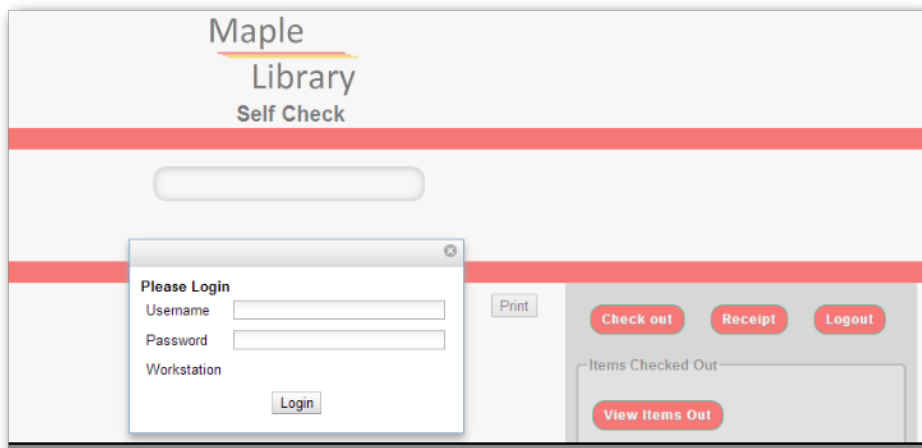
13.1. Staff Functions in the Evergreen Self Check

NOTE

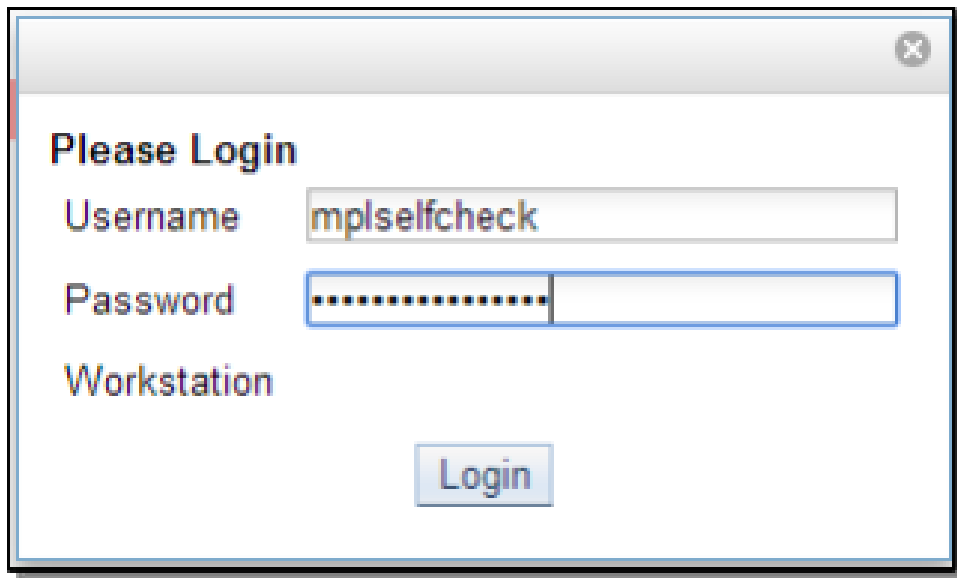
These instructions are specific to the native Evergreen Self Check. For instructions on using third party self check systems, libraries should refer to the instructions provided by the third party vendors.

13.1.1. 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**.



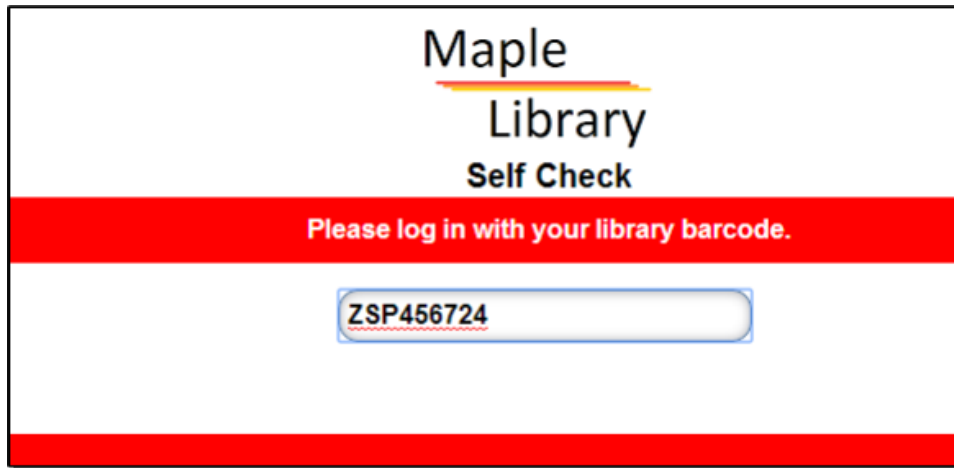
13.1.2. Turn off the Self Check

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.

13.2. Basic Check Out

1. Scan a library card.



Maple
Library
Self Check

Please log in with your library barcode.

ZSP456724

This is a screenshot of a library self-checkout interface. At the top, the text 'Maple Library Self Check' is displayed. Below this, a red banner contains the instruction 'Please log in with your library barcode.' Underneath the banner is a text input field containing the library barcode 'ZSP456724'. The interface has a white background with red and blue accents.

2. If required, enter password. Password is optional.



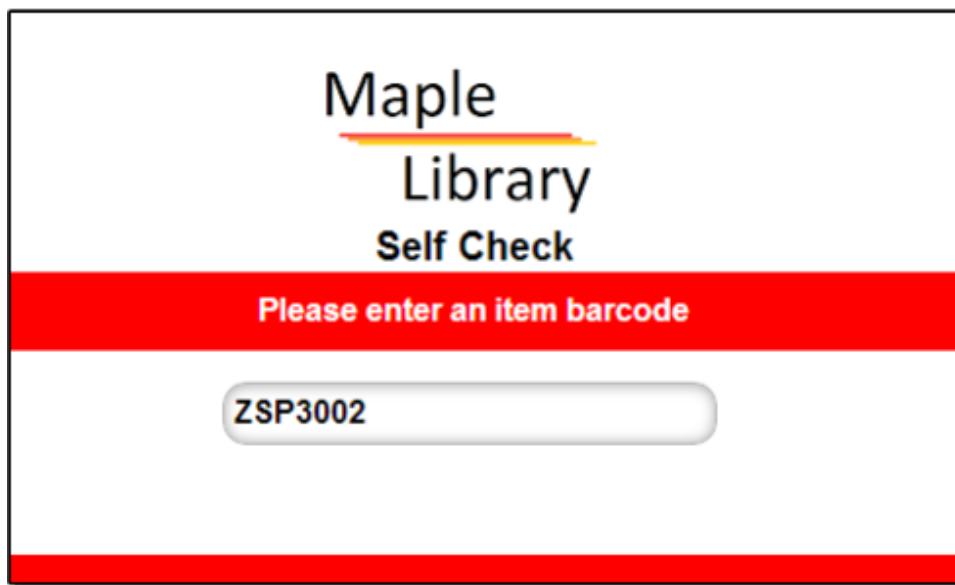
Maple
Library
Self Check

Please enter your password

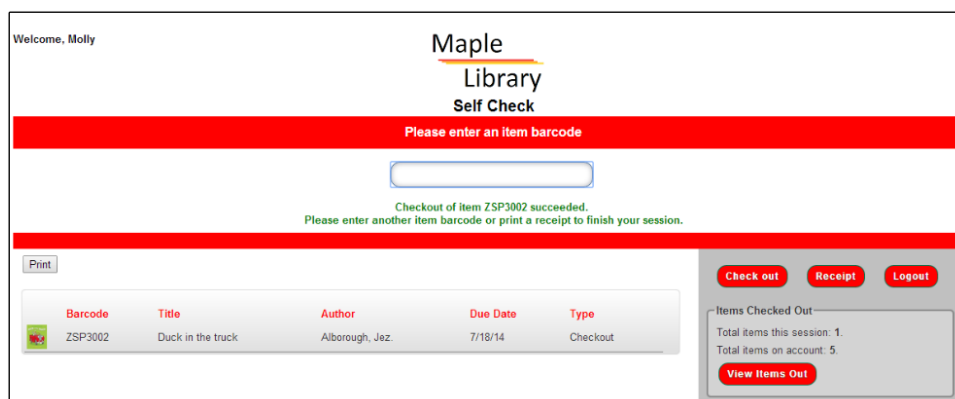
.....

This is a screenshot of the same library self-checkout interface, but at the password entry step. The text 'Maple Library Self Check' is at the top. Below it, a red banner says 'Please enter your password'. Underneath the banner is a password input field represented by a series of dots '.....'. The interface has a white background with red and blue accents.

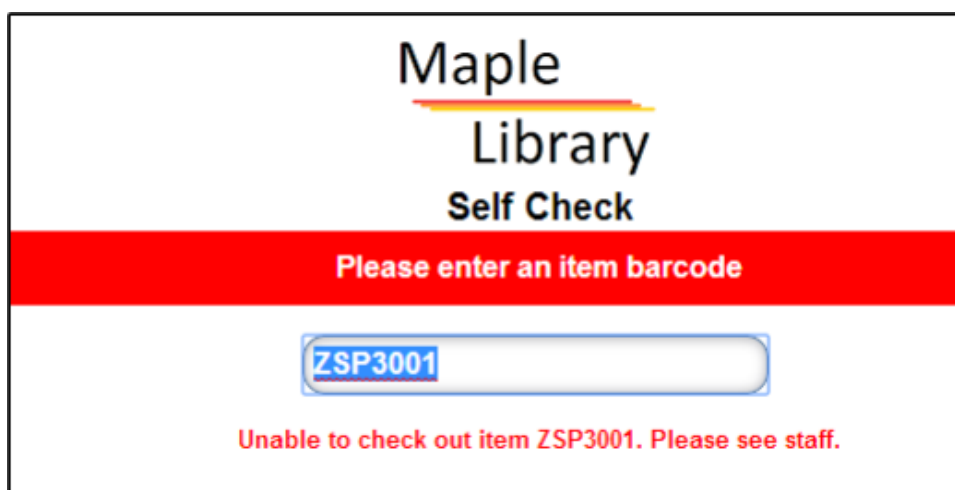
3. Scan item barcodes, or place items, one at a time, on the RFID pad.



4. Items are listed with a check out confirmation message.



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



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

Check out **Receipt** **Logout**

Items Checked Out

Total items this session: **1**.

Total items on account: **5**.

View Items Out

Holds

You have **1** item(s) ready for pickup.

You have **3** total holds.

View Holds

Fines

Total fines on account: **\$4.50**.

View Details

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.

13.3. Renew Items

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

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

Welcome, Lily

Maple Library

Self Check

Please enter an item barcode

Renewal of item 33987000510262 succeeded. Please enter another item barcode or print a receipt to finish your session.

Barcode	Title	Author	Due Date	Type
 33987000510262	Harry Potter and the deathly hallows	Rowling, J. K.	8/18/16	Renewal
 33987000540251	Harry Potter and the goblet of fire	Rowling, J. K.	8/18/16	Checkout

Home Logout
Logout (No Receipt)

Items Checked Out—
Total items this session: 1.
Total items on account: 5.
View Items Out

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

Self Check

Please enter an item barcode

33987000629732

Unable to check out item 33987000629732. Please see staff.

13.4. View Items Out

- Click View Items Out.

Check out
Receipt
Logout

Items Checked Out

Total items this session: 1.

Total items on account: 5.

View Items Out

Holds

You have 1 item(s) ready for pickup.

You have 3 total holds.

View Holds

Fines

Total fines on account: \$4.50.

View Details

- Items out list displays. Click **Print** to print list.

Print

	Barcode	Title	Author	Due Date	Type
	ZSP3023	The emerald atlas	Stephens, John.	6/7/14	Checkout
	ZSP3021	Eragon	Paolini, Christopher.	6/19/14	Checkout
	ZSP3001	Martin Chuzzlewit	Dickens, Charles.	6/20/14	Checkout
	ZSP3022	The eye of Zoltar	Fforde, Jasper	6/26/14	Checkout
	ZSP3002	Duck in the truck	Alborough, Jez.	7/18/14	Checkout

13.5. View Holds

- Click **View Holds**.

Check out
Receipt
Logout

Items Checked Out

Total items this session: 1.

Total items on account: 5.

View Items Out

Holds

You have 1 item(s) ready for pickup.

You have 3 total holds.

View Holds

Fines

Total fines on account: \$4.50.

View Details

- Items on hold list displays. Click **Print** to print list.

Print

Title	Author	Status
 The borrower : a novel	Makkai, Rebecca.	Ready for pickup
 English passengers	Kneale, Matthew	#1 in line with 1 copies
 The swan thieves : a novel	Kostova, Elizabeth.	#1 in line with 1 copies

13.6. View Fines

- Click **View Details**.

Check outReceiptLogout

Items Checked Out

Total items this session: 1.
Total items on account: 5.

View Items Out

Holds

You have 1 item(s) ready for pickup.
You have 3 total holds.

View Holds

Fines

Total fines on account: \$4.50.

View Details

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

Selected total: \$4.50

☒	Type	Details	Total Billed	Total Paid	Balance Owed
☒	Miscellaneous	Fine	4.00	1.50	2.50
☒	Miscellaneous	Fine	2.00	0.0	2.00

Chapter 14. Offline Circulation

14.1. Introduction

Evergreen's Offline Circulation interface is designed to log transactions during network outage. Transactions can be uploaded and processed once network operations are restored.

New in Evergreen version 3.1 you can choose how to save your offline transactions. You can use Chrome to save your transactions, or you can install and configure an Evergreen application called [Hatch](#).

14.1.1. Save Offline Transactions in Chrome

Chrome is simple to use and manage. Chrome uses cookies to save your transactions.

CAUTION

- Do not delete browser cookies if you have pending offline transactions.
- Offline transactions should be uploaded as soon as possible.

14.1.2. Save Offline Transactions in Hatch

If you have Hatch running on your workstation you can use it to save your offline transactions.

1. Log into Evergreen as LSA.
2. Click **Administration** → **Workstation**.
3. Click **Print/Storage Service (Hatch)**
4. Make sure that you see that Hatch is available. Click **Store Offline Transaction Data in Hatch**.
5. Log out.
6. Offline Transactions will now be stored in Hatch. This will enable you to delete your browser cookies and not lose your offline transactions.

14.2. Offline Workstation Set up

Prior to using **Offline Circulation** you must have access to your production server and register your workstation on the computer and in the browser you intend to use. The following should be completed on each workstation you intend to use for **Offline Circulation**.

14.2.1. 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.

- If you are logged out, you will see the tab default to **Checkout** and the button on the top-right will read **Export Transactions**.

Workstation: BRL- Working location: BRL-AHL Save Transactions Reprint Last Receipt Export Transactions

Checkout Renew In-house Use Checkin Register Patron

Due Date: [] [No Offset]

Patron barcode: []

Item Barcode: []

Non-cataloged Type: []

Clear [x] Strict Barcode [x] Print receipt Checkout

Patron barcode	Item barcode	Due date

- If you are logged in, you will see an additional tab on the left for **Session Management** and this will be the default tab. The top-right button will read **Download Block List**.

Workstation: BRL- Working location: BRL-AHL Save Transactions Reprint Last Receipt Download block list

Session Management Checkout Renew In-house Use Checkin Register Patron

Pending Transactions Offline Sessions

Export Transactions Import Transactions Clear Transactions

Type	Timestamp	Patron Barcode	Item Barcode	Non-cataloged Type	Checkout Date	Due Date	Checkin Date	First Name	Last Name

- If you are logged in and attempt to click on any tab other than **Session Management**, you will see a warning alerting you that you are about to enter offline mode.

Warning

You are about to enter offline mode. If you proceed, you will be logged out.

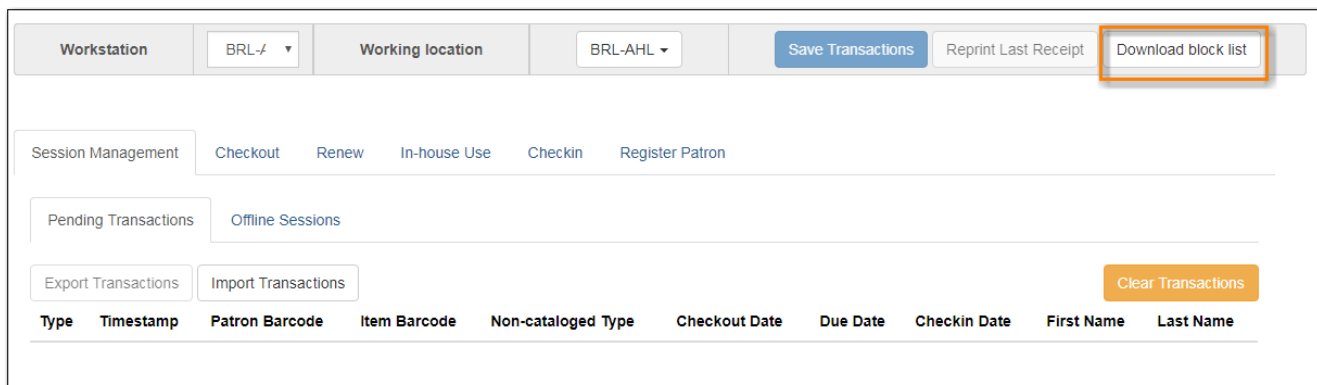
Proceed

- This warning is not network-aware and it will appear regardless of network connection state. You must be logged out to record offline transactions.
- If you see this warning and wish to record offline transactions, click **Proceed** in order to log out.

14.2.2. Download Offline Block List

While logged in and still online, you may download an **Offline Block List**. This will locally store a list of all patrons with blocks at the time of the download. If this list is present, **Offline Circulation** will check transactions against this list.

To download the block list, navigate to **Circulation** → **Offline Circulation** and click the **Download Block List** button in the top-right of the screen.



The screenshot shows the 'Offline Circulation' interface. At the top, there are two dropdown menus for 'Workstation' (set to 'BRL-') and 'Working location' (set to 'BRL-AHL'). To the right of these are three buttons: 'Save Transactions' (blue), 'Reprint Last Receipt' (grey), and 'Download block list' (white with an orange border). Below these are several tabs: 'Session Management', 'Checkout', 'Renew', 'In-house Use', 'Checkin', and 'Register Patron'. Under 'Session Management' are 'Pending Transactions' and 'Offline Sessions'. At the bottom, there are 'Export Transactions' and 'Import Transactions' buttons, and a 'Clear Transactions' button (orange). Below the buttons is a table header with columns: 'Type', 'Timestamp', 'Patron Barcode', 'Item Barcode', 'Non-cataloged Type', 'Checkout Date', 'Due Date', 'Checkin Date', 'First Name', and 'Last Name'.

If you attempt a checkout or a renewal for a patron on the block list, you will get a modal informing you that the patron has penalties. Click the **Allow** button to override this and proceed with the transaction. Click the **Reject** button to cancel the checkout or renewal.

NOTE | This procedure should be repeated on a regular basis (daily, weekly etc.)

14.2.3. 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** →

14.2.4. Save Patron Registration Form

1. Click **Circulation** → **Offline Circulation**
2. **Search** → **Search for Patrons**.
3. 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.

14.3. Offline Transactions

CAUTION

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

14.3.1. 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. You may also select an option from the **Offset Dropdown**. 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.
6. To print a receipt, check **Print Receipt**.

The screenshot shows the library's checkout interface. At the top, there's a header with 'Workstation' (BRL-), 'Working location' (BRL-AHL), and buttons for 'Save Transactions', 'Reprint Last Receipt', and 'Export Transactions'. Below this is a tabbed interface with 'Checkout', 'Renew', 'In-house Use', 'Checkin', and 'Register Patron'. The 'Checkout' tab is selected and highlighted with an orange box. The main form area contains fields for 'Due Date' (2018-05-07), 'Patron barcode' (28524000100013), and 'Item Barcode' (35180000214469). There are radio buttons for 'Item Barcode' (selected) and 'Non-cataloged Type'. At the bottom, there is a 'Clear' button, a 'Strict Barcode' checkbox (unchecked), a 'Print receipt' checkbox (checked), and a 'Checkout' button highlighted with an orange box. The right side of the screen shows a table with columns for 'Patron barcode', 'Item barcode', and 'Due date'.

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

The screenshot shows a library system interface. At the top, there are two dropdown menus for 'Workstation' (BRL-/) and 'Working location' (BRL-AHL). To their right is a red-outlined button labeled 'Save Transactions', followed by 'Reprint Last Receipt' and 'Export Transactions'. Below these are five tabs: 'Checkout', 'Renew', 'In-house Use', 'Checkin', and 'Register Patron'. The 'Checkout' tab is active. The form contains several fields: 'Due Date' (2018-05-07) with a calendar icon and a 'Today + 7 c' dropdown; 'Patron barcode' (28524000100013); 'Item Barcode' (empty); and 'Non-cataloged Type' (Select Non-cataloged Type). At the bottom left are 'Clear', 'Strict Barcode' (checkbox), and 'Print receipt' (checkbox). At the bottom right is a 'Checkout' button. On the right side of the form, there is a table with three columns: 'Patron barcode', 'Item barcode', and 'Due date'. The table contains one row with the values: 28524000100013, 35180000214469, and 5/7/2018.

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.

14.3.2. 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.

Workstation: BRL- / Working location: BRL-AHL

Buttons: Save Transactions, Reprint Last Receipt, Export Transactions

Tabs: Checkout, **Renew**, In-house Use, Checkin, Register Patron

Due Date: 2018-05-30 | Today + 30

Patron barcode:

Item Barcode: 3513290000183

Buttons: Clear, ☐ Strict Barcode, ☐ Print receipt, **Renew**

Patron barcode	Item barcode	Due date

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.

Workstation: BRL- / Working location: BRL-AHL

Buttons: **Save Transactions**, Reprint Last Receipt, Export Transactions

Tabs: Checkout, **Renew**, In-house Use, Checkin, Register Patron

Due Date: 2018-05-30 | Today + 30

Patron barcode:

Item Barcode:

Buttons: Clear, ☐ Strict Barcode, ☐ Print receipt, Renew

Patron barcode	Item barcode	Due date
	3513290000183	5/30/2018

14.4. Upload Offline Transactions

14.4.1. Upload Offline Transactions

Once connectivity is restored you will need to upload your offline transactions.

1. Open the **Evergreen Login Page**. You will see a message telling you that there are **Unprocessed offline transactions waiting for upload**.

Sign In

Username

Password

Workstation

Unprocessed offline transactions waiting for upload

2. Enter your **Username** and **Password**.
3. Click **Circulation** → **Offline Circulation**.
4. You will now see a **Session Management** tab to the left of the Register Patron tab. The Session Management tab includes **Pending Transactions** and **Offline Sessions**.
 - a. In the **Pending Transactions** tab you will see a list of all transactions recorded on that browser.
 - b. If you click **Clear Transactions**, you will be prompted with a warning.
5. Click on the **Offline Sessions** tab and then click **Create Session**.

Workstation: BRL-AHL Working location: BRL-AHL

Session Management | Checkout | Renew | In-house Use | Checkin | Register Patron

Pending Transactions | Offline Sessions

Session List

Organization	Created By	Description	Date Created	Upload Count	Transactions Processed	Date Completed
No Items						

6. Enter a descriptive name for your session in the pop-up and click **OK/Continue** to proceed.
7. You will see your new session at the top of the **Session List**.
 - a. The Session List may be sorted ascending or descending by clicking on one of the following column headers: **Organization**, **Created By**, **Description**, **Date Created**, or **Date Completed**. The default sort is descending by Date Created.
8. Click **Upload** to upload everything listed in the **Pending Transactions** tab.

Workstation

BRL-4

Working location

BRL-AHL

Save Transactions

Reprint Last Receipt

Download block list

Session Management

Checkout

Renew

In-house Use

Checkin

Register Patron

Pending Transactions

Offline Sessions

Create Session

Refresh

Session List

Organization	Created By	Description	Date Created	Upload Count	Transactions Processed	Date Completed
BRL-AHL	Sitka Staff	upgradedowntime18	4/30/2018 3:54 PM	0	0	Upload Process

- Once all transactions are uploaded, the **Upload Count** column will update to show the number of uploaded transactions.
- Click **Process** to process the offline transactions. Click **Refresh** to see the processing progress. Once all transactions are processed the **Date Completed** column will be updated.

Workstation

BRL-4

Working location

BRL-AHL

Save Transactions

Reprint Last Receipt

Download block list

Session Management

Checkout

Renew

In-house Use

Checkin

Register Patron

Pending Transactions

Offline Sessions

Create Session

Refresh

Session List

Organization	Created By	Description	Date Created	Upload Count	Transactions Processed	Date Completed
BRL-AHL	Sitka Staff	upgradedowntime18	4/30/2018 3:54 PM	4	0	Upload Process

- 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.

Create Session

Refresh

Session List

Organization	Created By	Description	Date Created	Upload Count	Transactions Processed	Date Completed
BRL-AHL	Sitka Staff	upgradedowntime18	4/30/2018 3:54 PM	4	4	4/30/2018 3:55 PM

Upload

Process

Exception List

Workstation	Type	Timestamp	Event Name	Patron Barcode	Item Barcode	Non-cataloged Type	Checkout Date	Due Date	Checkin Date
BRL-AHL-CatWeb	checkout	4/30/2018 2:33 PM	ASSET_COPY_NOT_FOUND	28524000100013	35180000214469		4/30/2018 2:33 PM	5/7/2018	

Item

Patron

Debug

14.4.2. Export Offline Transactions

If you anticipate a **multi-day closing** or if you plan to **process your offline transactions at a different workstation**, you will want to export your 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.

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. If you wish, you can at this point click **Clear Transactions** to clear the list of pending transactions.

14.4.3. Upload Previously Exported Transactions

If you had previously exported your offline transactions you can upload them for processing.

To import transactions:

1. Log in to the staff client via your **Login Page**
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 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](#).

14.4.4. Exceptions

Exceptions are problems that were encountered during processing. For example, a mis-scanned patron barcode, an open circulation, 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.

Exception List										
Workstation	Type	Timestamp	Event Name	Patron Barcode	Item Barcode	Non-cataloged Type	Checkout Date	Due Date	Checkin Date	
BRL-AHL-CatWeb	checkout	4/30/2018 2:33 PM	ASSET_COPY_NOT_FOUND	28524000100013	35180000214469		4/30/2018 2:33 PM	5/7/2018		Item Patron Debug

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.

Cataloguing

Chapter 15. Searching the Database for Cataloguing Purposes

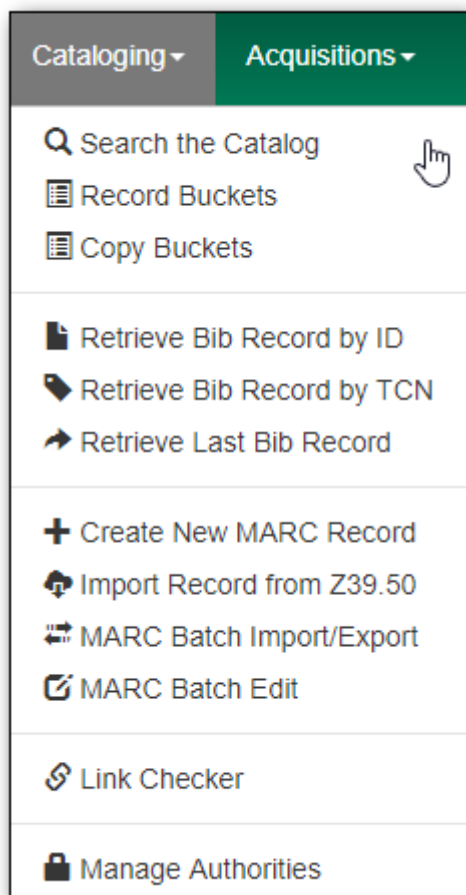
[Sitka Training Video - Search the Catalogue \(5:16\)](#)

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, either at the time of each search or via Workstation or My Account preferences.

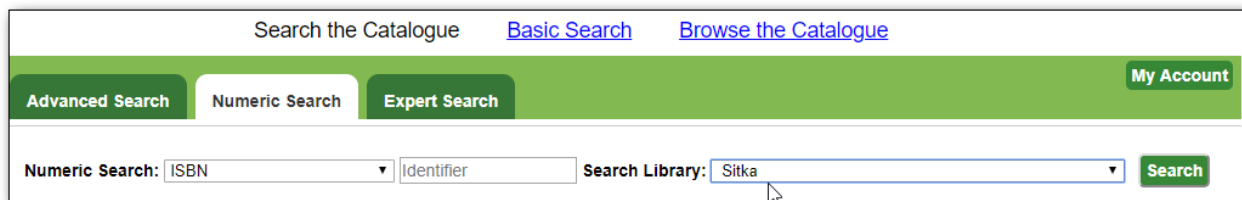
You can set workstation *search preferences* ([add link](#)) to configure default search location and preferred search library and you can choose to have Numeric Search or MARC Expert search be the default advanced search view. These workstation preferences override account login preferences set in My Account. For cataloguing workstations it is recommended that the Default Search Library be set to Sitka. This will ensure staff using those workstations are always searching all of Sitka.

15.1. Advanced/Numeric Search

1. To search the catalogue for holdings select **Cataloguing** → **Search the Catalogue**, or **Search** → **the Catalogue**, or press F3.



2. The advanced search screen is loaded. In this example, the search screen defaults to the **Numeric Search** tab. You may set up a different default search tab via **Workstation Administration**. In this example, note the search library is set to Sitka. A cataloguer must ensure they are searching the entire Sitka database.

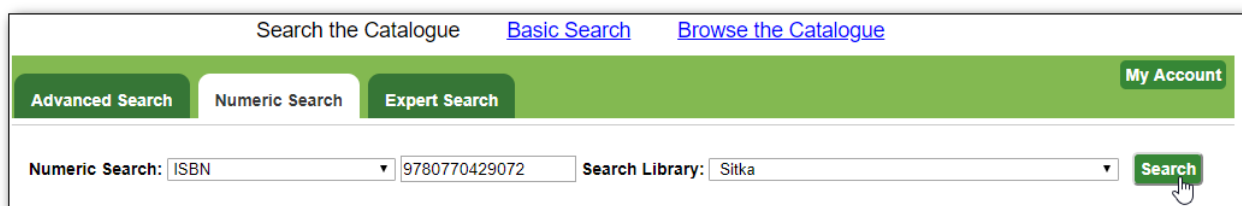


Search the Catalogue [Basic Search](#) [Browse the Catalogue](#)

Advanced Search **Numeric Search** Expert Search [My Account](#)

Numeric Search: ISBN Identifier Search Library: Sitka Search

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



Search the Catalogue [Basic Search](#) [Browse the Catalogue](#)

Advanced Search **Numeric Search** Expert Search [My Account](#)

Numeric Search: ISBN 9780770429072 Search Library: Sitka Search

4. In this example, the title has 6 copies in Sitka.

1. [The princes of Ireland / Rutherford, Edward.](#)

 Book

Publisher: Toronto : Seal Books, 2006.
ISBN: 9780770429072
Phys. Desc.: 800 p. : ill ; 18 cm.

Library	Shelving location	Call number	Status
Fort Nelson Public Library	Adult Paperbacks (main level) - General	PB RUT	Available
Salmo Public Library	Paperback Fiction	PBK FIC RUT	Available
Salt Spring Island Public Library	Paperback fiction	PB FIC RUT	Available
Shilo Community Library	Adult Fiction	F RUT	Available
Tumbler Ridge Public Library	Adult Paperback	APB RUT	Available

6 of 6 copies available at Sitka.

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

1.

[The princes of Ireland /](#)

[Rutherford, Edward.](#)



Book

Publisher: Toronto : Seal Books, 2006.

ISBN: 9780770429072

Phys. Desc.: 800 p. : ill ; 18 cm.

Display record details for "The princes of Ireland /"

Library	Shelving location	Call number	Status
Fort Nelson Public Library	Adult Paperbacks (main level) - General	PB RUT	Available
Salmo Public Library	Paperback Fiction	PBK FIC RUT	Available
Salt Spring Island Public Library	Paperback fiction	PB FIC RUT	Available
Shilo Community Library	Adult Fiction	F RUT	Available
Tumbler Ridge Public Library	Adult Paperback	APB RUT	Available

6 of 6 copies available at Sitka.

6. Confirm bibliographic data as displayed in the brief record. If satisfied that the record matches the item in hand, you can proceed to add holdings as described in [Adding Holdings to Bibliographic Records](#)

[Vanderhoof Public Library](#)

PB-GEN RUT ([Text](#))

35193000076168 [view](#) | [edit](#) Adult Paperback

Record details

- **ISBN:** 9780770429072
- **ISBN:** 0770429076
- **Physical Description:** 800 p. : ill ; 18 cm.
- **Publisher:** Toronto : Seal Books, 2006.

Content descriptions

7. You may also choose to view the MARC record by clicking on **MARC Record** button near the bottom of the screen, or click **MARC View** above the search bar.

Record Summary

Title:	The princes of Ireland	Edition:		TCN:	
Author:	Rutherford, Edward.	Pub Date:	2006	Database ID:	
Bib Call #:		Record Owner:			

[Start](#)
[Previous](#)
[Next](#)
[End](#)
[Back To Results \(1 / 2 \)](#)

[OPAC View](#)
[MARC Edit](#)
[MARC View](#)
[View Holds](#)
[Monograph Parts](#)
[Holdings View](#)
[Conjoined Items](#)

Numeric Search: ISBN Identifier **Search Library:** Sitka

Search: 9780770429072 **Type:** Keyword **Format:** All Formats **Library:** Sitka

Recent searches [Search Results](#) Showing Item 1 of 2 Preferred library: Fort St. John Campus [Next](#)

+ The princes of Ireland /
[Rutherford, Edward.](#) (Author).

8. This presents detailed bibliographic data to help you determine whether the record matches the item in hand.

```

LDR00486nam a2200181 a 4500
001 30516612
003 SITKA
005 20160819214008.0
008 080613s2006 xx g 00 1 eng d
020 |#a 9780770429072
020 |#a 0770429076
040 |#d UtOrBLW
100 1 |#a Rutherford, Edward.
245 1 4 |#a The princes of Ireland /
260 |#a Toronto : |#b Seal Books, |#c 2006.
300 |#a 800 p. : |#b ill ; |#c 18 cm.
490 1 |#a The Dublin saga ; |#v 1
520 |#a A sweeping panorama steeped in the tragedy and glory that is
Tara, with the fate of two lovers, the princely Conall and the ravish
650 0 |#a Mythology, Celtic |#v Fiction
650 0 |#a Princes |#v Fiction
651 0 |#a Ireland |#x History To 1603 |#v Fiction
651 0 |#a Dublin (Ireland) |#x History |#v Fiction
655 0 |#a Historical fiction.
830 0 |#a Dublin saga.
852 1 |#h PB |#i RUT |#p BFSJ101838
901 |#a 30516612 |#b SITKA |#c 30516612 |#t biblio
  
```

TIP

- It is possible to search ISBNs by Keyword, but results may not be exhaustive. We recommend using **Numeric Search** as described above.
- 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.
- If searching a LCCN do not use a hyphen, add a 0 in place of a hyphen, e.g. 2001001234.

15.2. MARC Expert Search

1. To search the catalogue for holdings select **Cataloguing** → **Search the Catalogue**, or **Search** → **the Catalogue**, or press **F3** and click on **Expert Search** tab.
2. Enter tag definitions and search criteria and click **Search**.

The screenshot shows the 'Search the Catalogue' interface with three tabs: 'Advanced Search', 'Numeric Search', and 'Expert Search'. The 'Expert Search' tab is active. Below the tabs, there is a form with the following fields: 'Tag' (245), 'Subfield' (a), 'Value' (frog toad), and 'Search Library' (Sitka). There is a green 'Search' button and a blue 'Add Search Row' link. A mouse cursor is pointing at the 'Search' button.

3. You may search multiple tags by clicking **Add Search Row**. The Boolean operator between the tags is always AND.

This screenshot is similar to the previous one, showing the 'Expert Search' tab. The 'Add Search Row' link is highlighted with a mouse cursor, indicating the next step in the process of adding multiple search criteria.

4. You may now search multiple tags.

Search the Catalogue [Basic Search](#)

Advanced Search Numeric Search **Expert Search**

Expert Search

Tag: 245 Subfield: a Value: frog toad X

Tag: 260 Subfield: a Value: random X

[Add Search Row](#)

Search Library: Sitka

Search

You can toggle record views during a session. You may set a default view by selecting the view, then clicking on **Set default view** button. Next time the record is loaded, it will be displayed in the selected view. MARC Edit is set as the default view in this example.

TIP

Start Previous Next End Back To Results (1 / 212)

Add Volumes Serials Mark for: Other Actions:

OPAC View **MARC Edit** MARC View View Holds Monograph Parts Holdings View Conjoined Items

Set default view

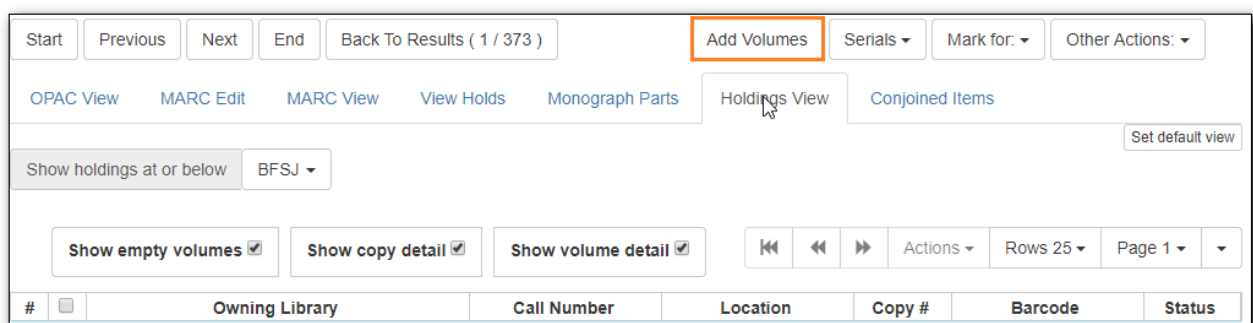
Numeric Search: ISBN Identifier Search Library: Sitka **Search** My Account

Chapter 16. Adding Holdings to Bibliographic Records

16.1. Adding Holdings to Bibliographic Records

16.1.1. Adding a Single Volume/Copy

1. Search the catalogue for a record that matches the item in hand, as described in [Searching the Database for Cataloguing Purposes](#). If you do not find a match, refer to the [Sitka Cataloguing Policy](#) for recommendations on required procedures. If you do find a match, proceed to next step.
2. When the record details are loaded, click **Holdings View**.



3. To add a new volume (also known as call number), click on **Add Volumes**, as shown in the above image.
4. The Volume Copy creator opens up in a new tab.

Record Summary (MARC)

Title: Dora the explorer : summer explorer	Edition:	TCN: 103776867	Created By: admin
Author:	Pub Date: c2007	Database ID: 103776867	Last Edited By: admin
Bib Call #:	Record Owner:	Last Edited On: 2012-06-13 01:08	

[Edit](#)
[Copy Templates](#)
[Defaults](#)

[Hide Volume/Copy Details](#)
[Hide Copy Attributes](#)

Batch Apply

Owning Library	Volumes	Classification	Prefix	Call Number	Suffix	Copies	Barcode	Copy #	Part
BFSJ	1	Dewey (DDC)				1			

[BFSJ](#) [Add volume](#)

[Working Copies](#)
[Completed Copies](#)

[Store Selected](#)
[Save & Exit](#)

☒ Barcode	☒ Created	☒ Activate	☒ CN	☒ Pref	☒ Call	☒ Nur	☒ CN	☒ Suff

Circulate? ☒ Yes ☐ No	Status 	Copy Alert
Circulation Library BFSJ	Reference? ☐ Yes ☒ No	Statistical Categories
Shelving Location Stacks (SITKA)	OPAC Visible? ☒ Yes ☐ No	Fort St John Public Library : <NONE>

CAUTION

Make sure your browser allows Evergreen to open pop-ups.

- Complete the required fields in both volume and copy records. Refer to [\[working_on_copy_attributes\]](#) for information about individual fields in a copy record. To ensure data consistency, using copy templates is recommended. Select one from the dropdown list, then click on **Apply**. Refer to [\[volume_copy_template\]](#) for more information.

Owning Library	Volumes	Classification	Prefix	Call Number	Suffix	Copies	Barcode	Copy #	Part
BFSJ	1	Dewey (DDC)		JFN DOR		1	1234543		

BFSJ
Add volume

Working Copies
Completed Copies

Store Selected
Save & Exit

Barcode	Created	Activate	CN	Prefix	Call	Nun	CN	Suffi
1234...				JFN	...			

Template

Apply
Clear

Circulate?	Status	Copy Alert
☒ Yes ☐ No		Alert message

Circulation Library	Reference?	Statistical Categories
BFSJ	☐ Yes ☒ No	Filter by Library

Shelving Location	OPAC Visible?	Fort St John Public Library :
JUNIOR Fiction (BFSJ)	☒ Yes ☐ No	<NONE>

Circulation Modifier	Price
juvenile-collection	12.99

Loan Duration	Acquisition Cost
Normal	

Circulate as Type	Deposit?
<NONE>	☐ Yes ☐ No

Holdable?	Deposit Amount
☒ Yes ☐ No	0

Age-based Hold Protection	Quality
	☒ Good ☐ Damaged

Fine Level
Normal

Copy Notes

- Once done, click on **Save & Exit**. The pop-up tab is closed. Use the browser function key to refresh the screen to see new items.

- 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. Item's **Active Date** will be filled when it leaves In Process status.
- You may configure the default displayed fields in volume copy editor. Click on **Defaults** on volume copy editor. See [\[volume_copy_defaults\]](#) for more information.

TIP

The screenshot shows the 'Record Summary (MARC)' interface. At the top, it displays 'Title: Dora the explorer : summer explorer' and 'Edition:'. Below that, 'Author:' and 'Pub Date: c2007' are shown. A 'Bib Call #' field is also present. A navigation bar includes 'Edit', 'Copy Templates', and 'Defaults' (which is highlighted with a mouse cursor). Below the navigation bar are two buttons: 'Hide Volume/Copy Details' and 'Hide Copy Attributes'. A 'Batch Apply' section contains three dropdown menus. At the bottom, there is a table with columns: 'Owning Library', 'Volumes', 'Classification', 'Prefix', and 'Call Number'. The 'Owning Library' column shows 'BFSJ' with a dropdown arrow. The 'Volumes' column shows '1'. The 'Classification' column shows 'Dewey (DDC)' with a dropdown arrow. The 'Prefix' and 'Call Number' columns are empty.

16.1.2. Adding Multiple Volumes

1. To add more than one volume for the same library, use the arrow in the **Volumes** column to increase the number.
2. To add volumes for other libraries, use the arrow in the **Owning Library** column to list the libraries, then click on **Add Volume**.

Owing Library	Volumes	Classification	Prefix	Call Number	Suffix	Copies	Barcode	Copy #
BLP-GB	1	Dewey (DDC)		JF DOR		1	12345613	
BLP-LL	2	Dewey (DDC)		JF DOR		2	12345612	
							12345614	
		Dewey (DDC)		REF DOR		1	12345615	

Working Copies Completed Copies

Store Selected Save & Exit Template Apply

Barcode	Created	Activated	Call Number
☒	12345612		JF DOR
☒	12345613		JF DOR
☒	12345615		REF DOR
☒	12345614		JF DOR

Circulate? ☒ Yes ☐ No Status Copy Alert

Circulation Library Reference? Statistical Categories

3. To create more than one copy for the same volume, use the arrow in the **Copies** column of the volume record.

- You can hide or display volume and copy details by coordinating the two Hide/Show buttons shown below.

TIP

Record Summary (MARC)

Title: Dora the explorer : summer explorer Edition: TCN: 103776867 Created By: a

Author: Pub Date: c2007 Database ID: 103776867 Last Edited By: a

Bib Call #: Record Owner: Last Edited On: 6

Edit Copy Templates Defaults

Hide Volume/Copy Details Show Copy Attributes

Batch Apply Generic test Apply

Owing Library	Volumes	Classification	Prefix	Call Number	Suffix	Copies	Barcode	Copy #
BABF	1	Generic		test		1		
MAOW	1	Generic		test		1		

- If all volumes share the same attributes, you can select the values in **Batch Apply** row, then click **Apply**. The selected values will be copied into all volumes.

16.1.3. Working on multiple copies

If you add multiple copies and they do not share the values in one or more item attributes, you can work on those that share item attributes first, temporarily store them to **Completed Copies** tab, then work on the next batch of items sharing the same attributes. Save and exit when all copies are done.

- After you enter the barcode(s), copies are displayed under **Working Copies**. Select those copies that share the same item attribute values. Complete the item attributes for these copies. Click on **Store Selected**.

- Selected copies are moved to the **Completed Copies** tab.
- Select more copies on **Working Copies**. Complete the required fields. Once done, store them in the **Completed Copies** tab, or click on **Save & Exit**.

- Completed copies may be edited. Click the **Completed Copies** tab. Select those you want to edit, and click on **Edit Selected**.

	Barcode	Created	Activated	Call Number	Circ Library	Shelving Loc	Circ Modifier	Circulate
☒	12345612			JF DOR	Fort St Joh...	Stacks		true
☐	12345613			JF DOR	Gold Bridg...	Stacks		true
☐	12345614			JF DOR	Lilloet Bra...	Stacks		true

- Selected copies are moved back to the **Working Copies** tab where you can edit them. After editing, you can store them to the **Completed Copies** tab, or click **Save & Exit** when all copies are done.
- You can save copies on the **Completed Copies** tab or **Save & Exit** from **Completed Copies** tab. When you choose to **Save Completed**, copy records are created in the database, but they remain on the **Completed Copies** tab.

	Activated	Call Number	Circ Library	Shelving
☐		JF DOR	Gold Bridge B...	Stacks
☐ 12345614		JF DOR	Lillooet Branc...	Stacks
☐ 12345615		REF DOR	Lillooet Branc...	Stacks

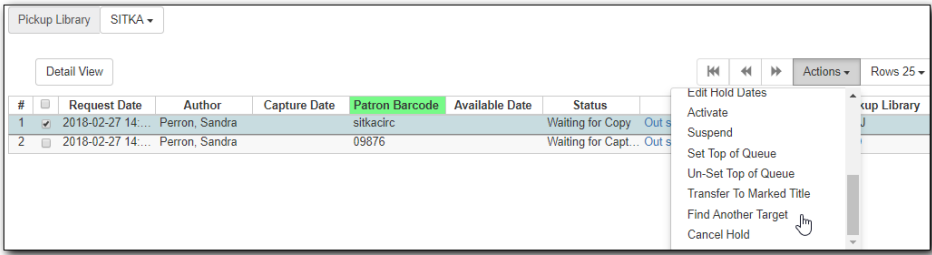
- Stored copies on **Completed Copies** tab are **not** saved in the database until you click on **Save & Exit** or **Save Completed**. They are available on the current Volume Copy Creator only. If you close the browser tab without saving them, you will lose them.
- **Save Completed** will save those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

New Copies and Holds ~~~~

Because of the way Evergreen targets holds, new copies are not guaranteed to fulfill pre-existing holds correctly until 24 hours after cataloguing. If your cataloguing turn-around time is shorter than 24 hours you can ensure the new copy is captured correctly at check in by using the checkin modifiers **Retarget Local Holds** and **Retarget All Statuses**, or by following the steps below. Co-op Support recommends single-branch libraries use the checkin modifiers, as once selected they are "sticky" and it is a simpler workflow than that described below. We recommend multi-branch libraries not use check-in modifiers to retarget holds, as the check-in modifier will only re-target the top local hold, which may not be the top system hold. We recommend you using the following procedure.

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 **Actions** → **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.

Adding Holdings for Non-physical Resources ~~~~~

There are two ways to catalogue non-physical resources in Evergreen. Recommended process is to use specially coded MARC records as described in [\[cataloguing_nonphysical_resources\]](#). Alternatively you may add dummy holdings to a MARC record, using the same steps as adding physical holdings as described above. Adding dummy holdings will scope your non-physical resources to your catalogue. If you use dummy holdings it is important to use item barcodes from within your designated barcode range.

Maintaining Holdings

Working on Copy Attributes

~~~~~

:linkattrs:

<https://www.youtube.com/watch?v=zIgen-2N4PI>[Sitka Training Video - Copy Editor (6:17), window="\_blank"]

The copy editor is used to create or edit item records. It is accessed through the \*Holdings View\* tab, or from the \*Item Status\* screen, or by clicking \*Edit\* beside the item barcode on record details screen. Item records contain multiple fields, called \*Copy Attributes\*. The \*Copy Attributes\* fields display during the process of cataloguing or editing an item record. It is best practice to understand how these attributes work.

The table below provides detailed descriptions of each field in an item record.

| [options="header"] |                                                 |      |
|--------------------|-------------------------------------------------|------|
| ===                |                                                 |      |
| Attribute          | Description                                     | Note |
| 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 Library | Library currently circulating the item |  
| Shelving Location | | 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.

| 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.

| 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.

| 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.

| 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.

| 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.

| 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.

| Status | Current status of the item | By default a new copy record is assigned a status of In Process. Item must be checked in to become Available or cataloguer can choose to change status to Available when a creating copy record. Some statuses, such as Checked Out and On Holds Shelf, are not editable. They can only be used by circulation functions.

| Reference? | | This flag can be used for setting up circulation policies or for statistical purposes.

| OPAC Visible? | Indicates whether the item is visible in the public catalogue | Leave it as 'YES', unless the item is in an OPAC visible shelving location, but should not be displayed on OPAC. If OPAC Visible? is "NO" for the shelving location, this field will have no effect. The "NO" value in this field will hide the item, if OPAC Visible? is "YES" for the shelving location.

| Price | Item's price |

| Acquisition Cost | The actual amount of money paid for the item | Billed amount in Acquisitions module

| 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.

| Quality | Indicates the quality of the item | Quality is used to determine whether an item can be used to fill a hold. By default, only Good items will be used to fill holds. Co-op Support strongly recommends leaving the quality of the item as Good for all items, unless you want to block holds on the item.

| Copy Note | |

| Copy Tags | |

| Copy Alert | This message will show up when the item is retrieved or checked in or out |

| Statistical Categories | copy statistical categories created by your library or federation | Use the dropdown list to choose which organization's entries to display.

|===

[[\_volume\_copy\_defaults]]

Volume/Copy Defaults

~~~~~

You may select to disable some fields in volume and copy

records.

. To configure the default fields, click on *Defaults* on volume copy editor.

+

image::images/cat/volume-copy-default-1.png[]

+

. Select/deselect the fields you want to enable/disable. Once done, close the tab.

+

image::images/cat/volume-copy-default-2.png[]

. When you load the volume copy editor again, you will see those deselected fields are disabled. You can not edit them.

+

image::images/cat/volume-copy-default-3.png[]

[TIP]

====

If you wish to print spine and/or pocket labels when saving copy records, select *Print Item Labels on Save & Exit* checkbox. You will be directed to the spine label printing screen when clicking on *Save & Exit* on volume copy editor.

====

[[_volume_copy_template]]

Volume/Copy Template

~~~~~

anchor:volume-copy-template[Volume Copy Template]

Volume Copy templates allow you to set up default values for selected volume and item attributes. For example, all adult fiction items use the same shelving location and circulation modifier. You may set up a template for adult fiction with the appropriate shelving location and circulation modifier values. When you apply this template, the two fields will be automatically filled with the default values. Use of templates enhances item creation and helps ensure consistency in records.

Creating Volume Copy Template

^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^

. You can create a volume copy template directly under \*Admin -> Local Administration -> Volume/Copy Template Editor\* or you can create a copy template when creating a new item or editing an existing item record.

+

image::images/cat/copy-template-3.png[]

+

. On Volume Copy Editor, select/enter value for each required

item attribute sharing the same default value.

+

image::images/cat/copy-template-1.png[]

+

. Type in a name for the template. Click \*Save\*.

+

[TIP]

====

If you choose to allow call number attributes to be included in copy template, you will be able set up classification scheme and call number prefixes for the template, as shown in the above screenshot. When the template is applied, these attributes will be applied to the call number. Refer to xref:\_volume\_copy\_defaults[] for how to allow call number attributes to be included in copy template.

====

+

. When you go to Volume Copy Editor again, you will see the newly created template listed in the \*Template\* dropdown list.

+

image::images/cat/copy-template-2.png[]

+

. To use it, select it and click \*Apply\*.

#### Sharing Volume Copy Template

^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^^

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

. To export copy templates, click on \*Export\* on Volume Copy Template Editor.

+

image::images/cat/copy-template-4.png[]

+

. You are prompted to specify a folder to keep the template. Click \*Save\* once done.

+

image::images/cat/copy-template-5.png[]

+

. Copy or email the file to the staff who wants to load the templates.

. Open the Volume Copy Template Editor on their workstation. Click on \*Import\*.

+

image::images/cat/copy-template-6.png[]





a checkin alert reminding staff to print spine label for the item. Click \*Clear\*, then \*OK/Continue\*.

+

image::images/cat/copy-alert-2a.png[]

+

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

+

image::images/cat/copy-alert-2c.png[]

+

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

+

image::images/cat/copy-alert-2b.png[]

====

### Copy Note

^^^^^^^^

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

. To add a note, go to the item record and click \*Copy Notes\*.

. Enter the note content in the pop-up window.

. Select \*Public\* to make it show up on the catalogue.

. Once done, click \*OK\* to go back to copy editor.

. Click \*Save & Exit\*.

+

image::images/cat/copy-alert-3.png[]

+

. Public copy note is displayed on the catalogue.

+

image::images/cat/copy-alert-4.png[]

. To delete a note, open the copy record and select the \*Deleted?\* check box. Click \*OK\*, then \*Save & Exit\*.

+

image::images/cat/copy-alert-5.png[]

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

### Copy Tag

AAAAAAAA

A copy tag adds searchable information to copy records. Staff and patrons search the copy tag by choosing *\*Digital Bookplate\** on the catalogue.

image::images/cat/copy-alert-7.png[]

Tags are added via *\*Copy Tags\** on the copy editor. Libraries may pre-create their own tags. Refer to xref:\_copy\_tag[]

- . To add a copy tag, go to the copy editor.
- . Click *\*Copy Tags\**.
- . Type a letter in the *\*Tag\** box to display the tags, and choose one.
- . Click *\*Add Tag\**, then *\*OK\**.
- . Click *\*Save & Exit\** on copy editor.

+

image::images/cat/copy-alert-6.png[]

OPAC visible copy tag is displayed on the catalogue.

image::images/cat/copy-alert-7a.png[]

Copy tags can be removed via the same process.

- . Click *\*Remove\** beside the selected tag.
- . Click *\*OK\** to close the pop-up window.
- . Click *\*Save & Exit\** on copy editor.

### Copy Statistical Category (Stat Cat)

AAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAA

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

- . To add a copy stat cat, go to copy editor.
- . In the *\*Statistical Categories\** column, choose an entry from the appropriate stat cat dropdown list. The value is added when the copy record is saved.

+

image::images/cat/copy-alert-8.png[]

### Editing Holdings

~~~~~

In Evergreen, the call number is kept in a separate record,

called volume or call number record. (These two terms are used interchangeably in this document.) Items under the same title with the same call number share the same call number record. Copy records and volume records can be edited at several places.

Editing Volume and Copy on Item Status

. Go to *Circulation -> Item Status*

+

image::images/cat/edit-holding-1.png[]

+

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

+

image::images/cat/edit-holding-2.png[]

+

. The Copy editor opens in a new tab. Make the changes, then *Save & Exit* to close the tab.

+

image:images/cat/edit-holding-3.png[]

[TIP]

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Use the *Hide Volume/Copy Details* and *Hide Copy Attributes* buttons to choose to display volume or copy only, or both volume and copy at the same time.

=====

Editing Copy on OPAC View

You can access the copy editor in the catalogue on record details in the OPAC view.

. Click *Edit* beside the item barcode that you want to edit. The copy editor opens in a new tab.

+

image:images/cat/edit-holding-4.png[]

anchor:edit-volume-copy-on-holdings-view[Edit Volume Copy on Holdings View]

Editing Volume and Copy on Holdings View

You can edit volumes and copies in the record's *Holdings View*.

. Select the item you want to edit, click *Actions* dropdown list. Scroll down to *Edit*. Click *Volumes*, *Copies* or *Volumes and Copies*.

+

image:images/cat/edit-holding-5.png[]

Replacing a Barcode

~~~~~

. You can replace an item's barcode in a few places. The simplest way is to use *\*Replace Barcode\** function on the *\*Circulation\** dropdown menu. You are prompted to enter the old barcode and then the new one.

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image::images/cat/replace-barcode-1.png[]

+

. Replace barcode function is also available on *\*Holdings View\** on *\*Record Details\** screen. Select the item, click *\*Actions\** dropdown list. Scroll down to *\*Edit\**, then choose *\*Replace Barcodes\**.

+

image::images/cat/replace-barcode-2.png[]

+

. You are prompted to type in or scan a new barcode. The prompt will be closed once you hit *\*Enter\** or click *\*Submit\**. Refresh the screen to see the new barcode.

+

image::images/cat/replace-barcode-3.png[]

+

. You can also replace an item's barcode on *\*Item Status\** screen. Select the item, click *\*Actions\** dropdown list. Scroll down to *\*Edit\**, then choose *\*Replace Barcodes\**.

+

image::images/cat/replace-barcode-4.png[]

## Batch Editing Copies

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

Batch Editing Copies on Item Status Screen

. Scan the barcodes to retrieve the copies you want to edit, or load copies from a CSV file of a list of barcodes.

. Select records to edit, click **Actions** dropdown list, scroll down to **Edit**, and click **Items**.

. Copy Editor opens in a new tab. Edit the copies and click **Save & Exit**.

+

image::images/cat/copy-batch-edit-1.png[]

[NOTE]

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- . When the selected copies do not share the same value in a field, the field is empty on the Copy Editor.
- . To update all selected copies to one shared value, for example *Shelving Location*, edit that attribute in Copy Editor in first record.
- . You can select a few copies to edit, store them in the *Completed Copies* tab, then work on other copies.

=====

Batch Editing Copies in Copy Bucket

- . Click *Cataloguing -> Copy Buckets*.
- . Select a copy bucket from the *Buckets* dropdown list.
- . Select the copies you wish to edit and click *Actions -> Edit Selected Copies*.

[[spine-label]]
Spine/Pocket Labels

^^

[[roll_label]]
Single Label Roll
^^

If your printer uses single label roll paper, please follow below procedure.

Printing Spine Label during Cataloguing

You may choose to print spine label during cataloguing process. On saving copy records, you will be directed to printing item label screen. You need to set it up first. Go to *Defaults* on copy editor.

image::images/cat/spine-label-1.png[]

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

image::images/cat/spine-label-2.png[]

With the above setting in place, when you finish editing copy records, click *Save & Exit*. *Print Item Labels* screen opens up in a new tab. Make adjustment, if necessary. Click *Print*.

image::images/cat/spine-label-3.png[]

[TIP]

=====

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

image::images/cat/spine-label-4.png[]

=====

Printing Spine Label by Batch

You may choose to print spine labels after cataloguing a batch of items. Scan the items on Items Status. Select them. Go to ***Actions -> Show -> Print Labels***.

image::images/cat/spine-label-5.png[]

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

image::images/cat/spine-label-6.png[]

You may also print labels from ***Copy Bucket***.

image::images/cat/spine-label-7.png[]

[[sheet_label]]

Label Sheet

^^^^^^^^^^^^

If your printer uses sheet labels, you may prepare a template in a text editor. On the above Label Preview screen, copy over labels from Evergreen to your template to print them.

Configuring Label Printing

^^

You may configure label printing on ***Print Items Label***. There are four tabs on this screen.

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 copy location suffix.

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.

image::images/cat/spine-label-8.png[]

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.

Label Template includes the script used to do the printing job. The top portion is the explanation. The code for printing contents and format starts from ***<table ...***.

```
image::images/cat/spine-label-9.png[]
```

The default template prints both spine label and pocket label. To print spine label only, you need to delete the portion for printing pocket label.

```
image::images/cat/spine-label-10.png[]
```

TIP: If you need to adjust the pocket label content, you may follow the instruction above the printing code.

CAUTION: Changes made on all tabs, except ***Call Numbers*** will be automatically saved when you leave the tab. To revert everything back to the default, you may click the ***Default*** on the top template bar.

Label Template

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

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

```
image::images/cat/spine-label-11.png[]
```

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

Transferring Holdings

~~~~~

There are times when you need to move copy records from one title record to another, or move copies from one volume 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 other record with the corresponding transfer function. Co-op Support recommends you read through the process first



before starting, as each scenario has different characteristics.

### Transferring Volume and Copies

AAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAA

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

[[transfer-volume-to-another-record]]

*\*Transferring Volumes to Another Record\**

. Find the destination or target record. Select *\*Transfer Volume\** on *\*Mark for\** dropdown list.

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image::images/cat/transfer-holding-1.png[]

+

. Confirmation appears at bottom right of the screen.

+

image::images/cat/transfer-holding-2.png[]

+

. If you check *\*Mark for\**, you will see the target record is marked. This target is kept until it is reset or a new volume transfer target is marked.

+

image::images/cat/transfer-holding-3.png[]

+

. Find the volume you want to transfer. Go to *\*Holdings View\**. Select the volume. Click *\*Actions\** list. Scroll down to *\*Transfer\**. Choose *\*Volumes to Previously Marked Record\**.

+

image::images/cat/transfer-holding-4.png[]

+

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

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image::images/cat/transfer-holding-4a.png[]

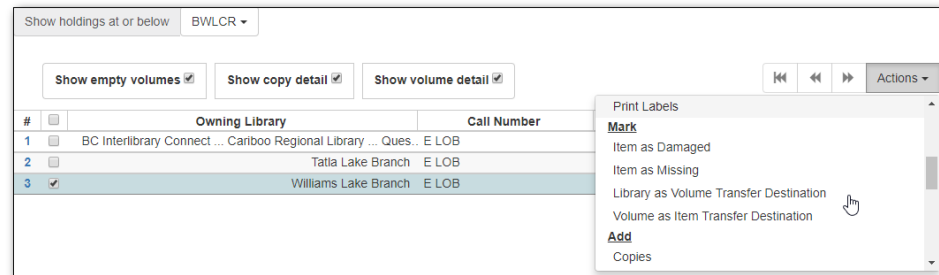
+

[NOTE]

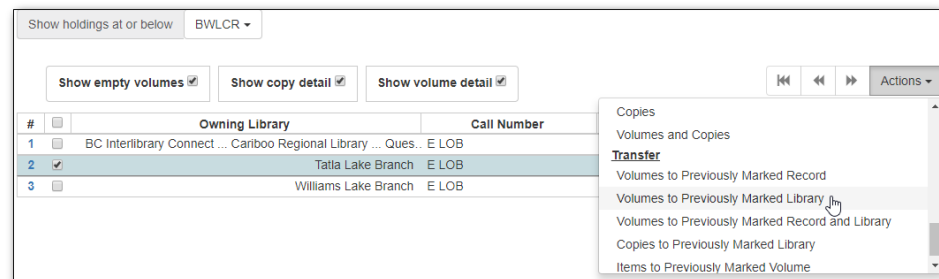
Your volume's owning library and copies' circulation library will not be changed during the transfer. If you already have volumes under the destination records and the call numbers are the same, the call numbers will be merged.

## Transferring Volumes to Another Library Under the Same Record

1. On Holdings View, select the destination library. Click **Actions** dropdown list. Scroll down to **Mark**. Select **Library as Volume Transfer Destination**.



2. Select the source volume. Click **Actions** dropdown list. Scroll down to **Transfer**. Select **Volumes to Previously Marked Library**



3. Confirmation appears at bottom right of the screen.

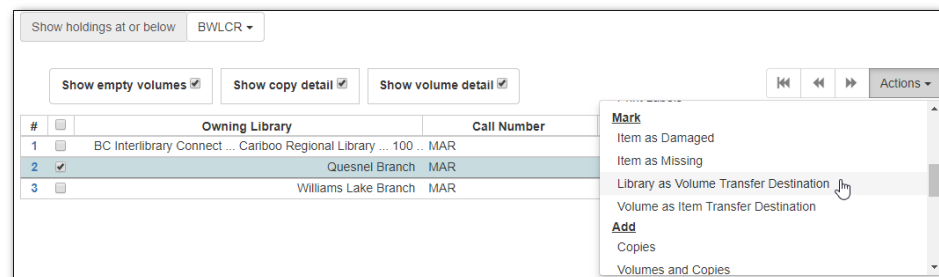
If the destination library has a volume with the same call number as the source volume, the volumes will be merged during the transfer.

**TIP**

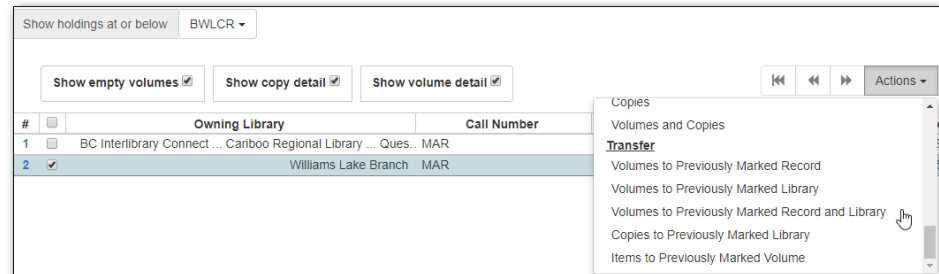
On Holdings View, Evergreen does not display libraries without holdings on the library tree. If your destination library is not shown on the list, you may edit the source volume's owning library and/or its copies' circulation library. Refer to [\[edit-volume-copy-on-holdings-view\]](#) for details.

**Transfer Volumes to Another Library under Another Record**

1. Find the destination bibliographic record. Go to Holdings View. Select the destination library. Click **Actions**. Scroll down to **Mark** to select **Library as Volume Transfer Destination**.



2. Find and select the source volume. Click **Actions** dropdown list. Go to **Transfer** to select **Volumes to Previously Marked Library and Record**.



3. The confirmation appears at bottom right of the screen.

**TIP**

If the destination library does not have a volume under the destination record, you may transfer the volume under the current library to the destination record first, then edit the owning and circulation library of the volume and copies.

The marking destination and transferring source volume functions work in pairs. A destination is kept for each marking destination function. There may be up to four volume transfer destinations marked at one time. The corresponding destination is used when a transferring source volume function is applied.

The destinations remain marked until new ones are marked or reset (marked via **Mark for** only).

Logging out of Evergreen, closing the browser, or rebooting your computer will not erase them. Co-op Support strongly recommends you apply transfer function right after you mark a destination.

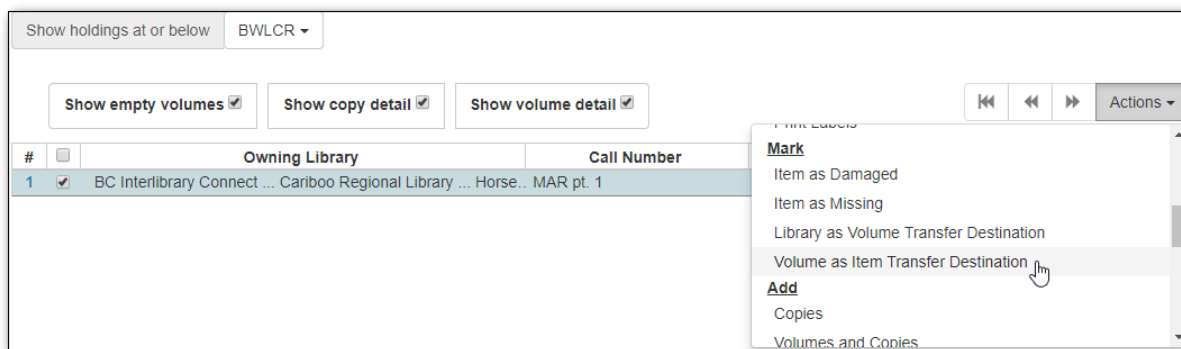
Choose the appropriate transfer function. Using the wrong one may send your volume to the wrong destination.

## Transferring Copies ^^^^^^ ^

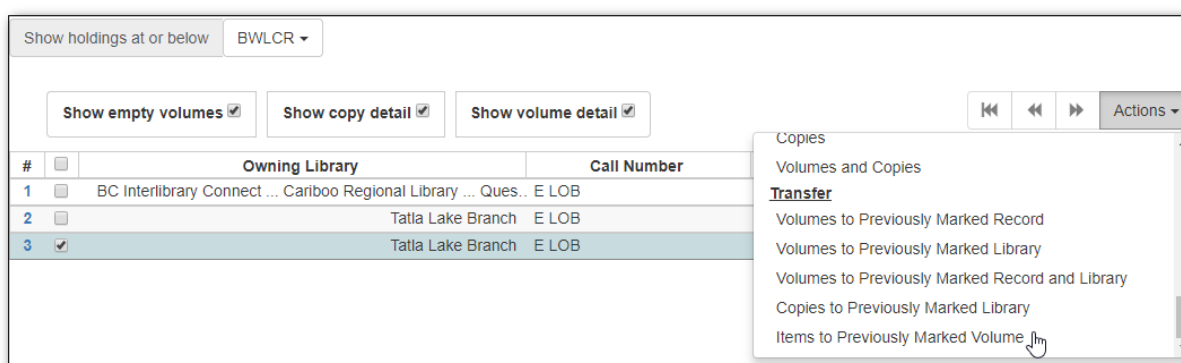
You may want to transfer some of the copies under one volume to another volume under the same or another record, or transfer all copies under one volume to another with a different call number. You use the transfer copies function to do so.

### Transferring Copies to Another Volume

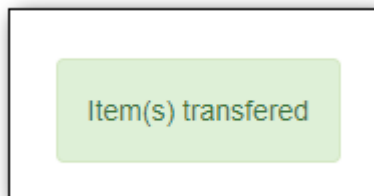
1. Find the destination bibliographic record. On Holdings View, select the destination volume. Click **Actions** dropdown. Go to **Mark** to select **Volume as Item Transfer Destination**.



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



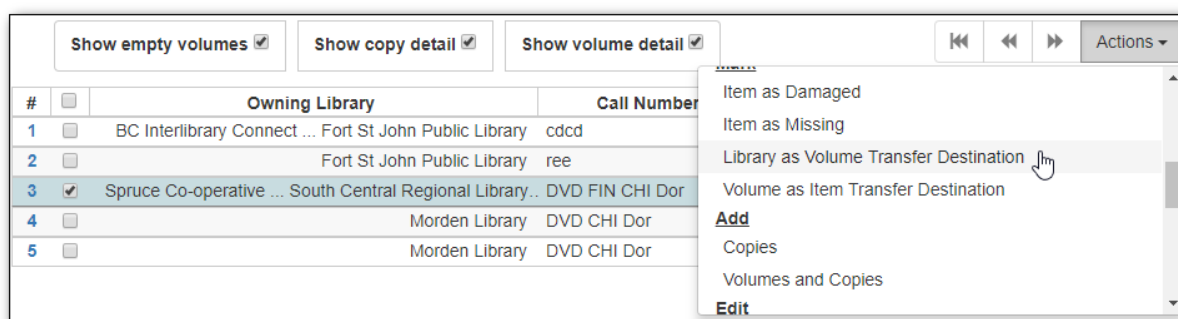
3. The source copy disappears, if destination is under another record. The confirmation pops up at the bottom right of the screen.



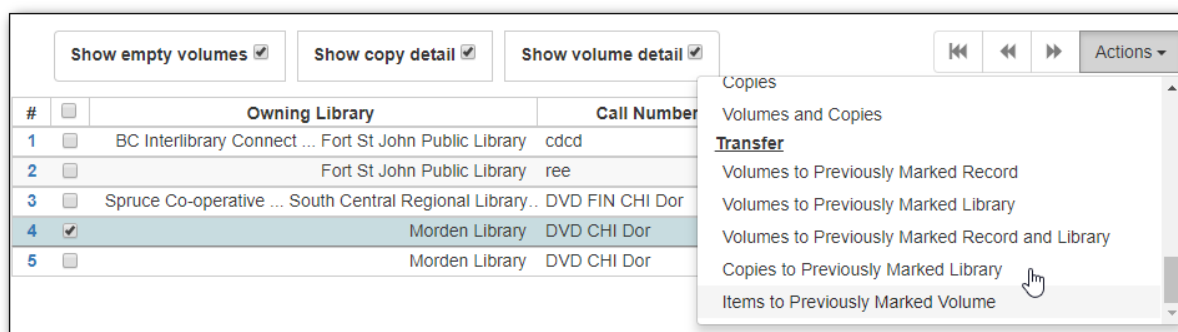
## Transferring Copies to Another Library

You may transfer some copies under one volume to another library, which may not have a volume, or to a volume with a different call number. The copies will be under a new volume record with the same call number.

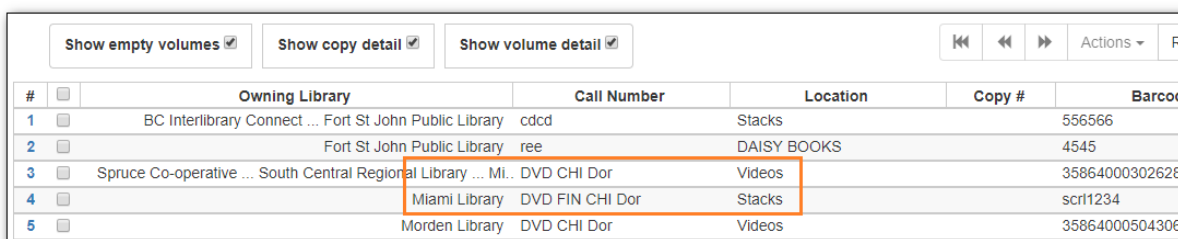
1. Find the destination bibliographic record. On Holdings View, select the destination library. Click **Actions** dropdown. Go to **Mark** to select **Volume as Volume Transfer Destination**.



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



3. The copy is transferred to the marked library under a separate volume. The copy's old call number is kept.



## Deleting Holdings ~~~~~^

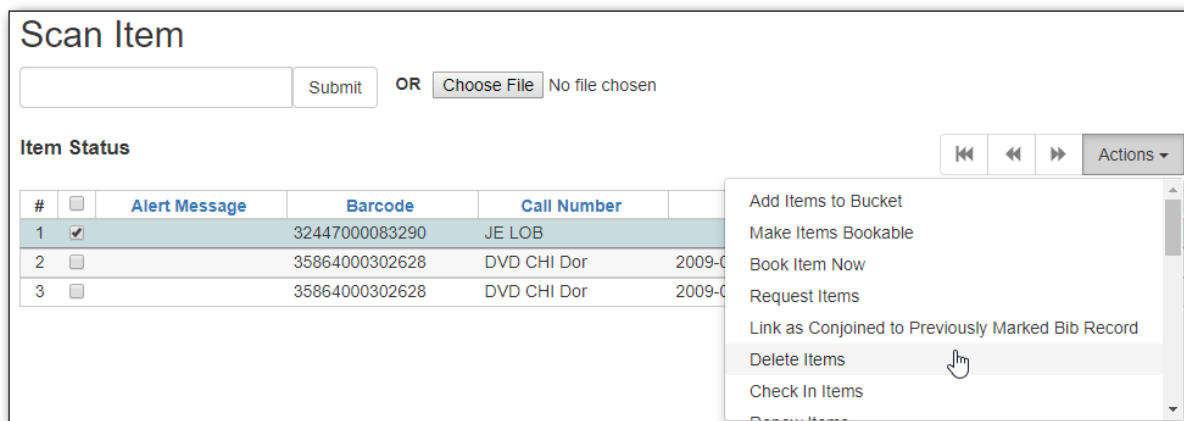
When adding items to the catalogue, you need to have a bibliographic record first, then you create a volume and a copy record. When you delete holdings you follow the reverse order. You need to delete copy records first. By design and Sitka's configuration, Evergreen will also attempt to delete the volume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

## Deleting Copies ^^^^^^

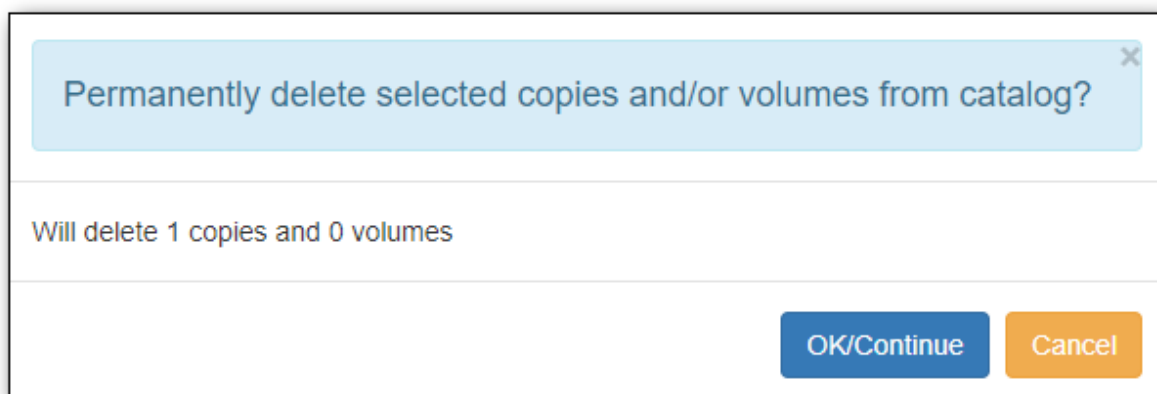
### Deleting Copies on Item Status Screen

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

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



2. You are prompted to confirm deleting the copies and volumes, if any.

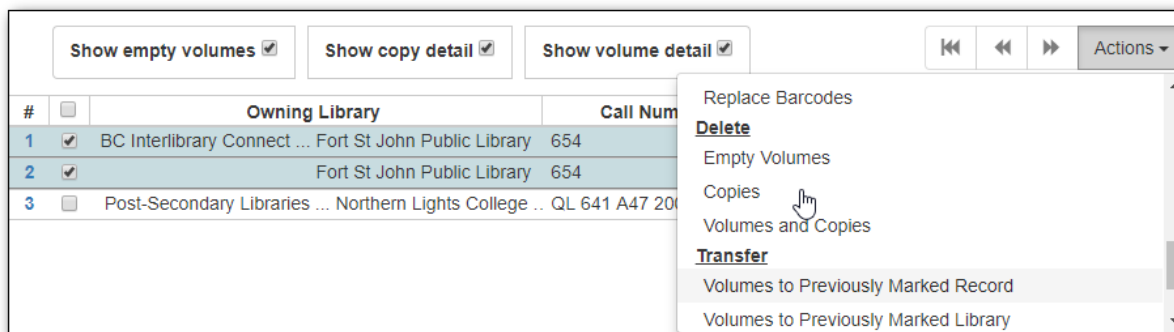


## NOTE

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

## Deleting Copies on Holdings View

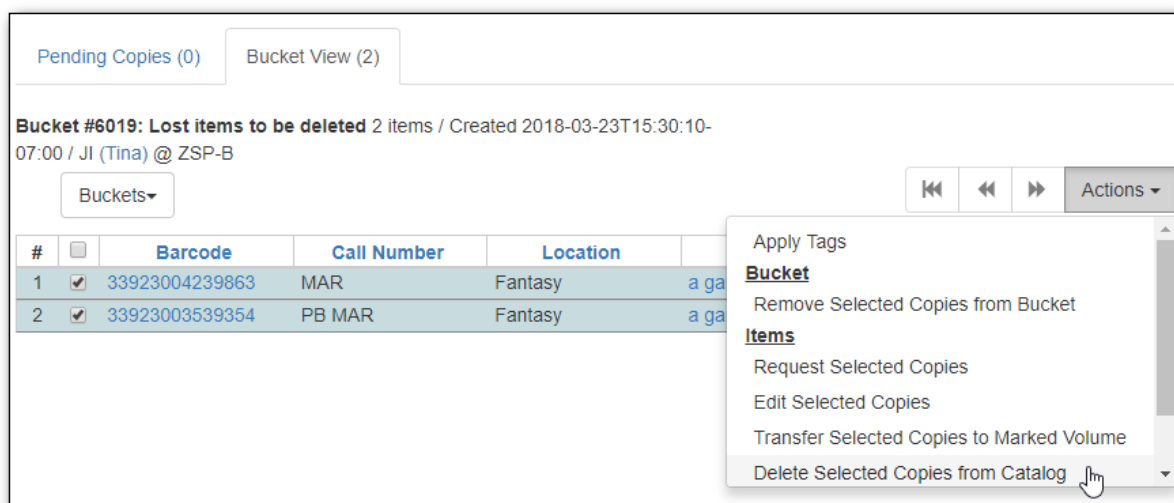
1. On the catalogue, in Holdings View, select the copies you want to delete. . Click **Actions** dropdown list.
2. Scroll down to **Delete** to select **Delete Copies** or **Volumes and Copies**.



## Deleting Copies in Copy Bucket

If your items are in a copy bucket, you can delete them from there.

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



## Deleting Volumes without Copies Attached ^^^^^^^^^^^^ ^^

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

## Deleting Bibliographic Record without Volume/Copy Attached ^^^^^^^^^^^^^^^^^^^^ ^^

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

The screenshot shows the 'Record Summary' page for the title 'A game of thrones' by George R. R. Martin, published in 1997. The page includes navigation buttons (Start, Previous, Next, End, Back To Results), action buttons (Add Volumes, Serials, Mark for, Other Actions), and view options (OPAC View, MARC Edit, MARC View, View Holds, Monograph Parts, Holdings View, Conjoined Items). The 'MARC Edit' tab is active. Below the navigation, there are checkboxes for 'Add Item', 'Flat Text Editor', and 'Stack subfields'. The 'Record Type' is set to 'BKS'. The 'Delete' button is highlighted with a mouse cursor. The main area contains a table with fields like Type, a, ELVI, 5, Audn, e, Ctrl, Lang, eng, BLVI, m, Form, Conf, Biog, MRec, Ctry, nyu, Desc, a, Ills, Fest, DtSt, s, Date1, 1997, Date2. At the bottom, there is a list of LDR records: LDR 00461nam a22001815a 4500, 001 106896767, 003 SITKA, 005 20171024004448.0.

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

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

The screenshot shows the 'Record Summary' page for the title 'Dora the Explorer Undercover Dora' by [2008], published in 2008. The page is marked as '(Deleted)' in red. The 'MARC Edit' tab is active. Below the navigation, there are checkboxes for 'Add Item', 'Flat Text Editor', and 'Stack subfields'. The 'Record Type' is set to 'VIS'. The 'Undelete' button is highlighted with a mouse cursor. The main area contains a table with fields like Type, g, ELVI, I, Audn, j, Ctrl, Lang, eng, BLVI, m, Form, MRec, Ctry, cau.

Co-op Support regularly deletes volume records without copies and bibliographic records without copies or volumes.



## Copy Bucket

<https://www.youtube.com/watch?v=4W-zw-jieos>[Sitka Snippet Video - Copy Buckets (3:48)]

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 copies with Buckets.

Currently there are copy and title record buckets. You may work on copy records with Copy 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.

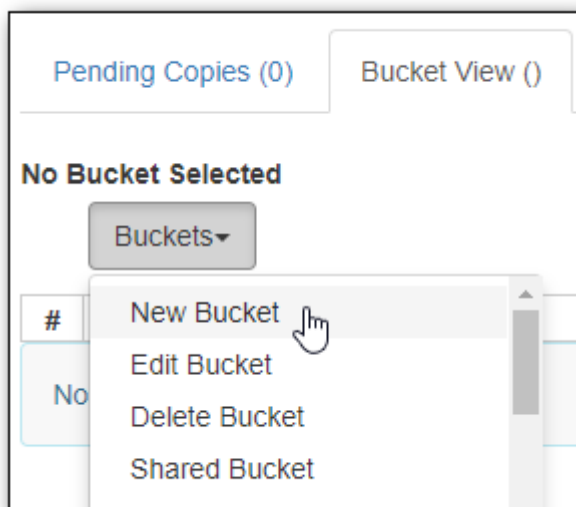
When a bucket is retrieved, all information about the records in it is transferred to the workstation. It consumes the computer's resources. It is recommended that a copy bucket contain no more than a few hundred records.

## Create Copy Buckets

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

### Create a Copy Bucket on Copy Buckets view

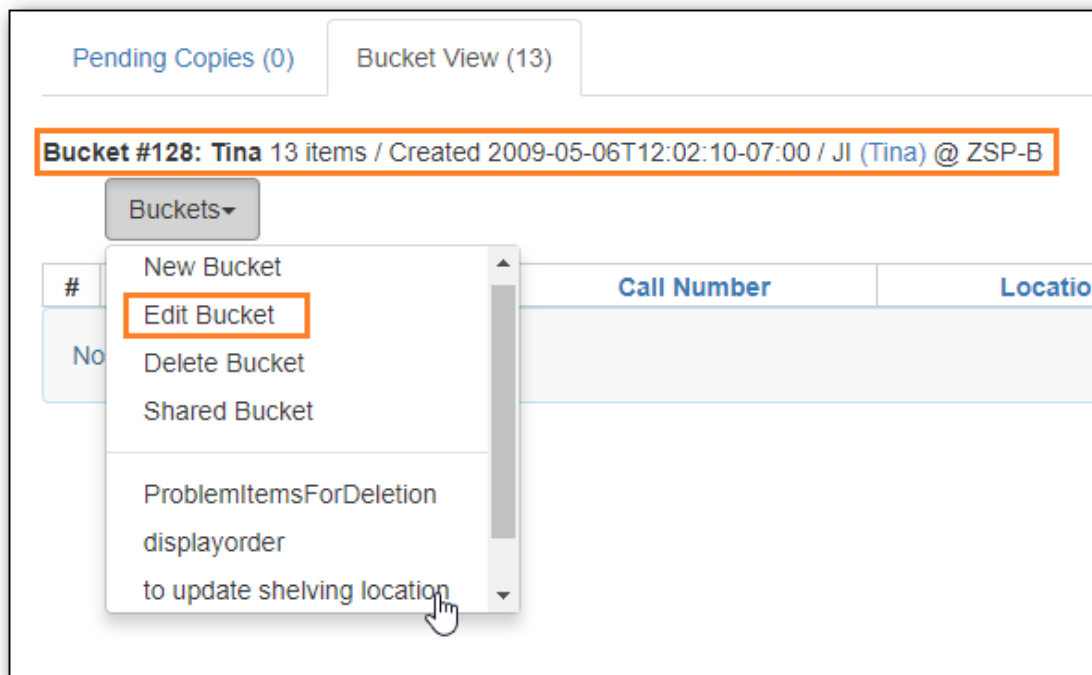
1. Select **Cataloging** → **Copy Buckets** from the menu bar.
2. Select **New Bucket** from the **Buckets** dropdown list.



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

A screenshot of the 'Create Bucket' dialog box. The dialog has a title bar with the text 'Create Bucket' and a close button (X). Inside the dialog, there are two text input fields. The first field is labeled 'Name' and contains the text 'to update shelving location'. The second field is labeled 'Description' and contains the text 'Description...'. Below the description field, there is a checkbox labeled 'Publicly Visible?'. At the bottom right of the dialog, there are two buttons: 'Create Bucket' (blue) and 'Cancel' (orange). A mouse cursor is pointing at the 'Create Bucket' button.

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

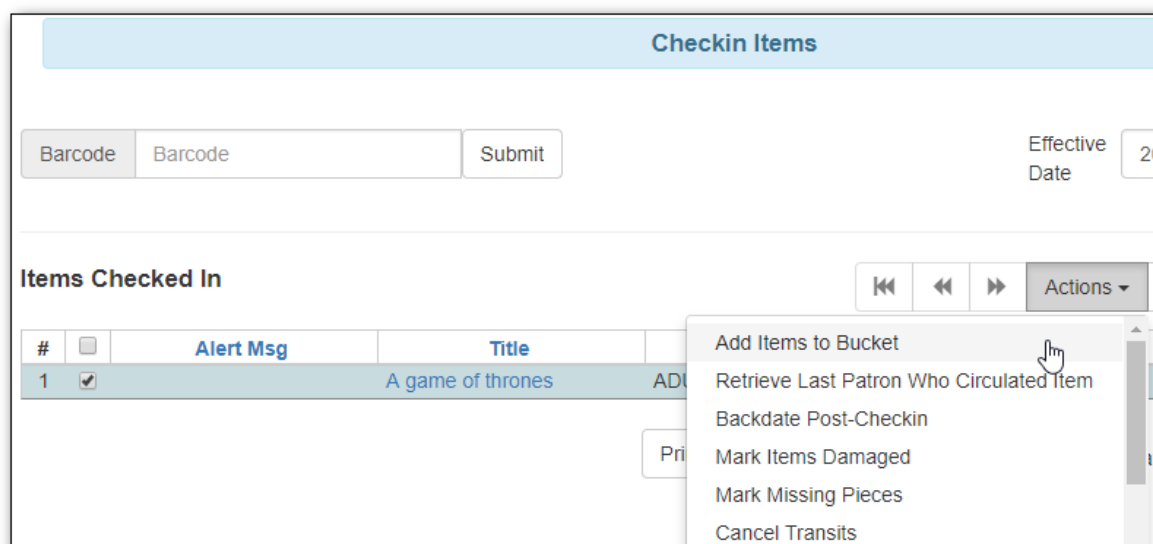


5. Click the **Buckets** dropdown list to see the bucket. You can edit the bucket's name or description by clicking on **Edit Bucket** on the list.

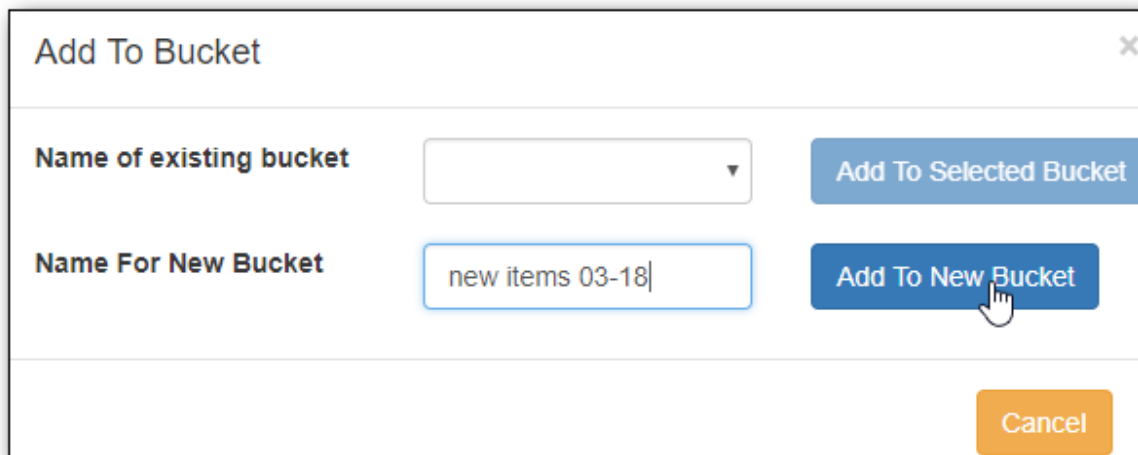
- Only buckets created by the login account are listed. But those created by other people can be retrieved via bucket number, if shared with you. Click **Shared Bucket** to type in the number to retrieve it.
- Ignore the check box for **Publicly Visible** - this function does not work as expected.

### Create a Copy Bucket when Adding a Copy Record to a Bucket

You can also create a bucket from within a copy record. When a copy is displayed on a screen such as **Checkin** or **Item Status**, you can add it to a copy bucket by choosing **Actions** → **Add Items to Bucket**.



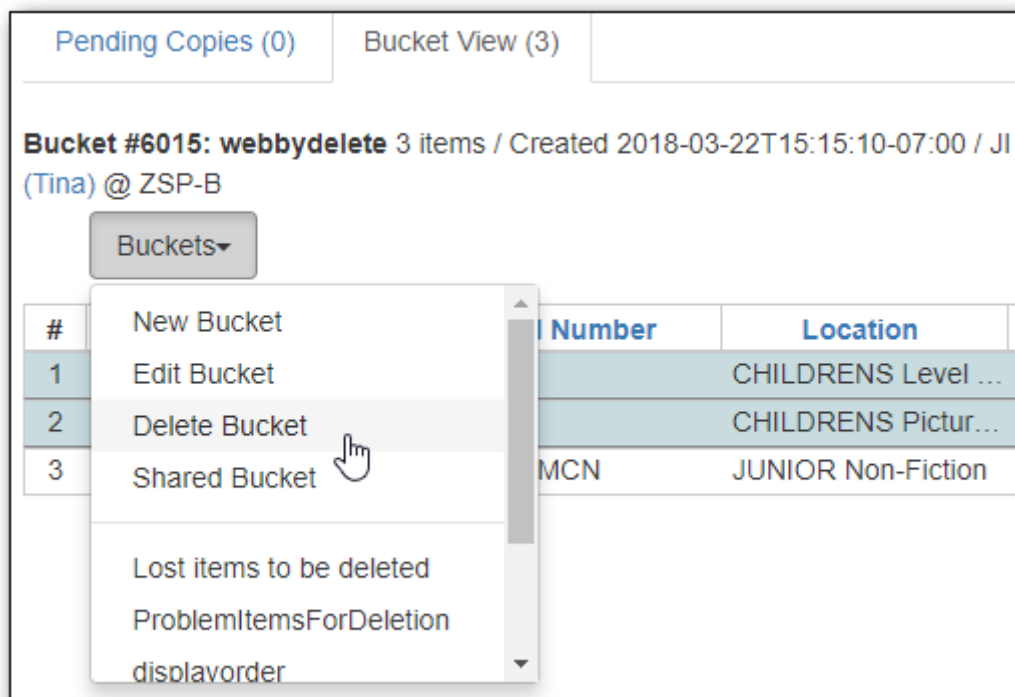
You are prompted to add the record to an existing bucket or a new one. To add to a new bucket, type in a name in **Name For New Bucket** box, then click **Add to New Bucket**.



The 'Add To Bucket' dialog box contains two input fields and three buttons. The first field, 'Name of existing bucket', is a dropdown menu. The second field, 'Name For New Bucket', contains the text 'new items 03-18'. To the right of the first field is a blue button labeled 'Add To Selected Bucket'. To the right of the second field is a blue button labeled 'Add To New Bucket', which has a mouse cursor hovering over it. At the bottom right is an orange button labeled 'Cancel'.

### Delete Copy Buckets

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



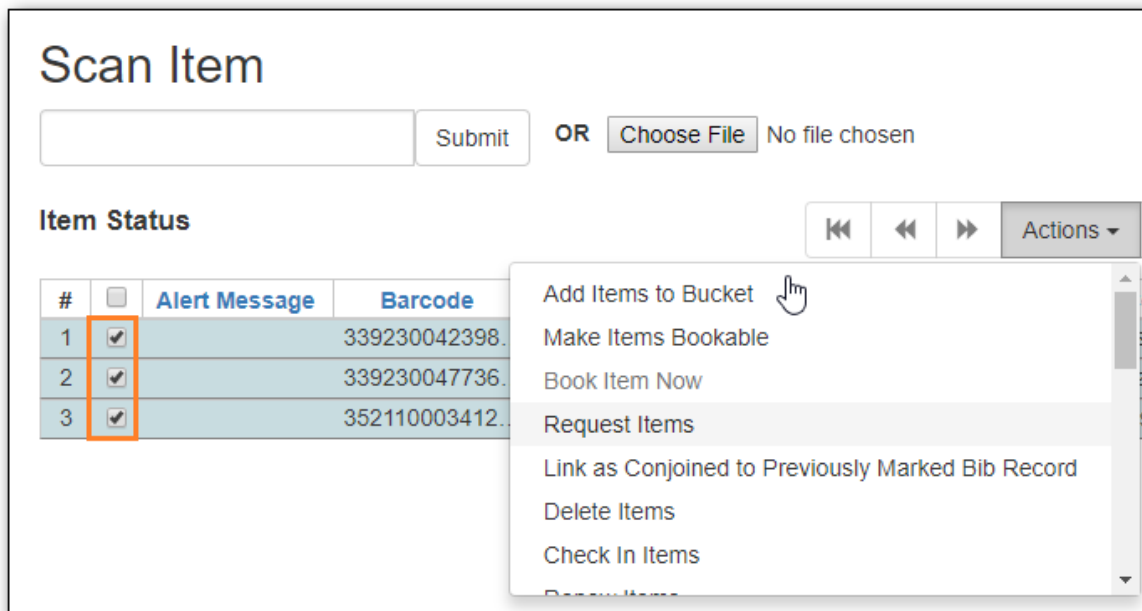
The 'Bucket View' interface shows a header with 'Pending Copies (0)' and 'Bucket View (3)'. Below this is a section for 'Bucket #6015: webbydelete' with '3 items' and creation details. A 'Buckets' dropdown menu is open, showing options: 'New Bucket', 'Edit Bucket', 'Delete Bucket' (highlighted with a mouse cursor), and 'Shared Bucket'. Below these are links for 'Lost items to be deleted', 'ProblemItemsForDeletion', and 'displayorder'. In the background, a table lists items with columns for '#', 'Number', and 'Location'.

| # | Number | Location            |
|---|--------|---------------------|
| 1 |        | CHILDRENS Level ... |
| 2 |        | CHILDRENS Pictur... |
| 3 | MCN    | JUNIOR Non-Fiction  |

Adding/Removing Copy Records to/from a Bucket .....

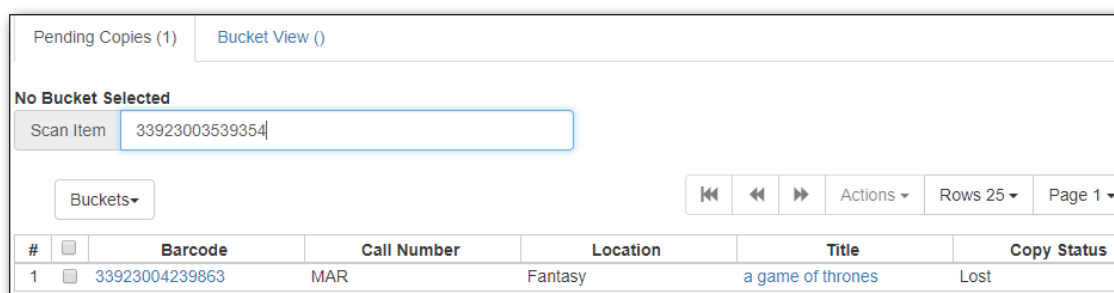
### Add Copies to a Bucket

Copies can be added to a bucket when they are displayed on **Checkin**, **Item Status** and **Holdings View** screen. You can select multiple items and add them to a copy bucket at one time. Click **Actions** → **Add Items to Bucket**.

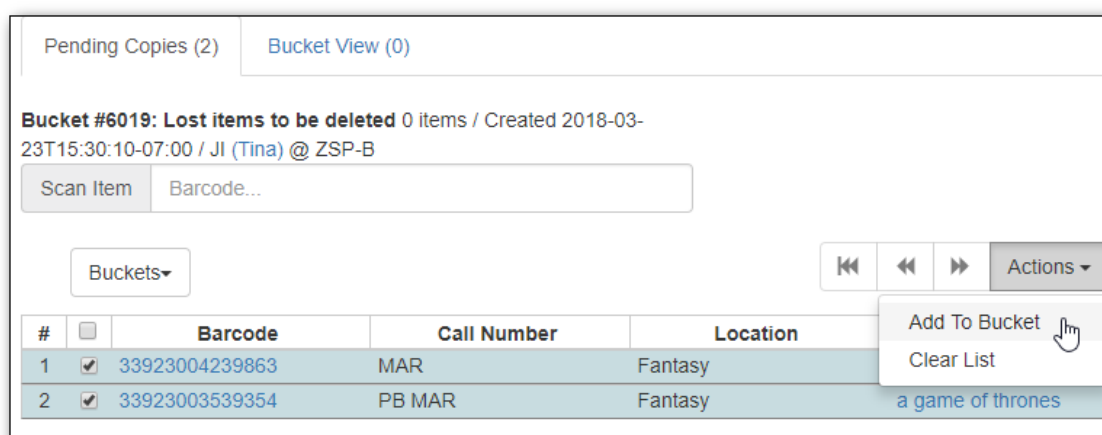


You can add copies to a bucket on Copy Bucket View.

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

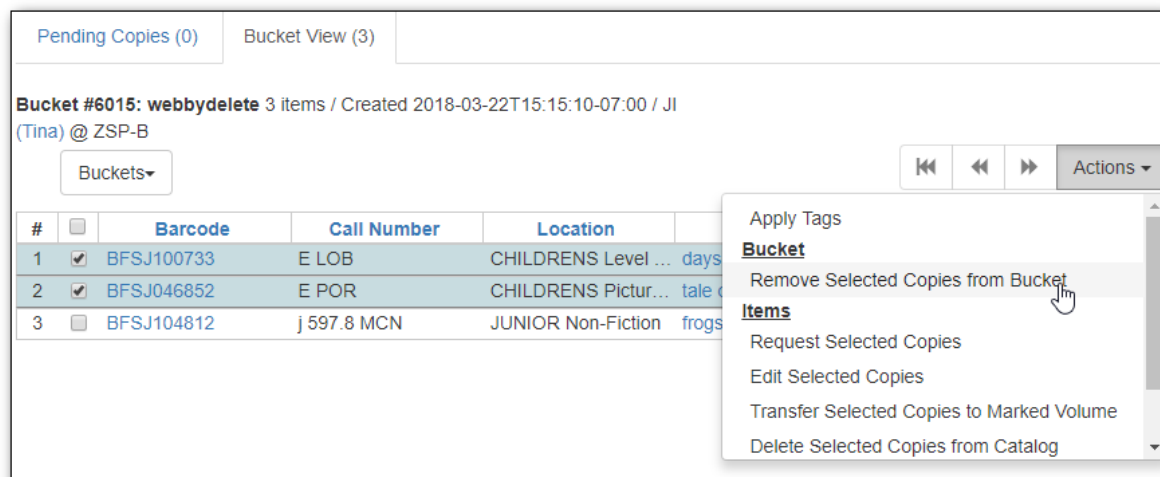


2. Click the **Buckets** dropdown list to open or create a bucket, if not done yet.
3. Select records that you want to add to the bucket.
4. Click **Actions** → **Add to Bucket**.



## Remove Copies from a Bucket

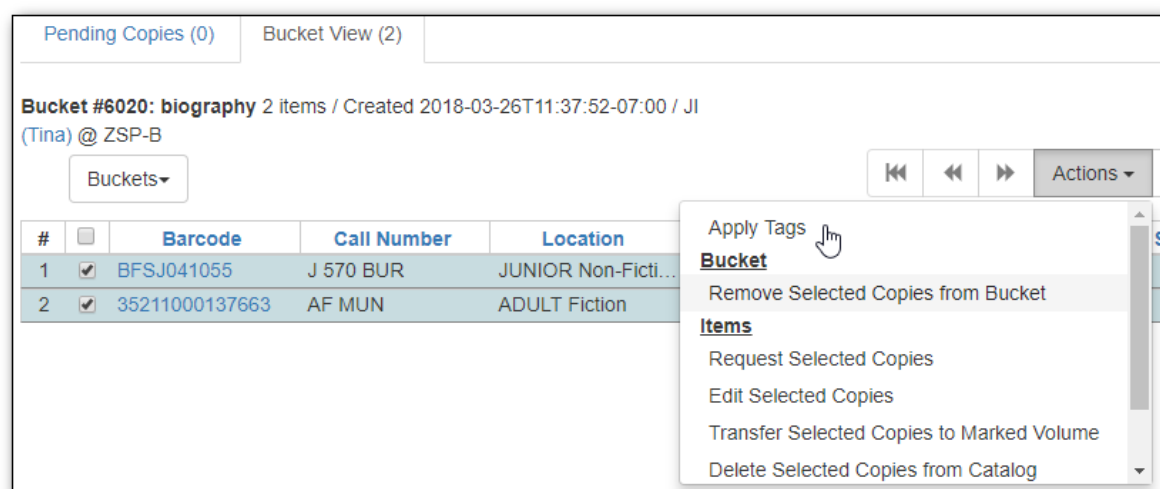
To remove copies from a bucket, retrieve the bucket, select the copies, choose **Actions** → **Bucket** → **Remove Selected Copies from Bucket**



Working with Copies in a Bucket ~~~~~ You can apply the following functions to selected copies in a bucket.

- **Apply Copy Tag**
- **Delete Copy Records**
- **Edit Copy Records**
- **Transfer Copies to a Selected Volume**
- **Print Labels**

To apply these functions, retrieve the bucket, select copies, then choose the function from the **Actions** list. The below example shows how to apply Copy Tag.



Retrieving Shared Buckets ~~~~~

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

To retrieve a shared bucket, click **Shared Buckets** on the Buckets list. Type in the bucket

number on the prompt, then click **Retrieve Bucket**.

Load Shared Bucket Bucket by ID

Bucket ID

6011

Load Bucket

Cancel

## Adding Bibliographic Records

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

## Importing Bibliographic Records via Z39.50 Interface

~~~~~

<https://www.youtube.com/watch?v=nkj0fMfUyFc>[Sitka Training Video - Z39.50 (5:20)]

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.

```
[[import_from_z39]]
```

Importing Bibliographic Records via Z39.50

AAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAA

. To access the Z39.50 interface, select *Cataloguing -> Import Record from Z39.50*.

+

```
image::images/cat/z39-1.png[]
```

. Select single or multiple pre-configured Z39.50 targets from the list. Note that most free targets do not have a User name or Password field. Some free targets and the subscription services held by some Sitka libraries require

login. Once you have made your choices, click **Save as Default** to save the services you usually search and the user names and passwords you have entered. They will be automatically selected the next time you open the Z39.50 screen.

+

image::images/cat/z39-2.png[]

+

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

+

image::images/cat/z39-3.png[]

+

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

+

image::images/cat/z39-4.png[]

+

image::images/cat/z39-5.png[]

+

. To import a record, choose the record from the results list that you would like to import. You should view the record first by clicking on **View MARC**. MARC record is displayed in a pop-up window. If a cover image is available, it will display as well. When you are sure you have chosen the correct record to import, click **Import**, if you do not want to edit the record or edit it after importing. The record is imported. A pop-up window appears with the new record ID and a link to it in the catalogue. Click **Go to Record** to add holdings.

+

image::images/cat/z39-6.png[]

+

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

+

image::images/cat/z39-7.png[]

+

. The Import Record window remains open. You can continue to edit the record.
. Click **Save** once done editing.
. Click **Go to Imported Record** to add holdings.

+

image::images/cat/z39-8.png[]

+

. You can also choose to add an item by selecting the **Add Item** checkbox on

Import Record screen. Type in a call number and barcode, then click *Import* or *Save* if record has been imported already.

+

image::images/cat/z39-9.png[]

+

. Volume Copy Editor opens in a new tab, so you can finish cataloguing the item.

[TIP]

====

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

====

Overlaying Records via Z39.50 Interface

^^

<https://goo.gl/kMu9iX>[Overlay via Z39.50 (4:23)]

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

Marking a Record for Overlay

+++++

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

. To mark a record for overlay, find it in the catalogue first.

+

. On record details screen, click *Mark for -> Overlay target*.

+

image:images/cat/z39-10.png[]

+

. Confirmation appears at the bottom right of the screen.

+
image:images/cat/z39-11.png[]

[CAUTION]

=====

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

=====

Overlaying Using Z39.50

+++++

. To overlay a record, go to **Cataloguing -> Import Record from Z39.50** to find a target record as described in xref:import_from_z39[]. This record should be a fuller and better catalogued record than the one you are overlaying. You can select potential records on the list based on the summary. Click on **View MARC** to see the full MARC record. Cancel the pop-up window, click on next record to view, or click **Overlay** once deciding on a record to import.

+
image::images/cat/z39-12.png[]

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

+
image::images/cat/z39-13.png[]

+
. MARC Edit screen opens up. Edit the record. Once done, click **Modify**, then **Use Edits**. You are back on Overlay screen.

+
image::images/cat/z39-14.png[]

+
. Click **Overlay** button at the bottom. You are back on Z39.50 Import interface. You can find the overlaid record based on its TCN number to continue to add holdings or further edit the MARC record.

[CAUTION]

=====

You must select **Merge Using INCOMING Record** as the merge profile. You may encounter error if you choose others.

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Batch Importing Bibliographic Records

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If the title records you need are not already in the Evergreen database, it is possible to upload vendor-supplied MARC files into Evergreen. Each file may contain one or more MARC records. During the uploading process, Evergreen

matches each record in the file with existing records in Evergreen based on pre-defined match points called *\*Record Match Sets\**. Records without matches may be imported directly into the catalogue. Records with matches must be examined by cataloguers. Due to the nature of Sitka's shared database, Co-op Support strongly advises against allowing Evergreen to select a merge target, and cautions you to adhere to instructions for selecting a match as outlined in this chapter.

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

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

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

[TIP]

There are some settings, namely Record Display Attributes, Record Match Sets, Merge/Overlay Profiles and Import Item Attributes on this screen that are reserved for Sitka server administration. You should not attempt to edit them as they affect all bibliographic records.

**Record Display Attributes** sets what fields will display on Inspect Queue screen, once a file of records has been loaded. Important descriptive MARC tags and control numbers are selected to display.

**Record Match Sets** are profiles set up by Sitka to allow for different match points to be used when loading records. The default profile is SitkaMatch. It matches on the 901c (record id), 020a (ISBN), 022a (ISSN), or 035a (System Control Number). It is used in the majority of record loads. The other profiles are only used to load special records. Please contact Co-op Support for which profile to use if your records require a set of different match points to load.

**Merge/Overlay Profiles** control how the incoming and existing MARC records are merged. Two profiles have been created for all Sitka libraries to use: Merge Using INCOMING Record and Merge Using EXISTING Record.

- Merge Using INCOMING Record: all tags in the INCOMING record will be brought into the final record. Tags: 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: 590, 595,

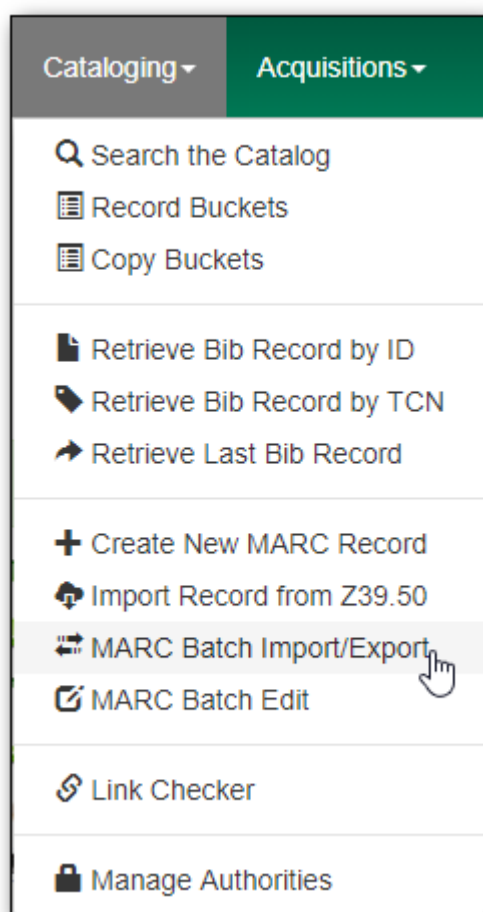
690, 852 and 856 in the INCOMING record will be brought into the final record. The rest will be removed upon merge.

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.

**Import Item Attributes** 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.

Uploading MARC Record Files ^^^^^^^^ ^

1. Select **Cataloguing** → **MARC Batch Import/Export**



2. The MARC File Upload screen opens.

3. 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 for your file in the box beside **Create a New Upload Queue**. To append records to an existing queue, choose a queue from the dropdown list beside **Add to an Existing Queue**.

**CAUTION** Do not use "/" or "\" (slash or backslash) in import queue name.

4. Leave **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.

5. 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.

6. 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.) Contact Co-op Support if you need to load records for non-physical items, such as an e-record collection like ebrary.
7. You do not need to choose a Merge Profile now.

8. 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. These options allow Evergreen to automatically merge records before you inspect them. It is best practice to inspect the potentially merged records first.

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.

+ . You do not need to select any of the checkboxes in Copy Import Actions now.

+ . Click **Choose File** to choose the source MARC file on your computer, then click **Upload**. Depending on the size of the file, it may take a while for the uploading to finish. Once it is finished, records will be displayed in Inspect Queue view. You can continue to examine and import records in the queue as described below. Or you can come back later to find the queue to examine and import the records.

+

#### CAUTION

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.

Once you hit the Upload button, the uploading process starts to run behind the scene until it finishes. Sometimes the progress bar persists and the process seems hanging, but the actual process may have finished. It is best practice to inspect queue to check the queue status first before attempting to reload the file.

+

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

#### 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**. 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, the Queue Summary screen is loaded after you upload the file.

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.

**Queue Filters** allows you to display only the selected type of records in the table below.

A selected number of records (10, 20, 50, 100) are displayed per page. Use the dropdown list beside **Records per Page** to select your preferred number. Use Previous and Next to flip over the page.

The records in the queue can be exported in non-MARC format via the method selected from the **Export Queue As** dropdown list. (Exporting via email is not currently functional.)

If you imported holdings with the MARC records, click **View Import Items** to see 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 to Bucket**.

The screenshot shows the 'Queue 030618' interface. At the top, there are tabs: Export Records, Import Records, Inspect Queue, Record Display Attributes, Merge / Overlay Profiles, Record Match Sets, and Holdings Import Profiles. Below the tabs, the interface is divided into three main sections: Queue Actions, Queue Summary, and Queue Filters.

**Queue Actions:** Includes links for Import Selected Records, Import All Records, View Import Items, Export Non-Imported Records, Delete Queue, and Copy To Bucket.

**Queue Summary:** Displays statistics: Records in Queue: 1, Records Imported: 0, Record Import Failures: 0, Items in Queue: 0, Items Imported: 0, and Item Import Failures: 0.

**Queue Filters:** Includes checkboxes for Limit to Records with Matches, Limit to Non-Imported Records, and Limit to Records with Import Errors.

Below these sections, there is a table with columns: View MARC, Matches, Import Failures, Import Time, Imported As, Title of work, Author of work, Language of work, Pagination, ISBN, ISSN, and Price. The table shows one record for 'Miss Fortune / by AJ Stern ; illustrated by Doreen Mulryan Marts.' with a price of 5.99.

At the bottom right, there are controls for 'Export Queue As...', 'Records Per Page' (set to 10), 'Page 1', and 'Previous Next' navigation links.

2. You can view both incoming and existing match records, if any, to determine which record to use. The links in **View MARC** column lead you to the incoming records, while records in the **Matches** column link to existing records.
3. Click the blue coloured **View MARC** link to view the incoming record. You may edit it before importing by clicking **Edit**. Once editing is complete, click **Save Changes**. Click **Return** to go back to the Record Queue screen.

### MARC Record

[Return](#) [Edit](#)

LDR01784cam a22003858a 4500  
 001 107477022  
 003 SITKA  
 005 20120606012457.0  
 008 120416s2012 nyu b 000 1 eng  
 010 [1a](#) 2011031481  
 020 [1a](#) 9780448457482 (pbk) : [1c](#) 5.99  
 040 [1a](#) DLC [1c](#) DLC [1d](#) UtOrBLW  
 042 [1a](#) lcac [1a](#) pcc  
 050 0 0 [1a](#) PZ7.S83818 [1b](#) Mi 2012  
 082 0 0 [1a](#) [Fic] [12](#) 23  
 092 [1a](#) J F Ste  
 100 1 [1a](#) Stern, A. J.  
 245 1 0 [1a](#) Miss Fortune / [1c](#) by AJ Stern ; illustrated by Doreen Mulryan Marts.  
 260 [1a](#) New York, N.Y. : [1b](#) Grosset & Dunlap, [1c](#) 2012.  
 300 [1a](#) 118 p. : [1b](#) ill. ; [1c](#) cm.  
 490 1 [1a](#) Frankly, Frannie  
 520 [1a](#) Frannie opens a fortune telling business at school after assisting Star, who reads tarot cards at a surprise party for Frannie's father, but soon it becomes clear that making up fortunes can cause a lot of trouble.  
 650 1 [1a](#) Fortune telling [1v](#) Fiction.  
 650 1 [1a](#) Schools [1v](#) Fiction.  
 650 1 [1a](#) Parties [1v](#) Fiction.  
 650 1 [1a](#) Surprise [1v](#) Fiction.  
 650 1 [1a](#) Behavior [1v](#) Fiction.  
 700 1 [1a](#) Marts, Doreen Mulryan, [1e](#) ill.  
 800 1 [1a](#) Stern, A. J. [1t](#) Frankly, Frannie.  
 830 0 [1a](#) Frankly, Frannie.  
 901 [1a](#) 107477022 [1b](#) SITKA [1c](#) 107477022 [1t](#) biblio

- On Queue screen click the blue coloured **Matches** link to view the match record. This takes you to the following **Import Matches** screen.
- On the **Import Matches** screen, you will see the match record's ID number and some non-MARC information. Click **View MARC**. The existing MARC record is displayed in view mode. You can not edit it. Click **Return** to go back to the Import Matches screen.

| Import Matches                       |           |                           |             |                       |                        |          |             |                |        |            |           |
|--------------------------------------|-----------|---------------------------|-------------|-----------------------|------------------------|----------|-------------|----------------|--------|------------|-----------|
| <a href="#">Back To Import Queue</a> |           |                           |             |                       |                        |          |             |                |        |            |           |
| Merge Target                         | ID        | View MARC                 | Match Score | Queued Record Quality | Matched Record Quality | Creator  | Create Date | Last Edit Date | Source | TCN Source | TCN Value |
| <input type="checkbox"/>             | 115557888 | <a href="#">View MARC</a> | 100         | 0                     | 0                      | virginia | 6/30/16     | 1/23/18        | 9      | OCOLC      | 115557888 |
| <input type="checkbox"/>             | 118003146 | <a href="#">View MARC</a> | 100         | 0                     | 0                      | NA978233 | 12/1/16     | 5/4/17         | 9      |            | 118003146 |

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.

1. 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 selecting the checkbox in front of the record in the Merge Target column. Click **Back to Import Queue** once done.

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.

| Import Matches                       |           |                           |             |                       |                        |          |             |                |        |            |           |
|--------------------------------------|-----------|---------------------------|-------------|-----------------------|------------------------|----------|-------------|----------------|--------|------------|-----------|
| <a href="#">Back To Import Queue</a> |           |                           |             |                       |                        |          |             |                |        |            |           |
| Merge Target                         | ID        | View MARC                 | Match Score | Queued Record Quality | Matched Record Quality | Creator  | Create Date | Last Edit Date | Source | TCN Source | TCN Value |
| <input checked="" type="checkbox"/>  | 115557888 | <a href="#">View MARC</a> | 100         | 0                     | 0                      | virginia | 6/30/16     | 1/23/18        | 9      | OCOLC      | 115557888 |
| <input type="checkbox"/>             | 118003146 | <a href="#">View MARC</a> | 100         | 0                     | 0                      | NA978233 | 12/1/16     | 5/4/17         | 9      |            | 118003146 |

However, if the incoming record contains local information in tags 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 as described in next step. If you are interested in loading holdings/item information, please contact Co-op support to set it up.

2. If you have marked a merge target, the record is shown as selected 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.

| Queue 030618                                                                                                                                                                                                                                                |                             |                 |                                                                                                                                                                      |             |                                                                   |                                                                                                                                                                                                          |                  |            |                                                                                                            |      |       |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|-----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|-------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|------------|------------------------------------------------------------------------------------------------------------|------|-------|
| <b>Queue Actions</b><br><a href="#">Import Selected Records</a><br><a href="#">Import All Records</a><br><a href="#">View Import Items</a><br><a href="#">Export Non-Imported Records</a><br><a href="#">Delete Queue</a><br><a href="#">Copy To Bucket</a> |                             |                 | <b>Queue Summary</b><br>Records in Queue: 1<br>Records Imported: 0<br>Record Import Failures: 0<br>Items in Queue: 0<br>Items Imported: 0<br>Item Import Failures: 0 |             |                                                                   | <b>Queue Filters</b><br>Limit to Records with Matches <input type="checkbox"/><br>Limit to Non-Imported Records <input type="checkbox"/><br>Limit to Records with Import Errors <input type="checkbox"/> |                  |            | Export Queue As...<br>Records Per Page: 10<br>Page 1 of 1<br><a href="#">Previous</a> <a href="#">Next</a> |      |       |
| <input type="checkbox"/> View MARC                                                                                                                                                                                                                          | Matches                     | Import Failures | Import Time                                                                                                                                                          | Imported As | Title of work                                                     | Author of work                                                                                                                                                                                           | Language of work | Pagination | ISBN                                                                                                       | ISSN | Price |
| <input checked="" type="checkbox"/> <a href="#">View MARC</a>                                                                                                                                                                                               | <a href="#">Matches (2)</a> |                 |                                                                                                                                                                      |             | Miss Fortune / by AJ Stern ; illustrated by Doreen Mulryan Marts. | Stern, A. J.                                                                                                                                                                                             |                  | 118 p. :   | 97804484574                                                                                                |      | 5.99  |

3. You are prompted to select import options. Make your choices and click **Import**.

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 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 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.

+

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 checkbox Use Org Unit Matching in Copy to Determine Best Match, too.
- +

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

#### CAUTION

1. 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.

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.

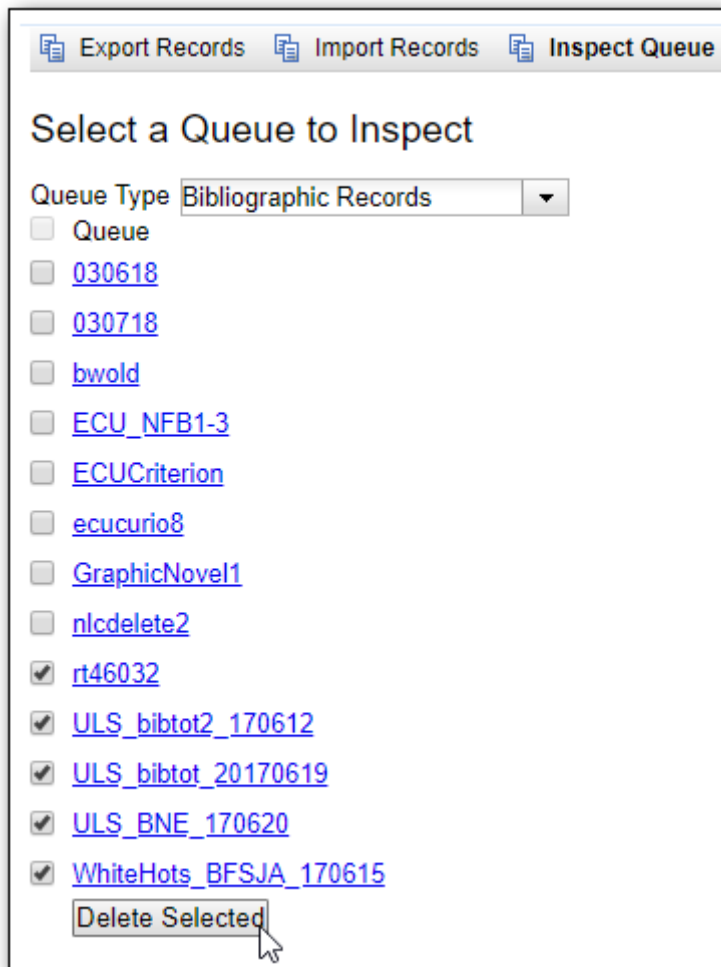
#### Managing Queues <sup>^^^^</sup>

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 delete 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 then clicking **Delete Selected** at the bottom.

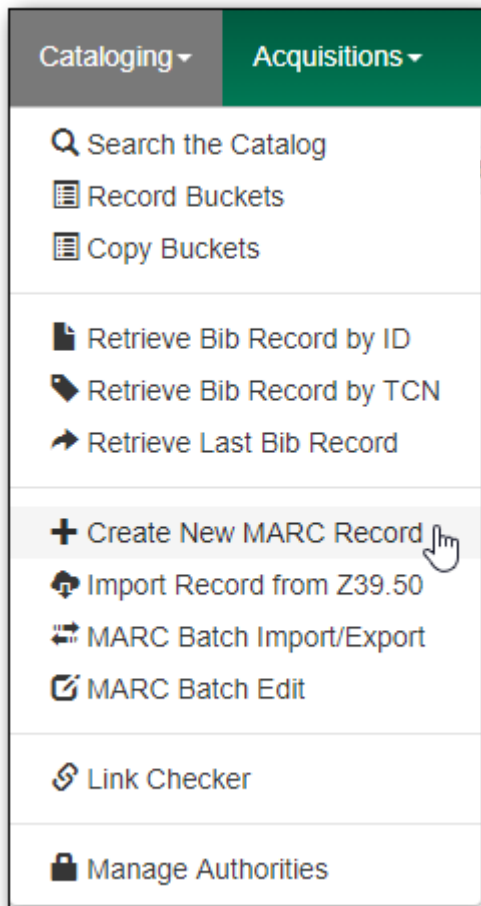


## Creating New Bibliographic Records ~~~~~

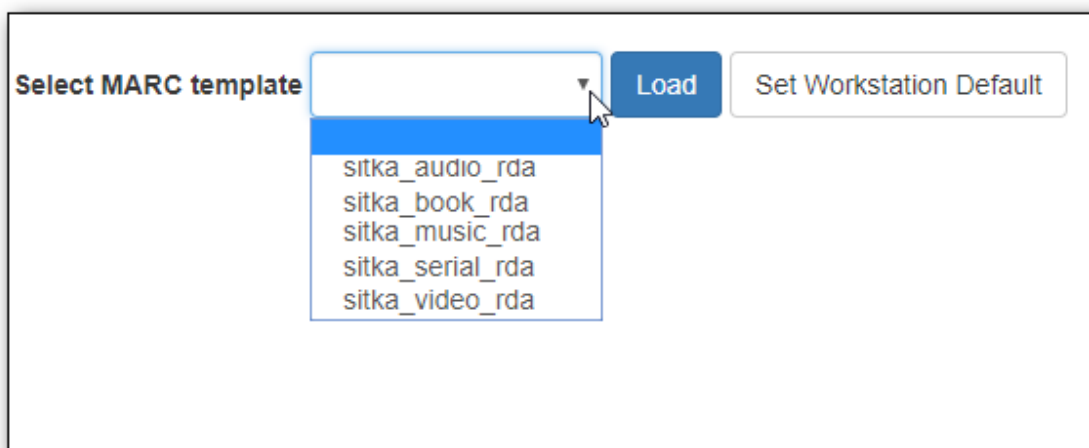
It is required practice, and Sitka policy, to search Evergreen, Z39.50 sources, or, in some libraries, a vendor file of MARC records, before using a MARC record template for original cataloguing. Original cataloguing should be done in Evergreen only if there is no record available in any of these previous sources. You can create new MARC records in Evergreen by using MARC templates that exist in Evergreen.

For information about working with MARC records see [\[edit-marc\]](#).

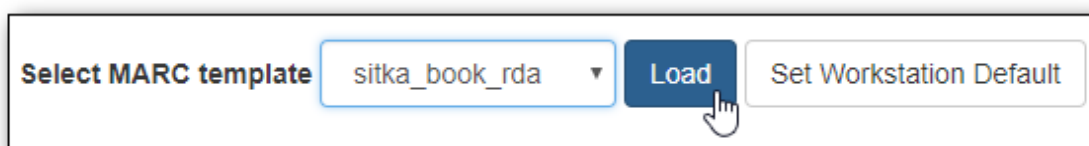
1. To access MARC templates, select **Cataloguing** → **Create New Marc Record**.



2. The MARC Template screen opens. Click into the drop down menu field to see available templates. Note you can select a workstation default here. Templates are available for book, music, audio, video and serial in MARC and RDA standards.



3. Select appropriate template and click **Load**.



4. A blank MARC record will load. In this example we have chosen a book template so MARC leader coding is for textual materials.

**Add Item**

☐ Flat Text Editor ☐ Stack subfields

Record Type: BKS

Select a Sol: ▼

Validate **Save** Help

|      |   |      |  |      |  |      |   |       |     |
|------|---|------|--|------|--|------|---|-------|-----|
| Type | a | ELvl |  | Audn |  | Ctrl |   | Lang  | eng |
| BLvl | m | Form |  | Conf |  | Biog |   | MRec  |     |
|      |   | Cont |  | GPub |  | LitF |   | Indx  |     |
| Desc | i | Ills |  | Fest |  | DtSt | s | Date1 |     |
|      |   |      |  |      |  |      |   | Date2 |     |

```

LDR 00620nam a22 i 4500
008 070101s          eng d
010 1 #a
020 1 #a
040 1 #a SITKA #b eng #e rda #c SITKA
082 0 4 #a
092 1 #a
100 1 #a
245 1 #a #b #c
250 1 #a
264 1 #a #b #c
300 1 #a #b #c
336 1 #a text #2 rdacontent
337 1 #a unmediated #2 rdamedia
338 1 #a volume #2 rdacarrier
490 0 #a
500 1 #a
520 1 #a
650 1 #a #v
650 1 #a
700 1 #a #e
  
```

5. Complete the MARC record as per Sitka policy. You can add and delete tags and subfields as required.
6. Click **Save**.
7. The record is created and will open up in your tab in the current default view. If you did not utilize **Fast Item Add**, you may now attach holdings as described in [Adding Holdings to Bibliographic Records](#)

#### Sitka's Minimum MARC record

As there is an approved minimum level for original MARC records, the following may assist you when creating original MARC records in Evergreen. For more detailed information on MARC and RDA standards, the Library of Congress has the authoritative website at <http://www.loc.gov/marc/> & <https://www.loc.gov/aba/rda/>.

Here is an example of a MARC record that meets and exceeds minimum cataloguing standards for a book in a series.

|     |                                  |                                                                                                                                             |
|-----|----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|
| LDR | 01174nam                         | a2200301 i 4500                                                                                                                             |
| 001 | 118378791                        |                                                                                                                                             |
| 003 | SITKA                            |                                                                                                                                             |
| 005 | 20180308002952.0                 |                                                                                                                                             |
| 006 | a e 000 f                        |                                                                                                                                             |
| 007 | ta                               |                                                                                                                                             |
| 008 | 170424t20182018nyu e 000 f eng d |                                                                                                                                             |
| 020 |                                  | ‡a 9780735217171                                                                                                                            |
| 035 |                                  | ‡a (OCoLC)sitkaBS02286709                                                                                                                   |
| 040 |                                  | ‡a YDX ‡b eng ‡c YDX ‡d BDX ‡d ABJ ‡d NOG ‡d OCLCO                                                                                          |
| 092 |                                  | ‡a WOO ‡5 BMK                                                                                                                               |
| 100 | 1                                | ‡a Woods, Stuart, ‡e author.                               |
| 245 | 1 0                              | ‡a Unbound / ‡c Stuart Woods.                                                                                                               |
| 264 | 1                                | ‡a New York : ‡b G.P. Putnam's Sons, ‡c 2018.                                                                                               |
| 300 |                                  | ‡a 311 pages ; ‡c 24 cm                                                                                                                     |
| 336 |                                  | ‡a text ‡b txt ‡2 rdacontent                                                                                                                |
| 337 |                                  | ‡a unmediated ‡b n ‡2 rdamedia                                                                                                              |
| 338 |                                  | ‡a volume ‡b nc ‡2 rdacarrier                                                                                                               |
| 490 | 1                                | ‡a A Stone Barrington novel                                                                                                                 |
| 650 | 0                                | ‡a Barrington, Stone (Fictitious character) ‡v Fiction.  |
| 650 | 0                                | ‡a Private investigators ‡v Fiction.                      |
| 655 | 7                                | ‡a Mystery fiction. ‡2 gsafd                              |
| 800 | 1                                | ‡a Woods, Stuart. ‡t Stone Barrington novel.           |

### Standard Numbers:

- 010 Library of Congress Control Number (LCCN) is the control number for MARC records distributed by the Library of Congress. Can often be found in the Cataloging in Publication (CIP) information on verso page of a book. Can be useful searching number.
- 020 International Standard Book Number (ISBN) is a unique number assigned to items by publisher. Can be 10 or 13 digit number. Sitka support and training team recommend searching Evergreen and Z39 targets, by both numbers, if present on item, before proceeding to original cataloguing. When cataloguing an item, if both numbers are present, enter both in separate 020 tags.
- 022 International Standard Serial Number (ISSN) is a unique number assigned to a serial title.
- 024 Universal Product Code (UPC) is a twelve digit number often assigned to sound recordings and videos.
- 028 are Publisher Control Numbers, formatted numbers used for sound recordings, printed music, and videorecordings.

**Classification Numbers:** Evergreen does not display call numbers from the shared MARC record, but the data is useful for searching, matching, and assessing quality of a MARC record. Evergreen uses each library's volume record for local call number display, and will give you the option to auto-fill your number from the MARC record if you want to use

that call number as yours.

- 05X are standard classification (call) numbers that are, or can be, present in a MARC record. The most common are the 050, which is the Library of Congress Classification Number (LCC), assigned by the Library of Congress, and the 055, which is the Canadian LCC.
- 082 is the Dewey Decimal Classification number (DDC).
- 090 and 092 are tags reserved for a library's local call number. This data is not used by Evergreen for call number display, but you will often see data there from a different library whose system may use the MARC record for call number display.

**Title:** 245 tag contains all the important title information and General Material Designations (GMD). 245 subfields a and b are title and sub-title respectively, 245c contains the statement of responsibility, and 245h is for approved GMDs. Note, for RDA records, the GMD is no longer used; instead the tags of 336, 337 and 338 are used (see below).

**Edition Statement:** 25X tags contain important descriptive information about the item being described. This information includes edition statement, imprint and other publication source information.

**Publication Information:** 264 tag and subfields a, place of publication, b, name of publisher, and c, year of publication, contain critical publication information and should be as complete as possible. When assessing record, matching the 264/260 tag should always be considered. Note, the second indicator of 264 should be filled: 1 for publication, 2 for distribution, etc.

**Physical Description of Item:** 300 tag is used to physically describe an item as completely as possible.

**Content, Media and Carrier type:** 336, 337, 338 tags are used for RDA records only. The fields of content, media and carrier collectively replace the GMD (245\$h). For 336, subfield \$a is content term and \$2 rda content. For subfield 337, \$a is media term and \$2 is rdamedia. For 338, \$a is carrier term and \$2 is rdacarrier. See here for appropriate RDA terms.

**Series Information:** 440 and 490 are used to describe relevant series. 440 was officially made obsolete in 2008, but you will still find it used in records that predate 2008, but for correct, current series cataloguing use the 490 tag.

**Notes:** 5xx tags are useful, keyword searchable notes tags, which assist in description and retrieval of items. Use the 500 tag for a note that cannot be placed in any other 5xx tag as per MARC standards.

**Subjects:** 6xx contain subject headings that follow standards for personal, topical, geographical, and genre terms. Use 690 for local, non-standard subject headings.

Cataloguing Non-physical Resources ~~~~~~



Ordinary bibliographic records are only visible in the OPAC when holdings records are attached, but it is also possible to catalogue non-physical resources such as websites, online journals, or downloadable audiobooks, etc. by adding a tag 856 with subfield \$9. The steps below describe how to catalogue a non-physical resource so it appears in OPAC searches.

These instructions are for adding individual records. To upload a batch of records (e.g. from an e-book subscription), please contact Co-op Support. For libraries that subscribe to OverDrive, Co-op Support creates and updates bibliographic records automatically.

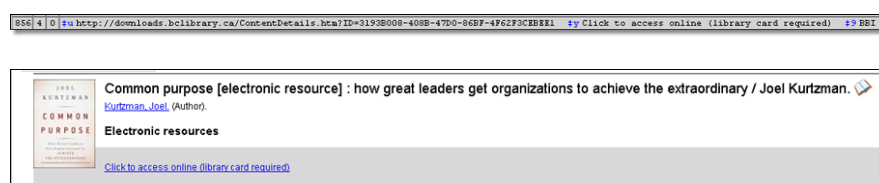
1. Locate, import, or create a bibliographic record as described in the preceding chapters.
2. Click the title link to go to record details. Click **MARC Edit**.
3. Add an 856 tag to the MARC record. Place the cursor in the desired location and press CTRL+Enter to add an empty row. Enter the tag number (856). You must set the first indicator to 4, and the second indicator to 0 or 1. The indicators cannot be left blank. For information about indicators see <http://www.loc.gov/marc/bibliographic/bd856.html>.
4. Add applicable subfields from the table below.

**NOTE**

| Subfield code | Description                                                           | Example                                                                             | OPAC Display                                                                                     |
|---------------|-----------------------------------------------------------------------|-------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|
| \$u           | Required; the URL or link to the resource                             | <a href="http://www.libraries.toresource.ca">http://www.libraries.toresource.ca</a> | Appears as a link in the OPAC display; the link text is the URI unless subfield \$y is specified |
| \$y           | Optional; 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                                                  |

| Subfield code | Description                 | Example | OPAC Display                                                                                            |
|---------------|-----------------------------|---------|---------------------------------------------------------------------------------------------------------|
| \$9           | Required; your library code | BBI     | Not displayed in the OPAC but required for the record to be included in searches scoped to your library |

5. After the tag 856 is added, the record will be displayed as search result on OPAC for the library in \$9. The image below shows a sample 856 tag and the corresponding OPAC display. This record would appear in OPAC searches of the Bowen Island Public Library catalogue (BBI).



A separate 856 tag should be added for each library that catalogues the resource. Multi-branch libraries may add a single 856 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 tag 856 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 search result to a selected library.

To remove a non-physical record from your library's collection, you need to delete your library's tag 856. If your library's tag 856 is the only one, you may delete the MARC record. See Deleting MARC records for more information.

## Maintaining Bibliographic records

The appropriate title information displayed on OPAC relies on correct MARC coding. For example, format icons for text, moving pictures and sound rely on MARC coding in the leader, and 007 and 008 fields, as do OPAC search filters, such as publication date, item type, or target audience. Bibliographic records matching and de-duplicating also rely on correct MARC coding and consistency in use of and contents in particular MARC tags. The ability to edit and manage MARC records is very important to maintaining database integrity.

Evergreen allows you to edit MARC tags, sub-fields, and indicators, as well as an easy entry box to edit parts of the leader and 008 field on a built-in

form called MARC Editor. Besides, it also provides a text based editor, which allows you to easily add or remove tags, and/or edit the fields. But you need to pay close attention to the position of the tags, indicators and the spacing required to preserve the record structure.

## Editing MARC Records

~~~~~

. To edit a MARC record, retrieve it on the catalogue. Once record is displayed on Record Details screen, click *MARC Edit*.

+

image::images/cat/marc-edit-1.png[]

+

[TIP]

=====

You can set the displayed view as default by clicking *Set Default View*. Individual records will be loaded in this view when selected/retrieved.

=====

+

. MARC record is displayed. Use scroll bar on right to move record up and down on screen.

+

image::images/cat/marc-edit-2.png[]

+

. Depending on your preference, you can select *Stack subfields* to change the way subfields are displayed.

+

image::images/cat/marc-edit-3.png[]

+

. Now the subfields are in separate rows.

+

image::images/cat/marc-edit-4.png[]

+

. To add or remove rows, or replace tags, click the *Help* button to display the keyboard shortcuts. Move the cursor to appropriate position, then use the keyboard shortcut.

+

image::images/cat/marc-edit-5.png[]

+

. You can right click at the appropriate position to list the functions and tags.

+

image::images/cat/marc-edit-5a.png[]

+

. To work with the data in a tag, simply click or Tab into required field.

. To edit indicators, click or Tab into the required field and right click to view correct indicators and enter appropriate data.

+

image::images/cat/marc-edit-6.png[]

+

. Once your edits are complete, click *Save Record*.

+
image::images/cat/marc-edit-7.png[]

To access the Flat-Text Editor, select the checkbox in front of it. To switch back to the form editor, de-select it.

[TIP]

=====

On Flat-Text Editor, each line stands for a tag. The tags, indicators and their values are at fixed positions. If there is no value at a position, you will see "\" as a spacing taker. For positionally defined tags, such as 007 or 008, you will see "\" in the field content area, too. You need to replace it with the content you want to put in, when necessary.

=====

Editing MARC Record Leader and Fixed Field 008

~~~~~

Parts of the leader and the 008 can be edited in the MARC Editor via the fixed field editor box displayed above the MARC record in default MARC Edit view, and at top of record in Flat-Text Editor view. Information about the leader and the 008 can be found on the Library of Congress's MARC Standards page at <http://www.loc.gov/marc/>

To edit the fixed fields, it is easiest to use default Edit MARC view and click on the name of the field. In Flat-Text Editor view, you must place the cursor at the correct position in the number to edit. When you click on the field name, e.g. Date1, what you type will appear in the box. When you click on the field box itself, you have to backspace your cursor to the very beginning of the box in order to type, because there are space takers in these positionally defined fields. Right-clicking in certain fields such as Type, BLvl, Form, Audn, and Lang will show a drop-down menu of possible choices.

[TIP]

=====

The format filter (eg. Books, E-Books, Audiobooks, Videos etc.) and format icons in the OPAC rely on accurate coding in the Leader, 008 and 007. Please see the format filter and icon specifications in [xref:\\_format\\_filters\\_and\\_format\\_icons\[\]](#).

=====

- . Retrieve and display record in Edit MARC view.
- . Click into any box displayed in the fixed field editor. In this example we are editing the first position, the Type or Format box, to describe the format of the resource, textual material, by use of an "a".

+  
image::images/cat/leader-1.png[]

- +
- . Right-clicking in the box will show a list of possible values (eg. BLvl, Type, Form Audn, and Lang). Choose from this list to populate the box.

```

+
image::images/cat/leader-2.png[]
+
. You can press the *Tab* key or use the mouse to click through to each
field, and can delete and add text as required by backspacing or highlighting
existing text and over typing. Here the publication date is being edited;
OPAC searches filtered by date rely on correct coding in the 008.
+
image::images/cat/leader-3.png[]
+
. Click *Save Record*.
+
image::images/cat/leader-4.png[]
+
The OPAC icon for textual materials is displayed as in the example below.
+
image::images/cat/leader-5.png[]

```

## Format Filters and Format Icons

~~~~~

Format Filter Groups and Format Icons are configured at the Sitka level.

* item_type (Type) is Leader position 06

* bib_level (BLvl) is Leader position 07

* item_form (Form) is 008 position 23

* vr_format is 007 position 04

* sr_format is 007 position 03

The format filter is used by the OPAC to allow staff and patrons to limit their search by material format. The following table shows the fixed fields associated with each format filter value.

```

[options="header"]
|===
| Label | Fixed Fields
| All Audiobooks | item_type(i)
| All Books | item_type(a,t) AND bib_level(a,c,d,m) but NOT item_form(a,b,c,f)
| All Videos | item_type(g)
| Audiobooks (electronic) | item_type(i) AND item_form(o,q,s)
| Audiobooks (physical) | item_type(i) AND sr_fmt(l,f)
| Books (electronic) | item_type(a,t) AND bib_level(a,c,d,m) AND item_form
(o,q,s)
| Books (large print) | item_type(a,t) AND bib_level(a,c,d,m) AND item_form(d)
| Books (physical) | item_type(a,t) AND bib_level(a,c,d,m) and NOT item_form
(a,b,c,f,o,q,s)
| Kits and Mixed Materials | item_type(o,p,k)

```

```

| Maps | item_type(e,f)
| Music (CD, cassette) | item_type(j)
| Music Scores | item_type(c,d)
| Pictures | item_type(k)
| Serials and Magazines | bib_level(b,s)
| Serials and Magazines (electronic) | bib_level(s) AND item_form(q,o,s)
| Software and Video Games | item_type(m)
| Toys, Puzzles and Equipment | item_type(r)
| Videos (electronic) | item_type(g) AND item_form (o,q,s)
| Videos (physical) | item_type(g) AND NOT item_form (o,q,s)
|===

```

The format icons show in the search results and record display in the catalogue. The following table shows the fixed fields associated with each format icon.

```

[options="header"]
|===
| Label | Fixed Fields
| Video (shown if format, eg. vhs, dvd, is unknown) | item_type(g) and NOT
vr_format(v,s,b)
| E-video | item_type(g) and item_form(o, s, q)
| DVD | vr_format(v)
| VHS | vr_format(b)
| Blu-ray | vr_format(s)
| Audiobook (shown if format, eg. cassette, disc, is unknown) | item_type(i)
and NOT item_form(o,q,s) and NOT sr_format(a,b,c,d,e,l,f)
| E-audiobook | item_type(i) and item_form(o,q,s)
| CD Audiobook | item_type(i) and sr_format(f)
| Cassette audiobook | item_type(i) and sr_format(l)
| Phonograph audiobook | item_type(i) and sr_format(a,b,c,d,e)
| Book | item_type(a,t) AND bib_level(a,c,d,m) and NOT item_form
(a,b,c,d,f,o,q,r,s)
| E-Book | item_type(a,t) AND bib_level(a,c,d,m) AND item_form (o,q,s)
| Large print book | item_type(a,t) AND bib_level(a,c,d,m) AND item_form(d)
| Braille | item_type(a) AND item_form(f)
| Kit or mixed material | item_type(o,p)
| Map | item_type(e,f)
| Music (shown if format, eg. cassette, disc, is unknown) | item_type(j) and
NOT sr_format(a,b,c,d,e,f,l)
| Phonograph music | item_type(j) AND sr_format(a,b,c,d,e)
| CD music | item_type(j) AND sr_format(f)
| Cassette music | item_type(j) AND sr_format(l)
| E-music | item_type(j) AND item_form(o, s, q)
| Music score | item_type(c,d)
| Picture | item_type(k)
| Serial or magazine | bib_level(b,s) and NOT item_form (o, s, q)
| E-Serial or magazine | bib_level(b,s) AND item_form (o, s, q)
| Software or video game | item_type(m)
| Online | bib_level(i) AND item_form (o, s, q)
| Toys, puzzles or equipment | item_type(r)
|===

```

```
| Picture | item_type(k)
| Microform | item_form(a,b,c)
|===
```

Merging Bibliographic Records

~~~~~

<https://goo.gl/91kp4e>[Sitka Training Video - Merge Duplicate Bibliographic Records (7:31)]

This lesson will demonstrate merging bibliographic records in the catalogue. A common application for this functionality is to replace brief records with full records to keep one bibliographic record for one title.

Any volume and copy records or holds associated with the brief record will be transferred to the full record upon merging.

. Records are merged via a *\*Record Bucket\**. You need to have a bucket for the records you wish to merge. To create a record bucket, refer to `xref:create-record-bucket[]` for detailed instructions. In the example below the bucket is named "merge117036601".

. Identify records to be merged and add them to the bucket. See `xref:add-record-to-bucket[]` for detailed instructions.

. Retrieve the bucket by selecting *\*Cataloguing -> Record Buckets\** on menu bar.

. Click the drop down arrow beside *\*Buckets\**, then select the bucket containing the records to be merged.

+

image::images/cat/merge-1.png[]

+

. Select the records you wish to merge. Click *\*Actions -> Merge Selected Records\**.

+

image::images/cat/merge-2.png[]

+

. Merge screen opens in a pop-up window. Records are listed in the right column. You can scroll down to view each record and its holdings, if any. Once decided on a lead record, click *\*Use as Lead Record\**. You can remove a record if you decide not to merge it by clicking *\*Remove from Consideration\**.

+

image::images/cat/merge-3.png[]

+

. The lead record is moved to the left column. Compare the records. Edit the lead record if necessary. Click *\*Edit\** to edit in the current window. Once done, click *\*Save\**. You can also click *\*Edit using full editor\** to open the record in a pop-up window. Once done editing, click *\*Save\** on top, then *\*Done\** at the bottom to go back to the merge screen.

+

image::images/cat/merge-4.png[]

+

- . Select a merge profile. We use "Merge Keeping Local Fields".
- . Once ready, click \*Merge\*. The lead record is displayed in the catalogue.

#### [NOTE]

=====

While you can edit volumes and/or copies from merge screen, Co-op Support recommends you focus on bibliographic records on merge screen. After the merging is done, you can edit your volume/copy on Holdings View.

=====

#### [TIP]

=====

Merging time and target record is displayed when the merged non-lead records are retrieved.

image::images/cat/merge-5.png[]

=====

#### [CAUTION]

=====

Deleted records remain in a Record Bucket. We suggest you merge records right after you add them to the bucket. If you merge them later, good practice is to check the records again before merging to avoid merging them into a deleted record. Right now, deleted records are not indicated on merge screen.

## 16.2. Deleting Bibliographic Records

Due to cascading record deletion on sole copies, you may find you do not need to delete bibliographic records very often, as Evergreen does this for you.

Remember that Sitka's Evergreen is configured to always delete a MARC record when the only copy attached to it is deleted and you can only delete a MARC record if there are no holdings attached to it. This may happen if you have imported a new MARC record in error, and have not attached any holdings to it, or some other error or conversion circumstance that leaves a MARC record in the database with no holdings attached.

You can delete a MARC record directly from the **MARC Edit** view only.

1. Find the record in the catalogue and go to Record Details, and click on **MARC Edit**.



OPAC View **MARC Edit** MARC View View Holds Monograph Parts Holdings View Conjoined Items Set default view

Numeric Search: ISBN Identifier Search Library: Fort St. John Cam Search My Account

Search: title:dora explorer Type: Keyword Format: All Formats Library: Fort St. John Cam Search Clear Form

[ Refine My Original Search ]

Recent searches **Search Results** Showing Item 1 of 4 Preferred library: Fort St John Public Library Next

Dora the Explorer. Undercover Dora [videorecording] / Nickelodeon Studios.

2. Click **Delete**.

☐ Flat Text Editor ☐ Stack subfields Record Type VIS Select a Source Validate Save Delete Help

|      |   |      |     |      |   |       |      |       |     |
|------|---|------|-----|------|---|-------|------|-------|-----|
| Type | g | ELVI | I   | Audn | j | Ctrl  |      | Lang  | eng |
| BLVI | m | Form |     | MRec |   | Ctry  | cau  |       |     |
| GPub |   |      |     |      |   |       |      |       |     |
| Desc | a |      |     | DtSt | s | Date1 | 2008 | Date2 |     |
| TMat | v | Time | 098 | Tech | a |       |      |       |     |

|     |                          |
|-----|--------------------------|
| LDR | 02271dgm a2200577Ia 4500 |
| 001 | 119821369                |
| 003 | SITKA                    |
| 005 | 3813830033301 8          |

3. Confirmation window pops up. Click **OK/Continue**.

Delete Record

Are you sure you want to delete title record 119821369 from the catalog?

OK/Continue Cancel

4. Record is now deleted and inactive and only retrievable by a TCN (title control number) search or bibliographic record id (presented at deletion confirmation prompt).

**Record Summary (Deleted)**

|                                                 |                         |                                         |                             |
|-------------------------------------------------|-------------------------|-----------------------------------------|-----------------------------|
| <b>Title:</b> Dora the Explorer Undercover Dora | <b>Edition:</b>         | <b>TCN:</b> 119821369                   | <b>Created By:</b> Tina     |
| <b>Author:</b>                                  | <b>Pub Date:</b> [2008] | <b>Database ID:</b> 119821369           | <b>Last Edited By:</b> Tina |
| <b>Bib Call #:</b> PN1992.77.D673 2008          | <b>Record Owner:</b>    | <b>Last Edited On:</b> 2018-03-15 16:13 |                             |

Start Previous Next End Back To Results ( 1 / 1 )

Add Volumes Serials Mark for: Other Actions:

OPAC View MARC Edit MARC View View Holds Monograph Parts Holdings View Conjoined Items

Numeric Search: ISBN Identifier Search Library: Fort St John Public Search My Account

Search: Type: Keyword Format: All Formats Library: Fort St John Public Search Clear Form

**Recent searches**

This record has been deleted from the database. We recommend that you remove this title from any lists it may have been added to.

Dora the Explorer. Undercover Dora [videorecording] / Nickelodeon Studios.

You may also delete bibliographic records from a Record Bucket.

Deleted records can be undeleted. Retrieve the record by record id. Go to MARC Edit. Click on **Undelete**.

**TIP**

Flat Text Editor Stack subfields Record Type VIS Select a Source Validate Save Undelete Help

|      |   |      |     |      |   |       |      |       |     |
|------|---|------|-----|------|---|-------|------|-------|-----|
| Type | g | ELvl | i   | Audn | j | Ctrl  |      | Lang  | eng |
| BLvl | m | Form |     | MRec |   | Ctry  | cau  |       |     |
| Desc | a | GPub |     | DtSt | s | Date1 | 2008 | Date2 |     |
| TMat | v | Time | 098 | Tech | a |       |      |       |     |

LDR 02271dgm a2200577Ia 4500

## 16.3. Exporting Bibliographic Records

There are times when you may want to export MARC records from Evergreen. Evergreen allows you to do so via the Record Bucket and the MARC Batch Import/Export interface. You may include the holdings information in the MARC records. Based on Sitka's configuration, the holdings information will be in tag 852, including the copy's circulating library, shelving location, barcode, call number, status, and others saved in the copy record.

MARC records can be exported from Evergreen in MARCXML, UNIMARC, MARC21/USMARC or Evergreen Record Entry format. You need to choose one from the dropdown list. The exported records can be encoded in either UTF-8 or MARC8.

### Export MARC Records from MARC Batch Import/Export

To export MARC records on MARC Batch Import/Export interface, click Cataloguing → MARC Batch Import/Export. The default screen is Import Records. Click **Export Records** tab to open the export interface.

**Export Records**

Use Field Number  (starting from 0)

From CSV File  No file chosen

Or

Record ID

Or

Record Bucket ID

Record Type

Record Format

Record Encoding

Include holdings in Bibliographic Records ☐

If you want to export more than one record at a time, the records need to be saved in a Record Bucket or their IDs saved in a CSV file. If the CSV file contains other information than just record ids, specify which column is the record id by filling it into the Use Field Number box. Note that the field number starts from 0. If the second column in the CSV file is record id, the field number is 1.

If you export one record only, you may type in the record ID directly on the Export interface.

Once you have completed the above form, click the **Retrieve Records** button at the bottom. You will be prompted to browse the records, and then save them, or save them directly into a file.

#### NOTE

Holding records can be exported in tag 852, but this includes all item records across the Sitka consortium, not just your library's holdings.

### Export MARC records from Record Bucket

To export MARC records from Record Bucket, go to Cataloguing → Record Bucket. Retrieve the bucket containing the records that you wish to export. Select a record, then click **Action** → **Export Records**.

**Bucket #652604: Fiction Export** 2 items / Created 2018-03-16T12:49:22-07:00 /  
 sitka (sitkacircat) @ MWPL

Buckets▼ Batch Edit

⏮ ⏪ ⏩ ⏭ Actions▼ Rows 25▼

| # | <input type="checkbox"/>            | Title         | Record ID | Fingerprint   | Overall Recd | TCN Source  | TCN Value | TCN | Location | ISBN    |
|---|-------------------------------------|---------------|-----------|---------------|--------------|-------------|-----------|-----|----------|---------|
| 1 | <input checked="" type="checkbox"/> | dora the e... | 202481    | Title:dora... | 118          | System L... | 202481    |     |          | {00439} |
| 2 | <input type="checkbox"/>            | dora the e... | 30008949  | Title:dora... | 113          | CaBTE       | 30008949  |     |          | {97814} |

- Show Selected Records in Catalog
- Remove Selected Records from Bucket
- Delete Selected Records from Catalog
- Transfer Title Holds
- Merge Selected Records
- Export Records

**NOTE** All records in the bucket are exported, not just the one you selected.

Select the exported record format and encoding, and whether to include holdings. Once done, click **Export**. You will be prompted to save the file.

Export Records

Record Format

MARC XML

Encoding

UTF-8

☐ Include Items?

Export

Cancel

# Chapter 17. Record Bucket

Record Bucket allows you to build a list of titles that you may process in batch. It is also the interface for merging records. Records, even after being deleted, remain in a bucket until they are removed from it.

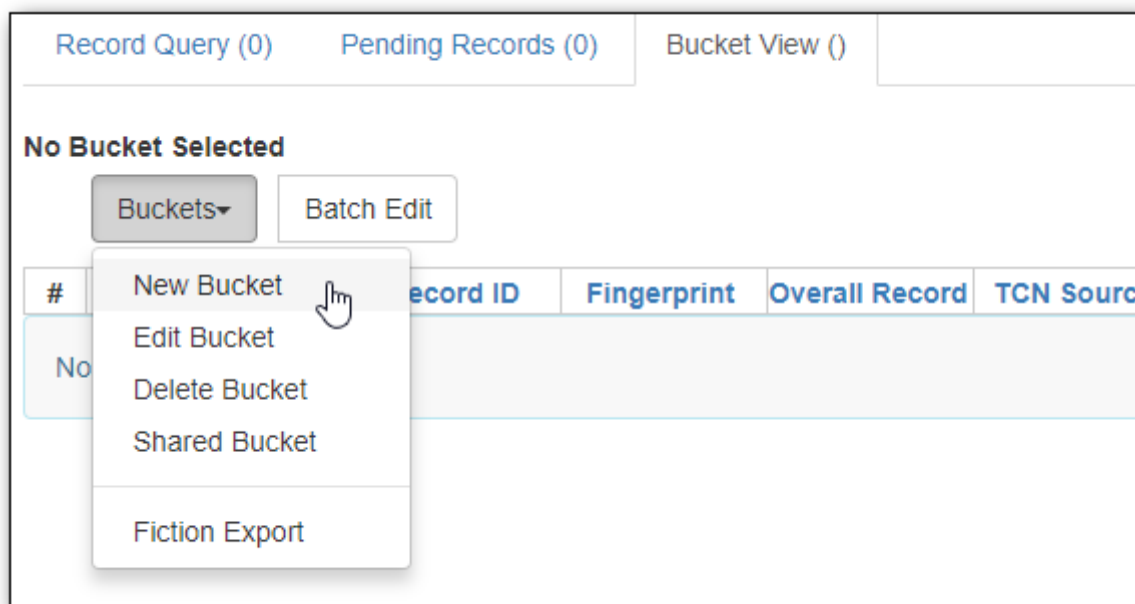
We will demonstrate how to create and manage bibliographic record buckets. The steps used for copy buckets are similar. It is very important when working with buckets to ensure you are working with the correct type of record for the corresponding bucket. You cannot add copy records to bibliographic record buckets and vice versa.

## 17.1. Creating Record Buckets

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

### Creating a Record Bucket on Record Buckets view

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



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

Create Bucket

×

Name

adult fiction

Description

adult fiction items to be deleted

☐ Publicly Visible?

Create Bucket

Cancel

- The newly created bucket is the active bucket in Bucket View. Note that the bucket is numbered, and creating owner identified.

Record Query (0)

Pending Records (0)

Bucket View (0)

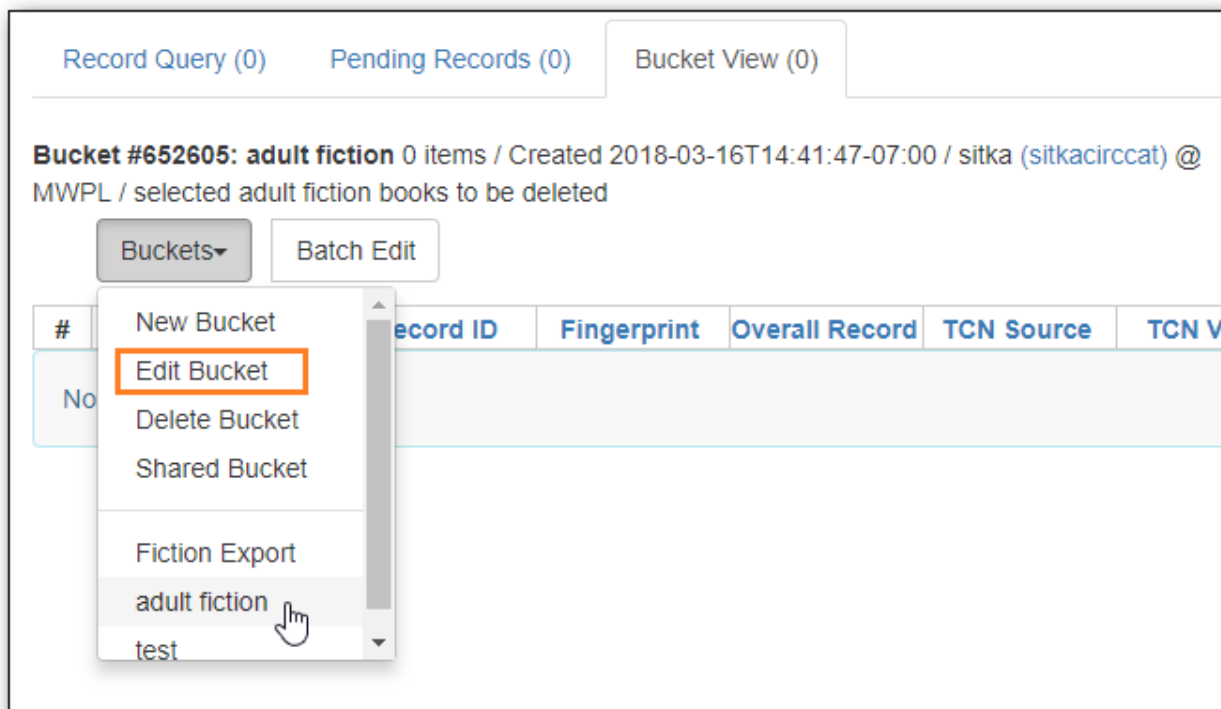
**Bucket #652605: adult fiction** 0 items / Created 2018-03-16T14:41:47-07:00 / sitka (sitkacirccat) @ MWPL / selected adult fiction books to be deleted

Buckets▼

Batch Edit

| #                   |  | Title | Record ID | Fingerprint | Overall Record | TCN Source | TCN Va |
|---------------------|--|-------|-----------|-------------|----------------|------------|--------|
| No Items To Display |  |       |           |             |                |            |        |

- Click the **Buckets** dropdown list, you will see the bucket on the list. You can edit the bucket's name or description by clicking on **Edit Bucket** on the list.

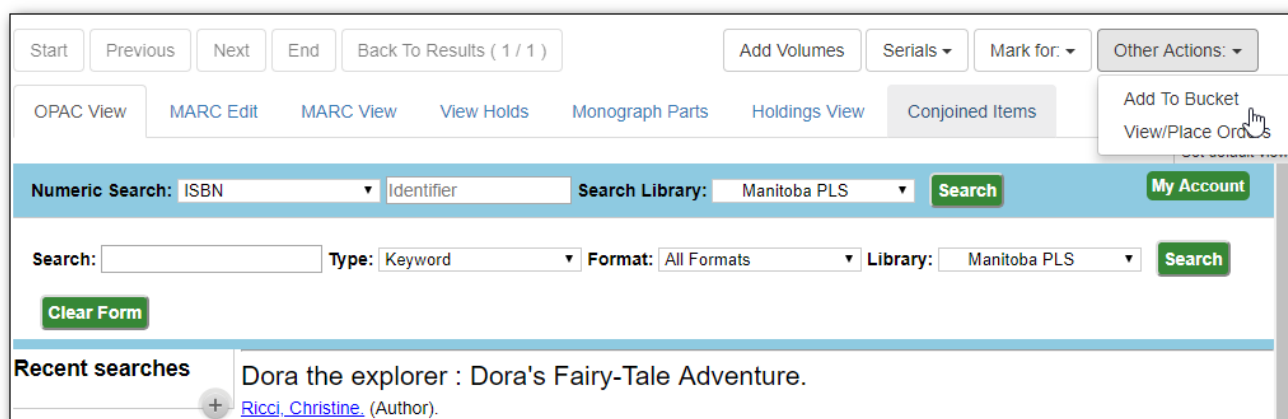


#### TIP

Only buckets created by the login account are listed. But those created by other people can be retrieved via bucket number, if shared with you. Click **Shared Bucket** to type in the number to retrieve it.

### Creating a Record Bucket when Adding a Record to a Bucket

You can also create a bucket from within a record. Search for, retrieve, and display any bibliographic record, then choose **Other Actions** → **Add to Bucket**.



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

## 17.2. Adding Records to a Record Bucket

You can add records to a bucket in a few places.

### Adding Records to a Bucket on the Catalogue

Once you retrieve a record on the catalogue, select **Other Actions** → **Add to Bucket** to add it to a record bucket.

### Add Records to a Bucket on Record Bucket View

You can run a search, then select records from the result list to add to a bucket on Record Bucket view.

1. Go to Record Bucket by choosing **Cataloguing** → **Record Bucket**.
2. Create or select a bucket by using the **Buckets** dropdown list on Bucket View tab now or later.
3. Click **Record Query**

4. Type in your search term, then hit **Enter** key to start the search.



**No Bucket Selected**

Record Query

Buckets Batch Edit

Actions Rows 100 Page 1

| # | Record ID | Overall Record Quality | Title Proper (normalized) | Author (normalized) | Publisher (normalized) | Publication Year (norm | ISBN                 |
|---|-----------|------------------------|---------------------------|---------------------|------------------------|------------------------|----------------------|
| 1 | 31397115  | 128                    | dora loves boots          | inches, alison      |                        | 2004                   | {068986373X,97806... |
| 2 | 106990623 | 145                    | dora the explorer do...   |                     | paramount              | 2011                   | {097361439365,097... |
| 3 | 107863437 | 122                    | dora the explorer         | hood, susan         | bendon pub             | 2010                   | {805219175859}       |
| 4 | 109626178 | 142                    | dora the explorer         |                     | paramount              | 2014                   | {097368053946,141... |
| 5 | 109804049 | 131                    | all star sports day       |                     | nickelodeon            | 2009                   | {032429148261,097... |
| 6 | 117030650 | 110                    | good night, boots         | rao, lisa           | viacom international   | 2006                   |                      |
| 7 | 117597105 | 109                    | dora the explorer do...   |                     |                        |                        |                      |
| 8 | 119703294 | 46                     | dora the explorer do...   |                     | nickelodeon, param...  | 2014                   | {097368053946,978... |

5. Select records on the result list, then click **Action** → **Add to Pending** or **Add to Bucket**, if a bucket has been selected.

**No Bucket Selected**

Record Query

Buckets Batch Edit

Actions Rows 100 Page 1

| # | Record ID                                     | Overall Record Quality | Title Proper (normalized)     | Author (normalized) | Publisher (normalized) | Publication Year (norm | ISBN                     |
|---|-----------------------------------------------|------------------------|-------------------------------|---------------------|------------------------|------------------------|--------------------------|
| 1 | <input checked="" type="checkbox"/> 31397115  | 128                    | dora loves boots              | inches, alison      |                        | 2004                   | {068986373X,978068986... |
| 2 | <input type="checkbox"/> 106990623            | 145                    | dora the explorer dora lov... |                     | paramount              | 2011                   | {097361439365,0973682... |
| 3 | <input type="checkbox"/> 107863437            | 122                    | dora the explorer             | hood, susan         | bendon pub             | 2010                   | {805219175859}           |
| 4 | <input type="checkbox"/> 109626178            | 142                    | dora the explorer             |                     | paramount              | 2014                   | {097368053946,1415776... |
| 5 | <input type="checkbox"/> 109804049            | 131                    | all star sports day           |                     | nickelodeon            | 2009                   | {032429148261,0973607... |
| 6 | <input checked="" type="checkbox"/> 117030650 | 110                    | good night, boots             | rao, lisa           | viacom international   | 2006                   |                          |
| 7 | <input type="checkbox"/> 117597105            | 109                    | dora the explorer dora & ...  |                     |                        |                        |                          |
| 8 | <input type="checkbox"/> 119703294            | 46                     | dora the explorer dora & ...  |                     | nickelodeon, paramount | 2014                   | {097368053946,9781415... |

6. You may continue search for more records and add them to Pending tab or Bucket. Once done, you may go **Bucket View** to create or select a bucket, if not done yet. You can select, then add records, on Pending Records tab, if any, to a bucket.

Record Query (8) Pending Records (2) **Bucket View (0)**

**Bucket #461829: short story** 0 Items / Created 2015-07-10T10:14:41-07:00 / JI (Tina) @ ZSP-B

Buckets Batch Edit

Actions Rows 25 Page 1

| # | Record ID                                     | Title Proper (normalized) | Author (normalized) | Publisher (normalized) | Pub  | ISBN                       |
|---|-----------------------------------------------|---------------------------|---------------------|------------------------|------|----------------------------|
| 1 | <input checked="" type="checkbox"/> 31397115  | dora loves boots          | inches, alison      |                        | 2004 | {068986373X,97806898637... |
| 2 | <input checked="" type="checkbox"/> 117030650 | good night, boots         | rao, lisa           | viacom international   | 2006 |                            |

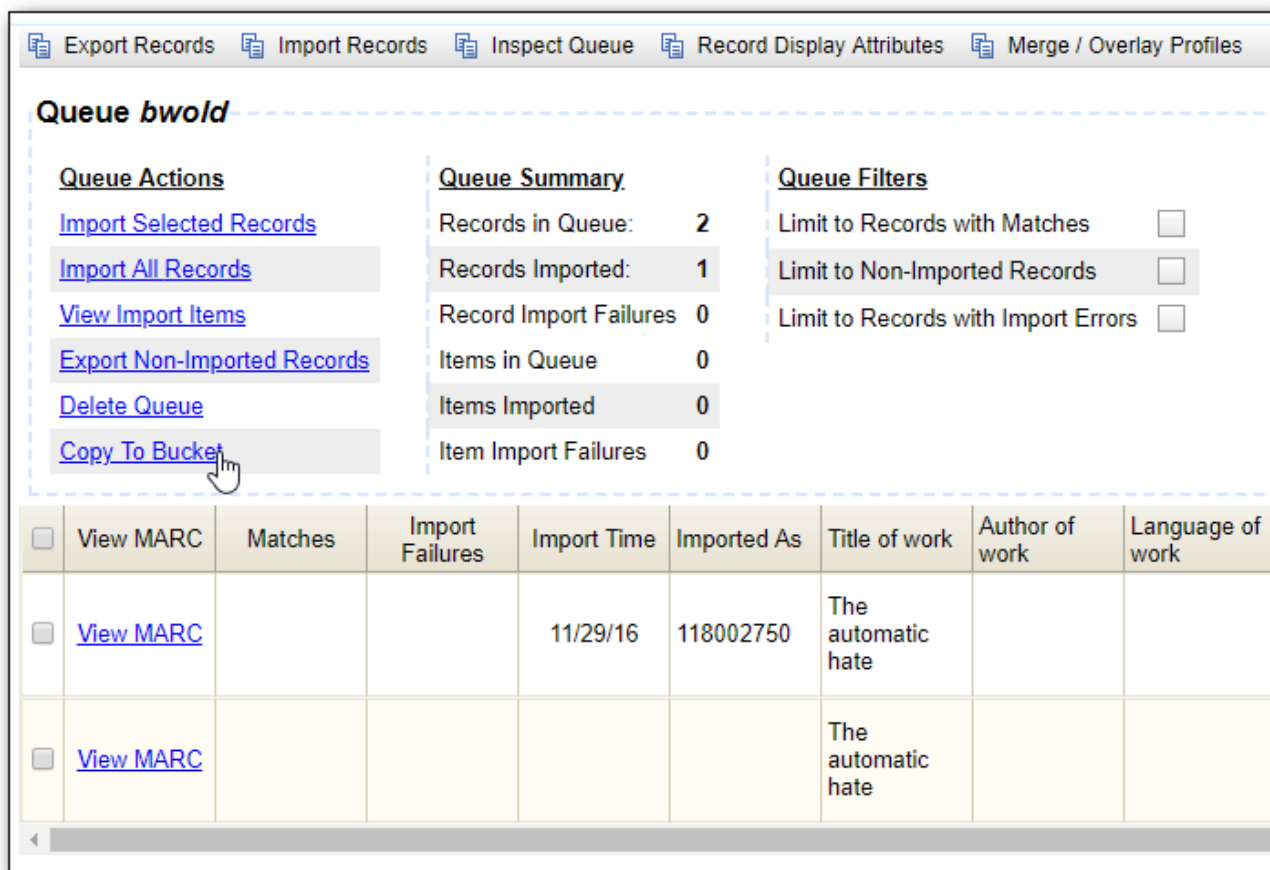
## Multiclass Search Help

### TIP

| Search Key     | Definition                                                                                                                                                |
|----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|
| keyword/kw     | search keyword(s)                                                                                                                                         |
| author/au/name | search author(s)                                                                                                                                          |
| title/ti       | search title                                                                                                                                              |
| subject/su     | search subject                                                                                                                                            |
| series/se      | search series                                                                                                                                             |
| lang           | limit by language (specify multiple langs with lang:l1 lang:l2 ...)                                                                                       |
| site           | search at specified org unit, corresponds to actor.org_unit.shortname, e.g. ti:dora explorer site:BFSJ                                                    |
| sort           | sort type (title, author, pubdate)                                                                                                                        |
| dir            | sort direction (asc, desc)                                                                                                                                |
| available      | if set to anything other than "false" or "0", limits to available items                                                                                   |
|                | <b>keyword, title, author, subject, and series</b> support additional search subclasses, specified with a  . For example: title proper:gone with the wind |

## Adding Imported Records on MARC Batch Import/Export

MARC records that have already been imported via MARC Batch Import/Export can be added to a bucket.



## 17.3. Working with Records in a Record Bucket

You may apply the following functions to selected copies in a bucket.

- **Show Selected Records in Catalogue**
- **Delete Selected Records from Catalogue**
- **Merge Selected Records** (Refer to [\[merging\\_bibliographic\\_records\]](#))
- **Export Records** (Refer to [Export MARC records from Record Bucket](#))

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

### CAUTION

Co-op support strongly suggests **not** using **Transfer Title Holds** as it transfers all holds, including other libraries', to the selected title.

# Public Catalogue

# Chapter 18. Search the Public Catalogue

The public catalogue can be accessed online from any location via the Internet.

The generic public catalogue which searches all of Sitka is <https://catalogue.libraries.coop>. This catalogue is also used in the staff client for searching the catalogue.

Each library has a public catalogue using their logo and colours. The default URL for all library specific public catalogues is <https://LIBRARYCODE.PROVINCECODE.catalogue.libraries.coop>.

## 18.1. 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.

+ image::images/opac/opac-basic-search-1.png[]

+

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.

### 18.1.1. 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. [LINK TO CHAPTER 20](#)

### 18.1.2. 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 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> 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.

## 18.2. 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.

### 18.2.1. Search Library

The current search library is displayed in the *Search Library* box.

The default search library is your library or borrowing zone. If your library system has multiple branches or a borrowing zone that includes multiple libraries you can use the *Search Library* box to select different branches or libraries.

If your library has multiple branches, your search result will display items available at your branch and all branches of your library system separately. If your library participates in Interlibrary Connect the results may display items available across the larger borrowing zone.

If you access the catalogue from <https://catalogue.libraries.coop>, your default search library is Sitka

or the library you have selected on the homepage. You may use the *Search Library* box to select a different library or regional libraries, or all libraries in Sitka to search.

### 18.2.2. Sort Results

By default, the search results are in order of greatest to least relevance. See OPAC Order of Results. In the *Sort Results* box you may select to order the search results by relevance, title, author, publication date, or popularity.

### 18.2.3. Limit to Available

When the *Limit to Available* checkbox is checked search results are limited based on an item's current circulation status. Titles without available items in the selected search library will not be displayed.

Item statuses that show as available are: *Available*, *On Display*, *Onsite Consultation*, *Reserves*, and *Reshelving*.

### 18.2.4. Group Formats and Editions

When the *Group Formats and Editions* checkbox is checked all formats and editions of the same title are grouped as one result. For example, the DVD and the first and second print editions of *Harry Potter and the Chamber of Secrets* will appear together.

### 18.2.5. Exclude Electronic Resources

When the *Exclude Electronic Resources* checkbox is checked electronic resources are not included in the search results.

### 18.2.6. Search Filter

You can filter your search by:

- Format
- Language
- Audience
- Literary Form
- Publication Year
  - Publication year is inclusive. For example, if you set Publication Year Between 2005 and 2007, your result items will be published in 2005, 2006 and 2007.
- Shelving Location
  - Shelving Locations that are not OPAC visible will not be displayed

#### **TIP**

All the search filters, with the exception of Shelving Location, rely on values entered into the Leader, 007, or 008 fields of the MARC record. Records with incorrect coding will not filter correctly.

## 18.3. 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, 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.

## 18.4. MARC Expert Search

You can access the MARC Expert Search by clicking on the **Expert Search** tab on the Advanced Search screen.

If you are familiar with the MARC standard, you may search by specific MARC tags in the Expert Search.

1. Enter the three-digit tag number, the subfield (if relevant), and the value or text that corresponds to the tag. For example, to search by publisher name, enter 260 b Random House.
  - a. To search several tags simultaneously, use the **Add Row** option.
2. Click **Search** to run the search.

## 18.5. 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.

You may move backward or forward through your results by clicking on **Back** or **Next**. Note your results are alphabetical, with results prior to your search term, and after, listed.



## 18.6. 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.

- 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.

### 18.6.1. 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.

## 18.7. Search Methodology

### 18.7.1. 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*.

### 18.7.2. Truncation

Use the wildcard \* (asterisk) at the end of the word to truncate search term.

### 18.7.3. 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.

#### 18.7.4. 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.

Popularity ratings display in the catalogue when search results are sorted by *Most Popular* or *Popularity Adjusted Relevance*.

##### NOTE

Currently popularity badges have been set up in Sitka based on hold and circulation counts over the last 3 years.

#### Title search for "river"

### 18.8. 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 double arrow on top or bottom of the list or click the page number to go to that page directly.

Your search terms will be highlighted both the search results and title details screens.

Information about the title, such as author, edition, publication date, call number, shelving location, status, etc., is displayed under each title. The icons below the title link indicate formats such as books, audiobooks, video recordings, and other formats. Hover your mouse over the icon, and a text explanation will show up in a small pop-up box.

Clicking a title goes to the title details. Clicking an author searches all works by the author. If you want to place a hold on the title, click **Place Hold** to the right of the title information.

Above the results list there are *Limit to Available* and *Exclude Electronic Resources* checkboxes. Checking *Limit to Available* will filter out those titles with no available copies in the library or libraries at the moment. Checking *Exclude Electronic Resources* will filter out titles for electronic resources. Usually you will see your search results re-displayed with fewer results.

The *Sort by* dropdown list is beside the checkboxes. Clicking an entry on the list will re-sort your search results accordingly.

### 18.8.1. 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.

### 18.8.2. Refine Your Search

You may refine your search results by *Topic*, *Place*, and *Genre*. Selecting one of these links on the left side of search results page narrows down the search results to that subject, author, or series. You may also refine your search by clicking the hyperlink labelled **Refine My Original Search** at top of search results. Refining a search this way allows you to add search filters such as Publication Date, Format, Language, etc., to your original search.

### 18.8.3. 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.

### 18.8.4. Availability

The number of available copies and total copies are displayed below the title details.

The availability will be scoped depending on your search library. If your library is a multi-branch system you can see how many copies are available in all branches. If your library participates in a larger borrowing zone you will see the available copies at your search library and the larger zone.

If you are searching multiple branches or libraries you will see the libraries with copies listed.

### 18.8.5. Viewing a record

Click on a title to view a detailed record of the title, including descriptive information, location and availability, and options for placing holds.

### 18.8.6. Details

The record shows details such as the cover image, title, author, publication information, and an abstract or summary, if available.

The Record Details view shows how many copies are at the library or libraries you have selected, and whether they are available or checked out. It also displays the *Call number* and *Copy Location* for locating the item on the shelves. Clicking on **Text** beside the call number will allow you to send the item's call number by text message, if desired. Clicking the location library link will reveal information about owning library, such as address and open hours.

Below the local details you can open up various tabs to display more information. You can select *Reviews and More* to see the book's summaries and reviews, if available. You can select *Shelf Browser* to view items appearing near the current item on the library shelves. Often this is a good way to browse for similar items. You can select *MARC Record* to display the record in MARC format. If your library offers the service, clicking on *Awards*, *Reviews*, and *Suggested Reads* will reveal that

additional information.

### 18.8.7. Search Additional Items by Author, Subject or Series

You can search for additional items by an author, one of the subjects in the record or other works in the same series. Clicking the author, subject or series will start a new search in the catalogue. You can do this from the results page or from within the record details view.

### 18.8.8. Going back

When you are viewing a specific record, you can always go back to your title list by clicking the link **Search Results** on the left of the page.

If you have selected *Group Formats and Editions* with your search, your search results are grouped by various formats and editions of the same title under *My Search Results*. You can always go back to this page by selecting the link to **Return to Grouped Search Results**.

You can start a new search at any time by entering new search terms in the search box at the top of the page, or by selecting the **Another Search**, **Basic Search**, or **Advanced Search** link at top of search results, depending on what screen you are on when wanting to do another search

# Chapter 19. Public Catalogue Holds

Through your public catalogue patron can place for a particular title or specific volume. If the item is available, it will appear on a library's holds pull list and be pulled from the shelf and held for your patron. If the item is not available your patron is be 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.

## 19.1. Title and Volume Holds

Patron can place holds using the **Place Hold** link in the search results view or on the title details page. Using either of these links means that any copy attached to the record will fill the hold. This is generally the best method when requesting an item, as the hold will be filled by any copy of the title record you are viewing.

If a patron wants a specific issue of a magazine or a specific DVD in a set, they can select **Volume Hold** in the item details view just below.

After clicking on **Place Hold** the system will prompt the patron to log into their account.

If your library is multi-branch or participates in reciprocal borrowing your patron can choose their pickup location.

Patrons can choose to be notified by phone, text message, or email. The notification method will be selected automatically if they have set it in their account preferences but can be overridden on this screen.

The phone number and email set in your patron's account will be used to populate the notification options but our patrons can supply a different phone number for phone or text notification when placing their hold.

While placing holds patrons have the option to suspend the hold so it can be activated at a later date.

Once your patron clicks **Submit** a message will appear confirming their hold was successfully placed or indicating that their hold could not be placed.

Patrons can view and cancel their holds at anytime through My Account. Patrons can edit, suspend or activate their holds until they are captured for pick up.

## 19.2. Placing Holds on Multiple Records of the Same Title

If *Group by Formats and Edition* was selected when doing a search, your patron may place a hold on multiple records of the title but of different formats or editions by clicking **Place Hold** to the right of the meta record.

Your patron may select the acceptable formats on the placing hold screen.

# Chapter 20. My Account

Patrons and library staff can access information about their account from any page in the public catalogue by selecting 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. Each of the sections in the *My Account* area is described in this chapter.

## 20.1. Logging into My Account

1. Click on the **My Account** link on any search page.
2. Enter your username or your library barcode.
  - a. If this is your first time logging in, your username will be your library card number. You have the option to change your username on the *Account Preferences* screen.
3. Enter your password.
  - a. You should have been given a password when you received your library card.
  - b. If you do not have or cannot recall your password please contact your local library to have the password reset or use the **Forgot Your Password?** link.
4. Click **Login**.

### NOTE

All patron and staff accounts in Evergreen can access *My Account* through the public catalogue.

## 20.2. Resetting Your Password

[Sitka Snippet Video - Password Reset \(1:20\)](#)

If you have an email address recorded in your library account you can use the **Forgot Your Password?** link in the event that you forget your password.

1. Click on the **Forgot Your Password?** link.
2. Enter your username or barcode into the appropriate field.
  - a. 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.
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.
7. 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.
8. 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 account using this method if there is an email address recorded in their account.

## 20.3. Account Summary

The default view when you login to your account is the *Account Summary* page. This view gives you an overview of items checked out, items on hold and any fines you may have. You can access any of these screens by clicking on the relevant tab.

If your library subscribes to Overdrive additional information will display.

## 20.4. Account Preferences

Select the *Account Preferences* tab at the top of the *My Account* area to access your preferences.

### 20.4.1. Personal Information

You can change the username and password that you use to log in to your library account as well as the email address the library uses to contact you in the *Personal Information* tab by clicking the **Change** link 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. 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.

### 20.4.2. Notification Preferences

The Notification Preferences tab is where you set your preferences for holds notification. You can choose to be contacted by email, phone or text message.

This is also where you can opt-out of receiving courtesy and overdue email notices using 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.

If you wish to receive checkout receipts via email by default you can check the *Email checkout receipts by default* checkbox.

### 20.4.3. Search and History Preferences

The *Search and History Preferences* tab allows you to configure settings around search results, history, and allowing others access to your account.

You can select how many search results are displayed per page on your catalogue searches as well as your preferred search location if your library is a multi branch system or part of a larger borrowing zone.

You can also set your preferred pick up location if your library is a multi branch system or part of a larger borrowing zone.

Check Out and Hold history can be enabled on this screen. The check out and holds history is not retroactive; it takes effect once you choose to retain your history.

You may also choose to disable a warning about adding items to a temporary list.

You can specify who, if anyone, you want to access to 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.

### 20.4.4. My Lists Preferences

The *My Lists Preferences* tab allows you to set how many lists you'd like to display per page and how many item should be displayed per page in your lists.

## 20.5. Messages

Select the Messages tab at the top of the *My Account* area to display any messages library staff have added to your account.

An indicator will also appear in the upper right corner when you have new messages.

You can set messages to read or unread, or delete them by selecting the message(s) and then choosing the desired action from the **Action for selected messages** menu and clicking **Go**.

Unread messages appear with the subject bolded. Click on the subject to read the message.

## 20.6. Items Checked Out

### 20.6.1. Current Items Checked Out

Select the *Items Checked Out* tab at the top of the *My Account* area to display all of the items you currently have checked out.

You can sort the list by Title, Author, Renewals Left, Due Date, Barcode, or Call number by clicking on the blue text. The first click sorts the list alphabetically in ascending order and a second click sorts the list alphabetically in descending order.

If you wish to renew items select the items you wish to renew and click **Go** beside *Renew Selected Titles*.

## 20.6.2. Check Out History

Select the *Check Out History* tab to display a list of items that you have previously checked out.

Check out history will only display if it has been enabled in your *Search and History Preferences*. History displays from the date you enabled it; items checked out prior will not be included in your history.

You can sort the list by Title, Author, Checkout Date, Due Date, Date Returned, Barcode, or Call number by clicking on the blue text. The first click sorts the list alphabetically in ascending order and a second click sorts the list alphabetically in descending order.

If you wish to delete individual titles from the list select the items you wish to delete and click **Go** beside *Delete Selected Titles*.

## 20.7. Holds

### 20.7.1. Items on Hold

Select the Holds tab to display a list of items you have holds on.

You can sort the list by Title, Author, and Format by clicking on the blue text. The first click sorts the list alphabetically in ascending order and a second click sorts the list alphabetically in descending order.

You can use the checkbox beside each hold to select the hold and the **Action for selected holds** dropdown list to suspend, activate, or cancel the selected holds. You may set an activation date when you suspend your hold or leave the date blank and manually activate it later. A suspended hold will not lose its hold queue position.

The *Status* column shows whether or not your hold is currently available for pickup, if it has been suspended, and what your position is in the hold queue.

Your position in the hold queue is indicated by the first number in the status column. For example "Hold #3 on 1 copy" indicates you are third in the hold queue.

Clicking the **Edit** link will bring you to the hold editing screen, where you may suspend the hold, if not already captured, or change the activation date or cancellation date. If your library has multiple branches you may also change the pick up location.

### 20.7.2. Holds History

Select the Holds History tab to display a list of items that you have previously had on hold. History displays from the date you enabled it; holds placed prior will not be included in your history.

Holds history will only display if it has been enabled in your *Search and History Preferences*.

## 20.8. Fines and Payments

The *Fines and Payments* tab, at bottom of the *Account Summary* screen, displays any fines or fees that you have accrued and the payments you have made. You can pay your fines at the library.

## 20.9. My Lists

The *My Lists* section allows you to create, edit, share, and remove lists of items.

Lists are lists of items that can be used for a number of purposes. For example, patrons use lists to keep track of what books they've read, books they'd like to read, to maintain a class reading list, to maintain a reading list for a book club, and more. Lists can also be used for maintaining publicly visible lists such as staff picks or themed lists that can be posted on a library's website. Lists are also used with Course Reserves module for post-secondary institutions.

You can see the lists you have created in the *My Lists* section of the *My Account* area.

### 20.9.1. Creating Lists

Best practice is to log in to your account and create a list.

1. Select the *My Lists* tab at the top of the *My Account* area.
2. In the *My Account* area, click on **My Lists**.
3. In the *Create New List* section, enter a name for your list into the text box. You may also enter an optional description.
4. Decide if you would like to share the contents of the list with other users.
5. Click **Submit**.

You can also create a temporary list from search results.

If you are logged into your account, hover over *Add to my list* and select **Temporary List**.

If you are not logged into your account click on **Add to my list**.

A warning will appear indicating that you are adding to a temporary list.

### 20.9.2. Sharing Lists

By default, all lists are private, and you must explicitly instruct the system to allow others to view the contents of a list by clicking **Share** beside the list name.

You can give the address (URL) of your list to anyone you want to share it with or add it to your library's website.

1. In the *My Lists* section there is an **HTML View link** for every shared list.
2. Click on that link and bookmark the resulting web page in your browser or copy and paste the address (URL) to share your list as required.

You can un-share a list by clicking **Hide**.

### 20.9.3. Downloading Lists

You can export your list to a comma delimited file by selecting **Download CSV** and following your computer's prompts to save the file on your computer.

### 20.9.4. Deleting Lists

If you no longer need a list you can delete it by clicking **Delete List**.

### 20.9.5. Adding Items to a List

1. Log in to the public catalogue by clicking the **My Account** button.
2. Search the catalogue for the item you would like to add to your list.
3. Hover over **Add to my list** and select the list you would like to add the item to.

#### TIP

If you select a default list in the *My List* section that list will appear first in the list of lists.

You can also move items from a temporary list to a permanent list by selecting the titles in the temporary list and then clicking on the drop-down menu labeled **Actions for these items** and making the appropriate choice.

### 20.9.6. Managing Items in a List

You can place a hold on an item from your list by selecting the item in your list, and choosing **Place hold** in the **Actions for these items** menu.

You can annotate your lists by using the *\_Notes\_* feature.

1. Click on one of your lists to open it and display the contents.
2. A *Notes* column will appear, with an **Edit** hyperlink beside it.
3. Click **Edit**, enter your note and click **Save Notes**.
4. Your note will display in your view of your list. If the list is shared, the note will also display in title record on the webpage used to access your shared list.

### 20.9.7. Removing Items From a List

1. Click on the name of the list you would like to remove the item from. The items in the list will appear.
2. Select the item you would like to remove from the list, click on **Actions for these items** → **Remove from list** and click **Go**.

# Chapter 21. Integrated e-Resources

# Reports

# Chapter 22. Reports Overview

Only users with reporting permissions (granted by Sitka Support on libraries' request) can access the Reports module, but the output can be visible to all staff accounts. Any staff requesting reporting permissions must sign and submit the Reporter Privacy Agreement see <https://bc.libraries.coop/support/sitka/reporter-privacy-waiver/>

The Reports interface is accessed from **Adminstration** → **Reports**.

Reports are owned by the account used to create them, though the owner can allow other people to view and copy (template only) them if he/she shares them with other staff in the library, other libraries in the federation, or the whole Sitka Consortium.

Evergreen has very powerful reporting functionalities. It is possible to report on almost every field in every table in the database. Connections between tables are pre-made on the Reports screen. Some views are also provided to group together records meeting certain conditions. For details refer to Commonly used tables and views in Evergreen Database.

The ultimate goal of reporting is finding the records in the database which meet the requirements. Sometimes the result records are processed to some extent before they are included in the output, such as counting and displaying the count of the records found instead of showing the records themselves. The requirements include two parts: the conditions used to extract the records and the information to be displayed in the result file.

Evergreen is designed to achieve the above goal by creating a template first. The template specifies the fields to be displayed in the result file (Displayed Fields) and the fields on which conditions can be applied (Filter Fields). For example, in an overdue template, Due Date in the circulation record should be a filter field so that a date can be given in order for the reporting program to compare and decide whether a checkout is overdue; while patron's names may be displayed fields so that staff may know who has the overdue item. In short, a template simply contains a list of displayed fields and a list of filter fields. The template can be used for multiple times. For example, the aforementioned overdue template can be used to run a report to capture circulation records with Due Date before 2012-01-01. It can also be used to capture circulations with Due Date before 2012-02-15.

Once a template is ready, the next step is assigning values to the filter fields, for example, giving 2012-01-01 to the *Due Date* field. This process is commonly known as defining a report, or running a report or setting up a report. The process also schedules the report's run-time and frequency (one time only or on regularly basis), selects the result file format(s) and designates output file receivers, if preferred. The information provided during this step is saved in a file called "Report" on Evergreen. This file contains the template information and the value for each filter. Unfortunately, most of these contents are neither viewable nor editable after the file is saved.

When a report starts to run, the program goes through the database and gathers the records that meet the conditions into a file in the selected format(s). This is the Output file that contains the result records.

The three types of files created during the above procedure need to be kept separately in different folders on the Reports interface. Before anything, you must create at least one Template, Report, and Output folder as described in Chapter 27, Folders.



This chapter focuses on the movements on the Reports module while demonstrating how to create reports in Evergreen. Once you understand how to navigate around the Reports module, you can create your own reports from scratch or take advantage of Sitka's pre-packaged report templates. Some background knowledge of Evergreen database and database terminology are at the end of this chapter.

# Chapter 23. Folders

There are three main components used on the Reports screen: Templates, Reports, and Output. Each of these components must be stored in a folder. Folders can be private (accessible to your login only) or shared with other staff at your library, other libraries in your federation, or with the whole Sitka Consortium. It is also possible to selectively share only certain folders and/or subfolders.

## CAUTION

A shared subfolder must be created in a shared folder. The sharing scope of the subfolder should be within the sharing scope of the parent folder. For example, a subfolder shared with Sitka Consortium should only be in a parent folder shared with Sitka. It should not be in a folder shared with your library only. Though creating shared subfolders in unshared folders or a subfolder with the sharing scope exceeding its parent's is not blocked by Evergreen, serious consequences will be caused by such folders. You must be cautious when creating shared subfolders.

There are two parts in the folders pane. The My Folders section contains folders created with your Evergreen account. Folders that other users have shared with you appear in the Shared Folders section under the username of the sharing account. You can only view the contents or clone the templates in the shared folders, but not make any change in the shared folders. The cloned template can only be saved into your own folder.

## 23.1. Creating Folders

Whether you are creating a report from scratch or working from a shared template you must first create at least one folder.

The steps for creating folders are similar for each reporting function. It is easier to create folders for templates, reports, and output all at once at the beginning, though it is possible to do it before each step. This example demonstrates creating a folder for a template.

1. Click on **Templates** in the *My Folders* section.
2. Name the folder. Select **Share** or **Do not share** from the dropdown menu.
3. If you want to share your folder, select who you want to share this folder with from the dropdown menu.
4. Click **Create Sub Folder**, and then **OK** on the confirmation prompt.
5. Next, create a folder for the report definition to be saved to. Click on **Reports**.
6. Repeat steps 2-5 to create a Reports folder also called Circulation.
7. Finally, you need to create a folder for the report's output to be saved in. Click on **Output**.
8. Repeat steps 2-5 to create an Output folder named Circulation.

## TIP

Using a parallel naming scheme for folders in Templates, Reports, and Output helps keep your reports organized and easier to find.

The folders you have just created, will now be visible by clicking the arrows in *My Folders*. Bracketed after the folder name, is the name of with whom the folder is shared. For example, Circulation (BNCLF) is shared with the North Coast Library Federation. If it is not a shared folder, there will be nothing after the folder name. You may create as many folders and sub-folders as you like.

## 23.2. Managing Folders

Once a folder has been created, you can change the name, delete it, create a new subfolder, or change the sharing settings. This example demonstrates changing a folder name; the other choices follow similar steps.

1. Click on the folder that you wish to rename.
2. Click **Manage Folder**.
3. Select **Change folder name** from the dropdown menu and click **Go**.
4. Enter the new name and click **Submit**.
5. Click **OK**.
6. You will get a confirmation box that the Action Succeeded. Click **OK**.

# Chapter 24. Creating Templates

Once the folders are ready, you can create or clone a template. Templates allow you to run a report more than once, without building it anew every time by changing definitions (such as values for the filters) to suit current requirements. For example, a template counting patrons with a registration date within a time frame can be used to find out the number of patrons registered within the last month or the last ten days. Another example is a shared template that reports on circulation statistics at a given library. This can be used by other libraries by selecting their own library as the circulating library when they run the report.

Creating a template is complex. It requires some understanding of the Evergreen database and how Evergreen handles various records when performing tasks on the staff client. You may refer to the last section of this chapter for some background knowledge. Bear in mind, that a template includes a list of displayed fields, the information you will see in the result, and a list of filter fields which enables you to set up the conditions for your target records. Generally you do not record your conditions in the template. For example, in an overdue template, you do not record 2012-01-01 as the due date. Instead, you just make the Due Date field in the circulation record as a filter field. When setting up the report with this template, you will be given the chance to put in 2012-01-01 as the due date.

It can be useful to plan out your report on paper before getting started with the reporting tool. The first thing to decide is the source table. You can choose only one starting source table for each template. If you need information from other tables, follow the link in the source table to those tables. Grouping together related fields and identifying the key fields will help you select the correct source.

We will take a report on circulation statistics as an example to show you how to create the template. In circulation statistic reports, libraries usually want to know how many circulations were done within a selected time period. When an item is checked out on the staff client, a record is created in the circulation table. You want a count of the number of circulation records created within the time period. So, the Circulation table is likely the source with which you want to start.

You may wish to break down the number of circulations by items' shelving locations to see the circulations by different types of materials (or the patrons' profile groups). In this case, the count of circulation records and the shelving location (or patron profile) are the potential displayed fields. For the filter fields, you need to limit the circulations done within a time period, so checkout date should be a filter. You probably want to count the circulations done at your library only as you are part of a consortium, or for all the branches of your library system. (In such a case, you may want to see the checkout library in the result, too.) So, the circulating library will be another filter.

With the above analysis, we will build the template from scratch in the following section to demonstrate the procedure on the template creating screen.

## 24.1. Choosing Displayed Fields

1. Click on the My Folder template folder where you want the template to be saved.
2. Click on **Create a new Template** for this folder.

3. You can now see the template creating interface. The upper half of the screen is the Database Source Browser, where you view the available tables in the database, the fields in each table, and the available transforms for the selected field. You select fields for your template here. The lower half is the Template Configuration, which displays your selected Displayed Fields and Base Filters and/or Aggregate Filters in the template.

We will select the displayed fields for our template first. So make sure Displayed Fields is selected.

The top left hand pane contains the database Sources drop-down list. This is the list of tables available as a starting point for your template. Commonly used sources are Circulation (contains circulation records that may be used for circulation statistics and overdue reports), ILS User (contains patron records that may be used for patron reports), and Item (contains copy records that may be used for reports on collection or items with special status).

The Enable source nullability checkbox below the sources list is for specifying the join type between linked source tables. In most cases, it should be left unchecked by default. See for how to use Enable source nullability checkbox.

The relationship between tables can be found by displaying Relationship field (using the Column Picker) in the low Source Specifier pane.

1. Select Circulation in the Sources dropdown menu. Note that the Core Sources for reporting are listed first, however it is possible to access all available sources at the bottom of this dropdown menu.

**CAUTION**

One template can have only one starting source table. If you need information from other tables you should follow the links made by the Reports interface to those tables. The reporting program can not put two pieces of isolated information together into one record in the result. When you change a starting table all your existing selected fields will be removed.

1. Click on Circulation to retrieve all the fields and links, which will be displayed in the middle pane. The Field Name column contains the label of each field. The Data Type column shows what type of data is in the field. For details of data type see Template Terminology. Note that the Source Specifier (above the middle and right panes) shows the path that you took to get to the specific field.
2. When you select a field in the middle pane, the available data transforms of the selected field are displayed in the right pane. Transforms specify how data should be processed before they are displayed/compared. Refer to Template Terminology for details of Transforms for each data type.

For our example template, select Circ ID in the middle Field Name pane, and Count Distinct from the right Field Transform pane. You are counting the number of circulation records.

1. Click Add Selected Fields underneath the Field Transform pane to add this field to your report output. Note that Circ ID now shows up in the bottom left hand pane under the Displayed Fields tab.
2. Circ ID will be the column header in the report output. You can rename default display names to

something more meaningful. To do so in this example, select the Circ ID row and click Alter Display Header.

Double-clicking on the displayed field name is a shortcut to altering the display header.

1. Type in the new column header name, for example Circ count and click OK.
2. Add other data to your report by going back to the Sources pane and selecting the desired fields. In this example, we are going to add Circulating Item → Shelving Location to further refine the circulation report.

In the top left hand Sources pane, expand Circulation. Depending on your computer you will either click on the + sign or on an arrow to expand the tree.

1. Click on the + or arrow to expand Circulating Item. Select Shelving Location.
2. In the Field Name pane select Name.
3. In the upper right Field Transform pane, select Raw Data and click Add Selected Fields. Use Raw Data when you do not wish to transform field data in any manner.
4. Name will appear in the bottom left pane. Select the Name row and click Alter Display Header.
5. Enter a new, more descriptive column header, for example, Shelving location. Click OK.
6. Note that the order of rows (top to bottom) will correspond to the order of columns (left to right) on the final report. The results will be sorted by the columns in this order, too. Select Shelving location and click on Move Up to move Shelving location before Circ count. The result will be sorted by Shelving Location first.
7. Return to the Sources pane to add more fields to your template. Under Sources click Circulation, then select Check Out Date/Time from the middle Field Name pane.
8. Select Year + Month in the right hand Field Transform pane and click Add Selected Fields
9. Check Out Date/Time will appear in the Displayed Fields pane. In the report it will appear as a year and month (YYYY-MM) corresponding to the selected transform.
10. Select the Check Out Date/Time row. Click Alter Display Header and change the column header to Check out month.
11. Move Check out month to the top of the list using the Move Up button, so that it will be the first column in an MS Excel spreadsheet. Now, the report output will sort by the checkout month first, then by shelving locations.

**TIP**

Note the Change Transform button in the bottom left hand pane. It has the same function as the upper right Field Transform pane for fields that have already been added.

## 24.2. Applying Filters

Without filters, all records in the database will be in the result, which is seldom desired, especially in Sitka's context where libraries share the same database. So some filters should be applied to keep out the unwanted records.

The following procedure shows how to add filters to the example template:

1. Select the Base Filters tab in the bottom Template Configuration pane.
2. For this circulation statistics example, select Circulation → Check Out Date/Time → Year + Month and click on Add Selected Fields. You are going to filter on the checkout month.
3. Select Check Out Date/Time. Click on Change Operator and select In list from the dropdown menu. This operator allows you to count circulations done within each month for several months by just one report.
4. To filter on the location of the circulation select Circulation → Circulating library → Raw Data and click on Add Selected Fields.
5. Select Circulating Library and click on Change Operator and select Equals. Note that this is a template, so the value for Equals will be filled out when you run the report.

For multi-branch libraries, you would select Circulating Library with In list as the operator, so you could specify multiple branch(es) when you run the report.

Refer to Template Terminology for details of Transforms and Operators, and Aggregate and Non-aggregate filters.

1. You may add a hint to the filter, e.g. explaining the function of the filter, what value is expected when setting up the report, etc. Select the filter and click Change Field Hint.

In the above example, we added some instruction on how to fill up the filter when setting up the report. The hint will show up on the report creation screen. Below is how it looks like on the report creation screen.

1. Once you have configured your template, you must name and save it. Name this template Circulations by month for one library. You can also add a description. In this example, the title is descriptive enough, so a description is not necessary. Click Save.
2. Click OK.
3. You will get a confirmation dialogue box that the template was successfully saved. Click OK.

**TIP**

The bottom right hand pane is also a source specifier. By selecting one of these rows you will limit the fields that are visible to the sources you have specified. This may help to find out the source of the fields, e.g. a circulating library is from the circulation table or item table. Use Ctrl+Click to select or deselect items.

Once a template is saved, it can not be edited anymore. To make changes you will need to clone it and edit the clone. This will ensure that the work you have done will not be lost. As mentioned before, creating a template is complex. The first try seldom gets the perfect result. Your subsequent changes may not always improve the result. You may need to refer back to your old version. Make changes step-by-step. Check the correctness of the result on each step. This may help you to find out the exact cause of the issue. After you have the desired template, you may delete all the interim ones.

The above paragraphs described how to create a template from scratch with a very simple example. You may choose instead to use one of the generic templates created by the Sitka team to meet

common reporting needs (see Chapter 33, Shared Templates in SITKA\_templates). However, knowing how a template is created will help you understand the report structure and is recommended as an introduction to editing template fields and filters.



# Chapter 25. Generating Reports from Templates

Now you are ready to run a report from the template you have created.

1. Find the template you just created in the Template folder. In the My Folders section, click the arrow next to Templates to expand this folder and select circulation.
2. Select the box beside Circulations by month for one library. Select Create a new report from selected template from the dropdown menu. Click Submit.
3. Complete the first part of report settings. Only Report Name and Choose a folder... are required fields.
  - a. Template Name, Template Creator, and Template Description are for informational purposes only. They are hard coded when the template is created. At the report definition stage it is not possible to change them.
  - b. Report Name is required. Reports stored in the same folder must have unique names.
  - c. Report Description is optional but may help distinguish among similar reports.
  - d. Report Columns lists the columns that will appear in the output. This is derived from the template and cannot be changed during the report definition.
  - e. Pivot Label Column and Pivot Data Column are optional. Pivot tables are a different way to view data. If you currently use pivot tables in MS Excel it is better to select an Excel output and continue using pivot tables in Excel. Please note that Pivot tables are suitable to some result data only.
  - f. You must choose a report folder to store this report definition. Only report folders under My Folders are available. Click on the desired folder to select it.
4. Select values for the Circulation > Check Out Date/Time. Use the calendar widget or manually enter the desired dates (always in YYYY-MM or YYYY-MM-DD format), then click Add to include the date on the list. You may add multiple dates with an InList operator by repeating the above step.

The Transform for this field is Year + Month, so even if you choose a specific date (2009-10-20) it will appear as the corresponding month only (2009-10).

1. Select a value for the Circulating Library.
2. Complete the bottom portion of the report definition interface, then click Save.
  - a. Select one or more output formats. In this example the report output will be available as an Excel spreadsheet, an HTML table (for display in the staff client or browser), and as a bar chart. Please note that charts are suitable to some result data only.
  - b. If you want the report to be recurring, check the box and select the Recurrence Interval as described in Recurring Reports. In this example, as this is a report that will only be run once, the Recurring Report box is not checked.
  - c. Select Run as soon as possible for immediate output. It is also possible to set up reports that run automatically in the future.

d. It is optional to fill out an email address where a completion notice can be sent. The email will contain a link to a password-protected report output (staff login required). If you have an email address in your Local System Administrator account, it will automatically appear in the email notification box. However, you can enter a different email address or multiple addresses separated by commas.

e. Select a folder for the report's output.

3. You will get a confirmation dialogue box that the Action Succeeded. Click OK.

Once saved, reports stay there forever unless you delete them. When a report is deleted all the linked output files will be deleted, too.

#### CAUTION

With version 2.8, report files are viewable and editable. You may view the contents of a report. You can generate a new report based on the past report file or re-schedule a recurring report. See Viewing/Editing/Rescheduling Reports for details.

#### TIP

- The required value for filters should be in a format corresponding to the data transform. For example, for a call number field transformed to First Continuous Non-space string, you need to put in the call number prefix; for a field transformed to Count you need to give an integer. See Template Terminology section for more on Data Transforms. \*Action corresponds to Operator used for filter fields. It specifies how the given value will be compared with the field value. See Template Terminology section for more on Operators. \*When creating a report, you may disable an unwanted filter in the template by choosing an appropriate value for it. For example, if a template lists items created within a time frame, specify a time frame between "1900-01-01" and "today" to cover the whole collection; select all copy statuses on the list to bypass the filter on item status. \*If the calendar widget is not provided for a date filter, key in the date in format yyyy-mm-dd.

# Chapter 26. Viewing Report Output

Once a report is finished, the output is stored in the specified Output folder and will remain there until manually deleted. Evergreen sends an email with a link to the output if an email address(s) is supplied when the report was set up.

1. To view the report output in the staff client, open the reports module from **Administration** → **Reports**.
2. Click on Output to expand the folder. Select Circulation (where you just saved the circulation report output).
3. View report output is the default selection in the dropdown menu. Select Recurring Monthly Circ by Location by clicking the checkbox and click Submit.
  - a. Click on the report name in blue colour, you will see the template name and report description field.
4. A new tab will open for the report output. Select either Tabular Output or Excel Output. If Bar Charts was selected during report definition the chart will also appear.
5. Below is what the tabular output looks like. If needed, click Back to output index to select another output format.
6. If you want to manipulate, filter or graph this data, Excel output would be more useful. Excel output looks like this in Excel:

# Chapter 27. Running Recurring Reports

Recurring reports are a useful way to save time by scheduling reports that you run on a regular basis, such as monthly circulation and monthly patron registration statistics. When you have set up a report to run on a monthly basis, you may request an email informing you that the report has successfully run. You can click on the link in the email that will take you directly to the report output. You can also access the output through the Reports interface as described in Chapter 30, Viewing Report Output.

To set up a monthly recurring report, follow the procedure in Generating Reports from Templates but make the changes described below.

1. Select the Recurring Report check-box and set the recurrence interval to 1 month.
2. Do not select Run ASAP. Instead schedule the report to run early on the first day of the next month. Enter the date in YYYY-MM-DD format.
3. Ensure there is an email address to receive completion emails. You will receive an email completion notice each month when the output is ready.
4. Select a folder for the report's output.
5. Click Save Report.
6. You will get a confirmation dialogue box that the Action Succeeded. Click OK.

With the above settings, you will get an email on the first day of each month with a link to the report output. By clicking this link it will open the output in a web browser. It is still possible to login to the staff client and access the output in Output folder.

**Always use relative date for recurring reports.** Date is a filter on nearly every template. When setting up a recurring report, always choose Relative Date, instead of Real Date for any date filter on the report creating screen. When using relative date the actual date will be calculated when the report runs. Unlike a real date, the actual value of relative date is adjusted according to the run time. For example, if the report runs at 2012-10-10 23:00, a relative date transformed to YYYY-MM of "1 month ago" will be Sept, 2012; while a relative date transformed to YYYY-MM-DD of "1 day ago" will be 2012-10-09. When it runs at 2012-11-10 23:00 "1 month ago", it will be Oct, 2012, while "1 day ago" will be 2012-11-09. The date goes by calendar day or month.

**How to stop an existing recurring report?** To stop a recurring report, you may delete the pending output from Pending area in Output folder. You may also delete the report from Report folder. But deleting the report will delete all the output files generated by it, too.

**How to make changes to an existing recurring report?** Sometimes you may wish to make changes to a recurring report, e.g. the recurrence interval, generation date, email address to receive completion email, output format/folder or even filter values (such as the number of days overdue). You may do it by editing the report. See Viewing/Editing/Rescheduling Reports for details.

**TIP**

- Report running interval should correspond to the date filter. For example, if the template filters on a date instead of month, a recurring report running with a monthly interval may miss a day or capture an extra day's data. So it works better if the filter can be transformed to month.
- Schedule your monthly report to run early next month, but not at the end of the current month.
- Once you have been on Evergreen for a year, you can set up your recurring monthly reports to show comparative data from one year ago. To do this select relative dates of 1 month ago and 13 months ago.

# Chapter 28. Viewing/Editing/Rescheduling Reports

You may view or edit an existing report to change the values for filters, run-time, email reminder recipient, recurring interval, etc. With this function, you may generate a new report by editing and saving the report with a new name; change the condition or email reminder recipient of a recurring report; reschedule the run-time or run-frequency of a recurring report. For example, you may reschedule a recurring report to run on Mondays, instead of Thursdays.

You may edit a report in Reports or Output folder.

To view or edit a report in Reports folder, go to Reports folder to find the report that you wish to view/edit. Click View or Edit in the Edit column. We choose Edit in this example.

To edit a report in Output folder, go to Output to find the report. Click the report name. The details of the report show up in the line below. Click Edit.

The report is loaded on the report creation screen, where you make the required changes.

To create a new report, you need to enter a new report name. Click Save As New at the bottom after finishing the editing. You can choose to create a one time or a recurring report.

To modify an existing recurring report, click Save Report after finishing the editing. Note that Evergreen will update the pending output only. The existing output will remain as is.

It is not possible to modify a completed one-time report. You need to enter a new report name and save it as a new report.

When choosing View a report on the above two screens, the report will be displayed in non-editable mode.

# Chapter 29. Shared Sitka Templates

## CAUTION

Sitka templates are currently unavailable as report templates created in the desktop client cannot be cloned in the web client. A fix for this is expected post-upgrade. Please contact Support if you need to report template created.

The Sitka support team has created generic templates for commonly requested reports and shared them under the `Sitka_templates` folder. This chapter describes how to make local copies of these templates for routine reports or as a starting point for customization. When creating a new template it is a good idea to review the shared templates first: even if the exact template you need does not exist, it is often faster to modify an existing template than to build a brand new one. Reporter permissions are required to clone templates from the Shared Folders section and save them to My Folders.

## 29.1. What's in `Sitka_templates`

The Sitka support team uses a dedicated staff account, `Sitka_templates`, to share ready-to-use templates. Below is what a user with reporter permissions can see after going to the Reports module, then follow the path to Shared Folders, click the arrow (or + sign) in front of Templates, and then `Sitka_templates`.

From Acquisitions to Typical Week Stats are the subfolders containing various templates. Templates using the same source table are usually grouped together under one subfolder. These templates are created based on the anticipation that most libraries may need such reports. The Support Team tends to make these templates generic, which means they contain more information. Individual libraries may have slightly different requirements. You can remove the unwanted information when cloning the templates or choose appropriate values for some filters to disable them. These templates are usually referred to as Sitka standard templates.

The following is a guideline of the templates for various kinds of reports. Please note that the Support Team regularly maintains the templates. The list below may not be the latest.

**Overdue reports.** Find overdue reports in Circulation folder. There are templates capturing checkouts with due date within a selected time frame for all patrons or those without email address (phone list) or the due date is before a selected date. You may use these templates to set up your overdue reports capturing items which are at a certain number of days overdue.

**Circulation statistics reports.** These templates are in Circulation folder. The regular circulation statistics can be grouped by various criteria: patron's home library, profile and/or stat cat; items' owning library and/or shelving location. There are two sets of templates: one set limit the circulation period by selected dates; the other selected month(s). The latter are for monthly recurring reports.

Other circulation statistics related templates are:

- non-catalogued circulation count
- pre-catalogued circulation count

- pre-catalogued circulation count for items with dummy title prefix of "ILL:" (ILL statistics via pre-catalogued circulation)
- checkin count
- in-house use count for non-catalogued items
- in-house use count for catalogued items
- in-house use count per title

Other circulation related templates are:

- lost and paid item list
- lost with outstanding bills item list
- claimed returned item list

**Reports on collection.** These templates are in Holdings folder. You will find templates counting items or titles of your whole collection or catalogued within the selected time period (new title/items statistics). The numbers are grouped by shelving location and/or circulation modifier.

Another group of templates in Holdings folder are item/title lists for items meeting various criteria: having selected shelving location(s) and/or circulation modifier(s), copy stat cat, barcode prefix, call number prefix or within a call number range; or being catalogued (new title/item list), marked missing, lost or deleted within selected time period.

In this folder, you will also find templates listing pre-catalogued items and items with certain circulation history (items with fewer circulation count for weeding report or more circulation count for popular title/item report).

**Patron reports.** All patron reports are in Patrons folder. You may find templates counting patrons by profile group and/or patron stat cat, registered or expired/expiring within a selected time period, or with circulation history within a selected time period.

Another group of templates list selected information for patrons meeting some conditions such as: email list for all or those patrons having certain stat cat; names and barcode for patrons without circulation history within selected time frame; patrons born before a selected date (seniors list); patrons exceeding maximum fine limit.

Besides, there is a template that counts patron's OPAC logins and another that summarizes the answers to patron survey question(s).

**Reports on bibliographic information.** It is not easy to generate reports based on bibliographic information due to the bibliographic record structure. But a simple report that lists the values in a selected MARC tag and subfield for the whole collection is possible. And the bibliographic records can be limited by a selected value of a MARC tag and subfield. These templates are in Bibliographic Records folder.

**Bills and payments.** You can find the templates listing the details of various kinds of payments made in a selected time period, and a template listing bills with negative balance.

**Hold reports.** Holds related reports are in this folder, including reports for holds that have been



long time outstanding (requested some time ago but not filled yet), cancelled, or have no eligible copies to be filled. There are other templates that count the total number of holds placed or fulfilled within a time span, and the hold count per title for popular titles.

**Inventory.** The two templates in Inventory folder list items based on whether the item showed up (being scanned on shelves or returned) in the library while the inventory was taken. The result of the Inventory - un-scanned items are the potential missing items.

**Library setting and policy related reports.** Find them in Library Configuration folder.

**Other folders.** If your library uses the Acquisitions Module or the Booking Module, you may find related templates in the relevant folders.

**Custom Templates folder.** If you open this folder, you will see a subfolder for your library federation with sub-subfolders for your library and other libraries within your library federation.

These folders are created when the Support Team creates or customizes templates for individual libraries. The templates go to these folders when there are similar templates in the standard folders already, or the Support Team does not anticipate wide use of the templates. The Support Team tries to limit the number of templates in each standard folder so that staff may find the target template easily.

## 29.2. Clone a template from Sitka\_templates

The steps below assume you have already created at least one Templates folder. If you have not done so, please see Chapter 27, Folders.

1. Access the Reports interface from **Administration** → **Reports**
2. Under Shared Folders expand the Templates folder and the Sitka\_templates subfolder. To expand the folders click on the grey arrow or folder icon. Do not click on the blue underlined hyperlink.
3. Click on the Circulation (SITKA) subfolder.
4. Select the template you wish to clone. In this example, we are cloning the Monthly Circulation by Shelving Location template. From the dropdown menu choose Clone selected templates, then click Submit.
  - a. By default Evergreen only displays the first 10 items in any folder. To view all content, change the Limit output setting from 10 to All.
5. Choose the folder where you want to save the cloned template, then click Select Folder. Only template folders created with your account will be visible. If there are no folders to choose from please see Chapter 27, Folders.
6. The cloned template opens in the template editor. From here you may modify the template by adding, removing, or editing fields and filters as described in Chapter 28, Creating Templates. Template Name and Description can also be edited. When satisfied with your changes, click Save.
7. Click OK in the resulting confirmation window.

## 29.3. Modify a template

Once saved it is not possible to edit a template. To make changes, clone the template and change the clone.

To modify a template, repeat the above steps 1-6. You will see the template open on Template Creating screen. Click Displayed Fields you will see all the displayed fields. To remove one, highlight it and click Remove Selected Field. You may move a field up or down the list, which will affect the sorting of the result records. You may also change the column label or the transform of the field by using respective buttons. See Field Transforms section for more information.

### TIP

- Removing displayed fields usually does not affect the result set. But sometimes it does, esp. when the report displays the count of records by each group. Sometimes some fields may contain important information. Removing them may cause misunderstanding the results. Usually such fields are explained in the template Description. Be cautious when you delete such fields.
- If you are not clear where a displayed field is from, you may use the Source Browser to the right to display fields from the selected table only.

To add a displayed field, go to the Sources to open the source table to find the field or follow the links to the appropriate table which contains the field you want to display. Click the text in the Sources to display fields in the table in Field Name pane. Click the arrow in front of the text to display the linked tables in the Sources pane.

Once find the field, select it in Field Name pane and the appropriate transform in Field Transform pane. Click Add Selected Fields.

The below screenshot shows how to add Precat Dummy Title field. Find Circulating Item table, which is linked from Circulation. Click it (text) to display its fields in Field Name. Select Precat Dummy Title, and then Raw Data in Field Transform.

### CAUTION

You can not change the starting source table, but have to follow the links to tables in the Sources pane. Changing the starting table will remove all existing fields, meaning building a new template from scratch.

Select Base Filters or Aggregate Filters to add or remove filters. The steps are the same as adding or removing displayed fields. Be careful with filters as usually changing filter makes a difference in the result set.

## 29.4. Examples of using Sitka's templates

### CAUTION

Please clone templates in Sitka\_templates and set up your reports from your own copy. This is to avoid any potential impact that may be resulted from changing the original templates. The Support Team regularly maintains these templates. Deletion may happen. Deleting a template will delete all linked reports and output files.

Below are a few screenshots showing you how to set up the reports based on some templates in Sitka\_templates. Some explanation is added in the boxes with light coloured background.

1. Setting up a monthly recurring report by using template: Monthly Circulation by Shelving Location (updated to include item's owning library) in Circulation folder:
2. Setting up a weekly recurring report by using template: Overdues Within Time Span - for Patrons without Email in Circulation folder:
3. Setting up a one-time report by using template: Circulation Statistics by One Patron Stat Cat within timespan in Circulation folder:
4. Setting up a report by using template: Items List by Shelving Location in Holdings folder:
5. Setting up a report by using template: Weeding - Items with few circulations since a selected month in Holdings folder:

# Chapter 30. Commonly Used Tables and Views in Evergreen Database

You are creating/updating records when you work on Evergreen. Reporting means you extract some of these records from the database that meet your requirements. Understanding the Evergreen database and how records are created/updated when tasks are performed on the staff client, will help you when you create templates and set up reports on the Reports interface.

There are various kinds of data used by Evergreen, such as patron's names, address, barcode, item's barcode, shelving location, status, price; checkout date, returned date, fines and bills and so on. This data must be organized in an efficient and effective way to make sure they can be stored and retrieved easily.

Evergreen uses various tables to keep each type of records. You can visualize a table as an MS Excel Worksheet: a specified number of columns with unlimited number of rows. Each column is called a field in the database terminology and each row is a record. There are many tables in Evergreen database. Each contains a certain type of records. The fields in a record you see on the Staff Client may be from more than one tables. For example, in a patron record, you can find patron's names, address, phone number, barcode, profile, etc. all in one record. But in the database, patron's address, barcode, and profile are in separate tables. You do not need to know where these fields are from when editing a patron record on the Staff Client, but you have to know it when creating a template on the Reports interface.

Since various information about one patron is saved in separate tables, there must be a mechanism of matching the information about one patron correctly to make sure all information is about the same patron. This is done via recording the patron id (a unique number in the main patron record) in every related table. So via recording the id of a record in another table, two tables are connected. The connections among many tables are pre-made by the Reports interface. You just need to follow the link to find the data saved in the related table. Below is a simplified diagram showing the connections among some commonly used tables/views on the Reports interface, which can be a guide for you to find various fields in different tables. Some explanation of these tables is after the diagram.

## 30.1. Commonly used tables and views

ILS User (aka Patron or User): contains patron records. A patron's name, phone number, email address, and registration date can all be found in this table. Follow the links to the table Current Library Card to find a patron's current barcode, Circulation to find the circulation history, Home Library, Mailing Address, Physical Address, and Main Profile Group, etc. to find more information about the patron.

Item (aka Circulating Item): contains copy records. Item's barcode, creation date, active date, last edited date, last copy status change date and price are in this table. For related information like call number, circulating library, circ modifier, status, shelving location, etc., you need to follow the links to the respective table to find them. For title information you need to follow the Call Number table to the Bibliographic Record table to find it. Follow the link to the Circulation table to find an item's circulation history.

Pre-catalogued item information such as dummy ISBN, title and author are also in this table. When a pre-catalogued item is checked out, an item record is created. If the barcode is already in the table and the item is not marked deleted, the item record will be updated with the new title, author, etc.

**Bibliographic Record.** Contains title information. To find the basic bibliographic information such as title, author, ISBN, etc., follow the link to Simple Records Extract.

**Circulation.** Contains circulation records, including pre-catalogued item circulations. When an item is checked out, a circulation record is created. When an item is renewed, the existing circulation record is closed and another record is created. Below are some important timestamps in this table.

**Checkout Date/Time:** the time when an item is checked out

**CheckIn Date/Time:** the effective date when the item is treated as checked-in

**CheckIn Scan Date/Time:** the time when the check in action is taken

**Due Date/Time:** For all daily loans the due time is 23:59:59 of the day in Pacific Time. Hourly loans have specific time with time zone information.

**Fine Stops Date/Time:** the date when the Maximum Fine limit has been reached, or the item is returned, marked lost or claimed returned. After this date, the fine generator will not create new overdue fines for this circulation.

**Record Creation Date/Time:** the date and time when the circulation record is created. For online checkout it is the same as Checkout Date/Time. For offline checkout, this date is the offline transaction processing date.

**Transaction Finish Date/Time:** the date when the bills linked to this checkout have been resolved. For a regular checkout without bills this field is filled with the checkin time when the item is returned.

**TIP**

The `circulating_library` field in this table refers to the checkout location. The `circulating_library` in the Item table refers to the item's owning library.

**Non-catalogued Circulation.** When a non-catalogued checkout is recorded, a record is created in this table. Non-catalogued item category can be found in the linked Non-Cat Item Type table.

**In-house Use.** Contains the catalogued item in-house use records.

**Non-catalogued In-house Use.** Contains the non-catalogued item in-house use records. Follow the link to Item Type to find the non-catalogued item category.

**Copy Transit.** When a copy is sent in transit, regardless of whether it is going back to its circulating library or going to fill a hold, a copy transit record is created in this table. Follow the link to Transit Copy to find the item information.

**Hold Transit.** When a copy is sent in transit to fill a hold, a hold transit record is created in this table and the Copy Transit table. So this table contains a subset of records of the Copy Transit table. You may find hold information following the link to Hold Requiring Transit. Follow the link to Transit Copy to find the item information.

Hold Request. When a hold is placed, a hold record is created in this table. You may find the hold receiver's information in Hold User. Requesting User is the person who takes the placing hold action. It can be the hold receiver or a staff member. Generally if the Hold User is different from the Requesting User, this is a staff-placed hold. Hold Copy Map equals Eligible Copies. Copies that can be used to fill the hold are in this table.

**NOTE**

Target Object ID is shown as a link. But there is no linked table in the Source pane. The value in this field could be a bibliographic record id, a volume record id or a copy record id depending on the hold type.

Timestamps in this table:

Capture Date/Time: The time when the hold achieves hold shelf or hold-in-transit status.

Fulfillment Date/Time: the time when the on-hold item is checked out.

Hold Cancel Date/Time: the time when the hold is cancelled.

Hold Expire Date/Time: This could be the date calculated based on your library's default Hold Expire Interval or a selected date when placing the hold.

Last Targeting Date/Time: The last time the hold targeting program checked for a target copy for the hold. It usually has the same time as the Hold Request Time. It is usually not useful for reporting, But it may serve as an indicator of whether the request time has been edited.

Notify Time: when the email notice is sent out.

Request Date/Time: Usually this is when the hold is placed. But it is editable on the staff client. So sometimes this may be the request time chosen by the staff.

Shelf Expire Time: the date is calculated based on the Shelf Time and your library's Default Hold Shelf Expire Interval.

Shelf Time: when the hold achieves On Hold Shelf status.

Thaw Date: the activation date for a suspended hold.

Bills tables and views.

Scroll down to the bottom of the Source list. Hover your mouse over All Available Sources. A new list will pop up to the right. Move your cursor to the list and scroll down to Billing Line Item. This table contains all the billing line items such as each day's overdue fines and the grocery bills created manually. The records in this table are viewable on the Full Details screen on Bills in the staff client.

Billable Transaction with Billing Location: this table contains the summary records of billings and payments. Most information in these records is displayed on Bills or Bills History screen. The records are updated when either the related billings or payments are updated. Transaction ID is the bill ID. It is also the circulation record ID for circulation bills. Transaction Start Time is the grocery bill creation time or circulation checkout time. Transaction Finish Time is when the bill is resolved.

Payments tables and views.

Payments: ALL contains all payment records. When a lump sum of payment is made on the staff client, one or more payment records are created depending on the number of bills it resolved or partially resolved. One bill may be resolved by multiple payments.

Payments: Brick-and-mortar contains all payments made at the circulation desk.

Payments: Desk: Cash/Check/Credit Card payment.

Payments: Non-drawer Staff: Forgive/Work/Goods/Patron Credit payments.

**TIP**

- A view is a virtual table which contains records meeting defined requirements. The fields in a view can be from one or more tables. Before you use a view for your report, you need to make sure the view contains the type of records that you want to report on. For example, Overdue Circulation is a view which contains circulation records without checkin date and the due date past "today". It does not work for a report on last month's circulation statistics, but it makes an overdue report easier.
- By default, tables are often, but not always, joined by left join. Other join types may be available. Select the Enable nullability checkbox under the source list on Template Creation screen (before linked tables are displayed) to list all available join types. You may see None, Child, Parent, Default in Nullable column beside the table names. None means a inner join; Parent is a right outer join; Child left outer join. Default is unknown, but likely left outer join.

# Chapter 31. Template Terminology: Data Types, Transforms, and Operators

## 31.1. Data Types

The central column of the Database Source Browser lists Field Name and Data Type for the selected database table.

Data Type is associated with each field. It tells what kind of information is stored in the field. The system handles the information differently based on the data type. Each data type has its own characteristics and uses:

| Data Type | Description                                                                   | Notes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|-----------|-------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Boolean   | Contains either “true” or “false”.                                            | Examples in Evergreen: “deleted” in item/patron record, “circulate?” in item record.                                                                                                                                                                                                                                                                                                                                                                                                                |
| ID        | Unique number assigned by the database to identify a record                   | IDs look like numbers, but the id data type is treated specially by the software for determining how tables are linked. Id is a good candidate field for counting records.                                                                                                                                                                                                                                                                                                                          |
| Integer   | A number like 1, 2, 3.                                                        | Examples in Evergreen: “remaining renewal count” in circulation record, “claimed returned count” in patron record.                                                                                                                                                                                                                                                                                                                                                                                  |
| Interval  | Time intervals, such as “2 weeks” and “6 months”                              | Examples in Evergreen: “loan duration” and “grace period” in circulation record,                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 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. |



| Data Type | Description                                                       | Notes                                                                                                                                                                                                                                                                                                                                                                                                         |
|-----------|-------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Money     | Monetary amount                                                   | Examples in Evergreen: "price" in item record, "billing amount" in billing record.                                                                                                                                                                                                                                                                                                                            |
| Org_unit  | Organizational unit. It is a number. It acts like link data type. | In Evergreen, libraries are organizational units. In Sitka context they are organized into a tree structure with consortium, library federations, libraries/library systems and branches for library systems. To filter on a library, make sure you choose the field having org_unit data type. To display a library, it is a better option to drill down to the org unit record to display the "name" of it. |
| Text      | Text field. Usually it takes whatever is typed into the field.    | Examples: "call number label" in call number record, "patron's names".                                                                                                                                                                                                                                                                                                                                        |
| Timestamp | A very detailed time such as 2007-11-25 17:54:26-07               | Example: checkout time in circulation record, last status date in item record.                                                                                                                                                                                                                                                                                                                                |

## 31.2. Field Transforms

Transforms determine how data is processed when it is retrieved from the database. Different data types can be transformed differently. Not all transforms are available to a certain data type.

**Raw Data.** To display the data exactly as it is stored in the database. It is available to all data types.

**Date.** This transform presents a timestamp as a human-readable date in yyyy-mm-dd format. For example, timestamp 2007-11-25 17:54:26-07 will be displayed as 2007-11-25. Date is available to timestamp field.

**Year + Month.** Presents a timestamp as the year and month in yyyy-mm format. For example, 2007-11-25 17:54:26-07 will be displayed as 2007-11. If filtering on a timestamp transformed to Year + Month, all days in the calendar month are included. It is available to timestamp field.

**Upper Case/Lower Case.** Transforms text to all upper/lower case. They are only available for the text data type.

**Substring.** This transform can be applied to filters, not display fields. It matches the given value with a continuous string of characters in the field. For example, if a given value is "123" and the match is with a call number field, call numbers like "123.34", "ANF 123.34", "JNF 233.123", etc. will be in the result list. Substring is only available to text data type.

**First Continuous Non-space string.** The first word (or string of numbers and/or characters until the

first spacing) in a field is returned by this transform. For example, this transform will return “E” from text “E DOR”, “E 123”, etc. This transform is available to the text data type.

Count. This transform counts the records found. Though you can count by any field, very often id field is used. Count is available to text, integer, id, money, and timestamp.

Count Distinct. This transform counts the number of records with unique value in the field. If two records have the same value in the field, they will be counted once only. A typical example of using Count Distinct is counting the number of active patrons who borrowed items at a library. Each patron can be counted once only but he/she may borrow multiple items. Transforming the patron id in circulation record with Count Distinct will result in the required number. Since each patron has a unique id, she/her will be counted once only. Count Distinct is available to text, integer, id, money, and timestamp.

Max. It compares the values in the field of all result records and then returns the one record with the highest value. Max is available to text, integer, money, and timestamp. For timestamp the highest value means the latest date. For example, if a checkout date is transformed by Max, the returned date is the last checkout date.

Min. It works the same way as Max except that it returns the lowest value. Min is available to text, integer, money, and timestamp.

## 31.3. Output Type

Note that each transform has either an Aggregate or Non-Aggregate output type.

Whether an output is Non-Aggregate or Aggregate depends on whether the output value relies on a single record or several records. It is Non-Aggregate if the result is strictly from a single record, while it is Aggregate if it is from several records. For example, the value of Count transform of circulation id will increase by 1 whenever a record is found. So the output is Aggregate. The output of Max transform of checkout date is technically not aggregated, but there may be several records involved before the highest value is determined.

When used as filters, non-aggregate and aggregate types correspond to Base and Aggregate filters respectively. To see the difference between a base filter and an aggregate filter, imagine that you are creating a report to find out the popular items that were circulated more than 3 times last month. This would require a base filter to specify the month of interest and an aggregate filter on the count of circulation record on each item.

## 31.4. Operators

Operators describe how two pieces of data can be compared to each other. They are used when creating filters in a template to determine which records should be included in the result. The record is included when the comparison returns "TRUE". The possible ways of comparing data are related to data type and data transforms. Below are some commonly used operators.

Equals. Compares two operands and returns TRUE if they are exactly the same.

In List. It is similar to Equals, except it allows you specify multiple parameters and returns "TRUE"

if the field is equal to any one of the given values.

Not In List . It is the opposite of In List. Multiple parameters can be specified. TRUE will be returned only when none of the parameters is matched with the value in the field.

Greater Than. This operator returns TRUE if a field is greater than your parameter. For text fields, the string is compared character by character in accordance with the general rule that numerical characters are smaller than alphabetical characters and upper case alphabeticals are smaller than lower case alphabeticals; for timestamps “Greater Than” can be thought of as “later than” or “after”.

Less Than. This operator returns TRUE if a field is less than, lower than, earlier than or smaller than your parameter.

Between. Two parameters are required by this operator. TRUE is returned when the field value is Greater Than or Equal to the smaller given value and Less Than or Equal to the bigger given value. The smaller parameter should always come first when filling in a filter with this operator. For example: between 3 and 5 is correct. Between 5 and 3 will return FALSE on the Reports interface. For timestamp earlier date always comes first.

Is NULL or Blank. Returns TRUE for fields that contain no data or blank string. For most intents and purposes this operator should be used when there is no visible value in the field.

Contains Matching Substring. This operator checks if any part of the field matches the given parameter. It is case-sensitive.

Contains Matching Substring (Ignore Case). This operator is identical to Contains Matching Substring, except it is not case-sensitive.

# Serials

# Chapter 32. Serials Administration

## 32.1. Serials Permissions

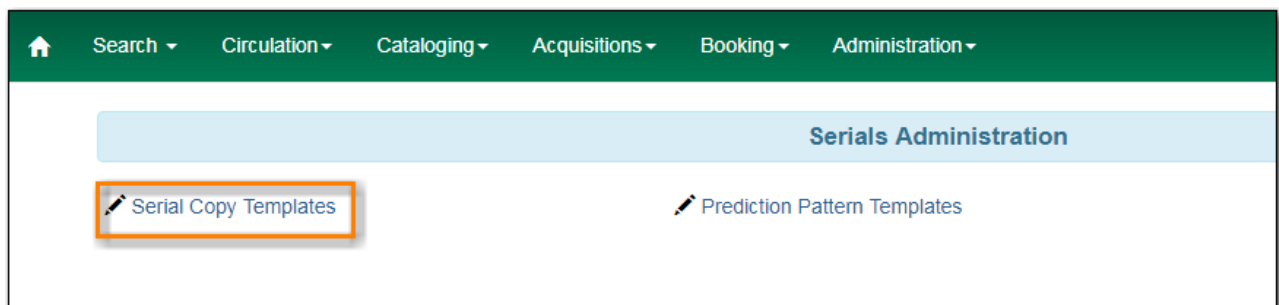
Serials permissions are required to use the Serials Module. If your library is interested in using the Serials module please contact Sitka Support.

## 32.2. Serial Copy Templates

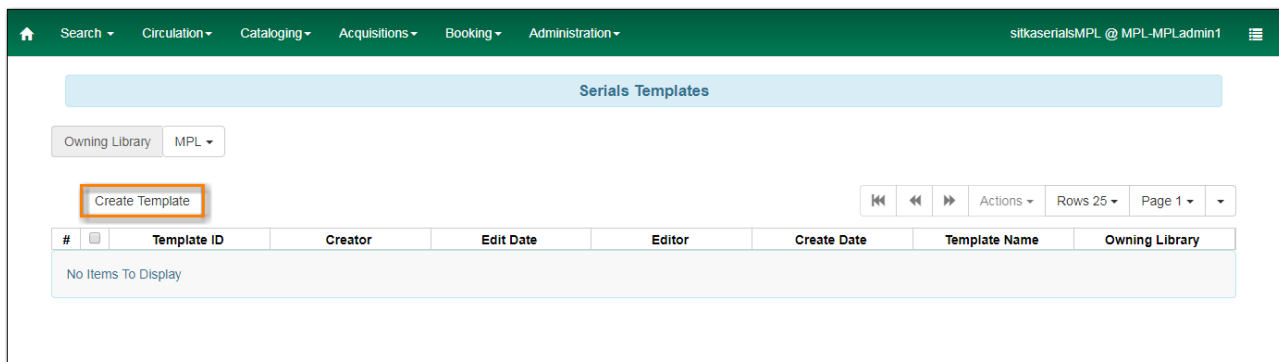
Serial Copy Templates specify the item attributes that should be applied when a serial copy is received. You must create at least one template to receive serials.

### 32.2.1. Create a Serial Copy Template

1. Click **Administration** → **Serials Administration** → **Serial Copy Templates**.



2. Click **Create Template**.



3. Enter a *Template Name*.
4. Choose the item attributes for this template.
5. Click **Save**.

Template Name  Clear Save Close

---

**Circulate?** ☒ Yes ☐ No **Status** Available ▼

---

**Circulation Library** MPL ▼ **Reference?** ☐ Yes ☒ No

---

**Shelving Location** Magazines (MPL) ▼ **OPAC Visible?** ☐ Yes ☒ No

---

**Circulation Modifier** magazine ▼ **Price** 15.00

---

**Loan Duration** Normal ▼

---

**Circulate as Type** ▼ **Deposit?** ☐ Yes ☐ No

---

**Holdable?** ☐ Yes ☐ No **Deposit Amount**

### 32.2.2. Edit a Serial Copy Template

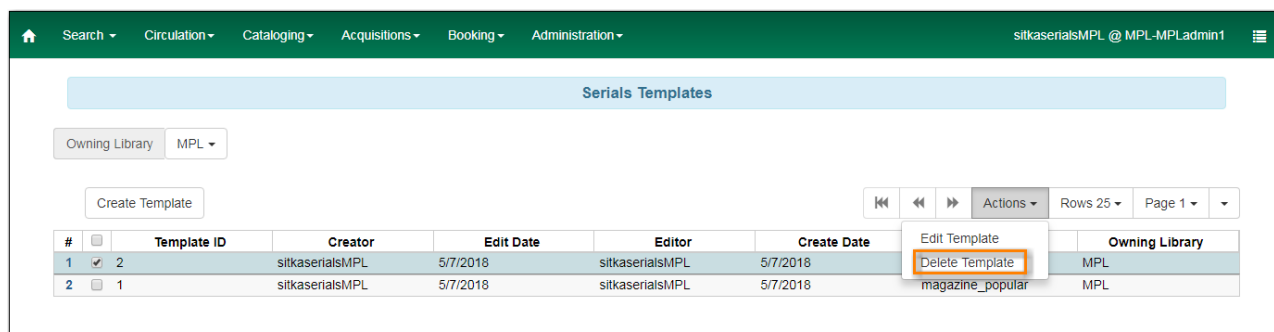
1. Click **Administration** → **Serials Administration** → **Serial Copy Templates**.
2. Click the check box beside the template you want to edit.
3. Click **Actions** → Choose *Edit Template*.

| Serials Templates |                                     |                                                                                                                                 |                 |           |                 |             |                |
|-------------------|-------------------------------------|---------------------------------------------------------------------------------------------------------------------------------|-----------------|-----------|-----------------|-------------|----------------|
| Owning Library    |                                     | MPL ▼                                                                                                                           |                 |           |                 |             |                |
| Create Template   |                                     | <span>⏪</span> <span>⏴</span> <span>⏵</span> <span>⏩</span> <span>Actions ▼</span> <span>Rows 25 ▼</span> <span>Page 1 ▼</span> |                 |           |                 |             |                |
| #                 | <input type="checkbox"/>            | Template ID                                                                                                                     | Creator         | Edit Date | Editor          | Create Date | Owning Library |
| 1                 | <input checked="" type="checkbox"/> | 2                                                                                                                               | sitkaserialsMPL | 5/7/2018  | sitkaserialsMPL | 5/7/2018    | MPL            |
| 2                 | <input type="checkbox"/>            | 1                                                                                                                               | sitkaserialsMPL | 5/7/2018  | sitkaserialsMPL | 5/7/2018    | MPL            |

4. Edit the item attributes for this template.
5. Click **Save**.

### 32.2.3. Delete a Serial Copy Template

1. Click **Administration** → **Serials Administration** → **Serial Copy Templates**.
2. Click the check box beside the template you want to delete.
3. Click **Actions** → Choose *Delete Template*.

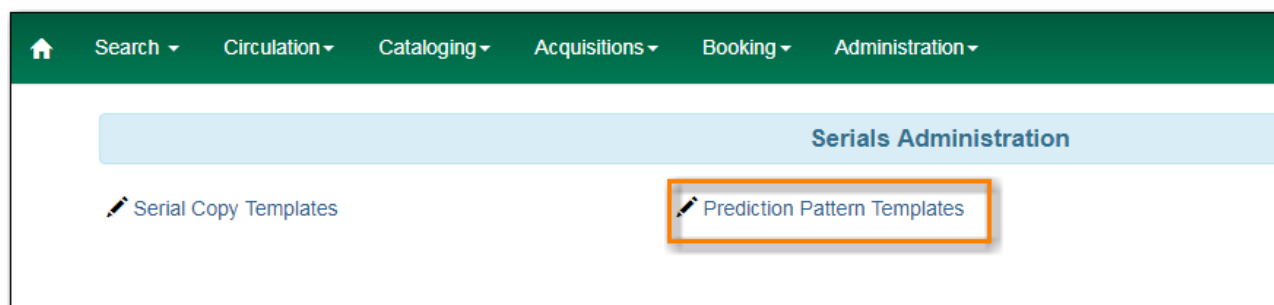


**NOTE** Serial Copy Templates that are being used by subscriptions cannot be deleted.

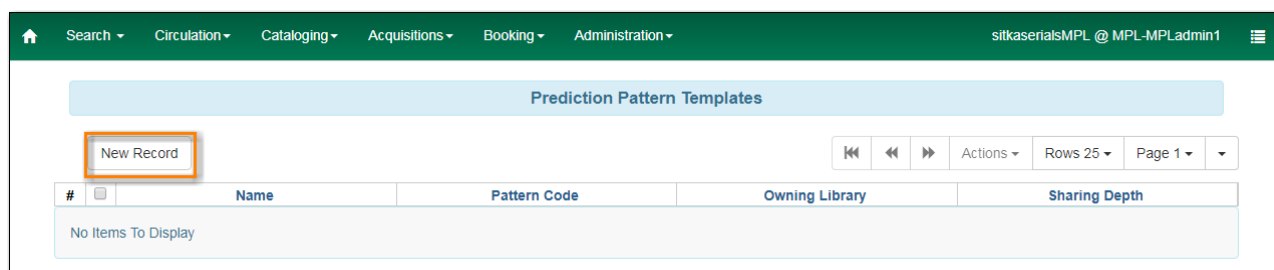
## 32.3. Prediction Pattern Templates

### 32.3.1. 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 step you through creating a prediction pattern for your publication.

Prediction Pattern Template

ID

Name Monthly\_enum

Pattern Code Pattern Wizard

Owning Library MPL ▾

Share Depth ▾

Save Cancel

a. See [Pattern Wizard](#) for detailed instructions.

5. Choose the **Owning Library**.

6. Choose the **Share Depth**.

7. Click **Save**.

Prediction Pattern Template

ID

Name Monthly\_enum

Pattern Code Pattern Wizard

Owning Library MPL ▾

Share Depth System / Library ▾

Save Cancel

### 32.3.2. 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. You can add up to six levels of enumeration.
6. Check the box adjacent to **Add alternative enumeration** if the publication uses an alternative enumeration.
7. 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.
8. 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.
  - a. Click **Next**

The screenshot shows the 'Edit Prediction Pattern' dialog box with the 'Chronology Display' tab selected. The 'Enumeration Labels' tab is also visible. The 'Use Chronology Captions?' checkbox is checked. Below it, 'Level 1' is set to 'Year' and 'Level 2' is set to 'Month'. To the right, there is a section for 'Display level descriptor? E.g., "Year: 2017, Month: Feb" (not recommended)' with two unchecked checkboxes. At the bottom, the 'Use Alternative Chronology Captions?' checkbox is unchecked. On the right side of the dialog, there are 'Back' and 'Next' buttons. At the bottom right, there are 'Remove Level' and 'Add Level' buttons.

## MFHD Indicators

1. Choose a **Compression Display Option**
  - a. The entries in the drop down menu correspond to the indicator codes and the subfield \$w in the 853 tag. 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**
  - c. Click **Next**

The screenshot shows the 'Edit Prediction Pattern' dialog box with the 'MFHD Indicators' tab selected. The 'Enumeration Labels' and 'Chronology Display' tabs are also visible. The 'Compression Display Options' dropdown menu is set to 'Can compress or expand'. The 'Caption Evaluation' dropdown menu is set to 'Captions verified; all levels present'. On the right side of the dialog, there are 'Back' and 'Next' buttons.

## 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. E.g., for a monthly combined issue, enter 02/03 to specify that February and March are combined.

### 3. Click **Next**

The screenshot shows the 'Edit Prediction Pattern' dialog box with the 'Frequency and Regularity' tab selected. The 'Pre-selected' radio button is chosen, and the 'Monthly' dropdown is set. The 'Next' button is highlighted with an orange box.

Enumeration Labels Chronology Display MFHD Indicators **Frequency and Regularity** Review

☒ Pre-selected ☐ Use number of issues per year

☐ Use specific regularity information? (combined issues, skipped issues, etc.)

Back **Next**

## Review

1. Review the **Pattern Summary**
  - a. Click the blue arrows to see the **Raw Pattern Code**
2. Click **Save**

The screenshot shows the 'Edit Prediction Pattern' dialog box with the 'Review' tab selected. The 'Raw Pattern Code' and 'Pattern Summary' are displayed. The 'Save' button is highlighted with an orange box.

Enumeration Labels Chronology Display MFHD Indicators Frequency and Regularity **Review**

**Raw Pattern Code**

**Pattern Summary** Enumeration captions: v., no.  
Chronology captions: year, month  
Frequency: Monthly

Back **Save**

### 32.3.3. 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 Template*.

The screenshot shows the 'Prediction Pattern Templates' table. The first row is selected, and the 'Edit Record' button in the 'Actions' column is highlighted with an orange box.

| Prediction Pattern Templates |              |                                                      |                |               |
|------------------------------|--------------|------------------------------------------------------|----------------|---------------|
| #                            | Name         | Pattern Code                                         | Owning Library | Sharing Depth |
| 1                            | Monthly_enum | ["2","0","8","0","a","v","b","no","u","12","v","...] | Maple Library  |               |

Actions: Edit Record, Delete Selected

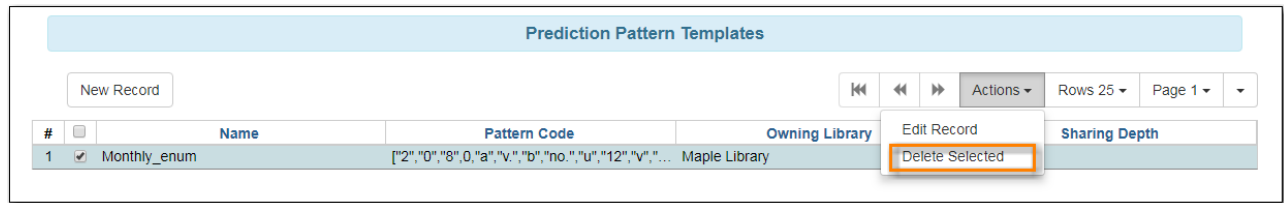
## NOTE

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.

### 32.3.4. 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 Template*.



#### NOTE

Prediction Pattern Templates that are being used by subscriptions cannot be deleted.

## 32.4. 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" | <b>enum</b> should display in the OPAC volume and number by month and year. <b>chron</b> will display in the OPAC by month . |
| 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" | <b>true</b> is recommended                                                                                                   |

# Chapter 33. 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, go to a serials record in the catalog, and click on **Serials** → **Manage Subscriptions**. This will open the serials interface for that particular record.

[subscription1]

## 33.1. 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.
  - a. Multibranch libraries will need to choose the system level library code to see their subscriptions.

4. Click **New Subscription**

[subscription1]

5. Enter the subscription information.
  - a. **Owned By** - Owning Library
  - b. **Start Date** - The subscription start date
  - c. **End Date** - The Subscription end date (Optional)
  - d. **Expected Offset** - The 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**
  - 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**
  - i. **Send to**
    - i. Click **Add Copy stream** to add additional Routing

6. Click **Save**

## 33.2. 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 you would like to attach your subscription to.
2. Click **Serials** → Choose **Manage Subscriptions**.

### 33.2.1. 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**

Manage Subscriptions | Manage Predictions | Manage Issues | Manage MFHDs

At MPL select subscription to work on Subscription 2 at MPL (1/1/2018 - )

Add New
Import from Bibliographic and/or MFHD Records
Create from Template
Monthly\_enum

☒ Active
 Start Date 5/8/2018
 Type Basic
Cancel
Create

**Create Pattern**

Existing Prediction Patterns

4. Follow the [Pattern Wizard](#) steps to modify the template.
5. Click **Create**.

Manage Subscriptions | Manage Predictions | Manage Issues | Manage MFHDs

At MPL select subscription to work on Subscription 2 at MPL (1/1/2018 - )

Add New
Import from Bibliographic and/or MFHD Records
Create from Template
Monthly\_enum

☒ Active
 Start Date 5/8/2018
 Type Basic
Edit Pattern
Cancel
Create

Existing Prediction Patterns

6. To create predictions, click **Predict New Issues**.

Manage Subscriptions | Manage Predictions | Manage Issues | Manage MFHDs

At MPL select subscription to work on Subscription 2 at MPL (1/1/2018 - )

Add New
Import from Bibliographic and/or MFHD Records
Create from Template
Monthly\_enum

Existing Prediction Patterns

| ID | Active                              | Start Date | Type               | Actions                                                                                         |
|----|-------------------------------------|------------|--------------------|-------------------------------------------------------------------------------------------------|
| 1  | <input checked="" type="checkbox"/> | 5/8/2018   | <span>Basic</span> | <span>Edit Pattern</span> <span>Predict New Issues</span> <span>Delete</span> <span>Save</span> |

- 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**.

**Predict New Issues: Initial Values**

**Publication date** 2018-01-01 **Type** Basic

**Enumeration labels**

Enumeration level 1 2018 (year)

Enumeration level 2 01 (month)

**Prediction count** 24 **Save** **Cancel**

9. Evergreen will generate the predictions and bring you to the *Manage Issues* tab to review the predicted issues.

[predictissue2]

### 33.2.2. 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**.

**Manage Subscriptions** **Manage Predictions** **Manage Issues** **Manage MFHDs**

**At** MPL **select subscription to work on** Subscription 2 at MPL (1/1/2018 - )

**Add New** **Import from Bibliographic and/or MFHD Records** **Create from Template** Monthly\_enum

**Existing Prediction Patterns**

monthly-calendar  
Monthly\_chrom  
Monthly\_enum



3. Click **Create from Template**.
4. If you want to use the pattern "as is" click **Create**.

The screenshot shows the 'Manage Predictions' tab. At the top, there are four tabs: 'Manage Subscriptions', 'Manage Predictions', 'Manage Issues', and 'Manage MFHDs'. Below the tabs, there's a section for creating a prediction pattern. It includes a dropdown menu for 'At' with 'MPL' selected, a text field for 'select subscription to work on' with 'Subscription 2 at MPL (1/1/2018 - )' entered, and three buttons: 'Add New', 'Import from Bibliographic and/or MFHD Records', and 'Create from Template'. Below these buttons are a checkbox for 'Active' and a 'Start Date' of 5/8/2018. There's also a 'Type' dropdown menu with 'Basic' selected, and buttons for 'Edit Pattern', 'Cancel', and 'Create'. The 'Create' button is highlighted with a red box. Below this section is a heading 'Existing Prediction Patterns'.

- 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.

### 33.3. 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, including

- receiving issues
- predicting new issues
- adding special issues.

## 33.4. Create and Manage MFHDs

MARC Format for Holdings Display (MFHD) display in the catalog in addition to holding statements generated by Evergreen from subscriptions created in the Serials Module. The MFHDs are editable as MARC but the holdings statements generated from the control view are system generated. Multiple MFHDs can be created and are tied to Organizational Units.

# Chapter 34. Serials Receiving

Issues can be received through the **Manage Issues** tab or through the **Quick Receive** option located in the bibliographic record display.

## 34.1. Quick Receive

1. From a serials record in the catalog, go to **Serials** → **Quick Receive**.
2. Select the Library and Subscription for which you are receiving issues from the drop down menu and click **OK/Continue**.
3. A Receive items dialog box will appear with the next expected issue.

**To receive the item(s) and barcode them:**

1. **Call Number:** Enter a call number. Any item with a barcode must also have a call number.
2. **Barcode:** Scan in the barcode that will be affixed to the issue.
3. The box adjacent to Receive the issue will be checked by default.
4. Click **Save** to receive the issue. The Status of the issue will update to "Received" and a Date Received will be recorded.
5. The barcoded copy will now appear in the holdings area of the catalog and the Holdings Summary in the Issues Held tab in the catalog will reflect the newly received issue.

### NOTE

The Copy 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. Copy location, call number, and circulation modifier can be applied to multiple copies in batch using the batch modify.

**To receive the item(s) without barcoding them:**

1. Uncheck the box adjacent to Barcode Items and click Save. The Holdings Summary in the Issues Held tab in the catalog will reflect the newly received issue.

## 34.2. Receive from the Manage Issues tab

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.

### 34.2.1. Receive Next Issue and 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. 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 Copy 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.
11. The barcoded item(s) will now appear in the holdings area of the catalog and the Holdings Summary in the Issues Held tab in the catalog will reflect the newly received issue.

### 34.2.2. 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 catalog will reflect the newly received issue.

## 34.3. Batch Receive

Multiple issues can be received at the same time using the Manage Issues tab.

### 34.3.1. Batch Receive and 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. 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**. A Receive items dialog box will appear with the selected issues and items. The Copy 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. Call Number: Enter a call number. Any item with a barcode must also have a call number. Barcode: Scan in the barcodes that will be affixed to the items. The box to Receive the items will be checked by default. Check the box adjacent to Routing List to print an existing routing list. Click Save to receive the items. The Status of the items will update to "Received" and a Date Received will be recorded. The barcoded items will now appear in the holdings area of

the catalog and the Holdings Summary in the Issues Held tab in the catalog will reflect the newly received issues.

### **34.3.2. Receive multiple issues (no barcode)**

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. Make sure the box next to Barcode on receive is unchecked and check the boxes adjacent to the expected issues you want to receive. A Receive items dialog box will appear with the message "Will receive # item(s) without barcoding." 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 catalog will reflect the newly received issues.

# Chapter 35. Special Issues

## 35.1. 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.

## 35.2. 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 36. 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

To create a routing list for a subscription, go to the Manage Subscriptions tab for a serials record, select the subscription from the list and go to Actions → Additional Routing, or right-click and select Additional Routing. A dialog box will appear where you can create the routing list.

Scan or type in the barcode of the user the items should be routed to in the Reader (barcode) field and click Add Route. Continue adding barcodes until the list is complete. To route items to a location, click the radio button next to Department, type in the routing location, and click Add Route. A Note may be added along with each addition to the list. 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. When the list is complete, click Update.

# Chapter 37. Serials Binding

To 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 **Action** and select **Bind**.
3. The Bind Items interface 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.



# Administration

# Chapter 38. 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 applied to or the effect scope, e.g. individual workstations, libraries or the whole consortium. These functions are visible to anyone logged into the staff client, but most of them usually 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 Organization Unit.

**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 39. Workstation Administration

## 39.1. Search Preferences

Refer to [Set Search Preferences](#) for detailed instructions

## 39.2. Registered Workstations

**Administration → Workstation → Registered Workstations**

### 39.2.1. Register a New Workstation For This Browser

You must register a workstation before you can log in to Sitka's Evergreen for the first time on a new computer or a new server.

You may want to register more than one workstation on a computer. \* Example Multibranch Libraries \* Federation Coordinarors

1. Choose your library short code from the drop down menu.
2. Enter a unique workstation name → Click **Register**.
3. The new workstation is listed in the **Workstations Registered With This Browser** menu → click **Use Now** to return to the login page.

### 39.2.2. Workstations Registered With This Browser

A dropdown menu shows the Workstations registered with this browser

Use the dropdown to choose a registered workstation

- Click **Use Now** to go to the staff client log in page
- Click **Mark as Default** to make the selected workstation your default.
- Click **Remove** to deleted the selected workstation.

## 39.3. Printer Settings

**Administration → Workstation → Printer Settings**

### 39.3.1. Printing without Hatch

If you do not have Hatch installed on your computer you will see this message "Hatch is not installed in this browser. Printing must be configured via the native browser print configuration."

image:images/admin/printersettingsnohatch.png

### 39.3.2. Printing with Hatch

If you do have Hatch installed on your computer you will use this screen to setup your printer defaults.

## 39.4. Print Templates

Most of the receipts that print from the Evergreen staff client software are managed via the Print Template Editor **Administration** → **Workstation** → **Print Templates** and can be customized on an individual workstation basis. Typically, library systems will set up the receipts the way they want them to print out on one workstation at a branch, then export the settings as a file and import that file to each of the other workstations at that branch.

If Hatch is installed receipts can be forced to use specific printer settings, Printer Settings can be set at **Administration** → **Workstation** → **Printer Settings**.

**This is a complete list of the receipts currently in use in Evergreen.**

#### *List of Receipts*

- **Bills, Current:** Listing of current bills on an account.
- **Bills, Historic:** Listing of bills that have had payments made on them. This used on the Bill History Transaction screen.
- **Bills, Payment:** Patron payment receipt.
- **Checkin:** List of items that have been entered in to the check-in screen.
- **Checkout:** List of items currently checked out by a patron during the transaction.
- **Hold Transit Slip:** This is printed when a hold goes in-transit to another library.
- **Hold Shelf Slip:** This prints when a hold is fulfilled.
- **Holds for Bib Record:** Prints a list of holds on a Title record.
- **Holds for Patron:** Prints a list of holds on a patron record.
- **Hold Pull List:** Prints the Holds Pull List.
- **Hold Shelf List:** Prints a list of hold that are waiting to be picked up.
- **In-House Use List:** Prints a list of items imputed into In-house use.
- **Item Status:** Prints a list of items imputed into Item Status.
- **Items Out:** Prints the list of items a patron has checked out.
- **Patron Address:** Prints the current patrons address.
- **Patron Note:** Prints a note on a patron's record.
- **Renew:** List of items that have been renewed using the Renew Item Screen.
- **Transit List:** Prints the list of items in-transit from the Transit List.
- **Transit Slip:** This is printed when an items goes in-transit to another location.

### 39.4.1. Customizing 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 you are using Hatch, you can choose different printers for different types of receipts with the Force Content field. If not, leave that field blank.
4. Make changes in the Template field.
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 1. Text Formatting

| Goal        | Original    | Code                                                                                 | Result       |
|-------------|-------------|--------------------------------------------------------------------------------------|--------------|
| Bold (HTML) | hello       | <code>&lt;b&gt;hello&lt;/b&gt;</code>                                                | <b>hello</b> |
| Bold (CSS)  | hello       | <code>&lt;span style="font-weight:bold;"&gt;hello&lt;/span&gt;</code>                | <b>hello</b> |
| Capitalize  | circulation | <code>&lt;span style="text-transform:capitalize;"&gt;circulation&lt;/span&gt;</code> | Circulation  |
| Currency    | 1           | <code>{{1   currency}}</code>                                                        | \$1.00       |

Table 2. Date Formatting

| Code                                  | Result                   |
|---------------------------------------|--------------------------|
| <code>{{today}}</code>                | 2017-08-01T14:18:51.445Z |
| <code>{{today   date:'short'}}</code> | 8/1/17 10:18 AM          |

| Code                                     | Result   |
|------------------------------------------|----------|
| <code>{{today   date:'M/d/yyyy'}}</code> | 8/1/2017 |

Table 3. Currency Formatting

| Code                                                  | Result |
|-------------------------------------------------------|--------|
| <code>{{xact.summary.balance_owed   currency}}</code> | \$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 | <code>{{checkout.title   limitTo:10}}</code>      | The Sisterhood of th |
| 123456789                             | <code>{{patron.card.barcode   limitTo:-5}}</code> | 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.

## 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:

```
`$$<tr ng-repeat="hold_data in holds | orderBy :  
['copy.location.name','volume.label']">$$`
```

## Export / Import Customized Templates

To 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” to save an external file that you can then Import into other workstations. See [link](#)

## Reset Print Templates to Default

The web client doesn't have a built-in option to reset the print templates to default, but they should reset if you clear your entire browser cache. You could also un-zip the file below and import the file it contains.

WARNING:

Clearing your browser's cache/temporary files will clear any print template customizations that you make. Be sure to export a copy of your customizations as a backup so that you can import it as needed.

### 39.4.2. Exporting and Importing Customized Receipts

Once you have your receipts set up on one machine you can export your receipts, and then load them on to another machine. Just remember to '*Save Locally*' once you import the receipts on the new machine.

#### Exporting templates

As you can only save a template on to the computer you are working on you will need to export the template if you have more than one computer that prints out receipts (i.e., more than one computer on the circulation desk, or another computer in the workroom that you use to checkin items or capture holds with)

1. Export.
2. Select the location to save the template to, name the template, and click Save.
3. Click OK.

#### Importing Templates

1. Click Import.
2. Navigate to and select the template that you want to import. Click Open.
3. Click OK.
4. Click Save Locally.
5. Click OK.

### 39.4.3. 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 4. 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                        |
| ====                                   | =====                                   |
| .Bills, Current [options="header"]     |                                         |
| 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                              |
| ====                                   | =====                                   |
| .Bills, Historical [options="header"]  |                                         |
| 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                              |
| {{xact.summary.last_billing_note}}     | Last billing note                       |



| Tag                                             | Notes                                                     |
|-------------------------------------------------|-----------------------------------------------------------|
| {{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                                                |
| ====                                            | =====                                                     |
| .Bills, Payment [options="header"]              |                                                           |
| 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                                                     |
| ====                                            | =====                                                     |
| .Checkin [options="header"]                     |                                                           |
| Tag                                             | Notes                                                     |
| {{checkin.copy_barcode}}                        | Barcode                                                   |
| {{checkin.call_number.label   "Not Cataloged"}} | Call Number (if no call number, displays “Not Cataloged”) |
| {{checkin.title}}                               | Title                                                     |
| ====                                            | =====                                                     |
| .Checkout [options="header"]                    |                                                           |
| Tag                                             | Notes                                                     |
| {{patron_money.balance_owed}}                   | Amount Owed                                               |
| {{checkout.author}}                             | Author                                                    |
| {{checkout.copy_barcode}}                       | Barcode                                                   |
| {{checkout.call_number.label}}                  | Call Number                                               |

| Tag                                                                                                                                                                         | Notes                                                  |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------|
| {{checkout.circ.due_date}}                                                                                                                                                  | Due Date                                               |
| {{checkout.copy.price}}                                                                                                                                                     | Price                                                  |
| {{checkout.title}}                                                                                                                                                          | Title                                                  |
| ====                                                                                                                                                                        | =====                                                  |
| .Hold Pull List [options="header"]                                                                                                                                          |                                                        |
| 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                                                  |
| ====                                                                                                                                                                        | =====                                                  |
| .Hold Shelf Slip [options="header"]                                                                                                                                         |                                                        |
| 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                                         |
| {{patron.email}}                                                                                                                                                            | Patron email address                                   |
| {{patron.first_given_name}}                                                                                                                                                 | Patron first name                                      |

| Tag                                      | Notes                        |
|------------------------------------------|------------------------------|
| {{patron.family_name}}                   | Patron last Name             |
| {{patron.second_given_name}}             | Patron middle name           |
| =====                                    | =====                        |
| .Hold Transit Slip [options="header"]    |                              |
| 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           |
| =====                                    | =====                        |
| .Holds for Bib Record [options="header"] |                              |
| Tag                                      | Notes                        |
| {{holds.title}}                          | Title                        |
| {{hold_data.author}}                     | Author                       |
| {{hold.copy.barcode}}                    | Hold target copy barcode     |
| {{hold.hold.request_time}}               | Hold request date            |
| {{hold.patron_barcode}}                  | Patron barcode               |
| {{hold.patron_alias}}                    | Patron hold alias            |
| {{hold.patron_last}}                     | Patron last name             |

| Tag                                                                           | Notes                                             |
|-------------------------------------------------------------------------------|---------------------------------------------------|
| =====                                                                         | =====                                             |
| .Holds for Patron [options="header"]                                          |                                                   |
| Tag                                                                           | Notes                                             |
| {{hold.author}}                                                               | Author                                            |
| div ng-if="hold.hold.email_notify == 't'">{{hold.hold.requestor.email}} /div> | Notify by email<br>(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                                             |
| =====                                                                         | =====                                             |
| .In-House Use List [options="header"]                                         |                                                   |
| Tag                                                                           | Notes                                             |
| {{ihu.copy.barcode}}                                                          | Barcode                                           |
| {{ihu.num_uses}}                                                              | Number of uses                                    |
| =====                                                                         | =====                                             |
| .Item Status [options="header"]                                               |                                                   |
| Tag                                                                           | Notes                                             |
| {{copy.barcode}}                                                              | Barcode                                           |
| {{copy['call_number.record.simple_record.title']}}<br>}                       | Title                                             |
| =====                                                                         | =====                                             |
| .Items Out [options="header"]                                                 |                                                   |
| Tag                                                                           | Notes                                             |
| {{checkout.copy.barcode}}                                                     | Barcode                                           |
| {{checkout.circ.due_date}}                                                    | Due date                                          |
| {{checkout.title}}                                                            | Title                                             |
| =====                                                                         | =====                                             |
| .Patron Address [options="header"]                                            |                                                   |
| 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                          |
| ====                                                           | =====                             |
| .Patron Note [options="header"]                                |                                   |
| 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                |
| ====                                                           | =====                             |
| .Renew [options="header"]                                      |                                   |
| Tag                                                            | Notes                             |
| {{renewal.copy.barcode}}                                       | Barcode                           |
| {{renewal.circ.due_date}}                                      | Due date                          |
| {{renewal.title}}                                              | Title                             |
| ====                                                           | =====                             |
| .Transit List [options="header"]                               |                                   |
| 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                             |
| =====                                                          | =====                             |
| .Transit Slip [options="header"]                               |                                   |
| Tag                                                            | Notes                             |
| {{dest_address.city}}                                          | Destination city                  |
| {{dest_courier_code}}                                          | Destination courier code          |

| Tag                         | Notes                        |
|-----------------------------|------------------------------|
| {{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         |
| {{author}}                  | Item author                  |
| {{copy.barcode}}            | Item barcode                 |
| {{title}}                   | Item title                   |

| Tag                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Notes        |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|
| <p>=====</p> <p>Stored Preferences ~~~~~</p> <p>Here you can view stored user preferences. User settings are added to the list whenever you choose to <b>Save Columns</b>, <b>Set default view</b> or pick a value from a sticky dropdown menu.</p> <p>* Click on a preference to view the stored value.<br/> * Click on the delete (X) button to remove a preference's value</p> <p>Local Prefs ^^^ ^^</p> <p>* Saved settings for this workstation only</p> <p>Remote Prefs ^^^^</p> <p>* Saved settings for any workstation registered to your Library</p> <p>Hatch ~~~</p> <p>Refer to <a href="#">Downloading and Installing Hatch</a> for detailed instructions</p> <p>Tests ~~~</p> <p>Latency Test ^^^^</p> <p>This will measure the websocket latency between your workstation client and the Evergreen server at the host above.</p> <p>* Click <b>Start Test</b> to run the test * Click <b>Copy to Clipboard</b> to copy the results * Click <b>Clear</b> to clear the results</p> <p><b>Average Latency</b> - Indicates how long it takes for your workstation to communicate with Sitka's Evergreen servers.</p> <p>NOTE: The current status of all BC Libraries Cooperative services can be found here - <a href="https://status.libraries.coop/">https://status.libraries.coop/</a></p> <p>Disable Sounds ~~~~ ^^</p> <p>Disable Sounds - Check the box for <b>Disable Sounds</b> to turn off the staff client Sounds.</p> <p>Test - Click the buttons to test the staff client</p> | <p>=====</p> |

| Tag                                                                                                                                                                                                                                                                                                        | Notes                                                                                              |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|
| 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                                                                                                                                                                                                                                                                                                        | <a href="#">[cash-report]</a>                                                                      |
| View summary report of cash transactions for selected date range                                                                                                                                                                                                                                           | All staff                                                                                          |
| <a href="#">[circulation-policy]</a>                                                                                                                                                                                                                                                                       | View circulation policies                                                                          |
| Viewable to LSA. Contact Co-op support for editing                                                                                                                                                                                                                                                         | <a href="#">[closed-date-editor]</a>                                                               |
| Set library ad hoc closure dates (affects due dates and fines)                                                                                                                                                                                                                                             | LSA                                                                                                |
| <a href="#">[copy-alert-suppression]</a>                                                                                                                                                                                                                                                                   | not to display copy alert on selected actions                                                      |
| LSA                                                                                                                                                                                                                                                                                                        | <a href="#">[copy-location-editor]</a>                                                             |
| Create and edit copy locations, also known as shelving locations                                                                                                                                                                                                                                           | LSA                                                                                                |
| <a href="#">[copy-location-group]</a>                                                                                                                                                                                                                                                                      | Allows one or more shelving locations to be grouped together as a search location.                 |
| LSA                                                                                                                                                                                                                                                                                                        | <a href="#">[copy-location-order]</a>                                                              |
| Change display order of copy locations on Holds Pull list, also known as shelving locations                                                                                                                                                                                                                | LSA                                                                                                |
| <a href="#">[copy-tag]</a>                                                                                                                                                                                                                                                                                 | Searchable copy information                                                                        |
| LSA                                                                                                                                                                                                                                                                                                        | <a href="#">[group-penalty-threshold]</a>                                                          |
| Set library-specific thresholds for maximum items out, maximum overdue, and maximum fines                                                                                                                                                                                                                  | LSA                                                                                                |
| <a href="#">[library-settings-editor]</a>                                                                                                                                                                                                                                                                  | Detailed library configuration settings                                                            |
| LSA/Co-op support                                                                                                                                                                                                                                                                                          | <a href="#">[non-catalogued-type]</a>                                                              |
| 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                                                                                                                                                                                                                                                                                                  | <a href="#">[stat-cat]</a>                                                                         |



| Tag                                                                        | Notes                                                        |
|----------------------------------------------------------------------------|--------------------------------------------------------------|
| Create and manage optional categories for detailed patron/item information | LSA                                                          |
| <a href="#">[admin-survey]</a>                                             | Create patron surveys to be completed at patron registration |
| LSA                                                                        | <a href="#">[transit-list]</a>                               |
| View items in transit to or from your library during selected date range   | All staff                                                    |
| <a href="#">[volume-copy-template]</a>                                     | Interface to create volume copy templates                    |
| LSA/Cataloguers                                                            | Work Log                                                     |
| List the most recent transactions processed at the selected workstation    | All staff                                                    |

| Tag                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Notes        |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|
| <p>=====</p> <p>Cash Reports ~~~~~</p> <p>. Go to <b>Administration</b> → <b>Cash Reports</b>. + .<br/> 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. . Select your library from the drop down menu. Click <b>Submit</b>. . 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: + image::images/admin/cash-report-1.png[]</p> <p>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.</p> <p>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 <a href="#">Shared Sitka Templates</a>.</p> <p>Circulation Policy ~~~~~</p> <p>A user with LSA privileges can view your library's circulation policies. Changes to circulation policies can be requested through the Sitka support team.</p> <p>* Select <b>Administration</b> → <b>Local Administration</b> → <b>Circulation Policies</b>. By</p> | <p>=====</p> |

| Tag                                                                                            | Notes                                                                                                                                                                                                                                                                                                                |
|------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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                                                                                                                                                                                                                                                                                                            |
| =====                                                                                          | =====                                                                                                                                                                                                                                                                                                                |
| .Booking and Cataloging [options="header"]                                                     |                                                                                                                                                                                                                                                                                                                      |
| Setting                                                                                        | Description                                                                                                                                                                                                                                                                                                          |
| Data type                                                                                      | Notes                                                                                                                                                                                                                                                                                                                |
| Edited by                                                                                      | Booking Allow Email Notify                                                                                                                                                                                                                                                                                           |
| Permit email notification when a reservation is ready for pick-up.                             | True/false                                                                                                                                                                                                                                                                                                           |
|                                                                                                | LSA                                                                                                                                                                                                                                                                                                                  |
| Elbow room                                                                                     | Elbow room specifies how far in the future you must make a reservation on an item if that item will have to transit to reach its pick-up location. It secondarily defines how soon a reservation on a given item must start before the check-in process will opportunistically capture it for the reservation shelf. |
| Duration                                                                                       |                                                                                                                                                                                                                                                                                                                      |
| LSA                                                                                            | Default Classification Scheme                                                                                                                                                                                                                                                                                        |
| Defines the default classification scheme for new call numbers: 1 = Generic; 2 = Dewey; 3 = LC | Number                                                                                                                                                                                                                                                                                                               |
| Effect on call number sorting.                                                                 | LSA                                                                                                                                                                                                                                                                                                                  |
| 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                                                                                                                                                                                                                                                                                                                  |

| Tag                                                                                                                                              | Notes                                                                                                                                           |
|--------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|
| 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                                                                                                                                              | 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                                                                                                    |

| Tag                                                                                                                                                                                                                                             | Notes                                                                                                                                                                                                               |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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                                                                                                                                                                                                                                             | 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                                                                                                                                                                                                                                             | 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                                                                                                 |

| Tag                                                                                                                  | Notes                                                                                                                                                                                                                                              |
|----------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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                                                                                                                                                                                                                                                |
| 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                                                                                                                                                                                                                                                |
| =====                                                                                                                | =====                                                                                                                                                                                                                                              |
| .Circulation [options="header"]                                                                                      |                                                                                                                                                                                                                                                    |
| Setting                                                                                                              | Description                                                                                                                                                                                                                                        |
| Data type                                                                                                            | Notes                                                                                                                                                                                                                                              |
| Edited by                                                                                                            | Auto-extend grace periods                                                                                                                                                                                                                          |

| Tag                                                                                                                                                                                                                                                                                                                                                                                                                             | Notes                                                                                                                                                                                                                                                              |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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                                                                                                                                                                                                                                                                                                                                                                                                                             | Auto-extending grace periods include trailing closed dates                                                                                                                                                                                                         |
| It works when the above setting "Auto-Extend Grace Periods" is set to TRUE. If enabled, grace periods will include closed dates that directly follow the last day of the grace period. A backdated check-in with effective date on the closed dates will assume the item is returned after hours on the last day of the grace period.                                                                                           | True/False                                                                                                                                                                                                                                                         |
| Useful when libraries' book drop equipped with AMH.                                                                                                                                                                                                                                                                                                                                                                             | LSA                                                                                                                                                                                                                                                                |
| Block hold request if hold recipient privileges have expired                                                                                                                                                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                                                    |
| True/False                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                                    |
| LSA                                                                                                                                                                                                                                                                                                                                                                                                                             | Cap max fine at item price                                                                                                                                                                                                                                         |
| This prevents the system from charging more than the item price in overdue fines                                                                                                                                                                                                                                                                                                                                                | True/False                                                                                                                                                                                                                                                         |
|                                                                                                                                                                                                                                                                                                                                                                                                                                 | LSA                                                                                                                                                                                                                                                                |
| Charge fines on overdue circulations when closed                                                                                                                                                                                                                                                                                                                                                                                | When set to True, fines will be charged during scheduled closings and normal weekly closed days.                                                                                                                                                                   |
| True/False                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                                    |
| LSA                                                                                                                                                                                                                                                                                                                                                                                                                             | 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                                                                                                                                                                                                                                                         |

| Tag                                                                                                                                                                                                                                                                                                                             | Notes                                                                                                                                                                                                                                              |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                                                                                                                                                                                                                                                                 | LSA                                                                                                                                                                                                                                                |
| Checkout fills related hold on valid copy only                                                                                                                                                                                                                                                                                  | When filling related holds on checkout only match on items that are valid for opportunistic capture for the hold. Without this set a Title or Volume hold could match when the item is not holdable. With this set only holdable items will match. |
| True/False                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                    |
| LSA                                                                                                                                                                                                                                                                                                                             | Checkout auto renew age                                                                                                                                                                                                                            |
| When an item has been checked out for at least this amount of time, an attempt to check out the item to the patron that it is already checked out to will simply renew the circulation. If the checkout attempt is done within this time frame, Evergreen will prompt for choosing Renewing or Check-in then Checkout the item. | Duration                                                                                                                                                                                                                                           |
|                                                                                                                                                                                                                                                                                                                                 | LSA                                                                                                                                                                                                                                                |
| Clear hold when other patron checks out item                                                                                                                                                                                                                                                                                    | Default to cancel the hold when patron A checks out item on hold for patron B                                                                                                                                                                      |
| True/False                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                    |
| LSA                                                                                                                                                                                                                                                                                                                             | Display copy alert for in-house-use                                                                                                                                                                                                                |
| Setting to true for an organization will cause an alert to appear with the copy's alert message, if it has one, when recording in-house-use for the copy.                                                                                                                                                                       | True/False                                                                                                                                                                                                                                         |
|                                                                                                                                                                                                                                                                                                                                 | LSA                                                                                                                                                                                                                                                |
| 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                                                                                                                                                                                                                                                |



| Tag                                                                                                                                                                                                                                                           | Notes                                                                                                                                                                                                                                                                      |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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 Itemsout Notices Count                                                                                                                                                                                                               |
|                                                                                                                                                                                                                                                               | True/False                                                                                                                                                                                                                                                                 |
|                                                                                                                                                                                                                                                               | LSA                                                                                                                                                                                                                                                                        |
| Forgive fines when checking out a long-overdue item and copy alert is suppressed?                                                                                                                                                                             |                                                                                                                                                                                                                                                                            |
|                                                                                                                                                                                                                                                               | Not in use                                                                                                                                                                                                                                                                 |
|                                                                                                                                                                                                                                                               | Forgive fines when checking out a lost item and copy alert is suppressed?                                                                                                                                                                                                  |
| Controls whether fines are automatically forgiven when checking out an item that has been marked as lost, and the corresponding copy alert has been suppressed.                                                                                               | True/False                                                                                                                                                                                                                                                                 |
|                                                                                                                                                                                                                                                               | LSA                                                                                                                                                                                                                                                                        |
| Hold shelf status delay                                                                                                                                                                                                                                       | The purpose is to provide an interval of time after an item goes into the on-holds-shelf status before it appears to patrons that it is actually on the holds shelf. This gives staff time to process the item before it shows as ready-for-pick-up.                       |
| Duration                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                                            |
| LSA                                                                                                                                                                                                                                                           | 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                                                                                                                                                                                                                                             |

| Tag                                                                                                                                                                                                                                                                                                                                          | Notes                                                                                                                                                                                                                                                                                                                                                      |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| This is the Item Status to use for items that have been marked or scanned as having Missing Pieces. In the absence of this setting, the Damaged status is used.                                                                                                                                                                              | Selection list                                                                                                                                                                                                                                                                                                                                             |
|                                                                                                                                                                                                                                                                                                                                              | LSA                                                                                                                                                                                                                                                                                                                                                        |
| Load patron from Checkout                                                                                                                                                                                                                                                                                                                    | When scanning barcodes into Checkout auto-detect if a new patron barcode is scanned and auto-load the new patron.                                                                                                                                                                                                                                          |
| True/False                                                                                                                                                                                                                                                                                                                                   | Not in use                                                                                                                                                                                                                                                                                                                                                 |
|                                                                                                                                                                                                                                                                                                                                              | Long-Overdue Check-In Interval Uses Last Activity Date                                                                                                                                                                                                                                                                                                     |
| Use the long-overdue last-activity date instead of the due_date to determine whether the item has been checked out too long to perform long-overdue check-in processing. If set, the system will first check the last payment time, followed by the last billing time, followed by the due date. See also "Long-Overdue Max Return Interval" | True/False                                                                                                                                                                                                                                                                                                                                                 |
| Not in use                                                                                                                                                                                                                                                                                                                                   |                                                                                                                                                                                                                                                                                                                                                            |
| Long-Overdue Items Usable on Checkin                                                                                                                                                                                                                                                                                                         | Long-overdue items are usable on checkin instead of going "home" first                                                                                                                                                                                                                                                                                     |
| True/False                                                                                                                                                                                                                                                                                                                                   | Not in use                                                                                                                                                                                                                                                                                                                                                 |
|                                                                                                                                                                                                                                                                                                                                              | Long-Overdue Max Return Interval                                                                                                                                                                                                                                                                                                                           |
| Long-overdue check-in processing (voiding fees, re-instating overdues, etc.) will not take place for items that have been overdue for (or have last activity older than) this amount of time                                                                                                                                                 | Duration                                                                                                                                                                                                                                                                                                                                                   |
| Not in use                                                                                                                                                                                                                                                                                                                                   |                                                                                                                                                                                                                                                                                                                                                            |
| 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 <i>home</i> 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.                                                                                                                                                                                                                                                             |

| Tag                                                                                                                                                                                          | Notes                                                                                               |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
| Number                                                                                                                                                                                       |                                                                                                     |
| LSA                                                                                                                                                                                          | Maximum visible age of User Trigger Events in Staff Interfaces                                      |
| If this is unset, staff can view User Trigger Events regardless of age. When this is set to an interval, it represents the age of the oldest possible User Trigger Event that can be viewed. | Duration                                                                                            |
| Not working                                                                                                                                                                                  | LSA                                                                                                 |
| Minimum transit checkin interval                                                                                                                                                             | In-Transit items checked in this close to the transit start time will be prevented from checking in |
| Duration                                                                                                                                                                                     |                                                                                                     |
| LSA                                                                                                                                                                                          | Number of Retrievable Recent Patrons                                                                |
| Number of most recently accessed patrons that can be re-retrieved in the staff client. A value of 0 or less disables the feature. Defaults to 1.                                             | Number                                                                                              |
|                                                                                                                                                                                              | LSA                                                                                                 |
| Patron merge address delete                                                                                                                                                                  | Delete address(es) of subordinate user(s) in a patron merge.                                        |
| True/False                                                                                                                                                                                   |                                                                                                     |
| LSA                                                                                                                                                                                          | Patron merge barcode delete                                                                         |
| Delete barcode(s) of subordinate user(s) in a patron merge                                                                                                                                   | True/False                                                                                          |
|                                                                                                                                                                                              | LSA                                                                                                 |
| Patron merge deactivate card                                                                                                                                                                 | Mark barcode(s) of subordinate user(s) in a patron merge as inactive.                               |
| True/False                                                                                                                                                                                   |                                                                                                     |
| LSA                                                                                                                                                                                          | Patron Registration: Cloned patrons get address copy                                                |
| If True, in the Patron editor, addresses are copied from the cloned user. If False, addresses are linked from the cloned user which can only be edited from the cloned user record.          | True/False                                                                                          |
|                                                                                                                                                                                              | LSA                                                                                                 |
| 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                                                                    |

| Tag                                                                                                                                                                                                      | Notes                                                                                                                                                                                  |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Full URL path to a JavaScript File to be loaded when printing. Should implement a print_custom function for DOM manipulation. Can change the value of the do_print variable to false to cancel printing. | Text                                                                                                                                                                                   |
| Not in use                                                                                                                                                                                               |                                                                                                                                                                                        |
| Require matching email address for password reset requests                                                                                                                                               |                                                                                                                                                                                        |
| True/False                                                                                                                                                                                               |                                                                                                                                                                                        |
| LSA                                                                                                                                                                                                      | Restore Overdues on Long-Overdue Item Return                                                                                                                                           |
|                                                                                                                                                                                                          | True/False                                                                                                                                                                             |
|                                                                                                                                                                                                          | LSA                                                                                                                                                                                    |
| Restore overdues on lost item return                                                                                                                                                                     | If true when a lost item is checked in overdue fines are charged (up to the maximum fines amount)                                                                                      |
| True/False                                                                                                                                                                                               |                                                                                                                                                                                        |
| LSA                                                                                                                                                                                                      | Specify search depth for the duplicate patron check in the patron editor                                                                                                               |
| When using the patron registration page, the duplicate patron check will use the configured depth to scope the search for duplicate patrons.                                                             | Number                                                                                                                                                                                 |
|                                                                                                                                                                                                          | Sitka                                                                                                                                                                                  |
| Suppress hold transits group                                                                                                                                                                             | To create a group of libraries to suppress Hold Transits among them. All libraries in the group should use the same unique value. Leave it empty if transits should not be suppressed. |
| Text                                                                                                                                                                                                     | Not in use                                                                                                                                                                             |
| Sitka                                                                                                                                                                                                    | Suppress non-hold transits group                                                                                                                                                       |
| To create a group of libraries to suppress Non-Hold Transits among them. All libraries in the group should use the same unique value. Leave it empty if Non-Hold Transits should not be suppressed.      | Text                                                                                                                                                                                   |
| Not in use                                                                                                                                                                                               | Sitka                                                                                                                                                                                  |
| Suppress popup-dialogs during check-in.                                                                                                                                                                  | When set to True, no pop-up window for exceptions on check-in. But the accompanying sound will be played.                                                                              |
| True/False                                                                                                                                                                                               |                                                                                                                                                                                        |
| LSA                                                                                                                                                                                                      | Target copies for a hold even if copy's circ lib is closed                                                                                                                             |

| Tag                                                                                                                                                                                                      | Notes                                                                                                                                                                                                                                                                           |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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                                                                                                                                                                                                                                                                           |
| Use Lost and Paid copy status                                                                                                                                                                            | Use Lost and Paid copy status when lost or long overdue billing is paid                                                                                                                                                                                                         |
| True/False                                                                                                                                                                                               | Default: True                                                                                                                                                                                                                                                                   |
| Sitka                                                                                                                                                                                                    | Void Long-Overdue Item Billing When Returned                                                                                                                                                                                                                                    |
|                                                                                                                                                                                                          | True/False                                                                                                                                                                                                                                                                      |
| Not in use                                                                                                                                                                                               | LSA                                                                                                                                                                                                                                                                             |
| Void Processing Fee on Long-Overdue Item Return                                                                                                                                                          |                                                                                                                                                                                                                                                                                 |
| True/False                                                                                                                                                                                               | Not in use                                                                                                                                                                                                                                                                      |
| LSA                                                                                                                                                                                                      | Void longoverdue item billing when claims returned                                                                                                                                                                                                                              |
|                                                                                                                                                                                                          | True/False                                                                                                                                                                                                                                                                      |
|                                                                                                                                                                                                          | LSA                                                                                                                                                                                                                                                                             |
| Void longoverdue item processing fee when claims returned                                                                                                                                                |                                                                                                                                                                                                                                                                                 |
| True/False                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                 |
| LSA                                                                                                                                                                                                      | Void lost item billing when claims returned                                                                                                                                                                                                                                     |
|                                                                                                                                                                                                          | True/False                                                                                                                                                                                                                                                                      |
|                                                                                                                                                                                                          | LSA                                                                                                                                                                                                                                                                             |

| Tag                                                                                                                                                    | Notes                                                                                                                                                                                                                                                                 |
|--------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Void lost item billing when returned                                                                                                                   | If true,when a lost item is checked in the item replacement bill (item price) is voided.                                                                                                                                                                              |
| True/False                                                                                                                                             |                                                                                                                                                                                                                                                                       |
| LSA                                                                                                                                                    | Void lost item processing fee when claims returned                                                                                                                                                                                                                    |
| When an item is marked claims returned that was marked Lost, the item processing fee will be voided.                                                   | True/False                                                                                                                                                                                                                                                            |
|                                                                                                                                                        | LSA                                                                                                                                                                                                                                                                   |
| Void lost max interval                                                                                                                                 | Items that have been overdue this long will not result in lost charges being voided when returned, and the overdue fines will not be restored, either. Only applies if <b>Circ: Void lost item billing</b> or <b>Circ: Void processing fee on lost item</b> 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 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.                                       |                                                                                                                                                                                                                                                                       |
| .Credit Card Processing [options="header"]                                                                                                             |                                                                                                                                                                                                                                                                       |
| Credit card payment is not currently supported.                                                                                                        | All settings can be ignored.                                                                                                                                                                                                                                          |
| =====                                                                                                                                                  | =====                                                                                                                                                                                                                                                                 |
| .Finances [options="header"]                                                                                                                           |                                                                                                                                                                                                                                                                       |
| Setting                                                                                                                                                | Description                                                                                                                                                                                                                                                           |
| Data type                                                                                                                                              | Notes                                                                                                                                                                                                                                                                 |

| Tag                                                                                                                                                                                                      | 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                                                                                                                                                                  |
| 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)                                                                                                                                                    |

| Tag                                                                                                                                                                                                      | Notes                                                                                                                                                                                                                                                          |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Not in use                                                                                                                                                                                               |                                                                                                                                                                                                                                                                |
| Lost materials processing fee                                                                                                                                                                            | The amount charged in addition to item price when an item is marked lost.                                                                                                                                                                                      |
| Number(Currency)                                                                                                                                                                                         |                                                                                                                                                                                                                                                                |
| LSA                                                                                                                                                                                                      | Maximum Item Price                                                                                                                                                                                                                                             |
| When charging for lost items, limit the charge to this as a maximum.                                                                                                                                     | Number(Currency)                                                                                                                                                                                                                                               |
|                                                                                                                                                                                                          | LSA                                                                                                                                                                                                                                                            |
| Minimum Item Price                                                                                                                                                                                       | When charging for lost items, charge this amount as a minimum.                                                                                                                                                                                                 |
| Number(Currency)                                                                                                                                                                                         |                                                                                                                                                                                                                                                                |
| LSA                                                                                                                                                                                                      | Negative Balance Interval (DEFAULT)                                                                                                                                                                                                                            |
| Amount of time after which no negative balances (refunds) are allowed on circulation bills. The "Prohibit negative balance on bills" setting must also be set to "true".                                 | Duration                                                                                                                                                                                                                                                       |
| If the settings for Lost and Overdues are the same, you may use this setting and the "Prohibit Negative Balance on Bills (DEFAULT)" setting, and ignore 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                                                                                                                                                                                                      | 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                                                                                                                                                                                                          |



| Tag                                                                                                                                                                                                                                                    | Notes                                                                                                                                                                                                                                                  |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Prevent negative balances (refunds) on bills for lost/long overdue materials. Set to "true" to prohibit negative balances at all times or, when used in conjunction with an interval setting, to prohibit negative balances after an interval of time. | True/False                                                                                                                                                                                                                                             |
|                                                                                                                                                                                                                                                        | LSA                                                                                                                                                                                                                                                    |
| Prohibit negative balance on bills for overdue materials                                                                                                                                                                                               | Prevent negative balances (refunds) on bills for lost/long overdue materials. Set to "true" to prohibit negative balances at all times or, when used in conjunction with an interval setting, to prohibit negative balances after an interval of time. |
| True/False                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                        |
| LSA                                                                                                                                                                                                                                                    | Void Overdue Fines When Items are Marked Long-Overdue                                                                                                                                                                                                  |
| If true overdue fines are voided when an item is marked Long-Overdue                                                                                                                                                                                   | True/False                                                                                                                                                                                                                                             |
| Not in use                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                        |
| Void overdue fines when items are marked lost                                                                                                                                                                                                          | If true overdue fines are voided when an item is marked lost                                                                                                                                                                                           |
| True/False                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                        |
| LSA                                                                                                                                                                                                                                                    | =====                                                                                                                                                                                                                                                  |
|                                                                                                                                                                                                                                                        | .GUI: Graphic User Interface                                                                                                                                                                                                                           |
|                                                                                                                                                                                                                                                        | [options="header"]                                                                                                                                                                                                                                     |
| =====                                                                                                                                                                                                                                                  | Setting                                                                                                                                                                                                                                                |
| Description                                                                                                                                                                                                                                            | Data type                                                                                                                                                                                                                                              |
| Notes                                                                                                                                                                                                                                                  | Edited by                                                                                                                                                                                                                                              |
| Alert on empty bib records                                                                                                                                                                                                                             | Alert staff when the last copy for a record is being deleted.                                                                                                                                                                                          |
| True/False                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                        |
| LSA                                                                                                                                                                                                                                                    | Button bar                                                                                                                                                                                                                                             |
| If TRUE, the staff client button bar appears by default on all workstations registered to your library; staff can override this setting at each login.                                                                                                 | True/False                                                                                                                                                                                                                                             |
| Not in use anymore                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                        |
| Cap results in Patron Search at this number.                                                                                                                                                                                                           | The maximum number of results returned per search. If 100 is set up here, any search will return 100 records at most.                                                                                                                                  |
| Number                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                        |

| Tag                                                                                                                                                                                                                          | Notes                                                                                                                    |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|
| 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                                                                                                           |
|                                                                                                                                                                                                                              | 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                                                                                                                      |
| 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. |

| Tag                                                                                                                                                                                                                                                                                                                                                   | Notes                                                                                                                                                                                                                 |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Text                                                                                                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                       |
| LSA                                                                                                                                                                                                                                                                                                                                                   | Example for Postal Code field on patron registration                                                                                                                                                                  |
| The example on validation on the Postal Code field in patron registration.                                                                                                                                                                                                                                                                            | Text                                                                                                                                                                                                                  |
|                                                                                                                                                                                                                                                                                                                                                       | LSA                                                                                                                                                                                                                   |
| Format Date+Time with this pattern                                                                                                                                                                                                                                                                                                                    |                                                                                                                                                                                                                       |
| Text                                                                                                                                                                                                                                                                                                                                                  | Default: yyyy-MM-dd HH:mm                                                                                                                                                                                             |
| Sitka                                                                                                                                                                                                                                                                                                                                                 | Format Dates with this pattern                                                                                                                                                                                        |
|                                                                                                                                                                                                                                                                                                                                                       | Text                                                                                                                                                                                                                  |
| Default: yyyy-MM-dd                                                                                                                                                                                                                                                                                                                                   | Sitka                                                                                                                                                                                                                 |
| GUI: Hide these fields within the Item Attribute Editor.                                                                                                                                                                                                                                                                                              | Sets which fields in the Item Attribute Editor to hide in the staff client.                                                                                                                                           |
| Text                                                                                                                                                                                                                                                                                                                                                  | This is useful to hide attributes that are not used.                                                                                                                                                                  |
| LSA                                                                                                                                                                                                                                                                                                                                                   | Horizontal layout for Volume/Copy Creator/Editor.                                                                                                                                                                     |
| The main entry point for this interface is in Holdings Maintenance, Actions for Selected Rows, Edit Item Attributes / Call Numbers / Replace Barcodes. This setting changes the top and bottom panes (if FALSE) for that interface into left and right panes (if TRUE).                                                                               | True/False                                                                                                                                                                                                            |
| Not in use anymore                                                                                                                                                                                                                                                                                                                                    | LSA                                                                                                                                                                                                                   |
| Idle timeout                                                                                                                                                                                                                                                                                                                                          | If you want staff client windows to be minimized after a certain amount of system idle time, set this to the number of seconds of idle time that you want to allow before minimizing (requires staff client restart). |
| Number                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                       |
| LSA                                                                                                                                                                                                                                                                                                                                                   | Items Out Claims Returned display setting                                                                                                                                                                             |
| Value is a numeric code, describing which list the circulation should appear while checked out and whether the circulation should continue to appear in the special list, when checked in with outstanding fines. 1 = regular list, special list. 2 = special list, special list. 5 = regular list, do not display. 6 = special list, do not display. | Number                                                                                                                                                                                                                |
|                                                                                                                                                                                                                                                                                                                                                       | LSA                                                                                                                                                                                                                   |
| Items Out Long-Overdue display setting                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                       |
| Number                                                                                                                                                                                                                                                                                                                                                | Not in use                                                                                                                                                                                                            |
| LSA                                                                                                                                                                                                                                                                                                                                                   | Items Out Lost display setting                                                                                                                                                                                        |

| Tag                                                                                                                                                                                                                                                                                                                                                   | Notes                                                                                                       |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|
| Value is a numeric code, describing which list the circulation should appear while checked out and whether the circulation should continue to appear in the special list, when checked in with outstanding fines. 1 = regular list, special list. 2 = special list, special list. 5 = regular list, do not display. 6 = special list, do not display. | Number                                                                                                      |
|                                                                                                                                                                                                                                                                                                                                                       | LSA                                                                                                         |
| Max user activity entries to retrieve (staff client)                                                                                                                                                                                                                                                                                                  | Sets the maximum number of recent user activity entries to retrieve for display in the staff client.        |
| Number                                                                                                                                                                                                                                                                                                                                                |                                                                                                             |
| LSA                                                                                                                                                                                                                                                                                                                                                   | Maximum payment amount allow                                                                                |
| The payment amount in the Patron Bills interface may not exceed the value of this setting.                                                                                                                                                                                                                                                            | Number                                                                                                      |
| Default: 1000                                                                                                                                                                                                                                                                                                                                         | LSA                                                                                                         |
| Maximum previous checkouts displayed                                                                                                                                                                                                                                                                                                                  | The maximum number of previous circulations the staff client will display when investigating item details   |
| Number                                                                                                                                                                                                                                                                                                                                                |                                                                                                             |
| LSA                                                                                                                                                                                                                                                                                                                                                   | Patron circulation summary is horizontal                                                                    |
|                                                                                                                                                                                                                                                                                                                                                       | True/False                                                                                                  |
| Not in use anymore                                                                                                                                                                                                                                                                                                                                    | LSA                                                                                                         |
| Payment amount threshold for Are You Sure? dialog                                                                                                                                                                                                                                                                                                     | In the Patron Bills interface, a payment attempt will warn if the amount exceeds the value of this setting. |
| Number                                                                                                                                                                                                                                                                                                                                                | Default: 1000                                                                                               |
| LSA                                                                                                                                                                                                                                                                                                                                                   | Record in-house use: # of uses threshold for Are You Sure? dialog.                                          |
| In the Record In-House Use interface, a submission attempt will warn if the # of uses field exceeds the value of this setting.                                                                                                                                                                                                                        | Number                                                                                                      |
|                                                                                                                                                                                                                                                                                                                                                       | LSA                                                                                                         |
| Record In-House Use: Maximum # of uses allowed per entry.                                                                                                                                                                                                                                                                                             | The # of uses entry in the Record In-House Use interface may not exceed the value of this setting.          |
| Number                                                                                                                                                                                                                                                                                                                                                |                                                                                                             |
| LSA                                                                                                                                                                                                                                                                                                                                                   | Regex for barcodes on patron registration                                                                   |
| The Regular Expression for validation on barcodes in patron registration.                                                                                                                                                                                                                                                                             | Regular Expression                                                                                          |
|                                                                                                                                                                                                                                                                                                                                                       | LSA                                                                                                         |

| Tag                                                                                        | Notes                                                                                                                                                                                                                                                                                             |
|--------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Regex for Day_phone field on patron registration                                           | The Regular Expression for validation on the Day_phone field in patron registration. Note: The first capture group will be used for the "last 4 digits of phone number" as patron password feature, if enabled. Ex: "[2-9]\d{2}-\d{3}-(\d{4})(x\d+)?" will ignore the extension on a NANP number. |
| Regular expression                                                                         |                                                                                                                                                                                                                                                                                                   |
| LSA                                                                                        | Regex for Email field on patron registration                                                                                                                                                                                                                                                      |
| The Regular Expression on validation on the Email field in patron registration.            | Regular expression                                                                                                                                                                                                                                                                                |
|                                                                                            | LSA                                                                                                                                                                                                                                                                                               |
| Regex for Evening-phone on patron registration                                             | The Regular Expression on validation on the Evening-phone field in patron registration.                                                                                                                                                                                                           |
| Regular expression                                                                         |                                                                                                                                                                                                                                                                                                   |
| LSA                                                                                        | Regex for Other-phone on patron registration                                                                                                                                                                                                                                                      |
| The Regular Expression on validation on the Other-phone field in patron registration.      | Regular expression                                                                                                                                                                                                                                                                                |
|                                                                                            | LSA                                                                                                                                                                                                                                                                                               |
| Regex for phone fields on patron registration                                              | The Regular Expression on validation on phone fields in patron registration. Applies to all phone fields without their own setting.                                                                                                                                                               |
| Regular expression                                                                         |                                                                                                                                                                                                                                                                                                   |
| LSA                                                                                        | Regex for Postal Code field on patron registration                                                                                                                                                                                                                                                |
| The Regular Expression on validation on the Postal Code field in patron registration.      | Regular expression                                                                                                                                                                                                                                                                                |
|                                                                                            | LSA                                                                                                                                                                                                                                                                                               |
| Require at least one address for Patron Registration                                       | Enforces a requirement for having at least one address for a patron during registration. If set to False, you need to delete the empty address before saving the record. If set to True, deletion is not allowed.                                                                                 |
| True/False                                                                                 |                                                                                                                                                                                                                                                                                                   |
| LSA                                                                                        | Require XXXXX field on patron registration                                                                                                                                                                                                                                                        |
| The XXXXX field will be required on the patron registration screen.                        | True/False                                                                                                                                                                                                                                                                                        |
| XXXXX can be Country, State, Day-phone, Evening-phone, Other-phone, DOB, Email, or Prefix. | LSA                                                                                                                                                                                                                                                                                               |
| Require staff initials for entry/edit of patron standing penalties and messages.           | Appends staff initials and edit date into patron standing penalties and messages.                                                                                                                                                                                                                 |

| Tag                                                                                                                                                                                                 | Notes                                                                                                                                                                                           |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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                                                                                                                                                                                                 | 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                                                                                                                                                                                      |
| Not in use anymore                                                                                                                                                                                  |                                                                                                                                                                                                 |

| Tag                                                                                                                                                                                                                                             | Notes                                                                                                                                        |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| Work Log: maximum actions logged                                                                                                                                                                                                                | Maximum entries for "Most Recent Staff Actions" section of the Work Log interface.                                                           |
| Number                                                                                                                                                                                                                                          |                                                                                                                                              |
| LSA                                                                                                                                                                                                                                             | Work Log: maximum patrons logged                                                                                                             |
| Maximum entries for "Most Recently Affected Patrons..." section of the Work Log interface.                                                                                                                                                      | Number                                                                                                                                       |
|                                                                                                                                                                                                                                                 | LSA                                                                                                                                          |
| =====                                                                                                                                                                                                                                           | =====                                                                                                                                        |
| .Global [options="header"]                                                                                                                                                                                                                      |                                                                                                                                              |
| 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.                                                                                                                                                                                     | 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                                                                                                                                        |
| Patron username format                                                                                                                                                                                                                          | Regular expression defining the patron username format, used for patron registration and self-service username changing only                 |
| Regular expression                                                                                                                                                                                                                              |                                                                                                                                              |
| Sitka                                                                                                                                                                                                                                           | =====                                                                                                                                        |
|                                                                                                                                                                                                                                                 | .Holds [options="header"]                                                                                                                    |

| Tag                                                                                                                                                                                                                                                                      | Notes                                                                                                                                                                                                                                               |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| =====                                                                                                                                                                                                                                                                    | 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                                                                                                                                                                                                                                                 |
| 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                                                                                                                                                                                                                                            |



| Tag                                                                                                                                           | Notes                                                                                                                                                          |
|-----------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                                                                               | LSA                                                                                                                                                            |
| Expire alert interval                                                                                                                         | Time before a hold expires at which to send an email notifying the patron                                                                                      |
| Duration                                                                                                                                      | Not in use                                                                                                                                                     |
| Sitka                                                                                                                                         | 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                                                                                                                                                          |
| 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                                                                                                                                                          |

| Tag                                                                                                                                              | Notes                                                                                                                                                                       |
|--------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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                                                                                                                                                                       |
| Reset request time on un-cancel                                                                                                                  | When a hold is uncanceled, 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                                                                                                                                                                       |
| =====                                                                                                                                            | =====                                                                                                                                                                       |
| .Library [options="header"]                                                                                                                      |                                                                                                                                                                             |
| 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                                                                                                                                                                    |

| Tag                                                                                                                                                             | Notes                                                                                                                                                              |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| The default is at midnight each night for items with "Reshelving" status for over 24 hours.                                                                     | LSA                                                                                                                                                                |
| 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                                                                                                                                                              |
| Mark item damaged voids overdues                                                                                                                                | When an item is marked damaged, overdue fines on the most recent circulation are voided.                                                                           |
| True/False                                                                                                                                                      |                                                                                                                                                                    |
| LSA                                                                                                                                                             | Pre-cat item circ lib                                                                                                                                              |
| Override the default circ lib of "here" with a pre-configured circ lib for pre-cat items. The value should be the "shortname" (aka policy name) of the org unit | Text                                                                                                                                                               |
|                                                                                                                                                                 | LSA                                                                                                                                                                |
| Telephony: Arbitrary line(s) to include in each notice callfile                                                                                                 | This overrides lines from opensrf.xml. Line(s) must be valid for your target server and platform (e.g. Asterisk 1.4).                                              |
| Text                                                                                                                                                            | Not in use                                                                                                                                                         |
| Sitka                                                                                                                                                           | Use external "library information URL" in copy table, if available                                                                                                 |

| Tag                                                                                                                                                                                                                                            | Notes                                                                                                                    |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|
| 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                                                                                                                      |
| =====                                                                                                                                                                                                                                          | =====                                                                                                                    |
| .OPAC [options="header"]                                                                                                                                                                                                                       |                                                                                                                          |
| 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                                                                                                                                                                                                                                            | 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                                                                                                                    |
| 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)                                                                                  |

| Tag                                                                                                                                                                                                                                                                                                   | Notes                                                                                                                                                       |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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                                                                                                                                                                                                                                                                                                  |                                                                                                                                                             |
| Sitka                                                                                                                                                                                                                                                                                                 | 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                                                                                                                                                                                                                                                                                                 | Org unit hiding depth                                                                                                                                       |

| Tag                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Notes                                                                                                                                                                                                                                                                                                                    |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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                                                                                                                                                                                                                                                                                                                    |
| 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                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                          |
| 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                                                                                                                                                                                                                                                                                            |

| Tag                                                                                                                                                                                                                                                                      | Notes                                                                                                                                                                                                                |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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 <i>desc</i> . To sort from oldest to newest by active date use <i>asc</i> . To sort by call number use <i>call</i> . | 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                                                                                                                                                                                                                |
| Uses phone as default pin                                                                                                                                                                                                                                                |                                                                                                                                                                                                                      |
| True/False                                                                                                                                                                                                                                                               | Not in use                                                                                                                                                                                                           |
|                                                                                                                                                                                                                                                                          | 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                                                                                                                                                                                                                |
| ====                                                                                                                                                                                                                                                                     | =====                                                                                                                                                                                                                |
| .Offline and Program [options="header"]                                                                                                                                                                                                                                  |                                                                                                                                                                                                                      |
| 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                                                                                                                                                                                                                  |
| 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                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                      |

| Tag                                                                                                                                                                                                                    | Notes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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.<br>WARNING: The Reshelving to Available status rollover will trigger this. | True/False                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|                                                                                                                                                                                                                        | LSA                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 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                                                                                                                                                                                                                    | 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 overdue, email holds notification). It is good practice to set up a generic account, like <a href="mailto:info@nameofyourlibrary.org">info@nameofyourlibrary.org</a> , so that one person's individual email inbox doesn't get cluttered with emails that were not delivered.                                                                                                                                                                                                                                                                                                                                               |
| Text                                                                                                                                                                                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| LSA                                                                                                                                                                                                                    | =====                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|                                                                                                                                                                                                                        | .Receipt Templates and SMS Text Message [options="header"]                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| =====                                                                                                                                                                                                                  | 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)%                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |



| Tag                                                                                           | Notes                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|-----------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Text                                                                                          | Not in use anymore                                                                                                                                                                                                                                                                                                                                                                                                                               |
|                                                                                               | 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                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 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                                                                                           | =====                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|                                                                                               | .Security [options="header"]                                                                                                                                                                                                                                                                                                                                                                                                                     |
| =====                                                                                         | Setting                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Description                                                                                   | Data type                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Notes                                                                                         | Edited by                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Default level of patrons' internet access                                                     | Enter numbers 1 (Filtered), 2 (Unfiltered), or 3 (No Access)                                                                                                                                                                                                                                                                                                                                                                                     |
| Number                                                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                  |

| Tag                                                                                                                                                                      | Notes                                                                                                                                                                                                                                                                       |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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                                                                                                                                                                                                                                                                       |
| 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                                                                                                                                                                      | 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                                                                                                                                                                                                                                                                       |

| Tag                                                                                         | Notes                                                                                                        |
|---------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|
| 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                                                                                                        |
| Staff login inactivity timeout (in seconds)                                                 | Number of seconds of inactivity before staff client prompts for login and password.                          |
| Number                                                                                      |                                                                                                              |
| LSA                                                                                         | =====                                                                                                        |
|                                                                                             | .Self Check and Others [options="header"]                                                                    |
| =====                                                                                       | 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                                                                                                          |
| Pop-up alert for errors                                                                     | If true, checkout/renewal errors will cause a pop-up window in addition to the on-screen message.            |

| Tag                                                                                                                                            | Notes                                                                                                                                                    |
|------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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 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                                                                                                                                          | 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                                                                                                                                          | Circ: default precat circ modifier                                                                                                                       |
|                                                                                                                                                | Selection List                                                                                                                                           |
|                                                                                                                                                | LSA                                                                                                                                                      |
| Claim Return: Mark copy as missing                                                                                                             |                                                                                                                                                          |
| True/False                                                                                                                                     | Default: False                                                                                                                                           |

| Tag                                                                                                                                                                            | Notes                                                                                                                                             |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|
| 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                                                                                                                                               |
| 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                                                                                                                                                                            | circ.renew.check_penalty                                                                                                                          |
|                                                                                                                                                                                | True/False                                                                                                                                        |
|                                                                                                                                                                                | Sitka                                                                                                                                             |
| global.credit.allow                                                                                                                                                            |                                                                                                                                                   |
| True/False                                                                                                                                                                     | Not in use                                                                                                                                        |

| Tag                                                                 | Notes                                                                       |
|---------------------------------------------------------------------|-----------------------------------------------------------------------------|
| 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                                                                 | =====                                                                       |
|                                                                     | .Vandelay [options="header"]                                                |
| =====                                                               | 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.                                      |

| Tag | Notes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-----|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| LSA | <p>=====</p> <p>Non-catalogued Type Editor ~~~~~~</p> <p>This is where you configure your non-catalogued and/or in-house types that appear in the dropdown menu for non-catalogued circulations/in-house use.</p> <p>Go to <b>Administration</b> → <b>Local Administration</b> → <b>Non-catalogued Type Editor</b>. To create a new non-catalogued circulation, type in a name, a loan period, click <b>Create</b>. Select the <b>Circulate In-House</b> box for non-catalogued items that will circulate in house. This can be used to manually track computer use, or meeting room rentals, etc.</p> <p>image::images/admin/non-cat-1.png[]</p> <p>This is what the dropdown menu for non-catalogued circulations in the patron checkout screen looks like:</p> <p>image::images/admin/non-cat-2.png[]</p> <p>Statistical Category Editor ~~~~~~</p> <p>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.</p> <p>. Select Administration → Local Administration → Statistical Categories Editor.</p> <p>. To create a new stat cat, enter the name of the stat cat and select <b>Copy</b> or <b>Patron</b> in the dropdown menu. Check the respective <b>On</b> or <b>Off</b> radio buttons beside each option. And then click <b>Create new statistical category.</b> + <b>OPAC</b></p> |

| Tag                                                                                                                          | Notes            |
|------------------------------------------------------------------------------------------------------------------------------|------------------|
| =====                                                                                                                        | Copy Status      |
| Definition                                                                                                                   | Holdable         |
| OPAC Viewable                                                                                                                | Sets copy active |
| Is Available?                                                                                                                | Available        |
| Item is on the shelf                                                                                                         | Yes              |
| Yes                                                                                                                          | Yes              |
| Yes                                                                                                                          | Bindery          |
| Sent to be rebound                                                                                                           | No               |
| Yes                                                                                                                          | No               |
| No                                                                                                                           | Canceled Transit |
| A transit for the item was aborted                                                                                           | Yes              |
| Yes                                                                                                                          | No               |
| No                                                                                                                           | Cataloguing      |
| Item is being catalogued or in cataloguing department                                                                        | Yes              |
| Yes                                                                                                                          | Yes              |
| No                                                                                                                           | Checked out      |
| Item is on loan                                                                                                              | Yes              |
| Yes                                                                                                                          | Yes              |
| No                                                                                                                           | Claimed Returned |
| Patron reports item has been returned.<br>(Libraries develop own procedure for deciding when to make an item Claimed Return) | No               |
| Yes                                                                                                                          | Yes              |
| No                                                                                                                           | Cleaning         |
| Item is being cleaned (ie. DVDs and CDs)                                                                                     | Yes              |
| Yes                                                                                                                          | Yes              |
| No                                                                                                                           | Damaged          |
| Damaged and may not circulate again                                                                                          | No               |
| Yes                                                                                                                          | Yes              |
| No                                                                                                                           | Discard/Weed     |
| Item is no longer in collection, it has been weeded or discarded                                                             | No               |
| No                                                                                                                           | Yes              |
| No                                                                                                                           | ILL              |
| Not currently used in Sitka.                                                                                                 | No               |
| No                                                                                                                           | Yes              |



| Tag                                                                                        | Notes                |
|--------------------------------------------------------------------------------------------|----------------------|
| No                                                                                         | In process           |
| Item is being processed and will soon be available                                         | Yes                  |
| Yes                                                                                        | No                   |
| No                                                                                         | In transit           |
| Item is travelling between libraries and remains in the In Transit status until checked in | Yes                  |
| Yes                                                                                        | Yes                  |
| No                                                                                         | Long Overdue         |
| Not currently used in Sitka.                                                               | No                   |
| No                                                                                         | No                   |
| No                                                                                         | Lost                 |
| Declared lost by patron or library (either manually or automatically)                      | No                   |
| Yes                                                                                        | Yes                  |
| No                                                                                         | Lost and Paid        |
| Item was declared lost by patron or staff and has now been paid for.                       | No                   |
| Yes                                                                                        | Yes                  |
| No                                                                                         | Mending              |
| Item is being repaired                                                                     | Yes                  |
| Yes                                                                                        | Yes                  |
| No                                                                                         | Missing              |
| Item cannot be found                                                                       | No                   |
| Yes                                                                                        | Yes                  |
| No                                                                                         | On display           |
| Item is on display and is not in its usual shelving location                               | Yes                  |
| Yes                                                                                        | Yes                  |
| Yes                                                                                        | On holds shelf       |
| Item is awaiting pick-up by patron. Item is usually on a "holds shelf" within the library  | Yes                  |
| Yes                                                                                        | Yes                  |
| No                                                                                         | On order             |
| Item has been ordered but not yet received from a vendor                                   | Yes                  |
| Yes                                                                                        | No                   |
| No                                                                                         | On reservation shelf |

| Tag                                                                                                                                      | Notes                   |
|------------------------------------------------------------------------------------------------------------------------------------------|-------------------------|
| 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                                                                                                                                       | 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                                                                                                                                      | Reserves                |
| In reserves collection                                                                                                                   | No                      |
| Yes                                                                                                                                      | Yes                     |
| Yes                                                                                                                                      | Reshelving              |
| Item has been returned but not yet shelved. Status automatically changes to Available after 24 hours                                     | Yes                     |
| Yes                                                                                                                                      | Yes                     |
| Yes                                                                                                                                      | Storage                 |
| On-site or off-site storage                                                                                                              | Yes                     |
| Yes                                                                                                                                      | Yes                     |
| No                                                                                                                                       | Temporarily Unavailable |
| Not available for patrons to borrow but will become available at a later date                                                            | No                      |
| No                                                                                                                                       | Yes                     |

| Tag | Notes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|-----|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| No  | <p>=====</p> <p>[TIP] =====</p> <p>. If the <b>Sets copy active</b> is set to NO, an item created with this status will not have the <b>Active Date</b> field filled. The date will be filled later when the item achieves a status with <b>Sets copy active</b> is set to YES.</p> <p>. If Is Available? is set to YES, items with that status will appear in search results when the <b>Limit to Available</b> checkbox is checked and can be checked out without needing to be first checked in or have any prompts regarding unavailable status appearing. =====</p> <p>Hard Due Date ~~~~~~</p> <p>One or more hard due date(s) can be set up for a library to force the circulation due on selected date(s). The hard due date is used in the circulation policy based on patron profile and/or item circulation modifier. It may be used to extend or shorten the regular loan duration. For example, it may be used to grant faculty members term loan by an Always Use? TRUE hard due date, or to force all students to return their items by the end of the term by an Always Use? FALSE hard due date, which takes effect when the regular due date falls after the hard due date. Please contact SCo-op support if you wish to use hard due date.</p> <p>Floating Group ~~~~~~</p> <p>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 partial of your items float within selected libraries/branches.</p> <p>Evergreen Self Check Administrative Set-up<br/>-----</p> <p>. 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</p> |

| Tag                             | Notes                                                                         |
|---------------------------------|-------------------------------------------------------------------------------|
| =====                           | 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                                    |

| Tag                                                                                                                           | Notes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|-------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Merge the accounts. Choose the card number that you want to keep as the lead record. See <a href="#">Merge Patrons</a></p> | <p>====</p> <p>Deleting Inactive Cards <small>*****</small></p> <p>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. Patrons cannot check out items or log into the OPAC with an inactive card, but the lost cards can be used to retrieve active patron data in the staff client. Whether a library routinely deletes inactive cards is a matter of local policy.</p> <p>Deleting Patron Accounts <small>*****</small></p> <p>Staff Accounts -----</p> <p>Staff accounts are special patron accounts on Evergreen which have been granted more permissions to allow the owners to log into the Staff Client. Besides extra permissions, each staff account has its own working location. Many functions on the staff client are available to the account at the assigned working locations only.</p> <p>There are three ways staff accounts can be set up and used in the system.</p> <p><b>Staff and Patron Accounts</b></p> <p>Accounts are created for staff members and given the appropriate Library Staff permission group and working location. Staff use the account for borrowing as well as to login into the staff client and perform their work.</p> <p><b>Staff Specific Accounts</b></p> <p>Accounts are created for staff members and given the appropriate Library Staff permission group and working location. These accounts often have something like LOGIN or STAFF as part of the name and may use a barcode such as SITKASTAFF rather than an actual barcode. Staff use the accounts only for logging into the staff client for work. Staff have a separate patron account for borrowing.</p> <p><b>Generic Accounts</b></p> |

| Tag                                            | Notes                            |
|------------------------------------------------|----------------------------------|
| =====                                          | 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               |
| *                                              | *                                |
| *                                              |                                  |
| *                                              |                                  |
| MaxRenewalReached override                     |                                  |
| *                                              | *                                |
| *                                              | *                                |
| *                                              | Basic patron record              |
| *                                              | *                                |
| *                                              | *                                |
| *                                              | *                                |
| Bar patrons                                    | *                                |
| *                                              | *                                |
| *                                              |                                  |
| *                                              | Unbar patrons                    |
|                                                | *                                |
| *                                              | *                                |
|                                                | *                                |
| Merge/delete patrons                           |                                  |
|                                                |                                  |
|                                                |                                  |
| *                                              | Patron restriction overrides     |
|                                                | *                                |

| Tag                                | Notes                        |
|------------------------------------|------------------------------|
| *                                  | *                            |
|                                    | *                            |
| Bills and payments                 | *                            |
| *                                  | *                            |
| *                                  |                              |
| *                                  | Holds                        |
| *                                  | *                            |
| *                                  | *                            |
| *                                  | *                            |
| Copy/volume records                |                              |
|                                    | *                            |
| *                                  | *                            |
| *                                  | Bib records                  |
|                                    |                              |
|                                    | *                            |
| *                                  | *                            |
| Buckets                            | *                            |
| *                                  | *                            |
| *                                  | *                            |
| *                                  | View report output           |
| *                                  | *                            |
| *                                  | *                            |
| *                                  | *                            |
| Create/upload offline transactions | *                            |
| *                                  | *                            |
| *                                  | *                            |
| *                                  | Process offline transactions |
|                                    |                              |
|                                    | *                            |
| Transit                            | *                            |
| *                                  | *                            |
| *                                  | *                            |
| *                                  | Abort remote transit         |
|                                    |                              |
| *                                  | *                            |
| *                                  | *                            |