

KCLS Enhancements for Evergreen

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**Draft - Final version and additional information will be posted
online at RSCEL.org and [http://evergreen-
ils.org/dokuwiki/doku.php?id=advocacy:presentations](http://evergreen-ils.org/dokuwiki/doku.php?id=advocacy:presentations)*



KCLS Evergreen Timeline

*content will be added and posted with final version available online



Patron Registration

Our goal was to streamline the process for registering a patron by

- Creating a single tab thru form
- Add field specific help files
- Providing the ability to auto fill City/State based on ZIP code
- Alerts and UI for pending addresses



This version of patron registration is all on 1 screen

1: admin@BR1-berick.dev198.esllibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking Admin

Check Out Check In Item Status Patron Search Patron Registration

1 Register Patron 2 Server Settings

Repat [Search] [Print Page]

Barcode [Text Box]
OPAC/Staff Client User Name [Text Box]
Password 5174 [Text Box]
Verify Password 5174 [Text Box]
First Name [Text Box]
Last Name [Text Box]
Primary Identification Type [Dropdown]
Primary Identification [Text Box]
Home Library [Dropdown]
Main (Profile) Permission Group [Dropdown]
Privilege Expiration Date [Text Box]
Internet Access Level Filtered [Dropdown]

User Settings

Hold is behind Circ Desk

Address Mailing Billing [Close]

Type [Text Box]
Postal Code [Text Box]
Street (1) [Text Box]
Street (2) [Text Box]
City [Text Box]
County [Text Box]
State [Text Box]
Country [Text Box]
Valid Address?
Within City Limits?

New Address

Save Save & Clone Show All Fields



You can limit the fields to those defined as required or select “Show All Fields”

The screenshot shows a web-based interface for managing library patrons. The browser address bar indicates the URL is `1: admin@BR1-berick.dev198.esllibrary.com`. The interface includes a navigation menu with options like 'Check Out', 'Check In', 'Item Status', 'Patron Search', and 'Patron Registration'. The main content area is titled 'Register Patron' and contains a form with various fields for user information, including 'Barcode', 'OPAC/Staff Client User Name', 'Password', 'Verify Password', 'First Name', 'Last Name', 'Primary Identification Type', 'Primary Identification', 'Home Library', 'Main (Profile) Permission Group', 'Privilege Expiration Date', and 'Internet Access Level'. Below these fields are sections for 'User Settings' (with a checkbox for 'Hold is behind Circ Desk') and 'Address' (with fields for 'Type', 'Postal Code', 'Street (1)', 'Street (2)', 'City', 'County', 'State', 'Country', 'Valid Address?', and 'Within City Limits?'). A 'New Address' button is located at the bottom of the address section. On the right side of the form, there is a button group containing 'Save', 'Save & Clone', and 'Show All Fields'. This button group is circled in red, indicating the focus of the text above.



You can also define local help files that staff can access by selecting the magnifying glass icon

The screenshot shows a web-based interface for managing library users. The browser address bar indicates the URL is `1: admin@LIB1-berkeley-dev198.esliblibrary.com`. The interface includes a menu bar with options like 'File', 'Edit', 'Search', 'Checkout', 'Cataloging', 'Acquisitions', and 'Billing'. Below the menu is a toolbar with icons for 'Check Out', 'Check In', 'Item Status', 'Patron Search', and 'Patron Registration'. The main content area is titled 'Register Patron' and contains a form with various fields. A red circle highlights a magnifying glass icon next to the 'OPAC/Staff Client Holds Alias' field. Other fields include Barcode, OPAC/Staff Client User Name, Password (with value 5678), Verify Password (with value 5678), First Name, Middle Name, Last Name, Title, Date of Birth, Juvenile (checkbox), Primary Identification Type, Primary Identification, Email Address, Daytime Phone, Evening Phone, Other Phone, Home Library, Main (Picture) Permission Group, Privilege Expiration Date, Internet Access Level (set to Friend), Active (checkbox checked), Banned (checkbox), Is Group Lead Account (checkbox), Claims-returned Count, Claims Never Checked Out Count, and Alert Message. On the right side, there are buttons for 'Save' and 'Save & Clone', a link for 'Show Only Required Fields', and a section for 'OPAC/Staff Client Holds Alias' with the text 'Alias. Will appear on holds slip'. At the bottom, there is a 'User Settings' section with a checkbox for 'Hide is behind Circ Desk'.



That will display on the right-hand side of the screen

The screenshot shows a web browser window with the URL `1: admin@IR1-berlek.dev198.esilibrary.com`. The browser's menu bar includes `File`, `Edit`, `Search`, `Checkout`, `Cataloging`, `Acquisitions`, and `Booking`. Below the menu bar are several icons for `Check Out`, `Check In`, `Item Status`, `Patron Search`, and `Patron Registration`. The main content area is titled `Register Patron` and contains a form with the following fields:

- Barcode
- OPAC/Staff Client User Name
- Password: 6678
- Verify Password: 6678
- First Name
- Middle Name
- Last Name
- Suffix/Title
- OPAC/Staff Client Holds Alias (highlighted with a red circle)
- Date of Birth
- Juvenile:
- Primary Identification Type
- Primary Identification
- Email Address
- Daytime Phone
- Evening Phone
- Other Phone
- Home Library
- Main (Picture) Permission Group
- Privilege Expiration Date
- Internet Access Level: Friend
- Active:
- Banned:
- Is Group Lead Account:
- Claims-returned Count
- Claims Never Checked Out Count
- Alert Message

At the bottom of the form, there is a `User Settings` section with the field `Hide is behind Circ Desk` and a checkbox. On the right side of the form, there are `Save` and `Save & Clone` buttons, and a tooltip for the `OPAC/Staff Client Holds Alias` field that reads `Alias. Will appear on holds slip`.



Maximizing screen real estate and information access

1. admin@881-harick.dav198.willlibrary.com

File Edit Search Circulation Cataloging Applications Reporting

Check Out Check In Item Status Patron Search Patron Registration

1 Patron Search

No Patron Selected Single Patron Search Data Multiple Patrons

Search for Patron

Include inactive patrons? List results to patrons in: Everyone

Last Name: Smith Address 1: _____ Phone: _____ District: _____
First Name: _____ Address 2: _____ Email: _____ DRAC login: _____
Middle Name: _____ City: _____ State: _____ ID: _____
Alias: _____ ZIP: _____

Search

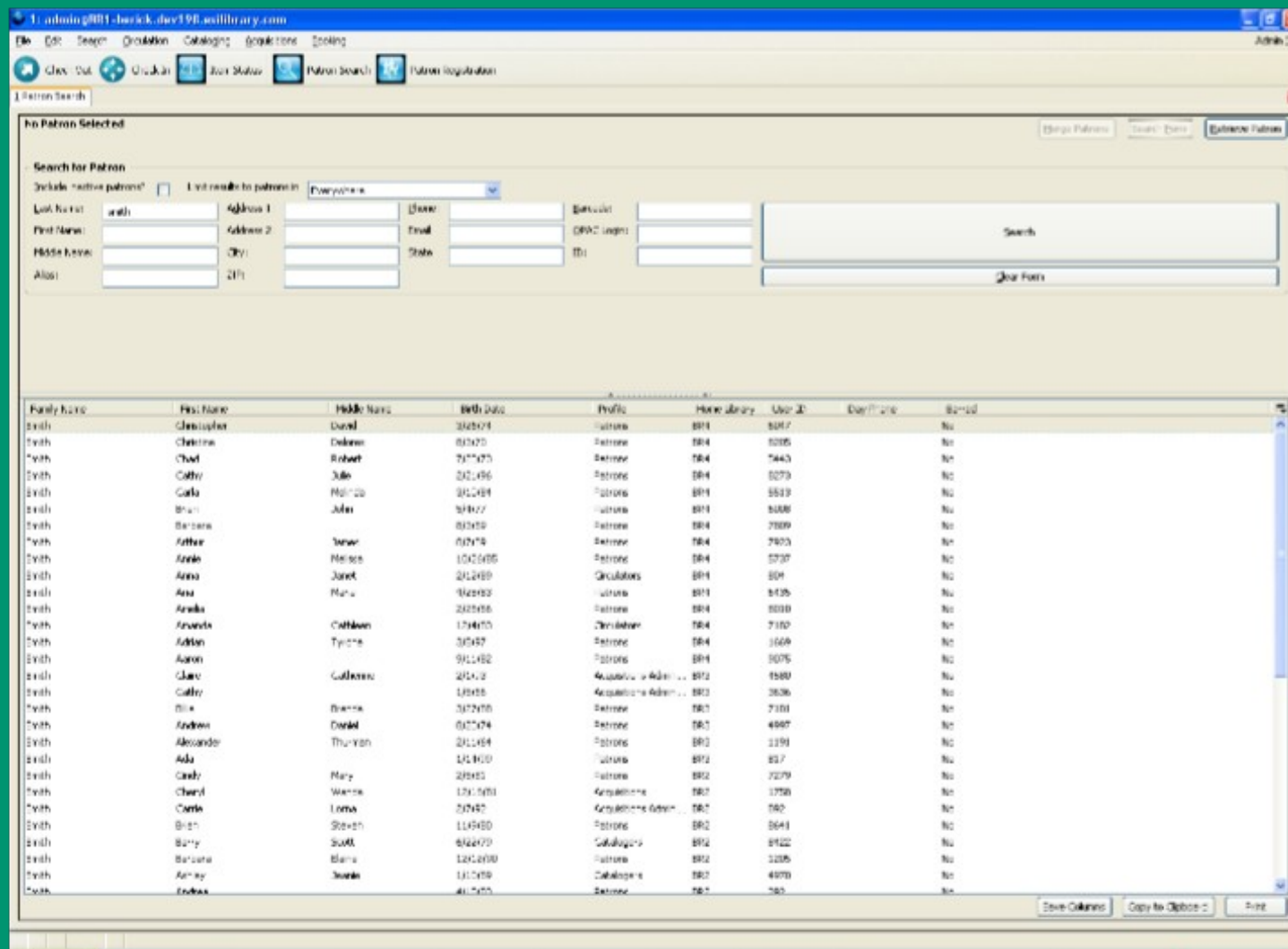
Clear Form

Family Name	First Name	Middle Name	Birth Date	Profile	Home library	User ID	Default	Sorted
Smith	Christopher	Daniel	200204	Patrons	881	5017		No
Smith	Christina	Debrae	01070	Patrons	884	5005		No
Smith	Clay	Robert	711105	Patrons	884	5443		No
Smith	Colby	Julie	011186	Patrons	884	5079		No
Smith	Carla	Marissa	010484	Patrons	881	5513		No
Smith	Shari	Julie	04027	Patrons	881	5008		No
Smith	Barbara		01059	Patrons	884	7889		No
Smith	Katherine	Terese	010718	Patrons	884	7903		No
Smith	Jessie	Melissa	100208	Patrons	884	5737		No
Smith	Anna	JaneK	211289	Circulation	881	501		No
Smith	Ava	Maru	04080	Patrons	881	5135		No
Smith	Arabella		200506	Patrons	884	5030		No
Smith	Arabella	CallieAnn	170405	Circulation	884	7100		No
Smith	Adrian	Tyrene	010487	Patrons	884	1669		No
Smith	Aaron		011182	Patrons	881	5075		No
Smith	Clare	CallieAnn	201112	Acquisitions Admin...	882	1580		No
Smith	Colby		10010	Acquisitions Admin...	882	3836		No
Smith	Mike	Branka	010205	Patrons	882	7101		No
Smith	Andrew	Daniel	010704	Patrons	882	4987		No
Smith	Alexander	Thurston	201184	Patrons	882	1191		No
Smith	Ada		101800	Patrons	882	517		No
Smith	Candy	Mary	20000	Patrons	882	7279		No
Smith	Cheryl	Wanda	101100	Circulation	882	1758		No
Smith	Carrie	Lorna	01040	Acquisitions Admin...	882	582		No
Smith	Brian	Steven	110400	Patrons	882	5641		No
Smith	Barry	Scott	010200	Circulation	882	0122		No
Smith	Barbara	Biana	120200	Patrons	882	1205		No
Smith	Aerly	Seana	110708	Circulation	882	4070		No
Smith	Ernest		01100	Patrons	882	782		No

Save Columns Copy to Clipboard Print



Maximum room for display of columns



The screenshot shows a web application interface for searching patrons. At the top, there is a navigation bar with links for Home, Search, Circulation, Cataloging, Applications, and Reporting. Below this is a toolbar with icons for Check Out, Check In, Item Status, Patron Search, and Patron Registration. The main content area is titled "Patron Search" and contains a search form with the following fields: Last Name, Address 1, City, State, ZIP, First Name, Address 2, Email, DRAC login, Middle Name, City, State, ID, and Alias. A "Search" button is located to the right of the form. Below the search form is a table of search results. The table has the following columns: Family Name, First Name, Middle Name, Birth Date, Profile, Home library, User ID, Date of Birth, and Status. The table contains 30 rows of data, each representing a patron record.

Family Name	First Name	Middle Name	Birth Date	Profile	Home library	User ID	Date of Birth	Status
Smith	Christopher	Daniel	200204	Patrons	BR1	5017		No
Smith	Christina	Debra	010720	Patrons	BR4	5005		No
Smith	Clay	Robert	711105	Patrons	BR4	5443		No
Smith	Colby	Julie	011186	Patrons	BR4	5079		No
Smith	Carla	Marissa	010484	Patrons	BR1	5513		No
Smith	Shari	Julie	090277	Patrons	BR1	5008		No
Smith	Barbara		010159	Patrons	BR4	7009		No
Smith	Kather	James	012178	Patrons	BR4	7903		No
Smith	Jessie	Melissa	1002005	Patrons	BR4	5737		No
Smith	Anna	Janet	211289	Circulation	BR1	501		No
Smith	Ann	Marci	040982	Patrons	BR1	5135		No
Smith	Annika		200505	Patrons	BR4	5030		No
Smith	Aravinda	Colleen	170405	Circulation	BR4	7100		No
Smith	Adrian	Tyrene	010487	Patrons	BR4	1069		No
Smith	Aaron		011182	Patrons	BR1	5075		No
Smith	Clare	Catherine	201112	Acquisitions Admin...	BR2	1500		No
Smith	Colby		100105	Acquisitions Admin...	BR2	3836		No
Smith	Mike	Branka	010205	Patrons	BR2	7101		No
Smith	Andrew	Daniel	010174	Patrons	BR2	4987		No
Smith	Alexander	Thurston	201184	Patrons	BR2	1191		No
Smith	Ada		101800	Patrons	BR2	517		No
Smith	Candy	Mary	200101	Patrons	BR2	7279		No
Smith	Cheryl	Wanda	170100	Circulation	BR2	1758		No
Smith	Carrie	Lorna	010487	Acquisitions Admin...	BR2	582		No
Smith	Brian	Steven	110400	Patrons	BR2	5641		No
Smith	Barry	Scott	010270	Circulation	BR2	0122		No
Smith	Barbara	Blaine	120200	Patrons	BR2	1205		No
Smith	Aerly	Seana	110109	Circulation	BR2	4070		No
Smith	Ernest		010105	Patrons	BR2	782		No



Improved presentation of patron data in summary display

The screenshot shows a web browser window with the URL `1: admin@BK1-berick.dev198.esilibrary.com`. The navigation menu includes `File`, `Edit`, `Search`, `Circulation`, `Cataloging`, `Acquisitions`, and `Booking`. Below the menu are icons for `Check Out`, `Check In`, `Item Status`, `Patron Search`, and `Patron Registration`. The `Patron Search` tab is active, displaying the name **Smith, Christopher David** in a green-bordered box. To the right of the name are buttons for `Merge Patrons`, `Search Form`, and `Retrieve P`. The main content area is divided into three sections: **Patron Info** (Smith, Christopher David; Date of Birth: 1974-03-26; Library Card: 317941; Holds Alias; OPAC Login: 317941; Email:), **Addresses** (9904 Available Lot Summit; Coggon IA 52218; Mailing Billing; [\(Copy\)](#)), and **Phone Numbers** (Day Phone:; Evening Phone:; Other Phone:). On the right, there are tabs for `Account Info`, `Identification`, `Group: 0.00`, and `Stat Cats`. The `Account Info` tab is selected, showing `Patrons` (BR4), `Internet Filtered`, and `Expires on 2012-01-01`.



Improved presentation of patron data in summary display

1: admin@BK1-berick.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking

Check Out Check In Item Status Patron Search Patron Registration

Patron Search

Smith, Christopher David

Merge Patron Search Form Retrieve Patron

Patron Info

Smith, Christopher David
Date of Birth: 1974-03-26
Library Card: 317941
Holds Alias:
OPAC Login: 317941
Email:

Addresses

9904 Available Lot Summit
Coggon IA 52218
 Mailing Billing

Phone Numbers

Day Phone:
Evening Phone:
Other Phone:

Account Info Identification Group: 0.00 Stat Cats

(Copy)

Patrons
BR4
Internet Filtered
Expires on 2012-01-01

More information available to staff at a glance and a mini tabbed browser for easy access to additional account details



Improved screen real estate and other patron account UI enhancements

The screenshot shows a web browser window with the URL `1: admin@ER1-berkck-dev198-esllibrary.com`. The page title is "Admin (U)". The navigation bar includes links for "Check Out", "Check In", "Item Status", "Patron Search", and "Patron Registration". The current page is "Patron Search" for "Patron: SMITH, Aaron".

The main content area displays the patron's name "Smith, Aaron" and a summary of their account: "Refresh", "Check Out", "Items Out" (2), "Holds" (0/2), "Bills" (\$ 9.00), "Edit", "Messages", and "Other".

The "Items Out" section contains a table with the following data:

Barcode	Checked out from Library	Circulation Library	Due Date	Fines Stopped	Remaining Reserves	Title
04050713337	BR1	ER1	2/4/10 11:09 PM	1		Clifford Brown : the life and art of the legendary jazz trumpeter
427407377058	BR1	ER1	2/11/10 11:59 PM	2		The arrangers' touch

Below the table are buttons for "Check Item-Cataloged Circulations in List Above", "Print Receipt", and "Export".

The "Lost, Claimed Returned, Long Overdue, Has Unpaid Billings" section contains a table with the following data:

Barcode	Check Date	Checked out from Library	Circulation Library	Fines Stopped	Title
---------	------------	--------------------------	---------------------	---------------	-------

Below the table are buttons for "Print Receipt" and "Export".



Group Options

The screenshot displays a web-based library management system interface. The browser address bar shows the URL: 1: admin@e11-berick.dev198.esllibrary.com. The navigation menu includes: File, Edit, Search, Patron Registration, Cataloging, Acquisitions, and Locking. The main navigation bar contains: Check Out, Check In, Item Status, Patron Search, and Patron Registration. The current page title is "Patron: Smith, Aaron".

The main content area is divided into several sections:

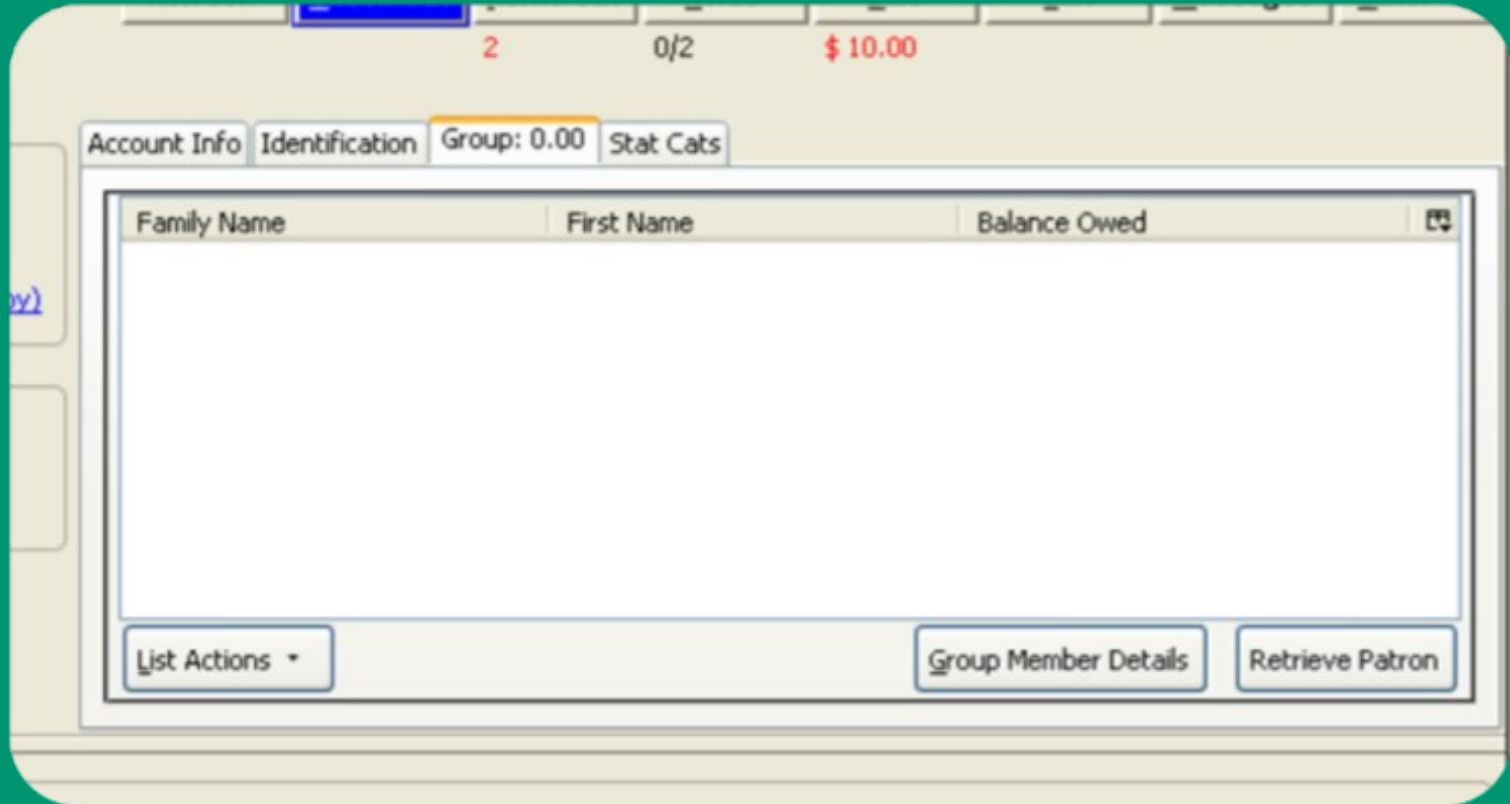
- Patron Info:** Displays "Smith, Aaron", Date of Birth: 1982-09-11, Library Card: 325224, Holds Alias, OPAC Login: 325224, and Email.
- Addresses:** Shows "323 Cheap Tape Valley, East springfield, PA 16111" with radio buttons for "Mailing" (selected) and "Billing". A "Copy" link is present.
- Phone Numbers:** Fields for Day Phone, Evening Phone, and Other Phone.
- Account Summary:** Shows "Refresh", "Check Out" (2), "Items Out" (62), "Holds" (0), "Bills" (\$10.00), "Edit", "Messages", and "Other".
- Group Members:** A table listing group members with columns: Active, Banned, Date of Birth, Last Name, First Name, Is Group Used Account, Middle Name, Balance Owed, Items Out, and Items Overdue. The table shows three members: Stinson, Clarence, and Smith, Aaron.

The "Group Members" table data is as follows:

Active	Banned	Date of Birth	Last Name	First Name	Is Group Used Account	Middle Name	Balance Owed	Items Out	Items Overdue
t	f	2/9/92 11:51 PM	Stinson	Pat	f		0.00	0	0
t	f	11/9/00 11:51 PM	Hill	Clarence	f	Reginald	0.00	0	0
t	f	9/10/82 11:53 PM	Smith	Aaron	f		10.00	0	2



Group Options



Brief display available in patron summary provides name and balance info with options to retrieve the record in another tab.



Group Options

Group Members

Total Owed: 10.00 Total Items Out: 0 Total Items Overdue: 0 Choose an Action...

Active	Barred	Date of Birth	Last Name	First Name	Is Group Lead Account	Middle Name	Balance Owed	Items Out	Items Overdue	
<input checked="" type="checkbox"/>	F	2/9/92 11:51 PM	Stinson	Pat	F			0	0	
<input type="checkbox"/>	F	11/9/88 11:51 PM	Hill	Clarence	F	Reginald		0	0	
<input type="checkbox"/>	F	9/10/82 11:53 PM	Smith	Aaron	F		10.00	0	2	

The full Group Members display provides more information on group members and management options for the group.



Streamlining of Bills interface UI

The screenshot displays a web-based interface for managing patron bills. The interface is organized into several key sections:

- Navigation and Search:** Includes a search bar at the top left and a menu with options like 'Check Out', 'Check In', 'Patron Search', and 'Patron Registration'.
- Patron Information:** Shows the name 'Smith, Aaron' and a 'Patron Search' filter.
- Summary Statistics:**
 - Total Owed:** 12.50
 - Total Checked:** 12.50
 - Refunds Available:** 0.00
 - Credit Available:** 0.00
- Payment Options:** A 'Pay bill' section with a 'Payment Type' dropdown (set to 'Cash'), a 'Payment Received' field, and buttons for 'Agree to Payment', 'View Payment', and 'Apply Payment'.
- Bills Table:** A table with columns: 'Balance Owed', 'Bill #', 'Price', 'Start', 'Total Billed', 'Total Paid', 'Type', 'Title', and 'Percent Pending'. It lists two bills:

Balance Owed	Bill #	Price	Start	Total Billed	Total Paid	Type	Title	Percent Pending
✓ 7.50	477		4/30/10 12:50 PM	7.50	0.00	gross y		0.00
✓ 5.00	354		3/31/10 4:00 PM	15.00	6.00	gross y		0.00
- Payment Summary:** A table at the bottom right showing:

Payment	Change	Owed	Billed	Paid
Pending: 0.00	0.00	Total: 12.50	18.50	6.00
		Gross: 12.50	18.50	6.00
- Additional Features:** Includes a 'Change Due Upon Payment: 0.00' section with a 'Convert Change to Patron Credit' checkbox, and a 'Receipt Options' button.



Fines Payment History: Transactions

The screenshot shows a web application interface for a library. At the top, there is a navigation menu with links: Home, Search, Checkout, Cataloging, Applications, and Logging. Below this is a toolbar with icons for Check Out, Checkout, Item Status, Patron Search, and Patron Registration. The main content area is titled 'Smith, Aaron' and includes a toolbar with buttons: Refresh, Check Out, Items Out, Holds, Bills, and Messages. Below this, there are tabs for 'Transactions' and 'Payments'. The 'Transactions' tab is active, showing a table of transactions. The table has columns: Balance Owed, Bill #, Fines, Date, Total Fined, Total Paid, Type, and Title. The data in the table is as follows:

Balance Owed	Bill #	Fines	Date	Total Fined	Total Paid	Type	Title
3.00	400		4/4/10 10:56 AM	3.00	0.00	grocery	
9.00	309		3/3/10 4:00 PM	15.00	6.00	grocery	

At the bottom of the page, there is a 'List Actions' button and a set of buttons: Print, Add Billing, Show Item Details, and Full Details.



Fines Payment History: Payments

admin@lib1-barick.dev198.willlibrary.com

File Edit Search Circulation Cataloging Applications Reporting

Check Out Check Out Item Status Patron Search Patron Registration

1 Patron Search 2 Patron Smith, Aaron

Smith, Aaron

Refresh Check Out Items Out Fines Info Edit Messages Other

(Name) (No Bills) (No Overdue)

Fines History

Transactions Payments

Selected Date: 6/27

Amount	Payment ID	Note	Payment Date/Time	Payment Type	No. due?	Transaction Type	Last Billing Type	Title
0.00	1		3/3/10 3:53 PM	cash_payment	F	grocery	None	
1.00	2		4/2/10 12:50 PM	cash_payment	F	grocery	None	
1.50	3		4/2/10 12:51 PM	cash_payment	F	grocery	None	

List All Items Show Item Details Full Details



Staff client activity log

The screenshot displays a web-based library management system interface. The browser address bar shows the URL: `1: admin@BR1-berick.dev190.estlibrary.com`. The navigation menu includes: File, Edit, Search, Circulation, Cataloging, Acquisitions, and Booking. Below the menu are icons for Check Out, Check In, Item Status, Patron Search, and Patron Registration. The main content area is divided into two sections:

Most Recent Staff Actions

Message	When
admin circulated 671946179063 to 325224 (Smith)	Sun Apr 04 2010 13:05:02 GMT-04:00 (Eastern Daylight Time)
admin circulated 494043679025 to 325224 (Smith)	Sun Apr 04 2010 13:03:02 GMT-04:00 (Eastern Daylight Time)
admin circulated 70907907090 to 325224 (Smith)	Sun Apr 04 2010 13:03:02 GMT-04:00 (Eastern Daylight Time)

Most Recently Affected Patrons and Last Action for each

Message	When
---------	------

The interface also includes buttons for Refresh, Retrieve Item, and Retrieve Patron in the top right of the first section, and a Retrieve Patron button in the top right of the second section.



Staff client activity log

1: admin@BR1-berick.dev190.estlibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking Admin

Check Out Check In Item Status Patron Search Patron Registration

Work Log

Most Recent Staff Actions

Refresh Retrieve Item Retrieve Patron

Message	When
admin circulated 671946179063 to 325224 (Smith)	Sun Apr 04 2010 13:05:02 GMT-0400 (Eastern Daylight Time)
admin circulated 494243679525 to 325224 (Smith)	Sun Apr 04 2010 13:03:52 GMT-0400 (Eastern Daylight Time)
admin circulated 70907907090 to 325224 (Smith)	Sun Apr 04 2010 13:03:32 GMT-0400 (Eastern Daylight Time)


Recent staff actions, such as materials checked out

Most Recently Affected Patrons and Last Action for each

Retrieve Patron

Message	When
---------	------

List of last patrons



Patron Merging/Deleting

*images and content provided with final version



Clear Hold Shelf

- A process that removes holds from items that have expired on the hold shelf and generates a report listing items to be pulled from the hold shelf
- Options to print sorted according to local policy
- Last hold shelf location is retained in the item record



Connexion

- Support of the OCLC product Connexion was a requirement for KCLS
- This will provide staff the ability to edit MARC records before loading them into Evergreen



MARC Import Profiles

The screenshot shows a web browser window with the URL `admin@BR1-berick.dev198.esilibrary.com`. The interface includes a menu bar with options like 'File', 'Edit', 'Search', 'Circulation', 'Cataloging', 'Acquisitions', and 'Reporting'. Below the menu, there are icons for 'Check Out', 'Check In', 'Item Status', 'Patron Search', and 'Patron Registration'. The main content area is titled 'Overlay / Merge Profiles' and features a 'Context Org Unit' dropdown set to 'BR1'. A table lists four profiles with columns for Name, Owner, Preserve Specification, Replace Specification, Add Specification, and Remove Specification. The 'Add Specification' column contains the value '600,650' for the first two rows. The 'Remove Specification' column contains the value '841,842,843,844,845,850,852' for the third row. Buttons for 'New Merge Profile' and 'Delete Selected' are located in the top right corner of the table area.

<input checked="" type="checkbox"/>	Name	Owner	Preserve Specification	Replace Specification	Add Specification	Remove Specification
<input type="checkbox"/>	Merge: Add Subjects	CONS		000	600,650	
<input type="checkbox"/>	Merge: Replace Subjects	CONS		600,650		
<input type="checkbox"/>	Overlay: Drop Holdings	CONS				841,842,843,844,845,850,852
<input type="checkbox"/>	Overlay: Keep Subjects	CONS	600,650			

MARC Import Profiles

1: admin@BRI-berick.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Backlog

Check Out Check In Item Status Patron Search Patron Registration

1 Server Settings 2 Patron Search 3 Patron Search 4 Patron: Smith, Anna Merge

Go Back Repat Go Forward Debug Print Page

Export Records Import Records Inspect Queue Edit Attributes Edit Merge/Overlay Profiles

Evergreen MARC File Upload

Record Type: Bibliographic Records

Create a New Upload Queue: [] or Add to an Existing Queue: []

Auto-Import Non-Colliding Records:

Auto Merge/Overlay Exact Matches:

Auto Merge/Overlay When Exactly 1 Match is Found:

Merge/Overlay Profile: [Overlay: Keep Subjects, Merge: Replace Subjects, Overlay: Drop Holdings, Merge: Add Subjects, oic]

Import Attached Holdings: []

Holdings Import Profile: []

Select a Record Source: []

File to Upload: [] Browse...

Upload

Telephony

- Enhanced patron notifications with support for Telephony
- Leveraging off of Asterisk
- Adds ability to issue automatic overdue notices, hold availability notices, billing notices and courtesy notices with a high degree of staff and patron configurability.



Other current enhancements

- Message interface - message status controlled via message wizard, option to require staff initials, ability to define local messages and easy edit/archive options
- Help Popup - Locally definable help pages, KCLS templates will be shared with the community as a starting place
- Password test - quick option to validate patron password in staff client
- Hold Note - Ability to add notes to patron holds

