Using Evergreen's Circulation Module

Documentation Interest Group

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Introduction

Chapter 1. About This Documentation

This guide was produced by the Evergreen Documentation Interest Group (DIG), consisting of numerous volunteers from many different organizations. The DIG has drawn together, edited, and supplemented pre-existing documentation contributed by libraries and consortia running Evergreen that were kind enough to release their documentation into the creative commons. Please see the Attributions section for a full list of authors and contributing organizations. Just like the software it describes, this guide is a work in progress, continually revised to meet the needs of its users, so if you find errors or omissions, please let us know, by contacting the DIG facilitators at docs@evergreen-ils.org.

This guide to Evergreen is intended to meet the needs of library workers who provide circulation services. It is organized into Parts, Chapters, and Sections addressing key aspects of the software.

Copies of this guide can be accessed in PDF and HTML formats from http://docs.evergreen-ils.org/.

Chapter 2. About Evergreen

Evergreen is an open source library automation software designed to meet the needs of the very smallest to the very largest libraries and consortia. Through its staff interface, it facilitates the management, cataloging, and circulation of library materials, and through its online public access interface it helps patrons find those materials.

The Evergreen software is freely licensed under the GNU General Public License, meaning that it is free to download, use, view, modify, and share. It has an active development and user community, as well as several companies offering migration, support, hosting, and development services.

The community's development requirements state that Evergreen must be:

- Stable, even under extreme load.

- Robust, and capable of handling a high volume of transactions and simultaneous users.

- Flexible, to accommodate the varied needs of libraries.

- Secure, to protect our patrons' privacy and data.

- User-friendly, to facilitate patron and staff use of the system.

Evergreen, which first launched in 2006 now powers over 544 libraries of every type – public, academic, special, school, and even tribal and home libraries – in over a dozen countries worldwide.

Logging into Evergreen
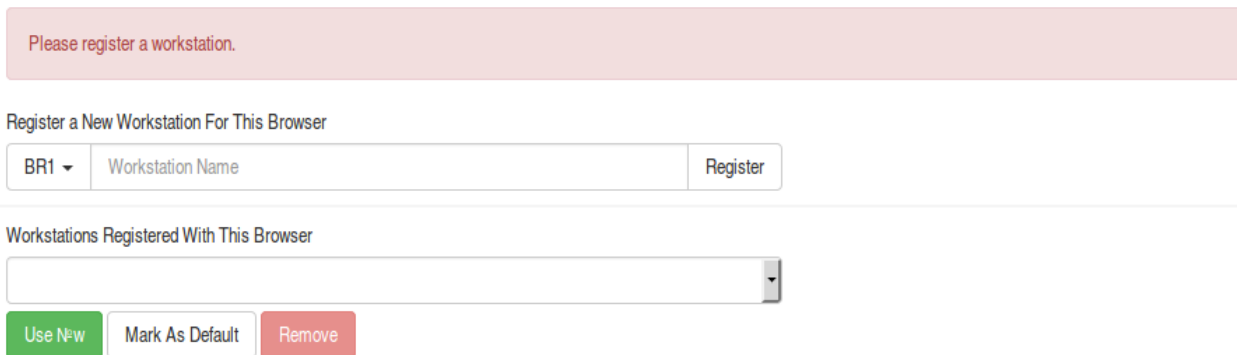
Chapter 3. Registering a Workstation

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

NOTE	You will need the permissions to add workstations to your network. If you do not have these permissions, ask your system administrator for assistance.

1. When you login for the first time, you will arrive at a screen asking that you register your workstation

2. Create a unique workstation name.

3. Click *Register*

4. After confirming the new workstation is listed in the *Workstations Registered With This Browser* menu, click *Use Now* to return to the login page. Your newly-registered workstation should be selected by default on the login page.

Chapter 4. Basic Login,

1. The default URL to log into the client is *https://localhost/eg/staff/login*

2. Enter your *Username* and *Password*.

3. Verify that the correct workstation is selected and click **Sign In**.

Chapter 5. Logging Out

To log out of the client:

1. Click the menu button to the right of your user name in the top-right corner of the window.

2. Select **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.

Best Practices for Using the Browser

Chapter 6. Pop-up Blockers

Before using the web client, be sure to disable pop-up blockers for your Evergreen system's domain.

- In Chrome, select *Settings* from the Chrome menu and click on *Content settings* in the advanced section. Select *Popups* and then add your domain to the *Allowed* list.

- In Firefox, select *Preferences* from the Firefox menu and then select the *Content* panel. Click the *Exceptions* button and add your domain to the *Allowed Sites* list.

Chapter 7. 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.

7.1. Setting the Web Client as the Home Page in Chrome

1. In the top-right corner of your browser, click the Chrome menu.
2. Select **Settings**.
3. In the *On startup* section, select *Open a specific page or set of pages.*
4. Click the **Set Pages** link.
5. Add *https://localhost/eg/staff/* to the *Enter URL* box and click **OK**.

7.2. Setting the Web Client as the Home Page in Firefox

1. In the top-right corner of your browser, click the menu button.
2. Click **Options**.
3. In the *When Firefox starts:* dropdown menu, select *Show my home page*.
4. In the *Home Page* box, add *https://localhost/eg/staff/* and click **OK**.

7.3. Turning off print headers and footers in Firefox

If you are not using Hatch for printing, you will probably want to configure your browser so that Firefox does not add headers and footers to items printed on certain printers. For example, if you are printing spine labels, you likely will not want Firefox to add a date or URL to the margins of your label.

You can turn off these headers and footers using the following steps:

1. In the Firefox menu, click *Print…* to open the print preview screen.
2. Click the *Page Setup…* button.
3. Go to the *Margins & Header/Footer* tab.
4. Make sure that all dropdown menus are set to *--blank--*.

If you only want to turn off those headers and footers for a specific printer, use these steps:

1. In the Firefox address bar, type about:config.
2. If a warning appears, click *I accept the risk*.

3. Type *print_header* into this screen's search box.

4. Double-click on the relevant *print_headerleft*, *print_headerright*, and *print_headercenter* entries in the grid.

5. Delete any existing data for that setting and click OK.

6. Type *print_footer* into the screen's search box and repeat these steps for the footer settings.

7.4. Turning off print headers and footers in Chrome

If you are not using Hatch for printing, you will probably want to configure your browser so that Chrome does not add headers and footers to items printed on certain printers. For example, if you are printing spine labels, you likely will not want Chrome to add a date or URL to the margins of your label.

You can turn off these headers and footers using the following steps:

1. In the Chrome menu, click *Print…* to open the print preview screen.

2. Click *More Settings*.

3. Uncheck *Headers and Footers*.

Chapter 8. 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 and Firefox on Windows PCs.

- 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-T.

- 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 to the next tab using CTRL-Tab. Go to the previous tab with CTRL-Shift-Tab.

8.1. Setting New Tab Behavior

Some users may want to automatically open the web client's portal page in a new tab. Neither Chrome nor Firefox will open your home page by default when you open a new tab. However, both browsers have optional add-ons that 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.

Configuring Evergreen for your workstation

Chapter 9. Setting search defaults

- Go to Administration → Workstation.

- Use the dropdown menu to select an appropriate *Default Search Library*. 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.

- Use the dropdown menu to select an appropriate *Preferred Library*. 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.

- Use the dropdown menu to select an appropriate *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 10. Turning off sounds

- Go to Administration → Workstation.

- Click the checkbox labeled *Disable Sounds?*
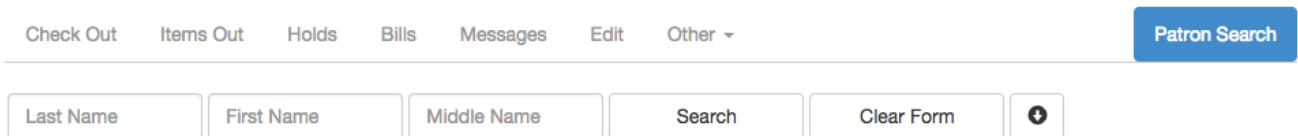
Circulation - Patron Record

Chapter 11. Searching Patrons

To search for a patron, select *Search → Search for Patrons* from the menu bar.

The Patron Search screen will display. It will contain options to search on the following fields:

- Last Name
- First Name
- Middle Name

Next to the *Clear Form* button there is a button with an arrow pointing down that will display the following additional search fields:

- Barcode
- Alias
- Username
- Email
- Identification
- database ID
- Phone
- Street 1
- Street 2
- City
- State
- Postal Code
- Profile Group
- Home Library
- DOB (date of birth) year
- DOB month
- DOB day

To include patrons marked "inactive", click on the *Include Inactive?* checkbox.

Tips for searching

TIP

- Search one field or combine fields for more precise results.

- Truncate search terms for more search results.

- Search ignores punctuation such as diacritics, apostrophes, hyphens and commas.

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

Once you have located the desired patron, click on the entry row for this patron in the results screen. A summary for this patron will display on the left hand side.

The *Patron Search* button on the upper right may be used to resume searching for patrons.

Chapter 12. Retrieve Recent Patrons

12.1. Setting up Retrieve Recent Patrons

- This feature must be configured in the *Library Settings Editor* (*Administration → Local Administration → Library Settings Editor*). The library setting is called "Number of Retrievable Recent Patrons" and is located in the Circulation settings group.

  ◦ A value of zero (0) means no recent patrons can be retrieved.

  ◦ A value greater than 1 means staff will be able to retrieve multiple recent patrons via a new *Circulation → Retrieve Recent Patrons* menu entry.

  ◦ The default value is 1 for backwards compatibility. (The *Circulation → Retrieve Last Patron* menu entry will be available.)

12.2. Retrieving Recent Patrons

- Once the library setting has been configured to a number greater than 1, the option Retrieve Recent Patrons will appear below the Retrieve Last patron option in the Circulation drop-down from the Menu Bar (*Circulation → Retrieve Recent Patrons*).

- When selected, a grid will appear listing patrons accessed by that workstation in the current session. The length of the list will be limited by the value configured in the *Library Settings Editor*. If no patrons have been accessed, the grid will display "No Items To Display."

Chapter 13. Registering New Patrons

To register a new patron, select *Circulation* → *Register Patron* from the menu bar. The Patron Registration form will display.

Mandatory fields display in yellow.

The *Show: Required Fields* and *Show: Suggested Fields* links may be used to limit the options on this page.

When finished entering the necessary information, select *Save* to save the new patron record or *Save & Clone* to register a patron with the same address. When *Save & Clone* is selected, the address information is copied into the resulting patron registration screen. It is linked to the original patron. Address information may only be edited through the original record.

TIP	• Requested fields may be configured in the *Library Settings Editor* (*Administration -> Local Administration -> Library Settings Editor*).
	• Statistical categories may be created for information tracked by your library that is not in the default patron record.
	• These may be configured in the *Statistical Categories Editor* (*Administration -> Local Administration -> Statistical Categories Editor*).
	• Staff accounts may also function as patron accounts.
	• You must select a *Main (Profile) Permission Group* before the *Update Expire Date* button will work, since the permission group determines the expiration date.

13.1. Email field

It's possible for administrators to set up the email field to allow or disallow multiple email addresses for a single patron (usually separated by a comma). If you'd like to make changes to whether multiple email addresses are allowed here or not, ask your system administrator to change the `ui.patron.edit.au.email.regex` library setting.

Chapter 14. Patron Self-Registration

Abstract

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

Patron Self-Registration

1. In the OPAC, click on the link to **Request Library Card**

2. Fill out the self-registration form to request a library card, and click **Submit Registration**.

3. Patrons will see a confirmation message: "Registration successful! Please see library staff to complete your registration."

Managing Pending Patrons

1. In the staff client select **Circulation** → **Pending Patrons**.

2. Select the patron you would like to review. In this screen you have the option to **Load** the pending patron information to create a permanent library account.

3. To create a permanent library account for the patron, click on the patron's row, click on the **Load Patron** button at the top of the screen. This will load the patron self-registration information into the main **Patron Registration** form.

4. Fill in the necessary patron information for your library, and click **Save** to create the permanent patron account.

Chapter 15. Updating Patron Information

Retrieve the patron record as described in the section Searching Patrons.

Click on *Edit* from the options that display at the top of the patron record.

Edit information as required. When finished, select *Save*.

After selecting *Save*, the page will refresh. The edited information will be reflected in the patron summary pane.

TIP	• To quickly renew an expired patron, click the *Update Expire Date* button. You will need a *Main (Profile) Permission Group* selected for this to work, since the permission group determines the expiration date.

Chapter 16. Renewing Library Cards

Expired patron accounts when initially retrieved – an alert stating that the "Patron account is EXPIRED."

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

Patron account is EXPIRED.

Patron account has invalid addresses.

Press a navigation button above (for example, Check Out) to clear this alert.

Open the patron record in edit mode as described in the section Updating Patron Information.

Navigate to the information field labeled *Privilege Expiration Date*. Enter a new date in this box. Or click the calendar icon, and a calendar widget will display to help you easily navigate to the desired date.

Select the date using the calendar widget or key the date in manually. Click the *Save* button. The screen will refresh and the "expired" alerts on the account will be removed.

Chapter 17. Lost Library Cards

Retrieve the patron record as described in the section Searching Patrons.

Open the patron record in edit mode as described in the section Updating Patron Information.

Next to the *Barcode* field, select the *Replace Barcode* button.
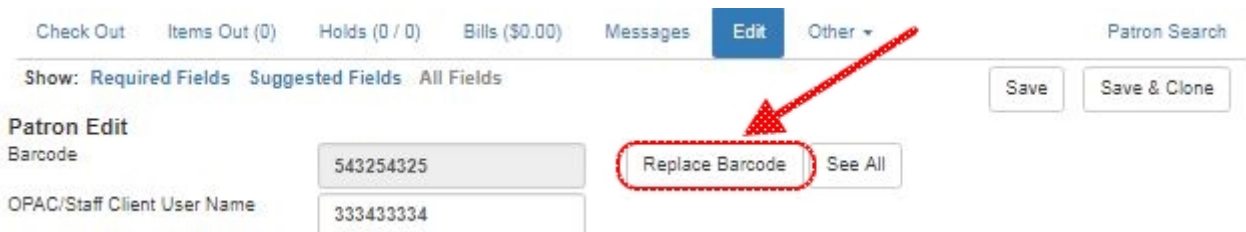
This will clear the barcode field. Enter a new barcode and *Save* the record. The screen will refresh and the new barcode will display in the patron summary pane.

If a patron's barcode is mistakenly replaced, the old barcode may be reinstated. Retrieve the patron record as described in the section Searching Patrons. Open the patron record in edit mode as described in the section Updating Patron Information.

Select the *See All* button next to the *Replace Barcode* button. This will display the current and past barcodes associated with this account.
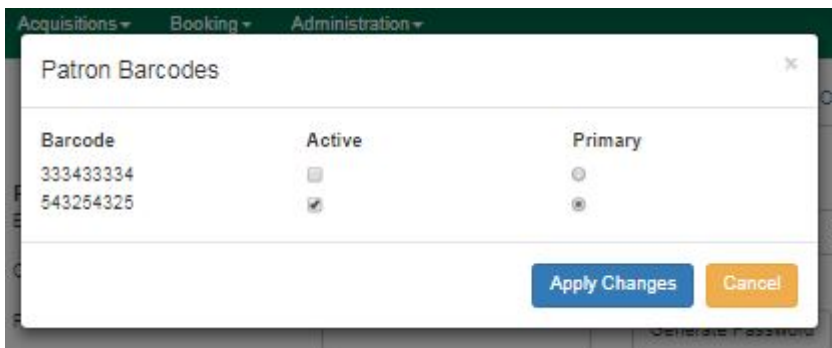
Check the box(es) for all barcodes that should be "active" for the patron. An "active" barcode may be used for circulation transactions. A patron may have more than one "active" barcode. Only one barcode may be designated "primary." The "primary" barcode displays in the patron's summary information in the *Library Card* field.

Once you have modified the patron barcode(s), *Save* the patron record. If you modified the "primary" barcode, the new primary barcode will display in the patron summary screen.

Chapter 18. Resetting Patron's Password

A patron's password may be reset from the OPAC or through the staff client. To reset the password from the staff client, retrieve the patron record as described in the section Searching Patrons.

Open the patron record in edit mode as described in the section Updating Patron Information.

Select the *Generate Password* button next to the *Password* field.

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

A new number will populate the *Password* text box. Make note of the new password and *Save* the patron record. The screen will refresh and the new password will be suppressed from view.

Chapter 19. Barring a Patron

A patron may be barred from circulation activities. To bar a patron, retrieve the patron record as described in the section Searching Patrons.

Open the patron record in edit mode as described in the section Updating Patron Information.

Check the box for *Barred* in the patron account.

Save the user. The screen will refresh.

NOTE	Barring a patron from one library bars that patron from all consortium member libraries.

To unbar a patron, uncheck the Barred checkbox.

Chapter 20. Barred vs. Blocked

Barred: Stops patrons from using their library cards; alerts the staff that the patron is banned/barred from the library. The "check-out" functionality is disabled for barred patrons (NO option to override – the checkout window is unusable and the bar must be removed from the account before the patron is able to checkout items). These patrons may still log in to the OPAC to view their accounts.

Blocked: Often, these are system-generated blocks on patron accounts.

Some examples:

- Patron exceeds fine threshold

- Patron exceeds max checked out item threshold

A notice appears when a staff person tries to checkout an item to blocked patrons, but staff may be given permissions to override blocks.

Chapter 21. Staff-Generated Messages

There are several types of messages available for staff to leave notes on patron records.

Patron Notes: These notes are added via *Other → Notes* in the patron record. These notes can be viewable by staff only or shared with the patron. Staff initials can be required. (See the section Patron Notes for more.)

Patron Alerts: This type of alert is added via *Edit* button in the patron record. There is currently no way to require staff initials for this type of alert. (See the section Patron Alerts for more.)

Staff-Generated Penalties/Messages: These messages are added via the *Messages* button in the patron record. They can be a note, alert or block. Staff initials can be required. (See the section Staff-Generated Penalties/Messages for more.)

Chapter 22. Patron Alerts

When an account has an alert on it, a Stop sign is displayed when the record is retrieved.

Alert Message
test alert

Navigating to an area of the patron record using the navigation buttons at the top of the record (for example, Edit or Bills) will clear the message from view.

If you wish to view these alerts after they are cleared from view, they may be retrieved. Use the Other menu to select *Display Alert* and *Messages*.
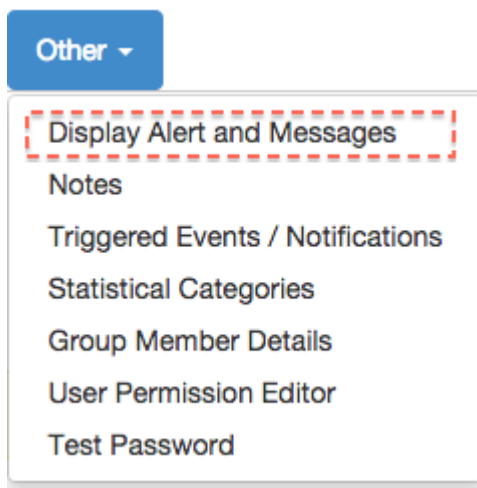
There are two types of Patron Alerts:

System-generated alerts: Once the cause is resolved (e.g. patron's account has been renewed), the message will disappear automatically.

Staff-generated alerts: Must be added and removed manually.

To add an alert to a patron account, retrieve the patron record as described in the section Searching Patrons.

Open the patron record in edit mode as described in the section Updating Patron Information.

Enter the alert text in the Alert Message field.

Save the record. The screen will refresh and the alert will display.

To remove the alert, retrieve the patron record as described in the section Searching Patrons.

Open the patron record in edit mode as described in the section Updating Patron Information.

Delete the alert text in the *Alert Message* field.

Save the record.

The screen will refresh and the indicators for the alert will be removed from the account.

Chapter 23. Patron Notes

Notes are strictly communicative and may be made visible to the patron via their account on the OPAC. In the OPAC, these notes display on the account summary screen in the OPAC.
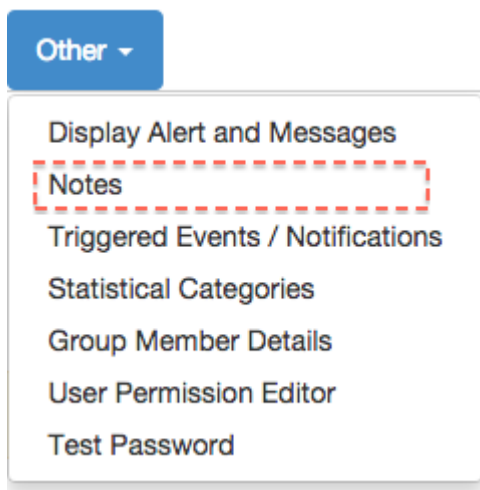
To insert or remove a note, retrieve the patron record as described in the section Searching Patrons.

Open the patron record in edit mode as described in the section Updating Patron Information.

Use the Other menu to navigate to *Notes*.

Select the *Add New Note* button. A *Create a new note* window displays.

TIP	Your system administrator can add a box in the *Add Note* window for staff initials and require those initials to be entered. They can do so using the "Require staff initials…" settings in the Library Settings Editor.

Enter note information.

Select the check box for *Patron Visible* to display the note in the OPAC.

Select *OK* to save the note to the patron account.

To delete a note, go to *Other → Notes* and use the *Delete* button on the right of each note.

Chapter 24. Staff-Generated Penalties/Messages

To access this feature, use the *Messages* button in the patron record.

24.1. Add a Message

Click **Apply Penalty/Message** to begin the process of adding a message to the patron.

There are three options: Notes, Alerts, Blocks

- **Note**: This will create a non-blocking, non-alerting note visible to staff. Staff can view the message by clicking the *Messages* button on the patron record. (Notes created in this fashion will not display via *Other → Notes*, and cannot be shared with the patron. See the Patron Notes section for notes which can be shared with the patron.)

- **Alert**: This will create a non-blocking alert which appears when the patron record is first retrieved. The alert will cause the patron name to display in red, rather than black, text. Alerts may be viewed by clicking the *Messages* button on the patron record or by selecting *Other → Display Alerts and Messages*.

- **Block**: This will create a blocking alert which appears when the patron record is first retrieved, and which behaves much as the non-blocking alert described previously. The patron will be also blocked from circulation, holds and renewals until the block is cleared by staff.

After selecting the type of message to create, enter the message body into the box. If Staff Initials are required, they must be entered into the *Initials* box before the message can be added. Otherwise, fill in the optional *Initials* box and click **OK**

The message should now be visible in the *Staff-Generated Penalties/Messages* list. If a blocking or non-blocking alert, the message will also display immediately when the patron record is retrieved.

Staff-Generated Penalties / Messages

Apply Penalty / Message				◀◀ ◀ ▶▶	Actions ▼	Rows 25 ▼	Page 1 ▼	▼
#	☐	**Applied On**	**standing_penalty.label**	**Library**		**Note**		
1	☐	1/22/16	Alerting Note, no blocks	APEX		This is an alert [ys]		
2	☐	1/22/16	Alerting block on Circ, Hold and R...	APEX		This is a block [YS]		
3	☐	1/22/16	Note, no blocks	APEX		This is a note [YS]		

24.2. Modify a Message

Messages can be edited by staff after they are created.

Staff-Generated Penalties / Messages

Apply Penalty / Message				◀◀ ◀ ▶▶	Actions ▼	Rows 25 ▼	Page 1 ▼	▼
#	☐	**Applied On**	**standing_penalty.label**			**Note**		
1	☐	1/22/16	Alerting Note, no blocks	APEX	Remove Penalty / Message	is an alert [ys]		
2	☐	1/22/16	Alerting block on Circ, Hold and R...	APEX	Modify Penalty / Message	is a block [YS]		
3	☐	1/22/16	Note, no blocks	APEX	Archive Penalty / Message	is a note [YS]		

Click to select the message to be modified, then click *Actions → Modify Penalty/Message*. This menu can also be accessed by right-clicking in the message area.

To change the type of message, click on **Note**, **Alert**, **Block** to select the new type. Edit or add new text in the message body. Enter Staff Initials into the *Initials* box (may be required.) and click **OK** to submit the alterations.

24.3. Archive a Message

Messages which are no longer current can be archived by staff. This action will remove any alerts or blocks associated with the message, but retains the information contained there for future reference.

Click to select the message to be archived, then click *Actions → Archive Penalty/Message*. This menu can also be accessed by right-clicking in the message area.

Archived messages will be shown in the section labelled *Archived Penalties/Messages*. To view messages, click **Retrieve Archived Penalties**. By default, messages archived within the past year will be retrieved. To retrieve messages from earlier dates, change the start date to the desired date before clicking **Retrieve Archived Penalties**.

24.4. Remove a Message

Messages which are no longer current can be removed by staff. This action removes any alerts or blocks associated with the message and deletes the information from the system.

Click to select the message to be removed, then click *Actions → Remove Penalty/Message*. This menu can also be accessed by right-clicking in the message area.

Chapter 25. 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. Batch changes made in User Buckets will not activate any Action/Trigger event definitions that would normally be activated when editing an individual account.

User accounts can be added to User Buckets by scanning individual user barcodes or by uploading a file of user barcodes directly in the User 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 User Bucket itself, not to the login of the bucket owner.

25.1. 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.

Pending Users (4)	Bucket View (7)				

Bucket: Group Update 7 items / Created Mar 21, 2017 / group update 3/2017

Scan Card	Barcode...	OR	Choose File	uploadbarcodes.txt

| Buckets▾ | | | | ⏮ ⏪ ⏩ | Actions ▾ | Rows 25 ▾ | Page 1 ▾ | ▾ |

#	☐	Barcode	First Name	Middle Name	Last Name	Home Library
1	☐	99999378730	Robert	Coy	Wade	Example Branch 3
2	☐	99999318240	John	Charles	Graham	Example Branch 4
3	☐	99999343281	Rebecca	Vanessa	Bradley	Example Branch 4
4	☐	99999300523	Shawn	Joseph	Little	Example Branch 4

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.

25.2. 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 dialog box called *Update all users* 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.

25.3. Batch Modify Statistical Categories

To 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 dialog box called *Update statistical categories* 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.
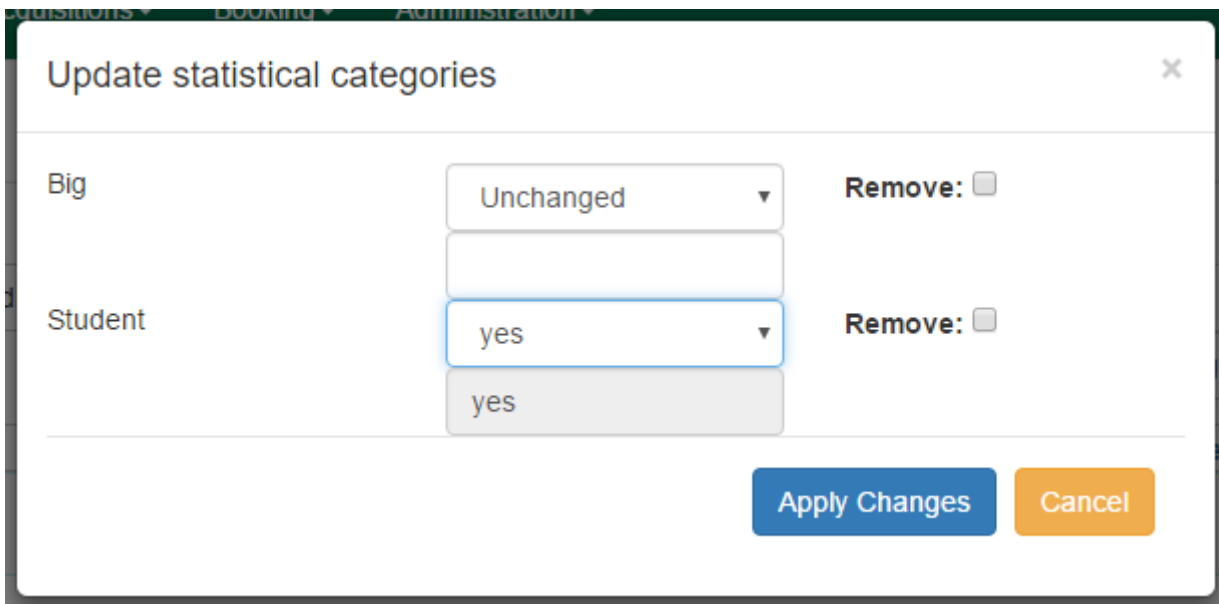
25.4. Batch Delete Users

To batch delete users in a bucket: . Go to **Circulation**→**User Buckets** and select the **Bucket View** tab. . Click on **Buckets** and select the bucket you want to modify from the list of existing buckets. .. After selecting a bucket, the Name, Description, number of items, and creation date of the bucket will appear at the top of the screen. . Verify the list of users in the bucket and click **Delete all users**. A dialog box called *Delete all users* will appear. . Assign a *Name for delete set*. This name will allow staff to identify the batch deletion for future verification or rollbacks. . 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.
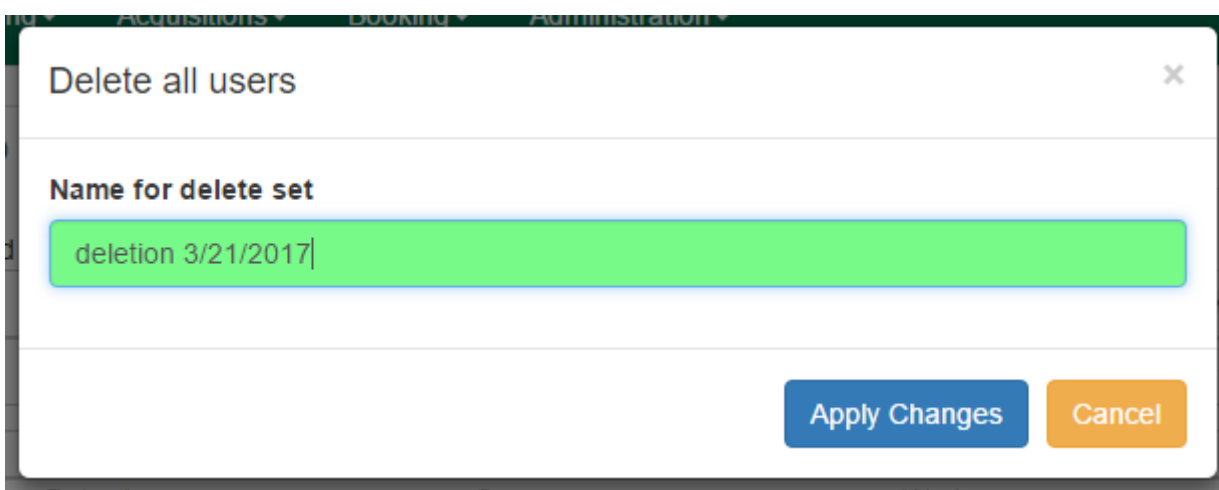
25.5. View Batch Changes

1. The batch changes that have been made to User Buckets can be viewed by going to **Circulation**→**User Buckets** and selecting the **Bucket View** tab.
2. Click **Buckets** to select an existing bucket.

3. Click **View batch changes**. A dialog 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.

25.6. Roll Back Batch Changes

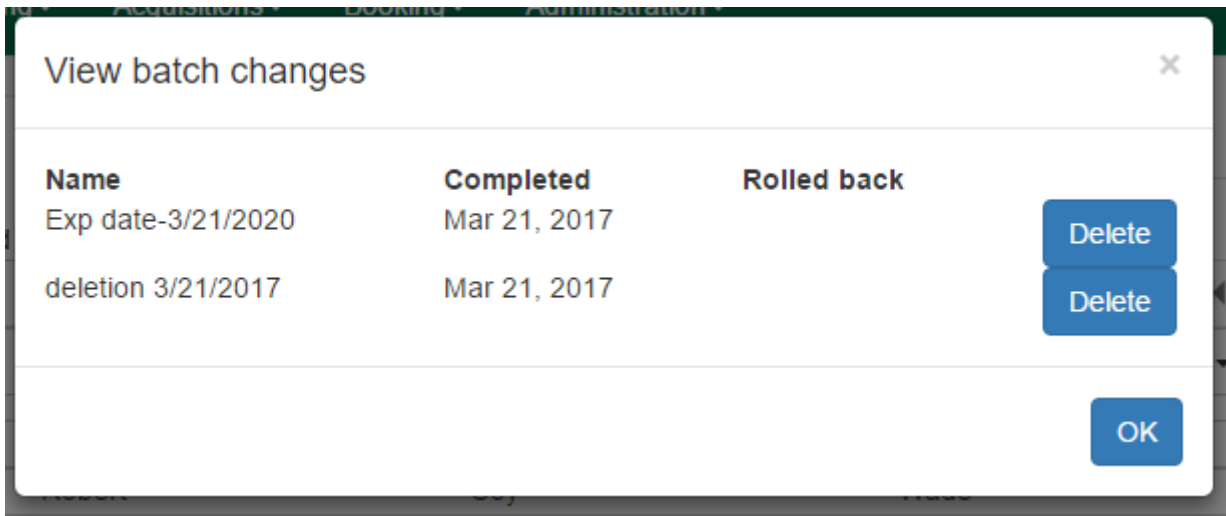1. Batch Changes and Batch Deletions can be rolled back or reversed by going to **Circulation→User Buckets** and selecting the **Bucket View** tab.

2. Click **Buckets** to select an existing bucket.

3. Click **Roll back batch edit**. A dialog box will appear that contains a drop down menu that lists all batch edits that can be rolled back. Select the batch edit to roll back and click **Roll Back Changes**. The batch change will be reversed and the roll back is recorded under *View batch changes*.

NOTE | Batch statistical category changes cannot be rolled back.
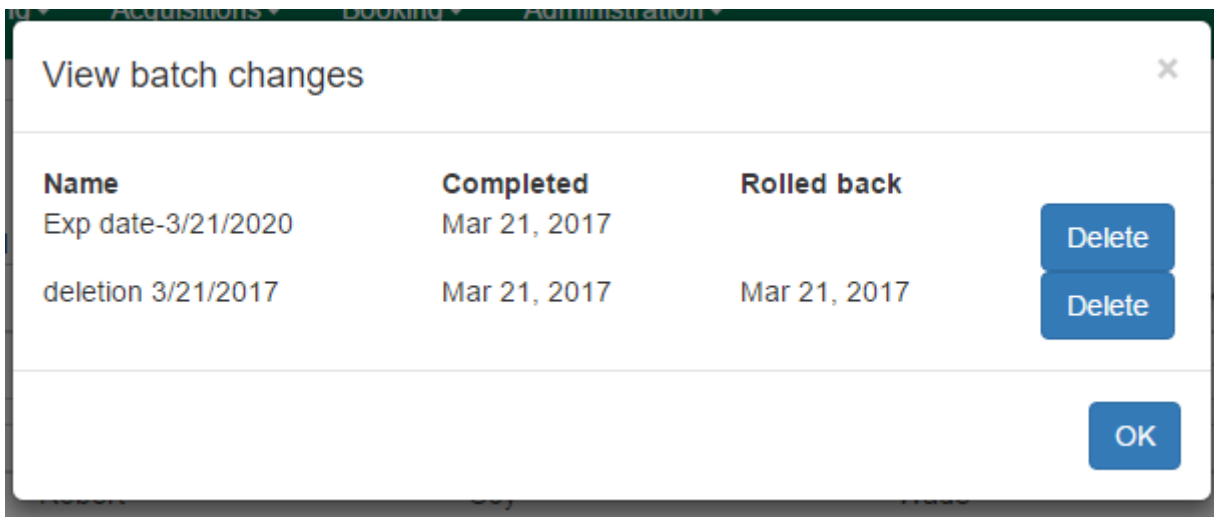
25.7. Sharing Buckets

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

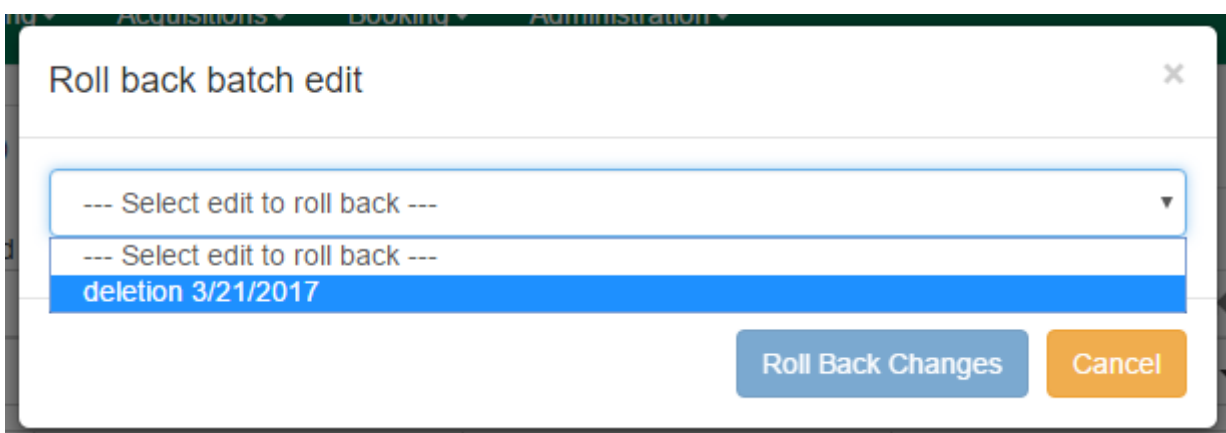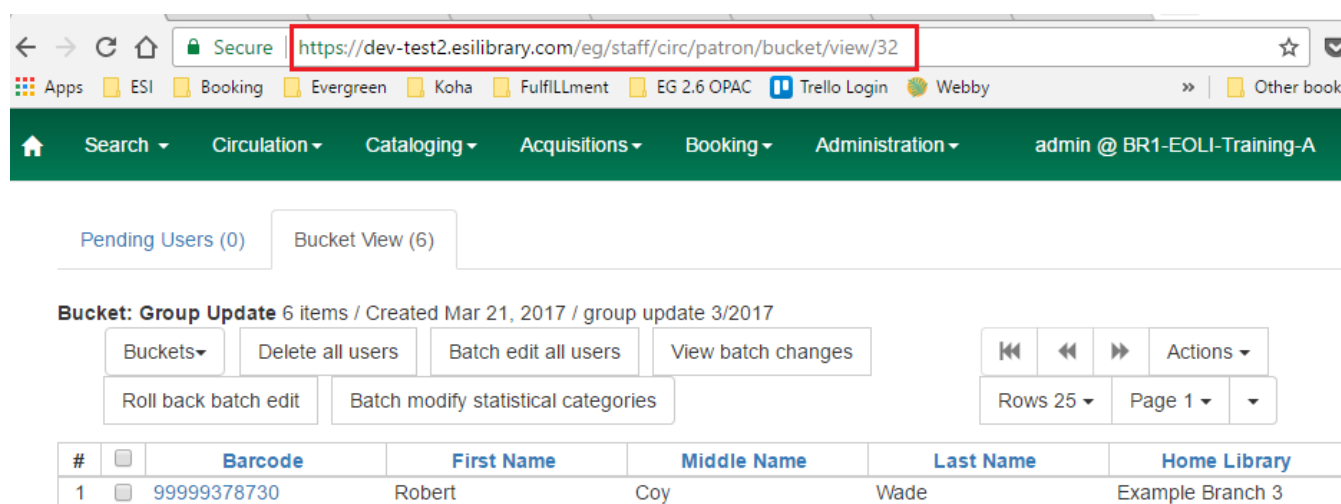A shared bucket can be retrieved by going to **Circulation**→**User Buckets** and selecting the **Bucket View** tab. Next, click **Buckets** and select **Shared Bucket**. A dialog box called *Load Shared Bucket by Bucket ID* will appear. Enter the ID of the bucket you wish to retrieve and click **Load Bucket**. The shared bucket will load in the Bucket View tab.

25.8. 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 at when a batch modification or deletion is executed.

Permissions for Batch Edits:

- To batch edit a user bucket, staff accounts must have the VIEW_USER, UPDATE_USER, and CONTAINER_BATCH_UPDATE permissions for all users in the bucket.

- To make a batch changes to Profile Group, staff accounts must have the appropriate group

application permissions for the profile groups.

- To make batch changes to the Home Library, staff accounts must have the UPDATE_USER permission at both the old and new Home Library.

- To make batch changes to the Barred Flag, staff accounts must have the appropriate BAR_PATRON or UNBAR_PATRON permission.
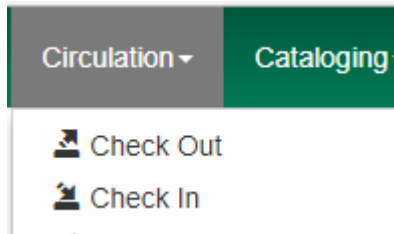
Permissions for Batch Deletion:

- To batch delete users in a user bucket, staff accounts must have the UPDATE_USER and DELETE_USER permissions for all users in the bucket.

Circulating Items

Chapter 26. Check Out

26.1. Regular Items

1) To check out an item click **Check Out Items** from the Circulation and Patrons toolbar, or select **Circulation → Check Out**.

2) Scan or enter patron's barcode and click **Submit** if entering barcode manually. If scanning, number is submitted automatically.

3) Scan or enter item barcode manually, clicking **Submit** if manual.

4) Due date is now displayed.

#	☐	Alert Msg	Balance Owed	Barcode	Bill #	Call Number	Due Date	Family Name
1	☐			156212485858	1860	IW39VQGJ-QFS6	12/22/14 11:59 PM	Smith

5) When all items are scanned, click the **Done** button to generate slip receipt or to exit patron record if not printing slip receipts.

26.2. Pre-cataloged Items

1) Go to patron's **Check Out** screen by clicking **Circulation → Check Out Items**.

2) Scan the item barcode.

3) At prompt, enter the required information click **Precat Checkout**.

TIP	On check-in, Evergreen will prompt staff to re-route the item to cataloging.
NOTE	This screen does not respond to the enter key or carriage return provided by a barcode scanner when the cursor is in the ISBN field. This behavior prevents pre-cataloged items from being checked out before you are done entering all the desired information.
NOTE	This requires the *CREATE_PRECAT* permission. All form elements in the dialog other than the Cancel button will be disabled if the current user lacks the CREATE_PRECAT permission.

26.3. Due Dates

Circulation periods are pre-set. When items are checked out, due dates are automatically calculated and inserted into circulation records if the **Specific Due Date** checkbox is not selected on the Check Out screen. The **Specific Due Date** checkbox allows you to set a different due date to override the pre-set loan period.

Before you scan the item, select the **Specific Due Date** checkbox. Enter the date in yyyy-mm-dd format. This date applies to all items until you change the date, de-select the **Specific Due Date** checkbox, or quit the patron record.

26.4. 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 associated with 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.

26.4.1. Staff Client Check Out

When a patron has opted to receive email checkout receipts by default, an envelope icon representing email will appear next to the receipt options in the Check Out screen. A printer icon representing a physical receipt appears if the patron has not opted in to the default email receipts.

Staff can click **Quick Receipt** and the default checkout receipt option will be triggered—an email will be sent or the receipt will print out. The Quick Receipt option allows staff to stay in the patron account after completing the transaction. Alternatively, staff can click **Done** to trigger the default checkout receipt and close out the patron account. By clicking on the arrow next to the Quick Receipt or Done buttons, staff can select which receipt option to use, regardless of the selected default. The email receipt option will be disabled if the patron account does not have an email address.

26.4.2. Self Checkout

In the Self Checkout interface, patrons will have the option to select a print or email checkout receipt, or no receipt. The radio button for the patron's default receipt option will be selected automatically in the interface. Patrons can select a different receipt option if desired. The email receipt radio button will be disabled if there is no email address associated with the patron's account.
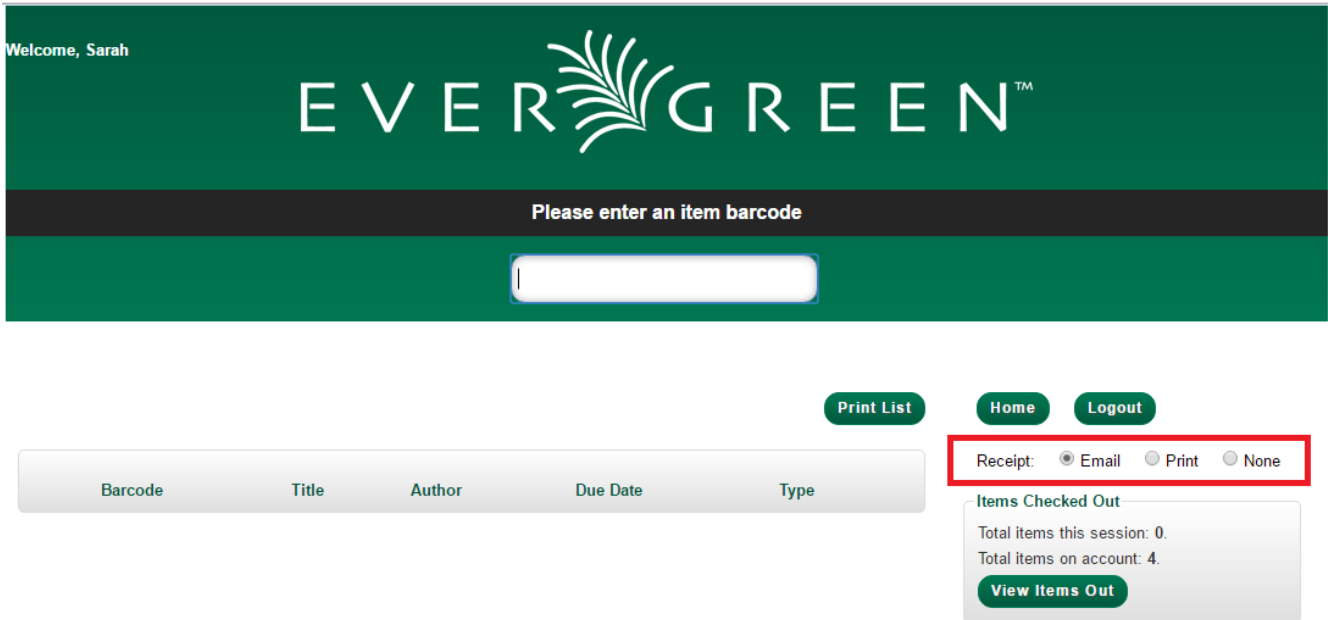
26.4.3. Opt In

Staff Mediated Opt In At Registration

Patrons can be opted in to receive email checkout receipts by default by library staff upon the creation of their library account. Within the patron registration form, there is a new option below the Email Address field to select *Email checkout receipts by default?*. Select this option if the patron wants email checkout receipts to be their default. Save any changes.

Staff Mediated Opt In After Registration

Staff can also select email checkout receipts as the default option in a patron account after initial registration. Within the patron account go to **Edit** and select *Email checkout receipts by default?*.

Make sure the patron also has an email address associated with their account. Save any changes.

Patron Opt In – Self-Registration Form

If your library offers patrons the ability to request a library card through the patron self-registration form, they can select email checkout receipts by default in the initial self-registration form:
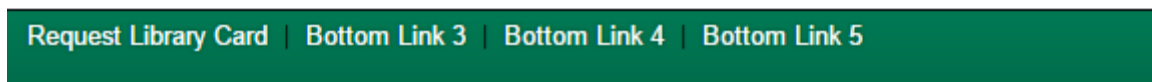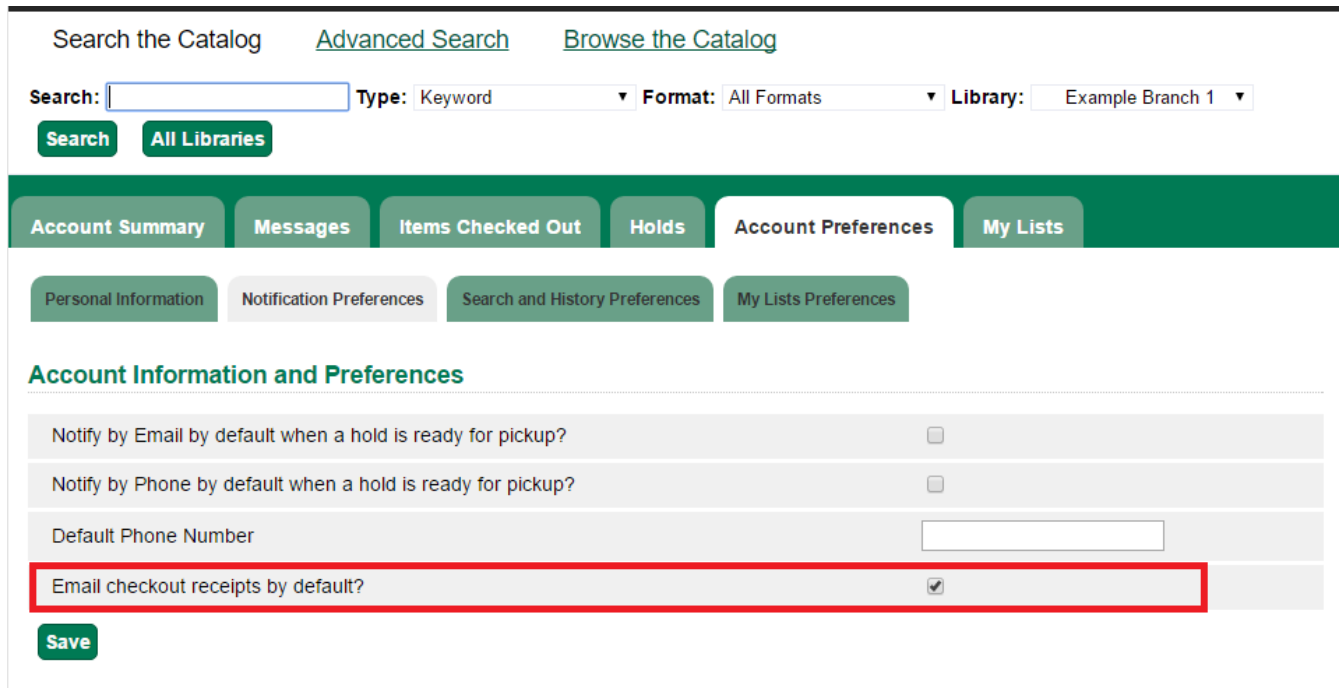
Patron Opt In - OPAC Account

Patrons can also opt in to receive email checkout receipts by default directly in their OPAC account. After logging in, patrons can go to **Account Preferences**→**Notification Preferences** and enable *Email checkout receipts by default?* and click **Save**.

26.4.4. Email Checkout Receipt Configuration

Email checkout receipts will be sent out through a Notifications/Action Trigger called Email Checkout Receipt. The email template and action trigger can be customized by going to **Administration**→**Local Administration**→**Notifications/Action Trigger**→**Email Checkout Receipt**.

Chapter 27. Check In

27.1. Regular check in

1) To check in an item click **Check In Items** from the Circulation and Patrons toolbar, or select **Circulation** → **Check In**.
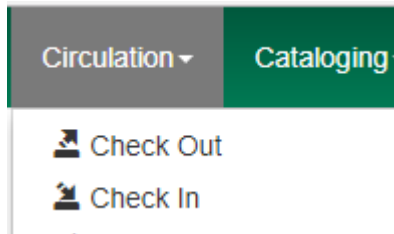
2) Scan item barcode or enter manually and click **Submit**.

3) If there is an overdue fine associated with the checkin, an alert will appear at the top of the screen with a fine tally for the current checkin session. To immediately handle fine payment, click the alert to jump to the patron's bill record.

4) If the checkin is an item that can fill a hold, a pop-up box will appear with patron contact information or routing information for the hold.

5) Print out the hold or transit slip and place the item on the hold shelf or route it to the proper library.

6) If the item is not in a state acceptable for hold/transit (for instance, it is damaged), select the line of the item, and choose **Actions** → **Cancel Transit**. The item will then have a status of *Canceled Transit* rather than *In Transit*.
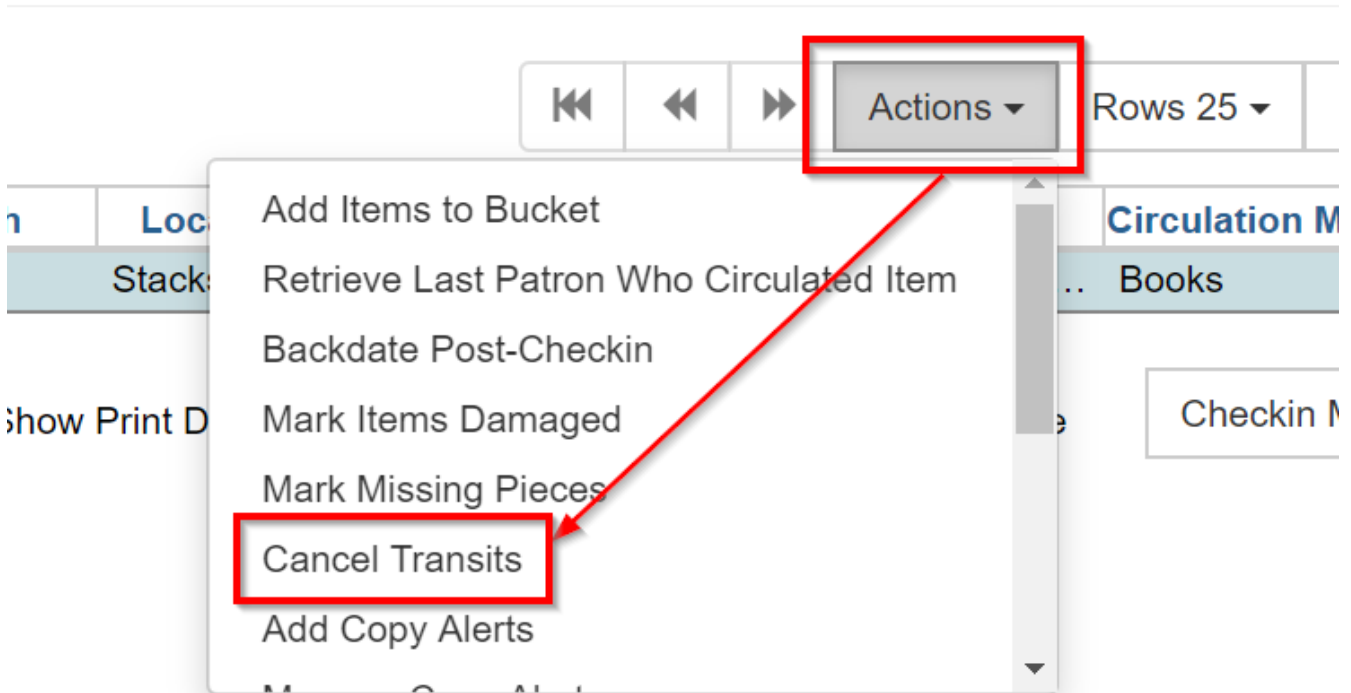
27.2. Backdated check in

This is useful for clearing a book drop.

1) To change effective check-in date, select **Circulation → Check In Items**. In **Effective Date** field enter the date in yyyy-mm-dd format.

2) The new effective date is now displayed in the red bar above the Barcode field.

3) Move the cursor to the **Barcode** field. Scan the items. When finishing backdated check-in, change the **Effective Date** back to today's date.

27.3. Backdate Post-Checkin

After an item has been checked in, you may use the Backdate Post-Checkin function to backdate the check-in date.

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

2) In **Effective Date** field enter the date in yyyy-mm-dd format. The check-in date will be adjusted according to the new effective check-in date.

Checkin Modifiers

At the right bottom corner there is a **Checkin Modifiers** pop-up list. The options are:

- **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 if already created or not be inserted if not yet created (e.g. hourly loans).

- **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 hold shelf (holds to be cancelled).

- **Retarget Local Holds**: When checking in in process items that are owned by the library, attempt to find a local hold to retarget. This is intended to help with proper targeting of newly-catalogued items.

- **Retarget All Statuses**: Similar to Retarget Local Holds, this modifier will attempt to find 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**: With this checkin modifier, any 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. If you wish to simply delay notification and allow time for staff to process item to holds shelf, you may wish to use the Hold Shelf Status Delay setting in Library Settings Editor instead. See Local Administration section for more information.

- **Manual Floating Active**: Floating Groups must be configured for this modifier to function. The manual flag in Floating Groups dictates whether or not the "Manual Floating Active" checkin modifier needs to be active for a copy to float. This allows for greater control over when items float.

- **Update Inventory**: When this checkin modifier is selected, scanned barcodes will have the current date/time added as the inventory date while the item is checked in.

These options may be selected simultaneously. The selected option is displayed in the header area.

Chapter 28. Renewal and Editing the Item's 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 editing the due date or renewing with a specific due date.

28.1. Renewing via a Patron's Account

1) Retrieve the patron record and go to the **Items Out** screen.

2) Select the item you want to renew. Click on **Actions** → **Renew**. If you want to renew all items in the account, click **Renew All** instead.

3) If you want to specify the due date, click **Renew with Specific Due Date**. You will be prompted to select a due date. Once done, click **Apply**.

28.2. Renewing by Item Barcode

1) To renew items by barcode, select **Circulation** → **Renew Items**.

2) Scan or manually entire the item barcode.

3) If you want to specify the due date, click **Specific Due Date** and enter a new due date in yyyy-

mm-dd format.

28.3. Editing Due Date

1) Retrieve the patron record and go to the **Items Out** screen.

2) Select the item you want to renew. Click on **Actions → Edit Due Date**.

3) Enter a new due date in yyyy-mm-dd format in the pop-up window, then click **OK**.

> **NOTE** Editing a due date is not included in the renewal count.

Chapter 29. Marking Items Lost and Claimed Returned

29.1. Lost Items

1) To mark items Lost, retrieve patron record and click **Items Out**.

2) Select the item. Click on **Actions → Mark Lost (by Patron)**.

		Circ ID	Barcode	Due Date	Workstation	Checkin Workstati	Checkout			Stopped	Title

Items Checked Out (2)   Other/Special Circulations (0)

Actions menu:
- Print Item Receipt
- Edit Due Date
- Mark Lost (By Patron)
- Mark Claims Returned
- Mark Claims Never Checked Out
- Renew
- Renew All
- Renew With Specific Due Date
- Check In
- Add Billing

#		Circ ID	Barcode	Due Date	Workstation	Checkin Workstati	Checkout			Stopped	Title
1	☐	1890	156212485858	1/2/15 11:59 PM	APEX-test		APEX				lost city
2	☑	1891	667281988628	1/2/15 11:59 PM	APEX-test		APEX				trunk music

3) The lost item now displays as lost in the **Items Checked Out** section of the patron record.

Items Checked Out (1)   Other/Special Circulations (1)

#		Circ ID	Barcode	Due Date	Workstation	Checkin Workstati	Checkout / Renew	Renewals Remaini	Fines Stopped	Title
1	☐	1891	667281988628	1/2/15 11:59 PM	APEX-test		APEX	2	LOST	trunk music

4) The lost item also adds to the count of **Lost** items in the patron summary on the left (or top) of the screen.

Smith, Alexandra	
Patron exceeds fine threshold	12/19/14
Profile	Patron
Home Library	APEX
Net Access	Filtered
Last Activity	
Last Updated	12/19/14
Create Date	10/19/10
Expire Date	7/29/16
Fines Owed	**$35.00**
Items Out	0
Overdue	0
Long Overdue	0
Claimed Returned	**1**
Lost	**1**
Holds	0 / 0

NOTE | Lost Item Billing

- Marking an item Lost will automatically bill the patron the replacement cost of the item as recorded in the price field in the item record, and a processing fee as determined by your local policy. If the lost item has overdue charges, the overdue charges may be voided or retained based on local policy.

- A lost-then-returned item will disappear from the Items Out screen only when all bills linked to this particular circulation have been resolved. Bills may include replacement charges, processing fees, and manual charges added to the existing bills.

- The replacement fee and processing fee for lost-then-returned items may be voided if set by local policy. Overdue fines may be reinstated on lost-then-returned items if set by local policy.

29.2. Refunds for Lost Items

If an item is returned after a lost bill has been paid and the library's policy is to void the replacement fee for lost-then-returned items, there will be a negative balance in the bill. A refund needs to be made to close the bill and the circulation record. Once the outstanding amount has been refunded, the bill and circulation record will be closed and the item will disappear from the Items Out screen.

If you need to balance a bill with a negative amount, you need to add two dummy bills to the existing bills. The first one can be of any amount (e.g. $0.01), while the second should be of the absolute value of the negative amount. Then you need to void the first dummy bill. The reason for using a dummy bill is that Evergreen will check and close the circulation record only when payment is applied or bills are voided.

29.3. Claimed Returned Items

1) To mark an item Claimed Returned, retrieve the patron record and go to the **Items Out** screen.

2) Select the item, then select **Actions** → **Mark Claimed Returned** from the dropdown menu.

		Circ ID	Barcode	Due Date	Workstation	Checkin Workstati	Checkout		Stopped	Title
							Print Item Receipt			
1	☑	1890	156212485858	1/2/15 11:59 PM	APEX-test		Edit Due Date	APEX		lost city
2	☐	1891	667281988628	1/2/15 11:59 PM	APEX-test		Mark Lost (By Patron)	APEX		trunk music
							Mark Claims Returned			
							Mark Claims Never Checked Out			
							Renew			
							Renew All			
							Renew With Specific Due Date			
							Check In			
							Add Billing			

Tabs: Items Checked Out (2) | Other/Special Circulations (0)

3) Enter date in yyyy-mm-dd format and click **Submit**.

Mark Item(s) Claims Returned ✕

Enter claims returned date for items: 601620844833

2014-12-31

[Submit] [Cancel]

4) The Claimed Returned item now displays in the **Other/Special Circulations** section of the patron record.

Tabs: Items Checked Out (1) | Other/Special Circulations (1)

#		Circ ID	Barcode	Due Date	Workstation	Checkin Workstati	Checkout / Renew	Renewals Remaini	Fines Stopped	Title
1	☐	1890	156212485858	1/2/15 11:59 PM	APEX-test		APEX	2	CLAIMSRETURNED	lost city

5) The Claimed Returned item adds to the count of items that are Claimed Returned in the patron summary on the left (or top) of the screen. It also adds to the total **Other/Special Circulations** that is displayed when editing the patron's record.
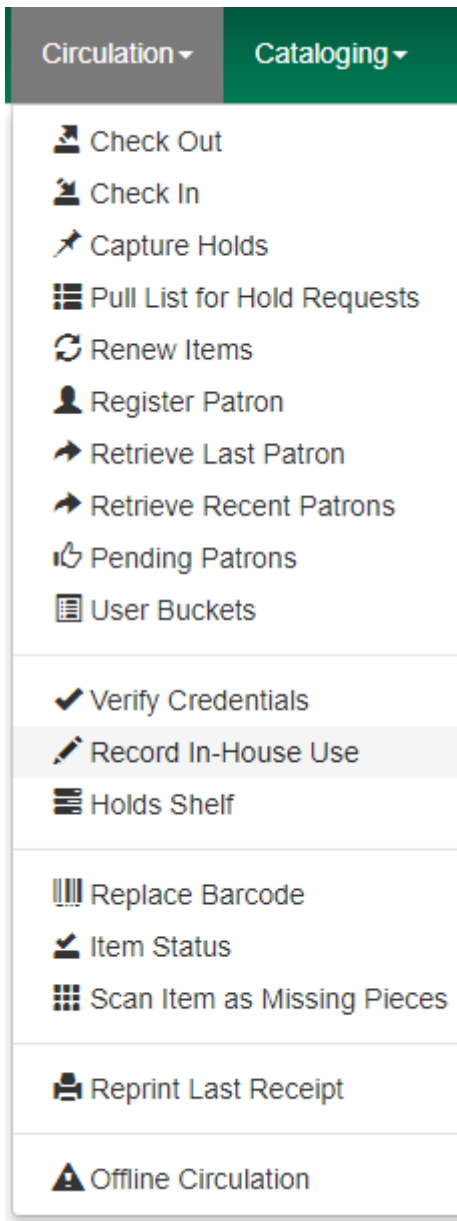
Smith, Alexandra	
Patron exceeds fine threshold	12/19/14
Profile	Patron
Home Library	APEX
Net Access	Filtered
Last Activity	
Last Updated	12/19/14
Create Date	10/19/10
Expire Date	7/29/16
Fines Owed	**$35.00**
Items Out	0
Overdue	0
Long Overdue	0
Claimed Returned	**1**
Lost	**1**
Holds	0 / 0

NOTE | More on Claimed Returned Items

- The date entered for a Claimed Returned item establishes the fine. If the date given has passed, bills will be adjusted accordingly.

- When a Claimed Returned item is returned, if there is an outstanding bill associated with it, the item will not disappear from the **Items Out** screen. It will disappear when the outstanding bills are resolved.

- When an item is marked Claimed Returned, the value in **Claims-returned Count** field in the patron record is automatically increased. Staff can manually adjust this count by editing the patron record.

Chapter 30. In-house Use (F6)

1) To record in-house use, select **Circulation** → **Record-In House Use**, click **Check Out** → **Record In-House Use** on the circulation toolbar , or press **F6**.

Circulation ▾   Cataloging ▾

⤒ Check Out
⤓ Check In
↗ Capture Holds
≣ Pull List for Hold Requests
↻ Renew Items
👤 Register Patron
→ Retrieve Last Patron
→ Retrieve Recent Patrons
👍 Pending Patrons
▤ User Buckets

✔ Verify Credentials
✎ Record In-House Use
☰ Holds Shelf

▥ Replace Barcode
⤓ Item Status
▦ Scan Item as Missing Pieces

🖶 Reprint Last Receipt

⚠ Offline Circulation

2) To record in-house use for cataloged items, enter number of uses, scan barcode or type barcode and click **Submit**.

# of Uses:	1	Barcode ▾	598158008026	Submit

In-House Use   ⏮ ◀◀ ▶▶ Rows 25 ▾ Page 1 ▾ ▾

#	☐	# of Uses	Barcode	Call Number	Location	Title
No Items To Display						

NOTE	There are two independent library settings that will allow copy alerts to display when scanned in In-house Use: **Display copy alert for in-house-use** set to true will cause an alert message to appear, if it has one, when recording in-house-use for the copy. **Display copy location check in alert for in-house-use** set to true will cause an alert message indicating that the item needs to be routed to its location if the location has check in alert set to true.

3) To record in-house use for non-cataloged items, enter number of uses, choose non-cataloged type from drop-down menu, and click **Submit**.
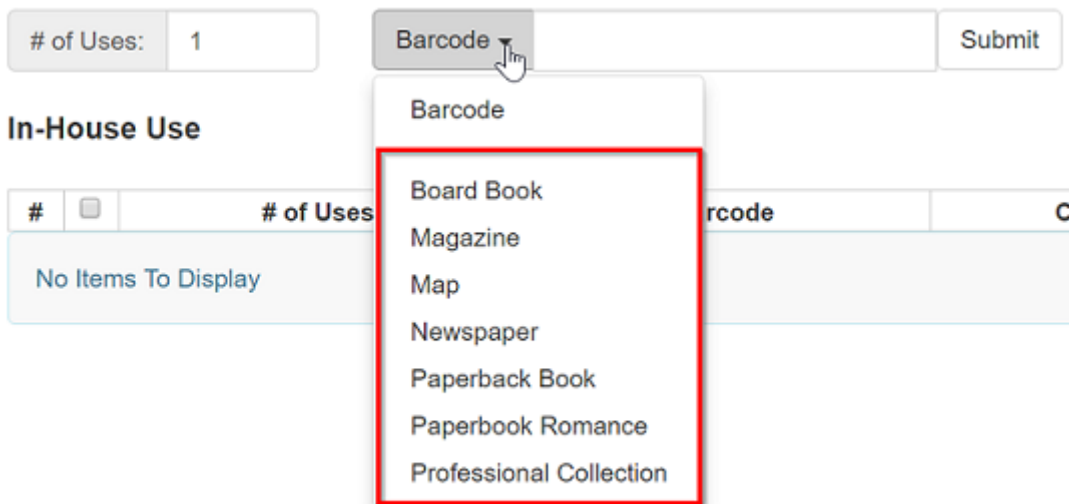

NOTE	The statistics of in-house use are separated from circulation statistics. The in-house use count of cataloged items is not included in the items' total use count.

Chapter 31. Item Status

The Item Status screen is very useful. Many actions can be taken by either circulation staff or catalogers on this screen. Here we will cover some circulation-related functions, namely checking item status, viewing past circulations, inserting item alert messages, marking items missing or damaged, etc.

31.1. Checking item status

1) To check the status of an item, select **Search** → **Search for copies by Barcode**.
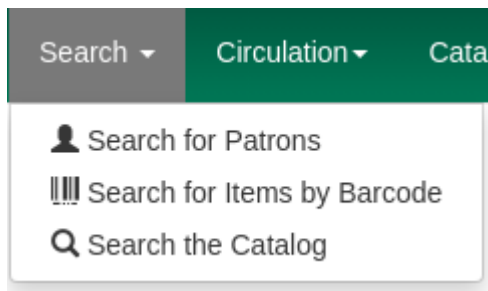
2) Scan the barcode or type it and click **Submit**. The current status of the item is displayed with selected other fields. You can use the column picker to select more fields to view.

3) Click the **Detail View** button and the item summary and circulation history will be displayed.

Barcode	FIC900001651	Circ Library	BM1	Call # Prefix		Status	Available
Price	21.99	Owning Library	BM1	Call #	FIC 223	Due Date	
Acquisition Cost		Shelving Location	Stacks	Call # Suffix		Checkout Date	
ISBN	{"0756407117 (hc.)","9780756407117 (hc.)"}	Loan Duration	Short	Renewal Type		Checkout Workstation	
Date Created	5/3/2019 8:57 AM	Fine Level	Low	Total Circs	0	Duration Rule	
Date Active	5/3/2019 8:57 AM	Reference	false	Total Circs - Current Year	0	Recurring Fine Rule	
Status Changed	5/3/2019 8:57 AM	OPAC Visible	true	Total Circs - Prev Year	0	Max Fine Rule	
Item ID	4256	Holdable	true	In-House Uses	0	Checkin Time	
Circulate	true	Renewal Workstation		Remaining Renewals		Checkin Scan Time	
Floating		Circ Modifier		Age-based Hold Protection		Checkin Workstation	
Inventory Date		Inventory Workstation					
Item Alerts	Add Manage						

4) Click **List View** to go back.

NOTE	If the item's status is "Available", the displayed due date refers to the previous circulation's due date.

TIP	Upload From File allows you to load multiple items saved in a file on your local computer. The file contains a list of the barcodes in text format. To ensure smooth uploading and further processing on the items, it is recommended that the list contains no more than 100 items.

31.2. Viewing past circulations

1) To view past circulations, retrieve the item on the **Item Status** screen as described above.

2) Select **Detail view**.

3) Choose **Recent Circ History**. The item's recent circulation history is displayed.

Scan Item

[ ] Submit	OR	[Browse...] No file selected.	[List View]

Record Summary

Title:	shostakovich, d	Edition:		TCN:	701441	Created By:	admin
Author:		Pub Date:	2009	Databse ID:	701441	Last Edited By:	admin
Bib Call #:				Record Owner:		Last Edited On:	

Quick Summary   **Recent Circ History**   Circ History List   Holds / Transit   Cataloging Info   Triggered Events

No Previous Circ Group

Most Recent Circ Group

Patron	Smith, Angel Heather : 322684
Total Circs	
Checkout Date	12/23/14 11:05 AM
Checkout Workstation	
Last Renewed On	
Renewal Workstation	
Stop Fines Reason	CHECKIN
Stop Fines Time	12/23/14 12:00 AM
Checkin Time	12/23/14 12:00 AM
Checkin Scan Time	12/23/14 11:06 AM
Checkin Workstation	

4) To retrieve the patron(s) of the last circulations, click on the name of the patron. The patron record will be displayed.

> **TIP**
> The number of items that displays in the circulation history can be set in Local **Administration → Library Settings Editor**.

> **NOTE**
> You can also retrieve the past circulations on the patron's Items Out screen and from the Check In screen.

31.3. Marking items damaged or missing and other functions

1) To mark items damaged or missing, retrieve the item on the **Item Status** screen.

2) Select the item. Click on **Actions for Selected Items → Mark Item Damaged** or **Mark Item Missing**.

> **NOTE**
> Depending on the library's policy, when marking an item damaged, bills (cost and/or processing fee) may be inserted into the last borrower's account.

3) Following the above procedure, you can check in and renew items by using the **Check in Items** and **Renew Items** on the dropdown menu.

31.4. Item alerts

The **Edit Item Attributes** function on the **Actions for Selected Items** dropdown list allows you to edit item records. Here, we will show you how to insert item alert messages by this function. See cataloging instructions for more information on item editing. 1) Retrieve record on **Item Status** screen.

2) Once item is displayed, highlight it and select **Actions for Selected Items** → **Edit Item Attributes**.

3) The item record is displayed in the **Copy Editor**.

4) Click **Alert Message** in the **Miscellaneous** column. The background color of the box changes. Type in the message then click **Apply**.

5) Click **Modify Copies**, then confirm the action.

Chapter 32. Long Overdue Items

Items Marked Long Overdue

Once an item has been overdue for a configurable amount of time, Evergreen will mark the item long overdue in the borrowing patron's account. This will be done automatically through a Notification/Action Trigger. When the item is marked long overdue, several actions will take place:

1. The item will go into the status of "Long Overdue"

2. The accrual of overdue fines will be stopped

Optionally the patron can be billed for the item price, a long overdue processing fee, and any overdue fines can be voided from the account. Patrons can also be sent a notification that the item was marked long overdue. And long-overdue items can be included on the "Items Checked Out" or "Other/Special Circulations" tabs of the "Items Out" view of a patron's record. These are all controlled by library settings.

Checking in a Long Overdue item

If an item that has been marked long overdue is checked in, an alert will appear on the screen informing the staff member that the item was long overdue. Once checked in, the item will go into the status of "In process". Optionally, the item price and long overdue processing fee can be voided and overdue fines can be reinstated on the patron's account. If the item is checked in at a library other than its home library, a library setting controls whether the item can immediately fill a hold or circulate, or if it needs to be sent to its home library for processing.
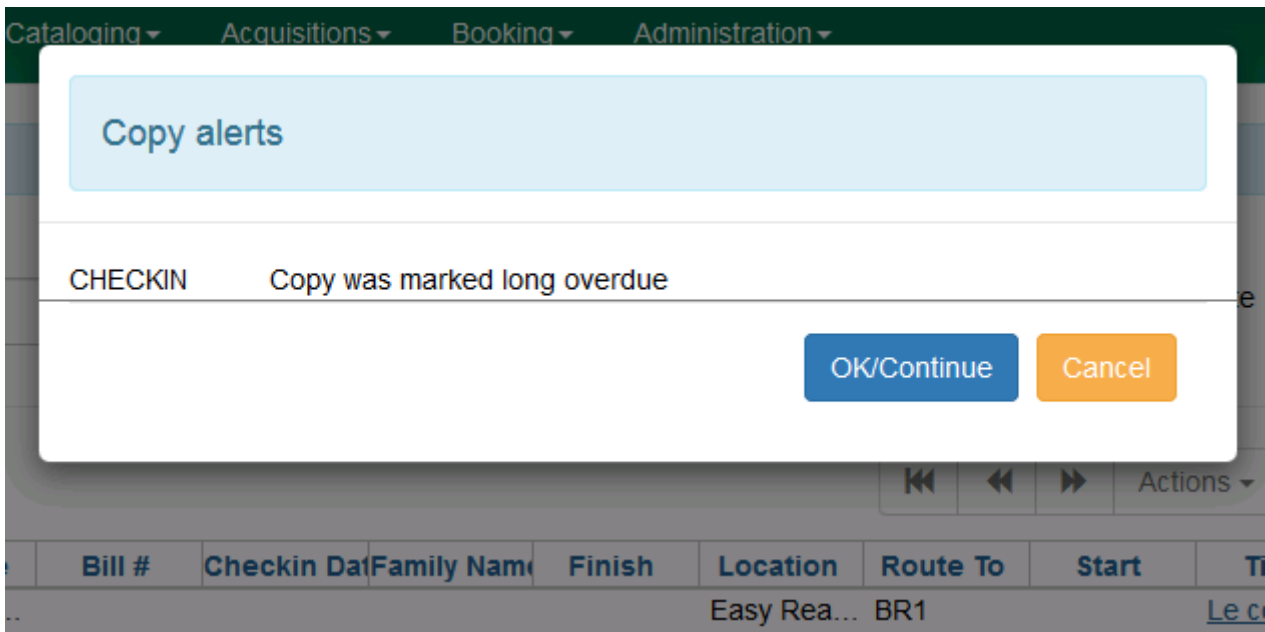
Notification/Action Triggers

Evergreen has two sample Notification/Action Triggers that are related to marking items long overdue. The sample triggers are configured for 6 months. These triggers can be configured for any amount of time according to library policy and will need to be activated for use.

- Sample Triggers
  - 6 Month Auto Mark Long-Overdue—will mark an item long overdue after the configured period of time
  - 6 Month Long Overdue Notice—will send patron notification that an item has been marked long overdue on their account

Library Settings

The following Library Settings enable you to set preferences related to long overdue items:

- **Circulation: 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 the "Long-Overdue Max Return Interval" setting.

- **Circulation: Long-Overdue Items Usable on Checkin** —Long-overdue items are usable on checkin instead of going "home" first

- **Circulation: 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

- **Circulation: Restore Overdues on Long-Overdue Item Return**

- **Circulation: Void Long-Overdue item Billing When Returned**

- **Circulation: Void Processing Fee on Long-Overdue Item Return**

- **Finances: 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

- **Finances: Long-Overdue Materials Processing Fee**

- **Finances: Void Overdue Fines When Items are Marked Long-Overdue**

- **GUI: Items Out Long-Overdue display setting**

TIP	Learn more about these settings in the chapter about the Library Settings Editor.

Permissions to use this Feature

The following permissions are related to this feature:

- COPY_STATUS_LONG_OVERDUE.override

  ◦ Allows the user to check-in long-overdue items thus removing the long-overdue status on the item

Holds Management

Chapter 33. Placing Holds

Holds can be placed by staff in the *Staff Client* and by patrons in the OPAC. In this chapter we demonstrate placing holds in the *Staff Client*.

Chapter 34. Holds Levels

Evergreen has different levels of holds. Library staff can place holds at all levels, while patrons can only place title-level holds, and parts-level holds. The chart below summarizes the levels of holds.

Hold level	Abbreviation	When to use	How to use	Who can use	Hold tied to
Title	T	Patron wants first available copy of a title	Staff or patron click on *Place Hold* next to title.	Patron or staff	Holdings attached to a single MARC (title) record
Parts	P	Patron wants a particular part of title (e.g. volume or disk number)	Staff or patron selects part on the create/edit hold screen when setting holds notification options.	Patron or staff	Holdings with identical parts attached to a single MARC (title) record.
Volume	V	Patron or staff want any title associated with a particular call number	In the staff client, click on *Volume Hold* under *Holdable?*	Staff only	Holdings attached to a single call number (volume)
Copy	C	Patron or staff want a specific copy of an item	In the staff client, click on *Copy Hold* under *Holdable?*	Staff only	A specific copy (barcode)

Chapter 35. Title Level Hold

<table>
<tr><td>**TIP**</td><td>A default hold expiration date will be displayed if the library has set up a default holds expiration period in their library settings. Uncaptured holds will not be targeted after the expiration date.

If you select the *Suspend this Hold* checkbox, the hold will be suspended and not be captured until you activate it.</td></tr>
</table>

1. To place a title level hold, retrieve the title record on the catalog and click the *Place Hold* link beside the title on the search results list, or click the *Place Hold* link on the title summary screen.

2. Scan or type patron's barcode into the *Place hold for patron by barcode* box, or choose *Place this hold for me*.

3. If this title contains multiple parts, you can specify which part to request. If you do not select a part, the hold will target any of the other copies on this record, that is, those with no parts attached. Those copies are usually the complete set, containing all the parts.

4. Edit patron hold notification and expiration date fields as required. Be sure to choose a valid *Pickup location*.

5. Click *Submit*.

Place Hold

○ Place hold for patron by barcode: [＿＿＿＿＿＿＿＿＿]
● Place this hold for me (Administrator System Account)

Life in Shakespeare's England : a book of Elizabethan prose / compiled by John Dover Wilson.
Select a Part (optional): [- All Parts - ▾]
Advanced Hold Options

Pickup location: [Abbey's Library ▾]
Notify when hold is ready for pickup?

☐ Yes, by Email

   Email Address:

☐ Yes, by Phone

   Phone Number: [＿＿＿＿＿＿＿]

☐ Yes, by Text Messaging

   Mobile carrier: [Verizon Wireless (USA) ▾] Note: carrier charges may apply
   Mobile number: [＿＿＿＿＿＿＿] Hint: use the full 10 digits of your phone #, no spaces, no dashes

[Submit] [Cancel]

6. A confirmation screen appears with the message "Hold was successfully placed".

Place Hold

☐ **Life in Shakespeare's England : a book of Elizabethan prose**
   Hold was successfully placed

Continue   Place another hold for this title

Advanced Hold Options

Clicking the **Advanced Hold Options** link will take you into the metarecord level hold feature, where you can select multiple formats and/or languages, if available.

Selecting multiple formats will not place all of these formats on hold. For example, selecting CD Audiobook and Book implies that either the CD format or the book format is the acceptable format to fill the hold. If no format is selected, then any of the available formats may be used to fill the hold. The same holds true for selecting multiple languages.

Place Hold

- ⦿ Place hold for patron by barcode: `3f8cf5f4acf14446ea2f41` System Account, Administrator
- ○ Place this hold for me (Administrator System Account)

Know your Shakespeare.
Basic Hold Options
_____

Select your desired format(s).   Select your desired language(s).
If none are selected, any available formats may be used.   If none are selected, any available languages may be used.

```
Book                    ▲          English                 ▲



                        ▼                                  ▼
```
_____

Pickup location: [Abbey's Library   ▼]

Notify when hold is ready for pickup?

☐ Yes, by Email

      Email Address:

☑ Yes, by Phone

      Phone Number: [_____]

☐ Yes, by Text Messaging

      Mobile carrier: [Verizon Wireless (USA)   ▼] Note: carrier charges may apply
      Mobile number: [_____] Hint: use the full 10 digits of your phone #, no spaces, no dashes

[Submit]   [Cancel]

Chapter 36. Patron Search from Place Hold

Patron Search from Place Hold allows staff members, when placing a hold on behalf of a patron in the web staff client, to search for patrons by names and other searchable patron information, rather than relying on barcode alone.

36.1. To use Patron Search From Place Holds:

1. After performing a search in the catalog, staff will retrieve a bibliographic record.

2. Click **Place Hold** either in the search results or within the detailed bibliographic record. The Place Hold Screen will appear. Note: this feature also appears when placing volume level holds and copy level holds.

3. Next to *Place Hold for patron by barcode*, click on **Patron Search**. Please note that Patron Search will only appear in this interface when using the web-based staff client. It will not appear in the patron-facing OPAC.

4. A dialog box will appear with the patron search interface used elsewhere in the staff client. By default, the search scopes to your workstation org unit, and you can search by patron last name, first name, and middle name.

Clicking the **arrow icon** to the right of *Clear Form* can either expand or condense the searchable fields display which includes other patron information.

5. To search for a patron, fill out the relevant search fields, and click **Search** or hit ENTER on your keyboard. Results will appear below in Patron Search Results in the lower half of the screen.

6. Click the row of the desired patron account, and click **Select**.

7. The dialog box will close and the selected patron's barcode will appear next to *Place Hold for patron by barcode*. This will cause the patron's hold notification preferences to appear in the relevant fields in the bottom half of the screen. Changes to the Hold Notification preferences can be made before clicking **Submit** to finish placing a hold for the patron.

Place Hold

○ Place hold for patron by barcode: 99999303411   Smith, Sarah II   **Patron Search**

○ Place this hold for me (Administrator System Account)

Critical entertainments : music old and new / Charles Rosen

Advanced Hold Options

Pickup location: Example Sub-library 1 ∨

Notify when hold is ready for pickup?

☐ Yes, by Email

Email Address:

☑ Yes, by Phone

Phone Number: 555-555-5555

Submit   **Cancel**

Chapter 37. TPAC Metarecord Search and Metarecord Level Holds

Metarecords are compilations of individual bibliographic records that represent the same work. This compilation allows for several records to be represented on a single line on the TPAC search results page, which can help to reduce result duplications.

Advanced Search Page

Selecting the **Group Formats and Editions** checkbox on the Advanced Search page allows the user to perform a metarecord search.

TIP	Administrators can also configure the catalog to default to a **Group Formats and Editions** search by enabling the relevant config.tt2 setting on the server. Setting this option will pre-select the checkbox on the Advanced Search and Search Result Pages. Users can remove the checkmark, but new searches will revert to the default search behavior.

Search Results Page

Within the Search Results page, users can also refine their searches and filter on metarecord search

results by selecting the **Group Formats and Editions** checkbox.

The metarecord search results will display both the representative metarecord bibliographic data and the combined metarecord holdings data (if the holdings data is OPAC visible).

The number of records represented by the metarecord are displayed in parenthesis next to the title.

The formats contained within the metarecord are displayed under the title.

For the metarecord search result, the **Place Hold** link defaults to a metarecord level hold.

To place a metarecord level hold:

1. Click the **Place Hold** link.

2. Users who are not logged into their accounts will be directed to the **Log in to Your Account** screen, where they will enter their username and password. Users who are already logged into their accounts will be directed to the **Place Hold** screen.

3. Within the **Place Hold** screen, users can select the multiple formats and/or languages that are available.

4. Continue to enter any additional hold information (such as Pickup Location), if needed.

5. Click **Submit**.

Selecting multiple formats will not place all of these formats on hold for the user. For example, a user cannot select CD Audiobook and Book and expect to place both the CD and book on hold at the same time. Instead, the user is implying that either the CD format or the book format is the acceptable format to fill the hold. If no format is selected, then any of the available formats may be used to fill the hold. The same holds true for selecting multiple languages.

Advanced Hold Options

When users place a hold on an individual bibliographic record they will see an **Advanced Hold Options** link within the Place Hold screen. Clicking the **Advanced Hold Options** link will take the users into the metarecord level hold feature, enabling them to select multiple formats and/or languages.

Metarecord Constituent Records Page

The TPAC now includes a Metarecord Constituent Records page, which displays a listing of the individual bibliographic records grouped within the metarecord. Access the Metarecord Constituent Records page by clicking on the metarecord title on the Search Results page.

This will allow the user to view the results for grouped records.

Show Holds on Bib

Within the staff client, **Show Holds on Bib** for a metarecord level hold will take the staff member into the Metarecord Constituent Records page.

Global Flag: OPAC Metarecord Hold Formats Attribute

To utilize the metarecord level hold feature, the Global Flag: OPAC Metarecord Hold Formats Attribute must be enabled and its value set at mr_hold_format, which is the system's default configuration.

Global Flags

Back Next Filter

#	Label	Enabled	Value
1	OPAC Metarecord Hold Formats Attribute	True	mr_hold_format

Chapter 38. Parts Level Hold

1. To place a parts level hold, retrieve a record with parts-level items attached to the title, such as a multi-disc DVD, an annual travel guide, or a multi-volume book set.

2. Place the hold as you would for a title-level hold, including patron barcode, notification details, and a valid pickup location.

3. Select the applicable part from the *Select a Part* dropdown menu.

4. Click *Submit*.

Place Hold

○ Place hold for patron by barcode: [   ]
◉ Place this hold for me (Administrator System Account)

Life in Shakespeare's England : a book of Elizabethan prose / compiled by John Dover Wilson.
Select a Part (optional): [- All Parts - ▾]
Advanced Hold Options

Pickup location: [Abbey's Library   ▾]
Notify when hold is ready for pickup?

☐ Yes, by Email
    Email Address:
☐ Yes, by Phone
    Phone Number: [   ]
☐ Yes, by Text Messaging
    Mobile carrier: [Verizon Wireless (USA)   ▾] Note: carrier charges may apply
    Mobile number: [   ] Hint: use the full 10 digits of your phone #, no spaces, no dashes

[Submit] [Cancel]

TIP	Requested formats are listed in the *Holdable Part* column in hold records. Use the *Column Picker* to display it when the hold record is displayed.

Chapter 39. Placing Holds in Patron Records

1. Holds can be placed from patron records too. In the patron record on the *Holds* screen, click the *Place Hold* button on the left top corner.

2. The catalog is displayed in the *Holds* screen to search for the title on which you want to place a hold.

3. Search for the title and click the *Place Hold* link.

4. The patron's account information is retrieved automatically. Set up the notification and expiration date fields. Click *Place Hold* and confirm your action in the pop-up window.

5. You may continue to search for more titles. Once you are done, click the *Holds* button on the top to go back to the *Holds* screen. Click the *Refresh* button to display your newly placed holds.

39.1. Placing Multiple Holds on Same Title

After a successful hold placement, staff have the option to place another hold on the same title by clicking the link *Place another hold for this title*. This returns to the hold screen, where a different patron's information can be entered.

This feature can be useful for book groups or new items where a list of waiting patrons needs to be transferred into the system.

Chapter 40. Managing Holds

Holds can be cancelled at any time by staff or patrons. Before holds are captured, staff or patrons can suspend them or set them as inactive for a period of time without losing the hold queue position, activate suspended holds, change notification method, phone number, pick-up location (for multi-branch libraries only), expiration date, activation date for inactive holds, etc. Once a hold is captured, staff can change the pickup location and extend the hold shelf time if required.

Staff can edit holds in either patron's records or the title records. Patrons can edit their holds in their account on the OPAC.

TIP	If you use the column picker to change the holds display from one area of the staff client (e.g. the patron record), it will change the display for all parts of the staff client that deal with holds, including the title record holds display, the holds shelf display, and the pull list display.

40.1. Actions for Selected Holds

1. Retrieve the patron record and go to the *Holds* screen.

2. Highlight the hold record, then select *Actions*.

3. Manage the hold by choosing an action on the list.

   a. If you want to cancel the hold, click *Cancel Hold* from the menu. You are prompted to select a reason and put in a note if required. To finish, click *Apply*.
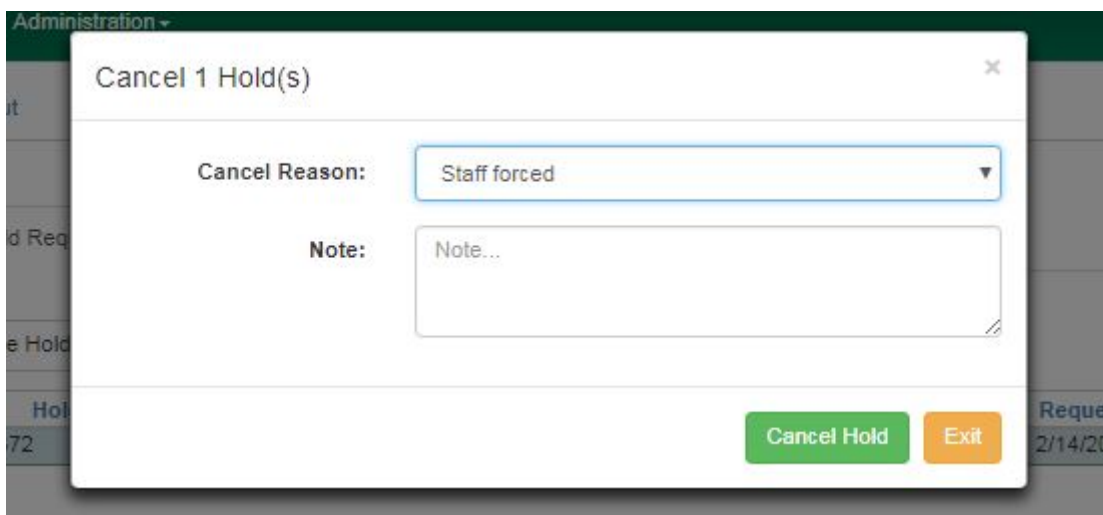
NOTE	A captured hold with a status of *On Hold Shelf* can be cancelled by either staff or patrons. But the status of the item will not change until staff check it in.

b. If you want to suspend a hold or activate a suspended hold, click the appropriate action on the list. You will be prompted to confirm your action. Suspended holds have a *No* value in the *Active?* column.

NOTE	Suspended holds will not be filled but its hold position will be kept. They will automatically become active on the activation date if there is an activation date in the record. Without an activation date, the holds will remain inactive until staff or a patron activates them manually.

c. You may edit the *Activation Date* and *Expiration Date* by using the corresponding action on the *Actions* dropdown menu. You will be prompted to enter the new date. Use the calendar widget to choose a date, then click *Apply*. Use the *Clear* button to unset the date.
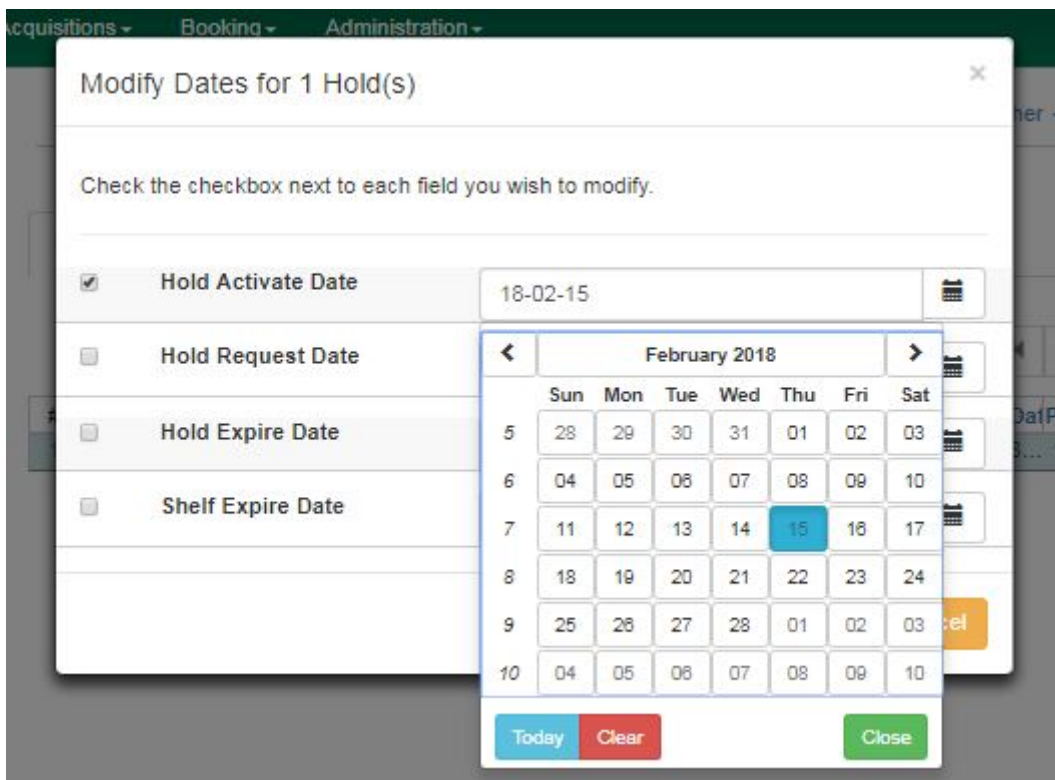
d. Hold shelf expire time is automatically recorded in the hold record when a hold is filled. You may edit this time by using the *Edit Shelf Expire Time* on the *Actions* dropdown menu. You will be prompted to enter the new date. Use the calendar widget to choose a date, then click *Apply*.

e. If you want to enable or disable phone notification or change the phone number, click *Edit Notification Settings*. You will be prompted to enter the new phone number. Make sure you enter a valid and complete phone number. The phone number is used for this hold only and can be different from the one in the patron account. It has no impact on the patron account. If you leave it blank, no phone number will be printed on the hold slip. If you want to enable or disable email notification for the hold, check *Send Emails* on the prompt screen.
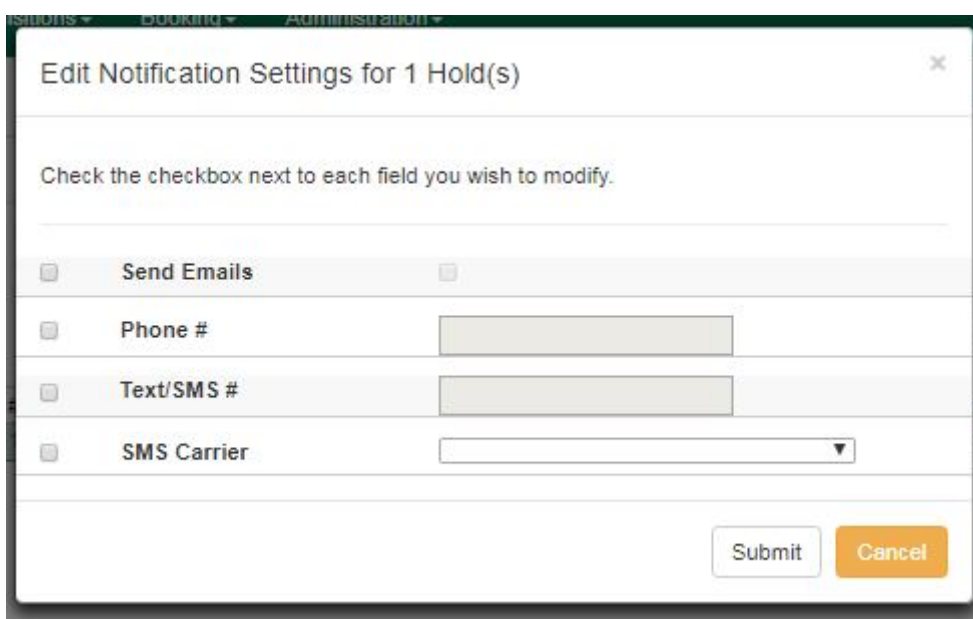
f. Pickup location can be changed by clicking *Edit Pickup Library*. Click the dropdown list of all libraries and choose the new pickup location. Click *Submit*.
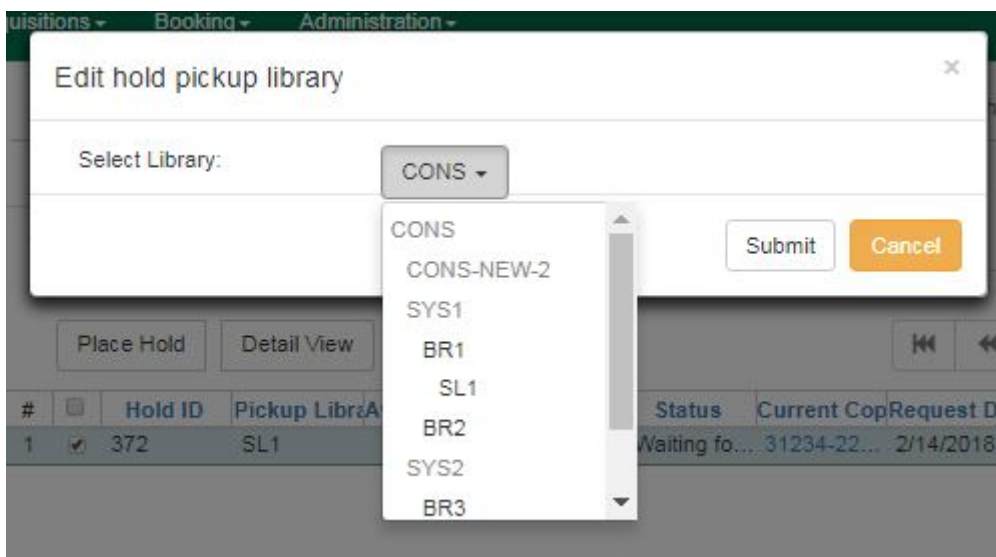
| | NOTE | Staff can change the pickup location for holds with in-transit status. Item will be sent in transit to the new destination. Staff cannot change the pickup location once an item is on the holds shelf. |

g. The item's physical condition is recorded in the copy record as *Good* or *Mediocre* in the *Quality* field. You may request that your holds be filled with copies of good quality only. Click *Set Desired Copy Quality* on the *Actions* list. Make your choice in the pop-up window.
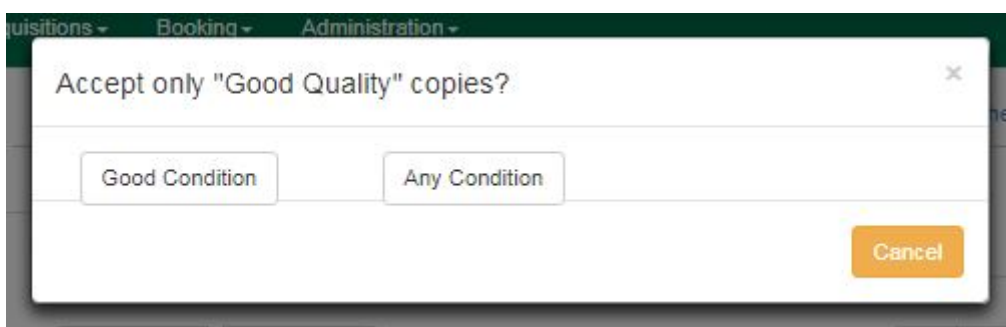
40.2. Transferring Holds

1. Holds on one title can be transferred to another with the hold request time preserved. To do so, you need to find the destination title and click *Mark for: → Title Hold Transfer*.
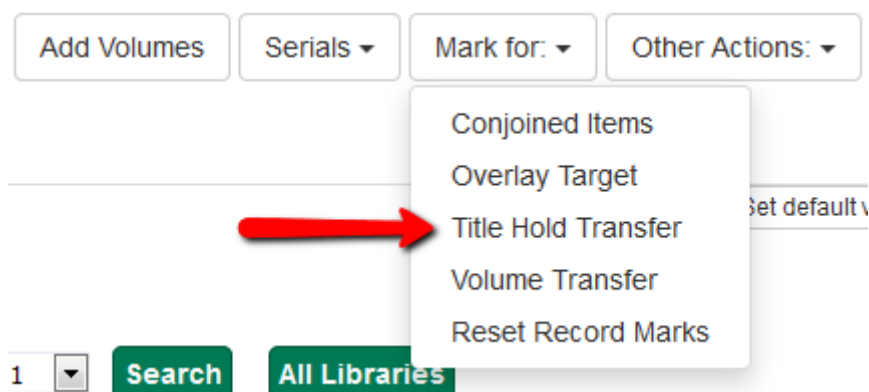
2. Select the hold you want to transfer. Click *Actions → Transfer to Marked Title*.
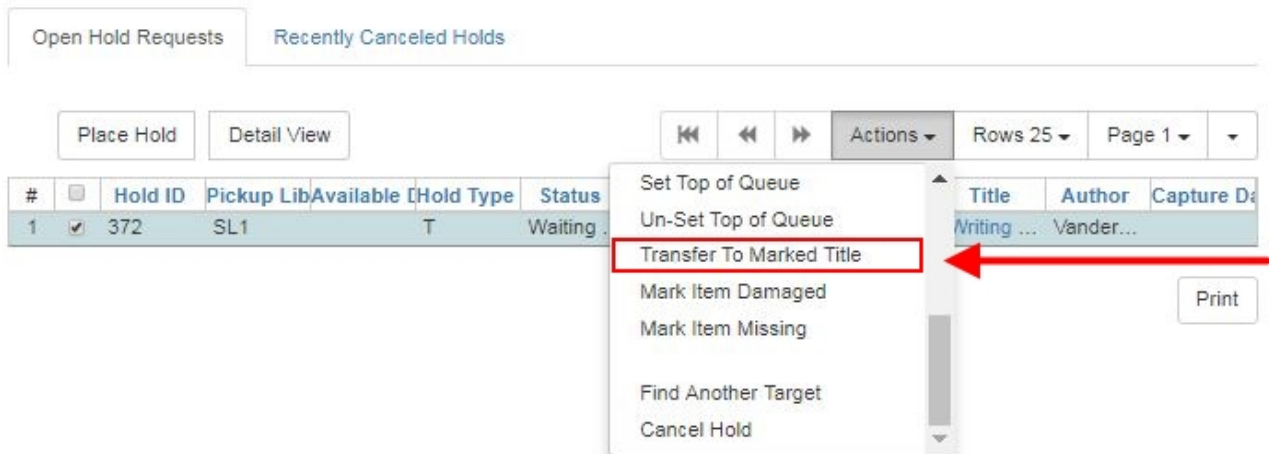
40.3. Cancelled Holds

1. Cancelled holds can be displayed. Click the *Recently Cancelled Holds* button on the *Holds* screen.
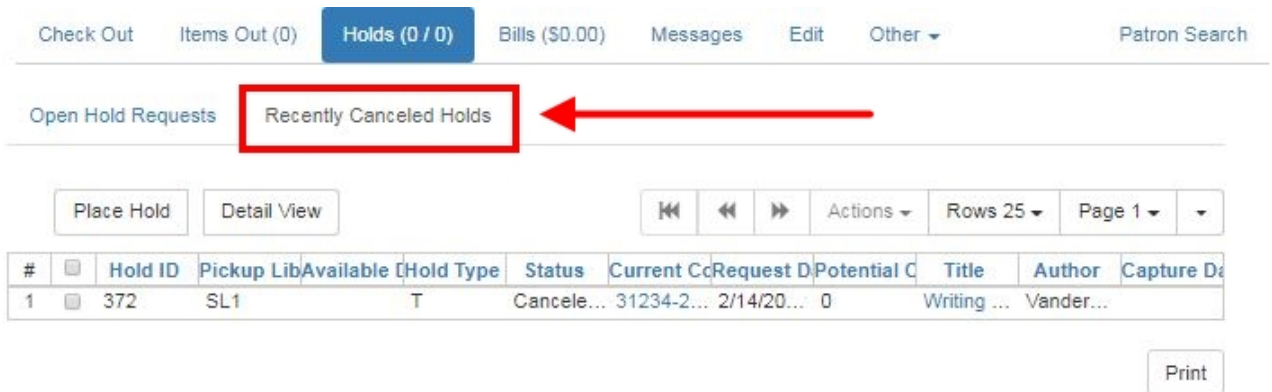
2. You can un-cancel holds.
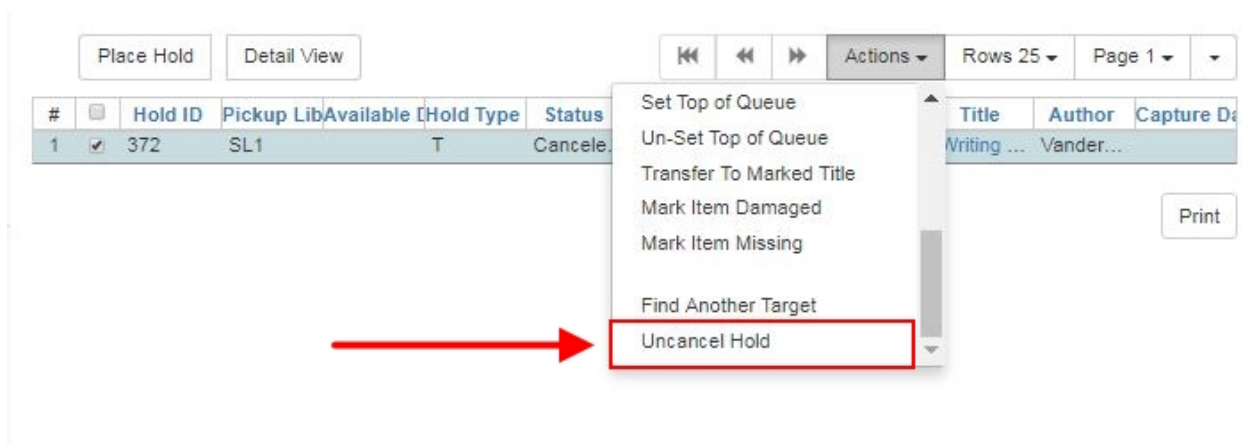
Based on your library's setting, hold request time can be reset when a hold is un-cancelled.

40.4. Viewing Details & Adding Notes to Holds

1. You can view details of a hold by selecting a hold then clicking the *Detail View* button on the *Holds* screen.

2. You may add a note to a hold in the *Detail View*.

3. Notes can be printed on the hold slip if the *Print on slip?* checkbox is selected. Enter the message, then click *OK*.
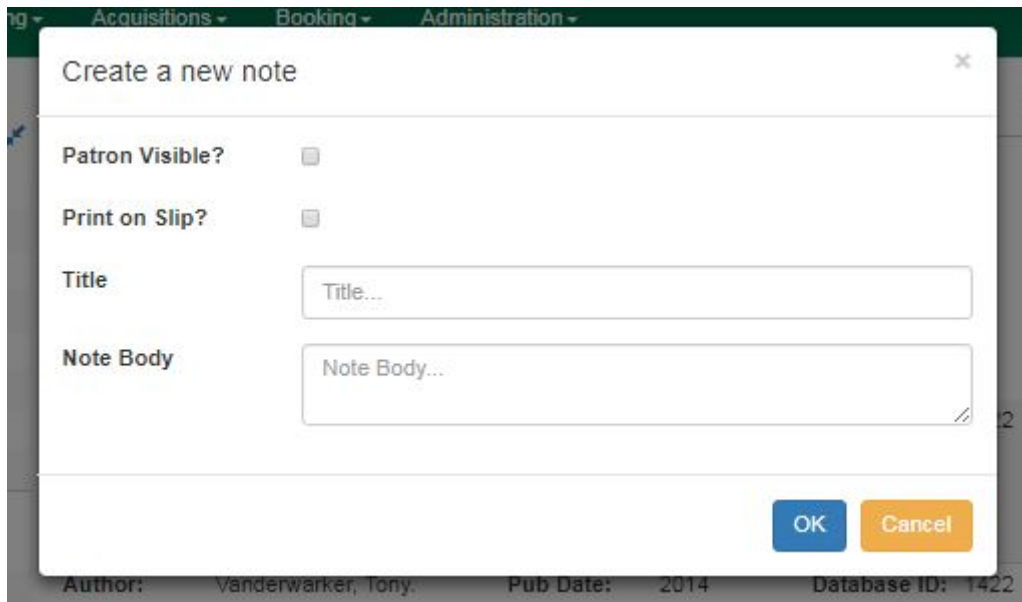
40.5. Displaying Queue Position

Using the Column Picker, you can display *Queue Position* and *Total number of Holds*.

40.6. Managing Holds in Title Records

1. Retrieve and display the title record in the catalog.

2. Click *Actions → View Holds*.
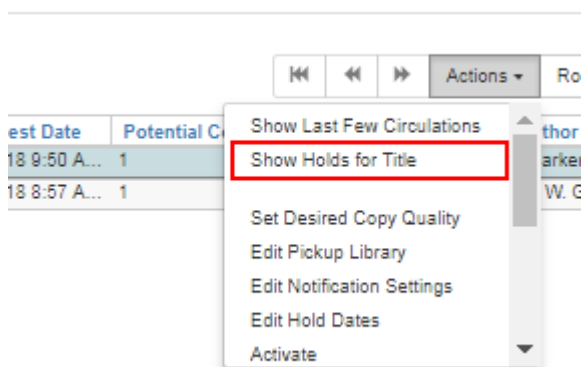
3. All holds on this title to be picked up at your library are displayed. Use the *Pickup Library* to view holds to be picked up at other libraries.
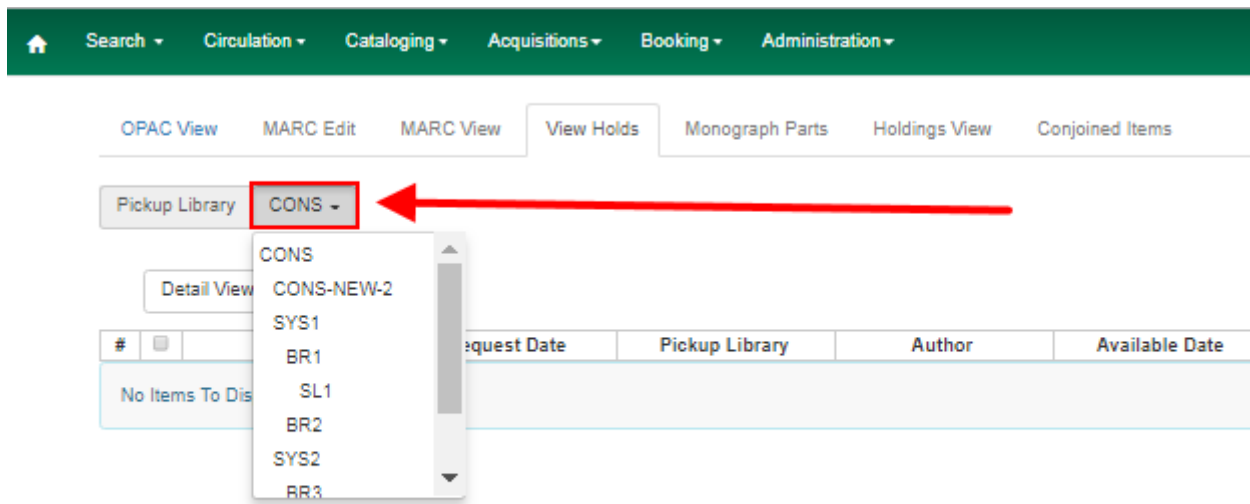
4. Highlight the hold you want to edit. Choose an action from the *Actions* menu. For more information see the Actions for Selected Holds section. For example, you can retrieve the hold requestor's account by selecting *Retrieve Patron* from this menu.
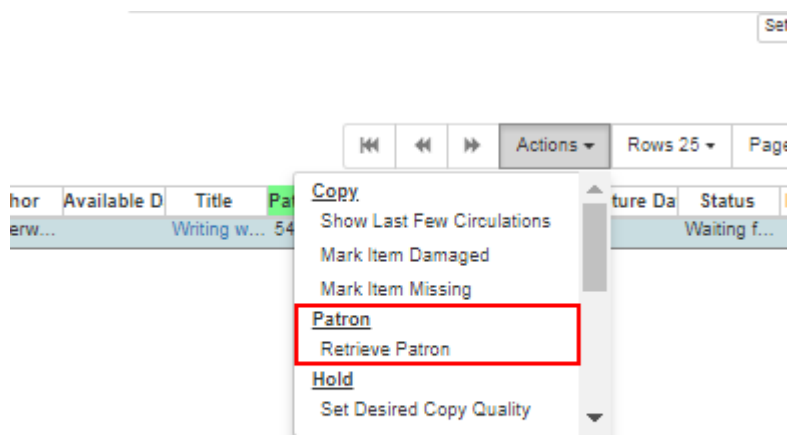
40.7. Retargeting Holds

Holds need to be retargeted whenever a new item is added to a record, or after some types of item status changes, for instance when an item is changed from *On Order* to *In Process*. The system does not automatically recognize the newly added items as available to fill holds.

1. View the holds for the item.

2. Highlight all the holds for the record, which have a status of *Waiting for Copy*. If there are a lot of holds, it may be helpful to sort the holds by *Status*.

3. Click on the head of the status column.

4. Under *Actions*, select *Find Another Target*.

5. A window will open asking if you are sure you would like to reset the holds for these items.

6. Click *Yes*. Nothing may appear to happen, or if you are retargeting a lot of holds at once, your screen may go blank or seem to freeze for a moment while the holds are retargeted.

7. When the screen refreshes, the holds will be retargeted. The system will now recognize the new items as available for holds.

40.8. Pulling & Capturing Holds

40.8.1. Holds Pull List

There are usually four statuses a hold may have: *Waiting for Copy, Waiting for Capture, In Transit* and *Ready for Pickup*.

1. **Waiting-for-copy**: all holdable copies are checked out or not available.

2. **Waiting-for-capture**: an available copy is assigned to the hold. The item shows up on the *Holds Pull List* waiting for staff to search the shelf and capture the hold.

3. **In Transit**: holds are captured at a non-pickup branch and on the way to the pick-up location.

4. **Ready-for-pick-up**: holds are captured and items are on the *Hold Shelf* waiting for patrons to pick up. Besides capturing holds when checking in items, Evergreen matches holds 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 can print the *Holds Pull List* and search for the items on shelves.

5. To retrieve your *Holds Pull List*, select *Circulation → Pull List for Hold Requests*.
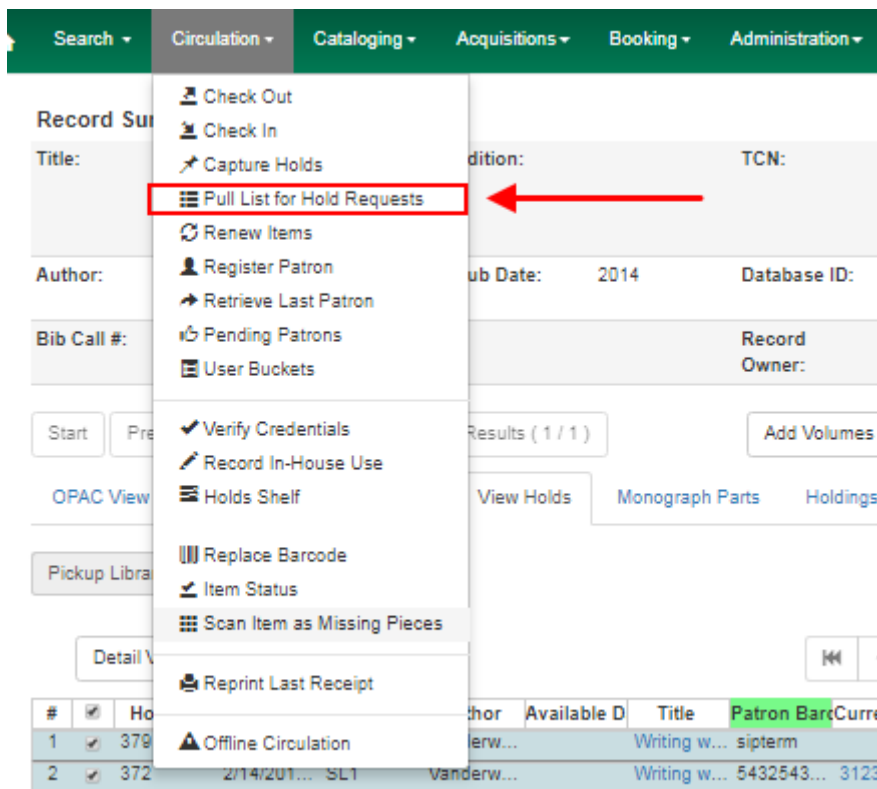
6. The *Holds Pull List* is displayed. You may re-sort it by clicking the column labels, e.g. *Title*. You

can also add fields to the display by using the column picker.

> **NOTE**   Column adjustments will only affect the screen display and the CSV download for the holds pull list. It will not affect the printable holds pull list.

7. The following options are available for printing the pull list:

   ◦ *Print Full Pull List* prints *Title, Author, Shelving Location, Call Number* and *Item Barcode*. This method uses less paper than the alternate strategy.

   ◦ *Print Full Pull List (Alternate Strategy)* prints the same fields as the above option but also includes a patron barcode. This list will also first sort by copy location, as ordered under *Admin → Local Administration → Copy Location Order*.

   ◦ *Download CSV* – This option is available from the *List Actions* button (adjacent to the *Page "#"* button) and saves all fields in the screen display to a CSV file. This file can then be opened in Excel or another spreadsheet program. This option provides more flexibility in identifying fields that should be printed.
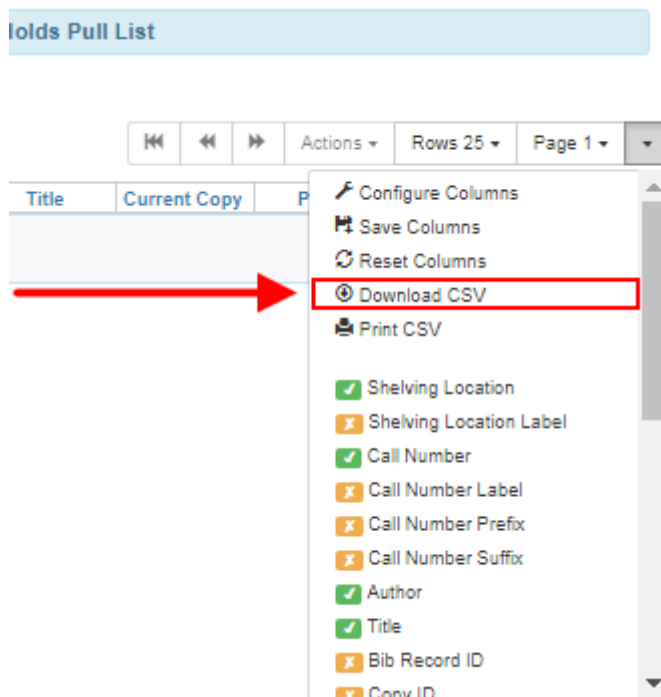
   With the CSV option, if you are including barcodes in the holds pull list, you will need to take the following steps to make the barcode display properly: in Excel, select the entire barcode column, right-click and select *Format Cells*, click *Number* as the category and then reduce the number of decimal places to 0.

8. You may perform hold management tasks by using the *Actions* dropdown list.

The *Holds Pull List* 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 *Holds Pull List* should be printed at least once a day.

40.8.2. Capturing Holds

Holds can be captured when a checked-out item is returned (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 and if the patron has chosen to be notified by email, the email notification will be sent out. The item should be put on the hold shelf.

1. To capture a hold, select *Circulation → Capture Holds* (or press *Shift-F2*).
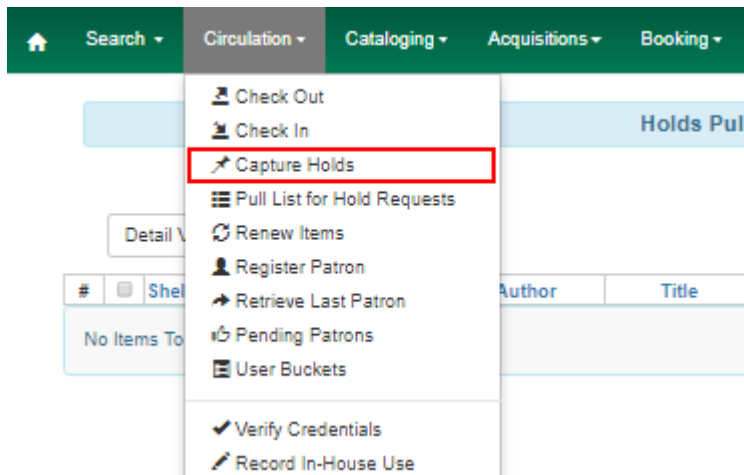
2. Scan or type barcode and click *Submit*.
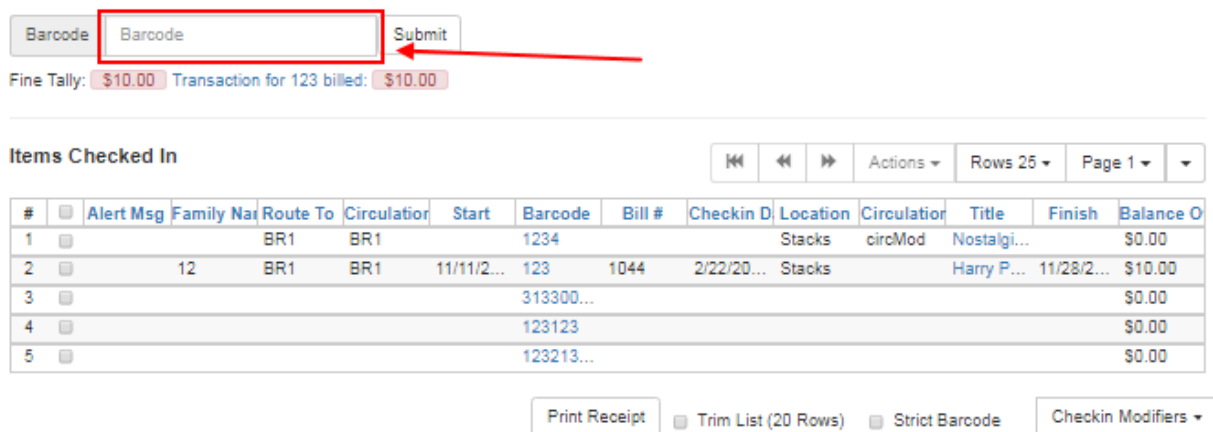
3. The following hold slip is automatically printed. If your workstation is not setup for silent printing (via Hatch), then a print window will appear.
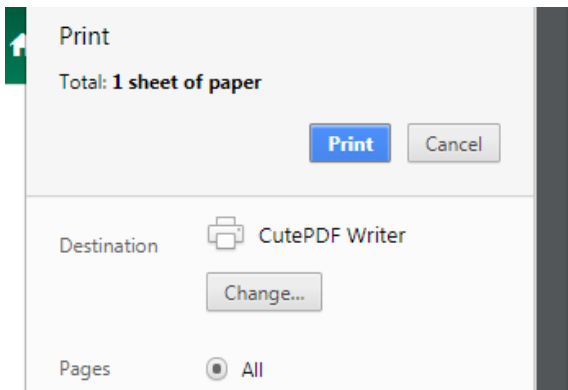
4. If the item should be sent to another location, a hold transit slip will be printed. If your workstation is not setup for silent printing (via Hatch), then another print window will appear.

TIP	If a patron has an *OPAC/Staff Client Holds Alias* in his/her account, it will be used on the hold slip instead of the patron's name. Holds can also be captured on the *Circulation → Check In Items* screen where you have more control over automatic slip printing.

40.9. Handling Missing and Damaged Item

If an item on the holds pull list is missing or damaged, you can change its status directly from the holds pull list.

1. From the *Holds Pull List*, right-click on the item and either select *Mark Item Missing* or *Mark Item Damaged*.
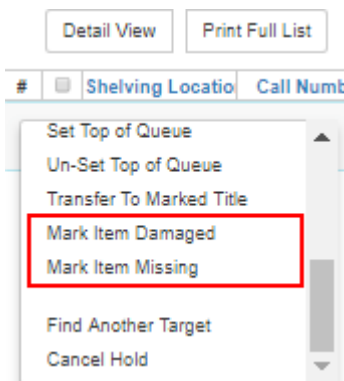
2. Evergreen will update the status of the item and will immediately retarget the hold.

40.10. Holds Notification Methods

1. In Evergreen, patrons can set up their default holds notification method in the *Account Preferences* area of *My Account*. Staff cannot set these preferences for patrons; the patrons must do it when they are logged into the public catalog.

2. Patrons with a default notification preference for phone will see their phone number at the time they place a hold. The checkboxes for email and phone notification will also automatically be checked (if an email or phone number has been assigned to the account).

3. The patron can remove these checkmarks at the time they place the hold or they can enter a different phone number if they prefer to be contacted at a different number. The patron cannot change their e-mail address at this time.

4. When the hold becomes available, the holds slip will display the patron's e-mail address only if the patron selected the *Notify by Email by default when a hold is ready for pickup?* checkbox. It will display a phone number only if the patron selected the *Notify by Phone by default when a hold is ready for pickup?* checkbox.

If the patron changes their contact telephone number when placing the hold, this phone number will display on the holds slip. It will not necessarily be the same phone number contained in the patron's record.

40.11. Clearing Shelf-Expired Holds

1. Items with *Ready-for-Pickup* status are on the *Holds Shelf*. The *Holds Shelf* can help you manage items on the holds shelf. To see the holds shelf list, select *Circulation → Holds Shelf*.
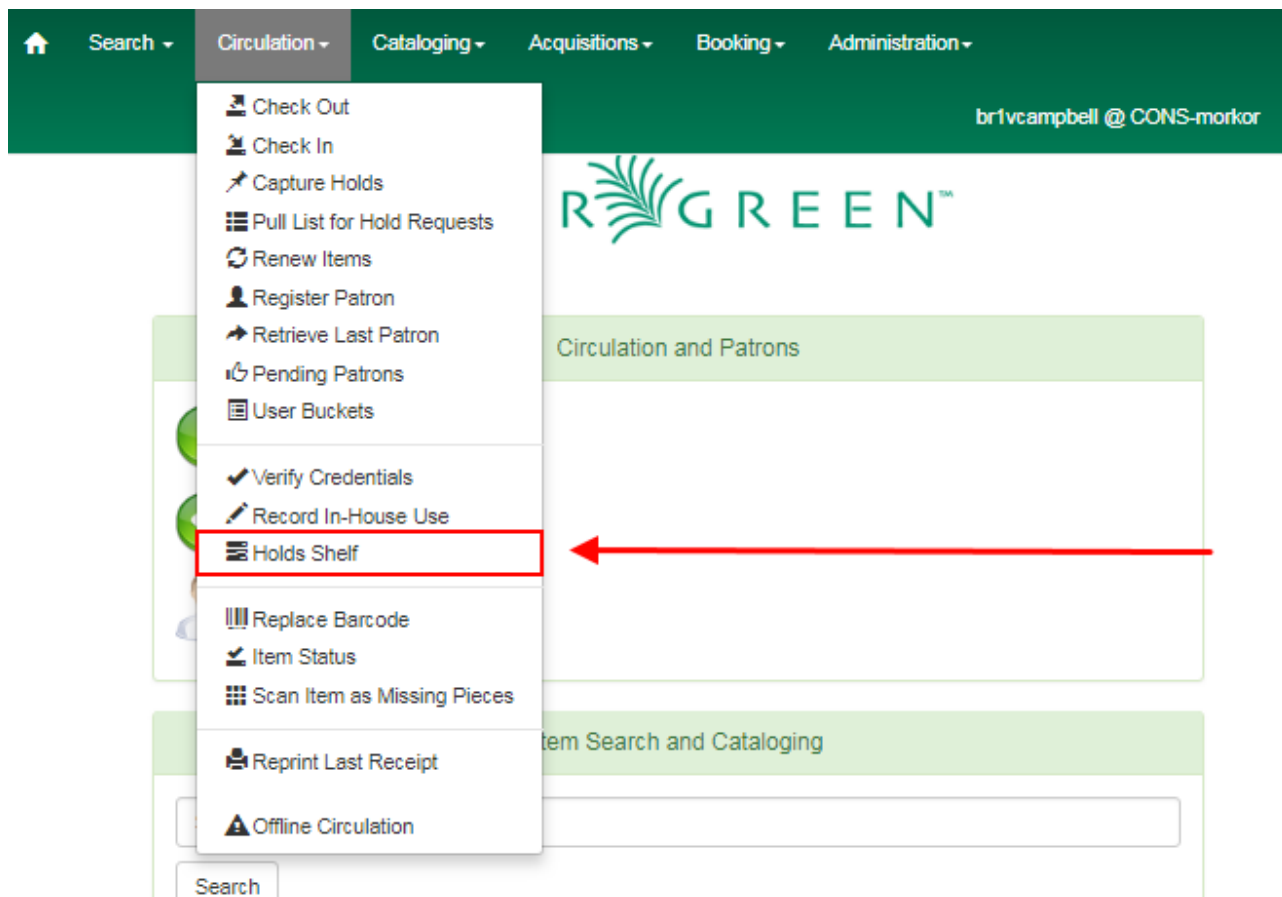
2. The *Holds Shelf* is displayed. Note the *Actions* menu is available, as in the patron record.

   You can cancel stale holds here.
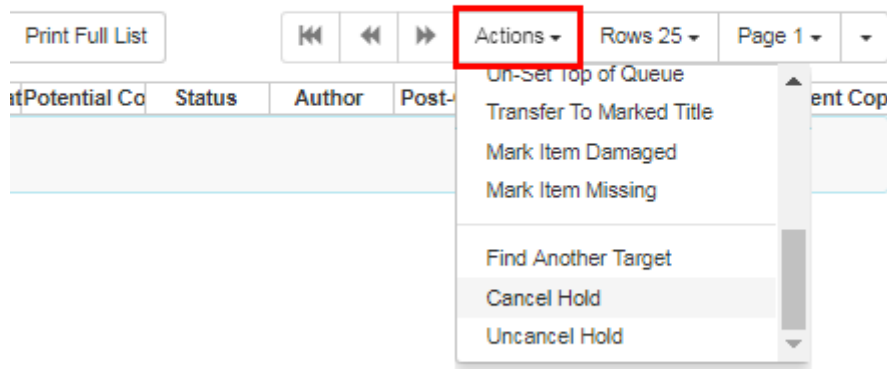
3. Use the column picker to add and remove fields from this display. Two fields you may want to display are *Shelf Expire Time* and *Shelf Time*.
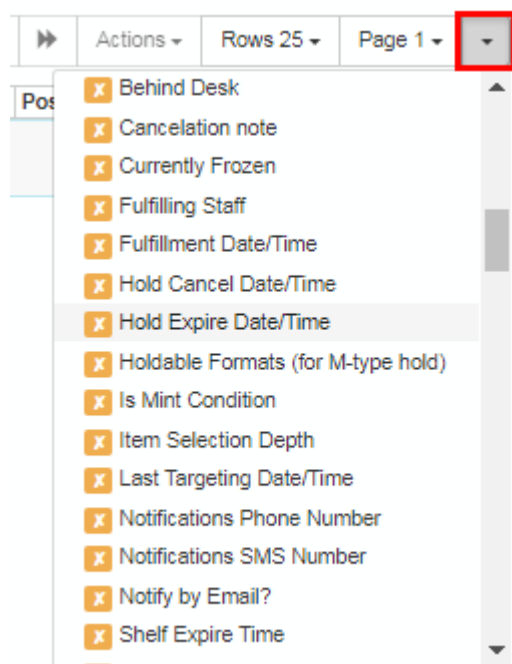
4. Click the *Show Clearable Holds* button to list expired holds, wrong-shelf holds and canceled holds only. Expired holds are holds that expired before today's date.
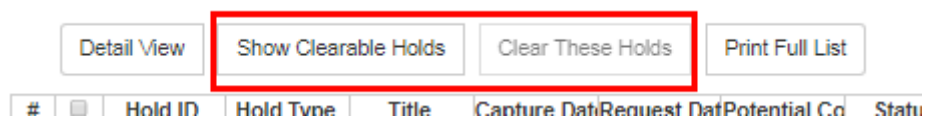
5. Click the *Print Full List* button if you need a printed list. To format the printout customize the **Holds Shelf** receipt template. This can be done in *Administration → Workstation → Print Templates*.

6. The *Clear These Holds* button becomes enabled when viewing clearable holds. Click it and the expired holds will be canceled.

7. Bring items down from the hold shelf and check them in.

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

Hold shelf expire time is inserted when a hold achieves on-hold-shelf status. It is calculated based on the interval entered in *Local Admin → Library Settings → Default hold shelf expire interval.*

NOTE	The clear-hold-shelf function cancels shelf-expired holds only. It does not include holds canceled by patron. Staff needs to trace these items manually according to the hold slip date.

Chapter 41. Alternate Hold Pick up Location

Abstract

This feature enables libraries to configure an alternate hold pick up location. The alternate pick up location will appear in the staff client to inform library staff that a patron has a hold waiting at that location. In the stock Evergreen code, the default alternate location is called "Behind Desk".

Configuration

The alternate pick up location is disabled in Evergreen by default. It can be enabled by setting **Holds: Behind Desk Pickup Supported** to *True* in the Library Settings Editor.

Libraries can also choose to give patrons the ability to opt-in to pick up holds at the alternate location through their OPAC account. To add this option, set the **OPAC/Patron Visible** field in the User Setting Type **Hold is behind Circ Desk** to *True*. The User Setting Types can be found under **Administration → Server Administration → User Setting Types**.

Display

When enabled, the alternate pick up location will be displayed under the Holds button in the patron account.

If configured, patrons will see the option to opt-in to the alternate location in the *Account Preferences* section of their OPAC Account.

Chapter 42. Display Hold Types on Pull Lists

This feature ensures that the hold type can be displayed on all hold interfaces.

You will find the following changes to the hold type indicator:

1. The hold type indicator will display by default on all XUL-based hold interfaces. XUL-based hold interfaces are those that number the items on the interface. This can be overridden by saving column configurations that remove the *Type* column.

2. The hold type indicator will display by default on the HTML-based pull list. To access, click *Circulation → Pull List for Hold Requests → Print Full Pull List (Alternate Strategy)*.

3. The hold type indicator can be added to the Simplified Pull List. To access, click *Circulation → Pull List for Hold Requests → Simplified Pull List Interface*.

To add the hold type indicator to the simplified pull list, click *Simplified Pull List Interface*, and right click on any of the column headers. The Column Picker appears in a pop up window. Click the box adjacent to *Hold Type*, and Click *Save*. The *Simplified Pull List Interface* will now include the hold type each time that you log into the staff client.

Offline Circulation

Chapter 43. Introduction

Evergreen's Offline Circulation interface is designed to log transactions during a network or server outage. Transactions can be uploaded and processed once connectivity is restored.

Offline Circulation in the Web Staff Client relies on the use of web service workers to store information for offline use. 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. You must also log in from that browser at least once and visit **Search** → **Search for Patrons**. Perform a search, select a user from the results, and open the **Patron Edit** interface. This will allow the Offline interface to collect the information it needs, such as workstation information and the patron registration form.

The web service workers will refresh the cache every 24 hours under normal use. Offline Circulation information is stored via IndexedDB.

Chapter 44. Using Offline Circulation

The Offline Circulation interface can be found by navigating to **Circulation** → **Offline Circulation**.

The permanent link for the Offline Circulation is **https://<yourhostname>/eg/staff/offline-interface** and it is recommended that this link be 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	BF ▾	Working location	BR1 ▾	Save Transactions	Reprint Last Receipt	Export Transactions

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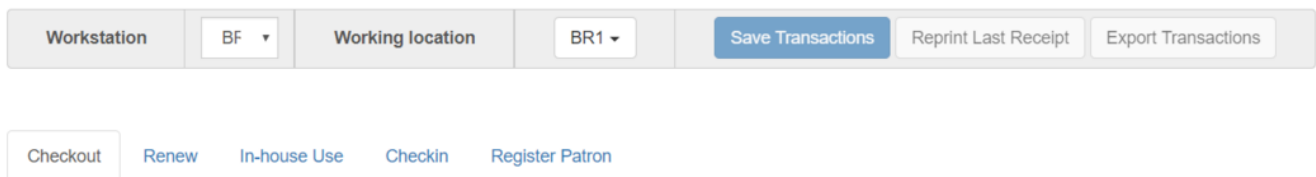
If you are logged in, you will see an additional tab on the left for **Session Management** and this will be the default tab. The top-right button will read **Download Block List**.

Workstation	BR1 ▾	Working location	BR1 ▾	Save Transactions	Reprint Last Receipt	Download block list

Session Management   Checkout   Renew   In-house Use   Checkin   Register Patron

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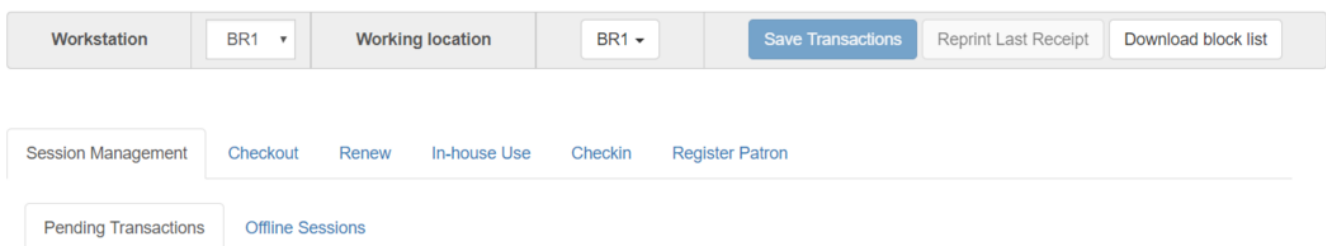
If you are logged in and attempt to click on any tab other than **Session Management**, you will see a warning alerting you that you are about to enter offline mode.

Warning

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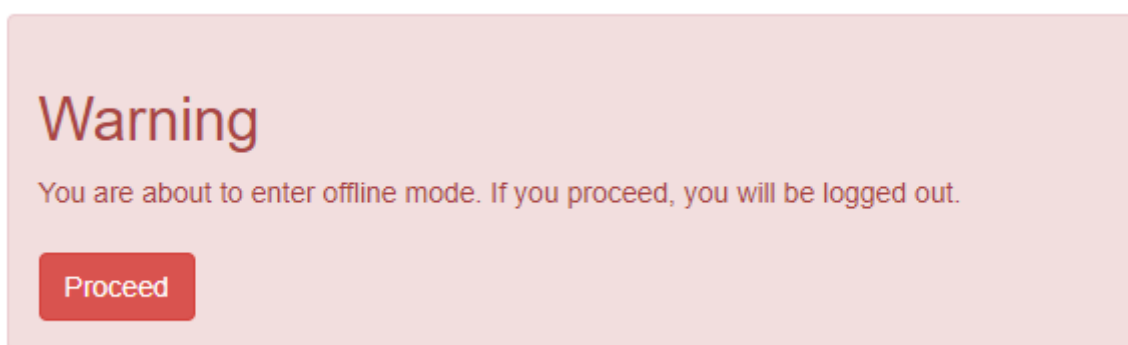
[Proceed]

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.

Chapter 45. Checkout

To check out items in Offline Circulation:

1. Click the **Checkout** tab.

2. If you wish to use Strict Barcode for patron and item barcodes, check the box labelled **Strict Barcode**.

3. 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.

4. Scan the Patron Barcode in the box labelled **Patron Barcode**.

5. 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.

6. To print a receipt, check the box labelled **Print Receipt**.

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

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

In the screenshot, the first two items in the right-hand list are regular checkout items. The third item is a non-cataloged item.

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. Pre-cataloged items which are checked in through offline will also result in an entry in the Exception List, but will successfully check in.

Chapter 46. 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. *(Optional)*: Enter the patron's library card barcode in the **Patron Barcode** field by scanning or typing the barcode.

4. 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.

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 the box labelled **Print Receipt**.

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

Chapter 47. In-House Use

To record in-house use transactions in **Offline Circulation**:

1. Click the **In-House Use** tab.

2. Enter the number of uses to record for the item in the **Use Count** field.

3. For each item to be recorded as in-house use, scan the item's barcode in the **Item Barcode** field. If you are typing the item barcode, click the **Record Use** button or hit the **Enter** key on your keyboard after each item barcode.

4. The item barcode and use count will appear on the right side of the screen.

5. To print a receipt, check the box labelled **Print Receipt**.

6. Click **Save Transactions** in the upper-right of the screen to record the in-house use. The date of the in-house use is automatically recorded.

Chapter 48. Checkin

To checkin items in Offline Circulation:

1. Click the **Checkin** tab.

2. Ensure that the **Due Date** value is correct. It will default to today's date.

3. For each item to be checked in, scan the item's barcode in the **Item Barcode** field. If you are typing the item barcode, click the **Checkin** button or hit the **Enter** key on your keyboard after each item barcode.

4. To print a receipt, check the box labelled **Print Receipt**.

5. Click **Save Transactions** in the upper-right of the screen when you are finished entering checkins.

Checkout	Renew	In-house Use	Checkin	Register Patron

Checkin Date:	07/25/17 📅		Item barcode	Effective Checkin date
Item Barcode:			332211	7/25/17
			115599	7/25/17
Clear	☐ Strict Barcode	☐ Print receipt	Checkin	31234-34061	7/25/17

Note that existing pre-cataloged items can be checked in through the Offline interface, but they will generate an entry in the Exceptions list when offline transactions are uploaded and processed.

Items targeted for holds will be captured for their holds when the offline transactions are uploaded and processed; however, there will be no indication in the Exceptions list about this unless the item is also transiting.

Chapter 49. Patron Registration

Patron registration in Evergreen Offline Circulation records patron information for later upload. In the web staff client, the Patron Registration form in Offline is the same as the regular Patron Registration interface.

All fields in the normal Patron Registration interface are available for entry. Required fields are marked in yellow and adhere to Required Fields set in the **Library Settings Editor**. Patron Registration defaults also adhere to settings in the **Library Settings Editor**. Stat cats are not recognized by the Offline Interface, even if they are required.

Enter patron information and click the **Save** button in the top-right of the Patron Registration interface. You may checkout items to this patron right away, even if you are still in offline mode.

Chapter 50. Managing Offline Transactions

50.1. 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, the Offline Circulation interface 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.

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.
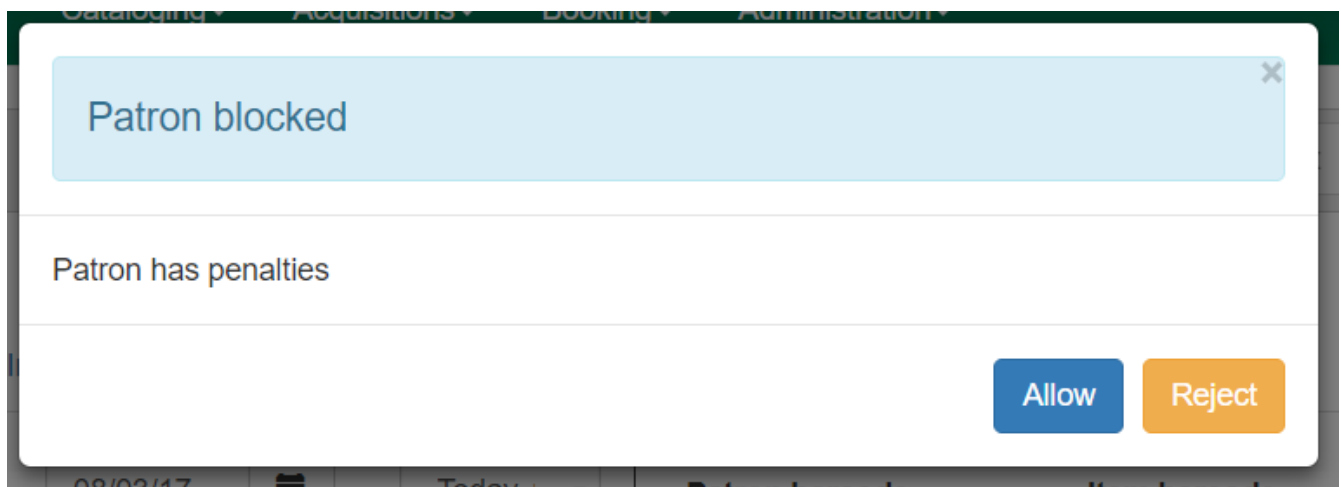
50.2. Exporting Offline Transactions

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.

50.3. Processing Offline Transactions

Once connectivity is restored, navigate back to your **Evergreen Login Page**. You will see a message telling you that there are unprocessed Offline Transactions waiting for upload.

Sign in and navigate to **Circulation → Offline Circulation**. Since you are logged in, 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**.

In the **Pending Transactions** tab you will see a list of all transactions recorded on that browser.

If you click **Clear Transactions**, you will be prompted with a warning.

If you are processing transactions right away and from the same browser you recorded them in,

follow the steps below:

1. Click on the **Offline Sessions** tab and then on the **Create Session** button.

2. Enter a descriptive name for your session in the modal and click **OK/Continue** to proceed. You will see your new session at the top of the **Session List**. 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.

3. Click **Upload** to upload everything listed in the **Pending Transactions** tab.

4. Once all transactions are uploaded, the **Upload Count** column will update to show the number of uploaded transactions.

5. 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.

6. 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.

50.4. Uploading Previously Exported Transactions

If you had previous 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 Processing Offline Transactions.

50.4.1. 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.

Exception List

Workstation	Type	Timestamp	Event Name	Patron Barcode	Item Barcode	Non-cataloged Type	Checkout Date	Due Date	Checkin Date	
APEX-abn	checkout	7/25/17 4:23 PM	COPY_IN_TRANSIT	23859000060659	csharptesting		7/25/17 4:23 PM	7/31/17		Item Patron Debug
APEX-abn	checkout	7/25/17 4:23 PM	OPEN_CIRCULATION_EXISTS	23859000060659	jhkjhjhjkh		7/25/17 4:23 PM	7/31/17		Item Patron Debug
APEX-abn	checkout	7/25/17 4:24 PM	PATRON_ACCOUNT_EXPIRED	387826	878787		7/25/17 4:24 PM	7/31/17		Item Patron Debug

At the right side of each exception are buttons for **Item**, **Patron**, and **Debug**. Clicking the **Item** button will retrieve the associated item in a new browser window. Clicking on the **Patron** button will retrieve the associated patron in a new browser window. Clicking the **Debug** button will result in a modal with detailed debugging information.

Common event names in the Exceptions List include:

- `ROUTE-ITEM` - Indicates the book should be routed to another branch or library system. You'll need to find the book and re-check it in while online to get the Transit Slip to print.

- `COPY_STATUS_LOST` - Indicates a book previously marked as lost was found and checked in. You will need to find the book and re-check it in while online to correctly clear it from the patron's account.

- `CIRC_CLAIMS_RETURNED` - Indicates a book previously marked as claimed-returned was found and checked in. You will need to find the book and re-check it in while online to correctly clear it from the patron's account.

- `ASSET_COPY_NOT_FOUND` - Indicates the item barcode was mis-scanned/mis-typed.

- `ACTOR_CARD_NOT_FOUND` - Indicates the patron's library barcode was mis-scanned, mis-typed, or nonexistent.

- `OPEN_CIRCULATION_EXISTS` - Indicates a book was checked out that had never been checked in.

- `MAX_RENEWALS_REACHED` - Indicates the item has already been renewed the maximum times allowed. Note that if the staff member processing the offline transaction set has the `MAX_RENEWALS_REACHED.override` permission at the appropriate level, the system will automatically override the error and will allow the renewal.

Booking Module

Chapter 51. Creating a Booking Reservation

NOTE	The "Create a booking reservation" screen uses your library's timezone. If you create a reservation at a library in a different timezone, Evergreen will alert you and provide the time in both your timezone and the other library's timezone.

Only staff members may create reservations. A reservation can be started from a patron record, or a booking resource. To reserve catalogued items, you may start from searching the catalogue, if you do not know the booking item's barcode.

51.1. To create a reservation from a patron record

1. Retrieve the patron's record.

2. Select Other → Booking → Create Reservations. This takes you to the Create Reservations Screen.

3. If you want to create a reservation that lasts less than a day (such as for a study room), select *Single-day reservation* as the reservation type. If your reservation will last several days (such as for a video camera needed for a class project), select *Multiple-day reservation.*

4. In the area labeled "Reservation details", select the *Choose resource by barcode* tab if you know the specific barcode of a resource you'd like to reserve. Otherwise, select the *Choose resource by type* tab.

5. A schedule grid will display on the bottom part of the screen.

6. If necessary, adjust the day or days that are displayed. You can also make other adjustments using the *Schedule settings* tab.

7. For non-catalogued resources, patrons may wish to specify certain attributes. The *Attributes* tab allows you to do this. For example, if a patron is booking a laptop, they can choose between PC and Mac laptops if they need to.

8. When you have found the days or times that work the best, you can proceed with creating the reservation, by doing one of the following:

   - Double click the appropriate row in the grid.

   - Use the tab and space keys to select the appropriate rows, then press Shift+F10 to open the actions menu. Select "Create Reservation".

   - Select the appropriate rows in the grid, then right click to open the actions menu. Select "Create Reservation".

   - Select the appropriate rows in the grid, then select the actions button. Select "Create Reservation".

9. Adjust the values in this screen as necessary.

10. Select the "Confirm reservation" button.

11. The screen will refresh, and the new reservation will appear in the schedule.

51.2. Search the catalogue to create a reservation

If you would like to reserve a catalogued item but do not know the item barcode, you may start with a catalogue search.

1. Select Cataloguing → Search the Catalogue to search for the item you wish to reserve. You may search by any bibliographic information.

2. Select the *Holdings View* tab.

3. Right-click on the row that you want to reserve. Select *Book Item Now*. This takes you to the Create Reservations Screen.

4. If you want to create a reservation that lasts less than a day (such as for a study room), select *Single-day reservation* as the reservation type. If your reservation will last several days (such as for a video camera needed for a class project), select *Multiple-day reservation*.

5. A schedule grid will display on the bottom part of the screen.

6. If necessary, adjust the day or days that are displayed. You can also make other adjustments using the *Schedule settings* tab.

7. When you have found the days or times that work the best, you can proceed with creating the reservation, by doing one of the following: .* Double click the appropriate row in the grid. .* Use the tab and space keys to select the appropriate rows, then press Shift+F10 to open the actions menu. Select "Create Reservation". .* Select the appropriate rows in the grid, then right click to open the actions menu. Select "Create Reservation". .* Select the appropriate rows in the grid, then select the actions button. Select "Create Reservation".

8. Enter the patron's barcode.

9. Adjust the values in this screen as necessary.

10. Select the "Confirm reservation" button.

11. The screen will refresh, and the new reservation will appear in the schedule.

NOTE	Reservations on catalogued items can be created on Item Status (F5) screen. Select the item, then Actions → Book Item Now.

Chapter 52. Reservation Pull List

Reservation pull list can be generated dynamically on the Staff Client.

1. To create a pull list, select Booking → Pull List.

2. You can decide how many days in advance you would like to pull reserved items. Enter the number of days in the box adjacent to Generate list for this many days hence. For example, if you would like to pull items that are needed today, you can enter 1 in the box, and you will retrieve items that need to be pulled today.

3. The pull list will appear. Select the actions button, then *Print* to print the pull list.

Chapter 53. Capturing Items for Reservations

Depending on your library's workflow, reservations may need to be captured before they are ready to be picked up by the patron.

CAUTION	Always capture reservations in Booking Module. Check In function in Circulation does not function the same as Capture Resources.

1) In the staff client, select Booking → Capture Resources.
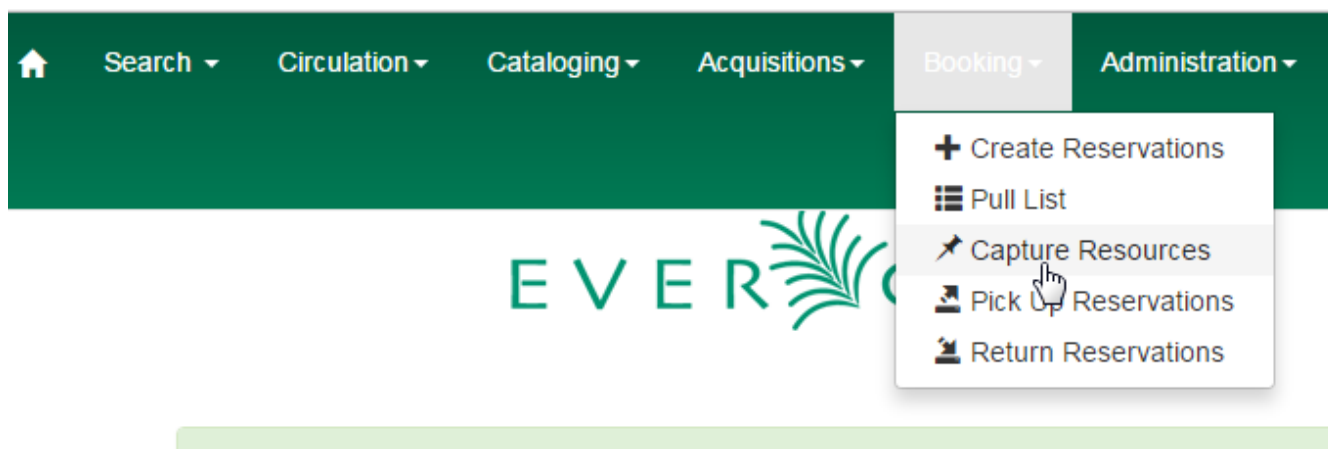
2) Scan the item barcode or type the barcode then click Capture.
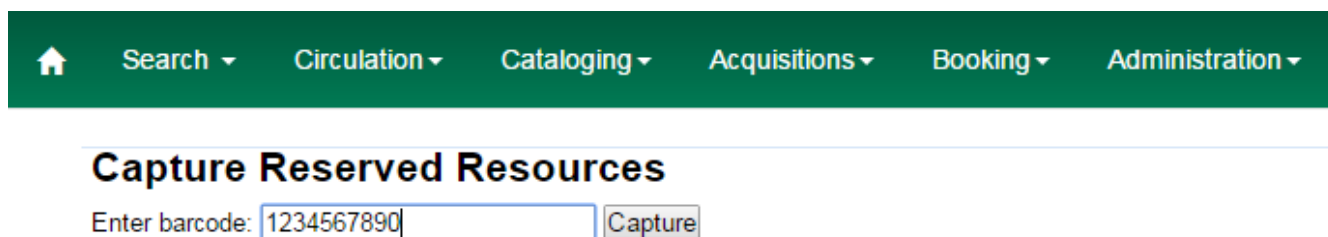
3) The message Capture succeeded will appear to the right. Information about the item will appear below the message. Click Print button to print a slip for the reservation.

Capture Reserved Resources

Enter barcode: [98723000112233] [Capture]   Capture succeeded

---

Capture Information   [Print]

- -

This item need to be routed to **RESERVATION SHELF:**
Barcode: 98723000112233
Title: Laptop

Reserved for patron Pringle, Jennifer
Barcode: 998723000123456

Request time: 2011-06-17 11:50
Reserved from: 2011-06-17 17:30 - 2011-06-17 18:45

Slip date: Fri Jun 17 13:54:25 2011
Printed by System Account, Administrator at BPR

Chapter 54. Picking Up Reservations

CAUTION   Always use the dedicated Booking Module interfaces for tasks related to reservations. Items that have been captured for a reservation cannot be checked out using the Check Out interface, even if the patron is the reservation recipient.

1) Ready-for-pickup reservations can be listed from Other → Booking → Pick Up Reservations within a patron record or Booking → Pick Up Reservations.

2) Scan the patron barcode if using Booking → Pick Up Reservations.

3) The reservation(s) available for pickup will display. Select those you want to pick up and double click them.

4) The screen will refresh to show that the patron has picked up the reservation(s).

Chapter 55. Returning Reservations

CAUTION When a reserved item is brought back, staff must use the Booking Module to return the reservation.

1) To return reservations, select Booking → Return Reservations

2) You can return the item by patron or item barcode. Here we choose Resource to return by item barcode. Scan or enter the barcode, and click Go.

3) A pop up box will tell you that the item was returned. Click OK on the prompt.

4) If we select Patron on the above screen, after scanning the patron's barcode, reservations currently out to that patron are displayed. Highlight the reservations you want to return, and double click them.

5) The screen will refresh to show any resources that remain out and the reservations that have been returned.

NOTE Reservations can be returned from within patron records by selecting Other → Booking → Return Reservations

Chapter 56. Cancelling a Reservation

A reservation can be cancelled in a patron's record or reservation creation screen.

56.1. Cancel a reservation from the patron record

1) Retrieve the patron's record.

2) Select Other → Booking → Manage Reservations.

3) The existing reservations will appear at the bottom of the screen.

4) Highlight the reservation that you want to cancel. Select the Actions menu, then select *Cancel Selected.*

5) A pop-up window will confirm the cancellation. Click OK on the prompt.

6) The screen will refresh, and the cancelled reservation(s) will disappear.

Triggered Events and Notices

Chapter 57. Introduction

Improvements to the Triggered Events interface enables you to easily filter, sort, and print triggered events from the patron's account or an item's details. This feature is especially useful when tracking notice completion from a patron's account.

Chapter 58. Access and View

You can access **Triggered Events** from two Evergreen interfaces: a patron's account or an item's details.

To access this interface in the patron's account, open the patron's record and click **Other** → **Triggered Events / Notifications**.

To access this interface from the item's details, enter the item barcode into the **Item Status** screen, and click **Actions** → **Show** → **Triggered Events**.

Information about the patron, the item, and the triggered event appear in the center of the screen. Add or delete columns to the display by right clicking on any column. The **Column Picker** appears in a pop up box and enables you to select the columns that you want to display.

Chapter 59. Filter

The triggered events that display are controlled by the filters on the right side of the screen. By default, Evergreen displays completed circulation events. Notice that the default filters display **Event State is Complete** and **Core Type is Circ**.

To view completed hold-related events, such as hold capture or hold notice completion, choose **Event State is Complete** and **Core Type is Hold** from the drop down menu.

You can also use the **Event State** filter to view circs and holds that are **pending** or have an **error**.

Add and delete filters to customize the list of triggered events that displays. To add another filter, click **Add Row**. To delete a filter, click the red *X* adjacent to a row.

Chapter 60. Sort

You can sort your results by clicking the column name.

Chapter 61. Print

You can select the events that you want to print, or you can print all events. To print selected events, check the boxes adjacent to the events that you want to print, and click **Print Selected Events**. To print all events, simply click **Print All Events**.

Chapter 62. Reset

If the triggered event does not complete or the notice is not sent and the trigger needs to be run again, then select the event, and click **Reset Selected Events**.

User buckets

Chapter 63. Introduction

You can select and group a set of users into a User Bucket. You can add users to a User Bucket from the Patron Search interface or directly from the User Bucket interface by user barcode. It is also possible to add users to a User Bucket by uploading a text file that contains a list of user barcodes.

From this interface it is possible to perform a set of specific batch update operations on the group of users you have identified.

Chapter 64. Editing users

You can change the following fields in batch:

- Active flag

- Primary Permission Group (group application permissions consulted)

- Juvenile flag

- Home Library (if you have the UPDATE_USER permission for both the original and destination libraries)

- Privilege Expiration Date

- Barred flag (if you have the BAR_PATRON permission)

- Internet Access Level

NOTE You will need the UPDATE_USER permission.

Each change set requires a name. Buckets may have multiple change sets. All users in the Bucket at the time of processing are updated when the change set is processed, and change sets are processed immediately upon successful creation. The interface delivers progress information regarding the processing stage and percent of completion.

While processing the users, the original value for each field edited is recorded for potential future rollback. Users can examine the success and failure of applied change sets.

The user will be able to rollback the entire change set, but not parts thereof. The rollback will affect only those users that were successfully updated by the original change set and may be different from the current set of users in the Bucket. Users can manually discard change sets, removing them from the interface but preventing future rollback.

As a batch process, rather than a direct edit, this mechanism explicitly skips processing of Action/Trigger event definitions for user update, so users will not receive any notifications that they might otherwise receive when their accounts are edited.

Chapter 65. Deleting users

You may also delete users as a batch.

> **NOTE** You will need the UPDATE_USER and DELETE_USER permissions.

Each delete set requires a name. Buckets may have multiple delete sets. All users in the Bucket at the time of processing are marked as deleted when the delete set is processed. The interface delivers progress information regarding the processing stage and percent of completion.

While processing the users, the original value for the "deleted" field will be recorded for potential future rollback. Users are able to examine the success and failure of applied delete sets in the same interface used for the above described change sets.

As a batch process, rather than a direct edit, this mechanism explicitly skips processing of Action/Trigger event definitions for user deletion.

This mechanism does not completely purge the user from the database. User data will still be available to system administrators with database access.

Chapter 66. Editing Statistical Category Entries

All users in the bucket can have their Statistical Category Entries modified. Unlike user data field updates, modification of Statistical Category Entries is permanent and cannot be rolled back. No named change sets are required. The interface will deliver progress information regarding the processing stage and percent of completion.

As a batch process, rather than a direct edit, this mechanism explicitly skips processing of Action/Trigger event definitions for user update.

Using the Public Access Catalog

Chapter 67. Basic Search

From the OPAC home, you can conduct a basic search of all materials owned by all libraries in your Evergreen system.

This search can be as simple as typing keywords into the search box and clicking the *Search* button. Or you can make your search more precise by limiting your search by fields to search, material type or library location.

The *Homepage* contains a single search box for you to enter search terms. You can get to the *Homepage* at any time by clicking the *Another Search* link from the leftmost link on the bar above your search results in the catalogue, or you can enter a search anywhere you see a search box.

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 bib 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.

TIP	To search an item copy call number, use *Advanced Search: Numeric*

67.1. Formats

You can limit your search by formats based on MARC fixed field type:

- **All Books**
- **All Music**
- **Audiocassette music recording**
- **Blu-ray**
- **Braille**
- **Cassette audiobook**

- **CD Audiobook**

- **CD Music recording**

- **DVD**

- **E-audio**

- **E-book**

- **E-video**

- **Equipment, games, toys**

- **Kit**

- **Large Print Book**

- **Map**

- **Microform**

- **Music Score**

- **Phonograph music recording**

- **Phonograph spoken recording**

- **Picture**

- **Serials and magazines**

- **Software and video games**

- **VHS**

67.1.1. Libraries

If you are using a catalogue in a library or accessing a library's online catalogue from its homepage, the search will return items for your local library. If your library has multiple branches, the result will display items available at your branch and all branches of your library system separately.

Chapter 68. Advanced Search

Advanced searches allow users to perform more complex searches by providing more options. Many kinds of searches can be performed from the *Advanced Search* screen. You can access by clicking *Advanced Search* on the catalogue *Homepage* or search results screen.

The available search options are the same as on the basic search. But you may use one or many of them simultaneously. If you want to combine more than three search options, use *Add Search Row* button to add more search input rows. Clicking the *X* button will close the search input row.

68.1. Sort Results

By default, the search results are in order of greatest to least relevance, see Order of Results. In the sort results menu you may select to order the search results by relevance, title, author, or publication date.

68.2. Search Library

The current search library is displayed under *Search Library* drop down menu. By default it is your library. The search returns results for your local library only. If your library system has multiple branches, use the *Search Library* box to select different branches or the whole library system.

68.3. Limit to Available

This checkbox is at the bottom line of *Search Library*. Select *Limit to Available* to limit results to those titles that have items with a circulation status of "available" (by default, either *Available* or *Reshelving*).

68.4. Exclude Electronic Resources

This checkbox is below *Limit to Available*. Select *Exclude Electronic Resources* to limit results to those bibliographic records that do not have an "o" or "s" in the *Item Form* fixed field (electronic forms) and overrides other form limiters.

This feature is optional and will not appear for patrons or staff until enabled.

TIP	To display the **Exclude Electronic Resources** checkbox in the advance search page and search results, set the *ctx.exclude_electronic_checkbox* setting in config.tt2 to 1.

68.5. Search Filter

You can filter your search by *Item Type*, *Item Form*, *Language*, *Audience*, *Video Format*, *Bib Level*, *Literary Form*, *Search Library*, and *Publication Year*. Publication year is inclusive. For example, if you set *Publication Year* Between 2005 and 2007, your results can include items published in 2005, 2006 and 2007.

For each filter type, you may select multiple criteria by holding down the *CTRL* key as you click on the options. If nothing is selected for a filter, the search will return results as though all options are selected.

68.5.1. Search Filter Enhancements

Enhancements to the Search Filters now makes it easier to view, remove, and modify search filters while viewing search results in the Evergreen OPAC. Filters that are selected while conducting an advanced search in the Evergreen OPAC now appear below the search box in the search results interface.

For example, the screenshot below shows a Keyword search for "violin concerto" while filtering on Item Type: Musical sound recording and Shelving Location: Music.

In the search results, the Item Type and Shelving Location filters appear directly below the search box.

Each filter can be removed by clicking the X next to the filter name to modify the search within the search results screen. Below the search box on the search results screen, there is also a link to *Refine My Original Search*, which will bring the user back to the advanced search screen where the original search parameters selected can be viewed and modified.

68.6. Numeric Search

If you have details on the exact item you wish to search for, use the *Numeric Search* tab on the advanced search page. Use the drop-down menu to select your search by *ISBN, ISSN, Bib Call Number, Call Number (Shelf Browse), LCCN, TCN,* or *Item Barcode*. Enter the information and then click the *Search* button.

68.7. Expert Search

If you are familiar with MARC cataloging, you may search by MARC tag in the *Expert Search* option on the left of the screen. 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. To search several tags simultaneously, use the *Add Row* option. Click *Submit* to run the search.

TIP	Use the MARC Expert Search only as a last resort, as it can take much longer to retrieve results than by using indexed fields. For example, rather than running an expert search for "245 a Gone with the wind", simply do a regular title search for "Gone with the wind".

Chapter 69. Boolean operators

Classic search interfaces (that is, those used primarily by librarians) forced users to learn the art of crafting search phrases with Boolean operators. To a large extent this was due to the inability of those systems to provide relevancy ranking beyond a "last in, first out" approach. Thankfully, Evergreen, like most modern search systems, supports a rather sophisticated relevancy ranking system that removes the need for Boolean operators in most cases.

By default, all terms that have been entered in a search query are joined with an implicit `AND` operator. Those terms are required to appear in the designated fields to produce a matching record: a search for *golden compass* will search for entries that contain both *golden* **and** *compass*.

Words that are often considered Boolean operators, such as *AND, OR*, and *NOT*, are not special in Evergreen: they are treated as just another search term. For example, a title search for `golden and compass` will not return the title *Golden Compass*.

However, Evergreen does support Boolean searching for those rare cases where you might require it, using symbolic operators as follows:

Table 1. Boolean symbolic operators

Operator	Symbol	Example
AND	`&&`	`a && b`
OR	`||`	`a || b`
NOT	`` `-` ``*term*	`a -b`

Chapter 70. Search Tips

Evergreen tries to approach search from the perspective of a major search engine: the user should simply be able to enter the terms they are looking for as a general keyword search, and Evergreen should return results that are most relevant given those terms. For example, you do not need to enter author's last name first, nor do you need to enter an exact title or subject heading. Evergreen is also forgiving about plurals and alternate verb endings, so if you enter *dogs*, Evergreen will also find items with *dog*.

The search engine has no *stop words* (terms are ignored by the search engine): a title search for `to be or not to be` (in any order) yields a list of titles with those words.

- Don't worry about white space, exact punctuation, or capitalization.
    1. White spaces before or after a word are ignored. So, a search for `[ golden compass ]` gives the same results as a search for `[golden compass]`.
    2. 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*.
    3. Punctuation marks occurring within a word are removed; the exception is _. So, a title search for _gol_den com_pass_ gives no result.
    4. Diacritical marks and solitary `&` or `|` characters located anywhere in the search term are removed. Words or letters linked together by `.` (dot) are joined together without the dot. So, a search for *go|l|den & comp.ass* is equivalent to *golden compass*.
    5. Upper and lower case letters are equivalent. So, *Golden Compass* is the same as *golden compass*.
- Enter your search words in any order. So, a search for *compass golden* gives the same results as a search for *golden compass*. Adding more search words gives fewer but 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 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*.
- **Truncation** Words may be right-hand truncated using an asterisk. Use a single asterisk * to truncate any number of characters. (example: *environment* agency*)

Chapter 71. Search Methodology

71.1. Stemming

A search for *dogs* will also return hits 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 to force an exact search. For example, a search for `parenting` will also return results for `parental`, but a search for `"parenting"` will not.

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 the same results as `golden compass`, because `-en` is not a regular suffix in English, and therefore the stemming algorithm does not recognize *gold* as a stem of *golden.*

71.2. Order of Results

By default, the results 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 which 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, or publication date before you start the search. You can also re-order your search results using the *Sort Results* dropdown list on the search result screen.

Chapter 72. 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 links that say *Previous* or *Next* on top or bottom of the list. You can also click on the adjacent results page number listed. These page number links allow you to skip to that results page, if your search results needed multiple pages to display. Here is an example:

Brief information about the title, such as author, edition, publication date, etc. is displayed under each title. The icons beside the brief information indicate formats such as books, audio books, video recordings, and other formats. If you hover your mouse over the icon, 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* beside the format icons.

On the top right, there is a *Limit to Available* checkbox. Checking this box will filter out those titles with no available copies in the library or libraries at the moment. Usually you will see your search results are re-displayed with fewer titles.

When enabled, under the *Limit to Available* checkbox, there is an *Exclude Electronic Resources* checkbox. Checking this box will filter out materials that are cataloged as electronic in form.

The *Sort by* dropdown list is found at the top of the search results, beside the *Show More Details* link. Clicking an entry on the list will re-sort your search results accordingly.

72.1. Facets: Subjects, Authors, and Series

At the left, you may see a list of *Facets of Subjects*, *Authors*, and *Series*. Selecting any one of these links filters your current search results using that subject, author, or series to narrow down your current results. The facet filters can be undone by clicking the link a second time, thus returning your original results before the facet was activated.

Search Results Results 1 - 10

Personal Author	More
Bartók, Béla 1881-1945	(2)
Beethoven, Ludwig van 1770-1827	(2)
Brahms, Johannes 1833-1897	(2)
Carter, Elliott 1908-	(2)
Mozart, Wolfgang Amadeus 1756-1791	(2)

Topic Subject	More
Concertos (Violin)	(15)
Concertos (Piano)	(2)
Music	(2)
Suites (Orchestra)	(2)
Ballets	(1)

Series Title	
Columbia Masterworks	(1)
Digital Classics	(1)
Great recordings of the century	(1)
Hawkes Pocket Scores ; 710	(1)
Student composers' concert	(1)

72.2. Availability

The number of available copies and total copies are displayed under each search result's call number. If you are using a catalogue inside a library or accessing a library's online catalogue from its homepage, you will see how many copies are available in the library under each title, too. If the library belongs to a multi-branch library system you will see an extra row under each title showing how many copies are available in all branches.

You may also click the *Show More Details* link at the top of the results page, next to the *Limit to available items* check box, to view each search result's copies' individual call number, status, and shelving location.

72.3. Viewing a record

Click on a search result's title to view a detailed record of the title, including descriptive information, location and availability, current holds, and options for placing holds, add to my list, and print/email.

Violin concerto

Penderecki, Krzysztof, 1933- (Author).

♫ Musical Sound Recording (Unknown Format)

Electronic resources

Link text here - Public note here

✔ Place Hold

📋 Add to my list

📋 Print / Email

🔗 Permalink

Available copies

- 26 copies at Example Consortium.

Current holds

1 current hold with 31 total copies.

Location	Call Number / Copy Notes	Barcode	Shelving Location	Status	Due Date
Example Branch 1	780 B92 (Text)	CONC40000628	Stacks	Available	-
Example Branch 1	780 B92 (Text)	CONC41000628	Stacks	Available	-
Example Branch 1	ML 2533 B34 C92 (Text)	CONC40000128	Stacks	Checked out	05/12/2015
Example Branch 1	ML 2533 B34 C92 (Text)	CONC41000128	Stacks	Available	-
Example Branch 1	ML 2533 B34 C92 (Text)	CONC42000128	Stacks	Available	-
Example Branch 1	ML 2533 B34 C92 (Text)	CONC43000128	Stacks	Available	-
Example Branch 1	ML 2533 B34 C92 (Text)	CONC44000128	Stacks	Available	-
Example Branch 2	780 A92 (Text)	CONC50000728	Stacks	Available	-
Example Branch 2	780 A92 (Text)	CONC51000728	Stacks	Available	-
Example Branch 2	ML1263F92 (Text)	CONC50000228	Stacks	Checked out	04/28/2015

Next 10 »

➕ Show more copies

Record details

- **Physical Description:** 1 sound disc (37 min.) : 33 1/3 rpm, stereo.
- **Publisher:** New York, NY : Columbia [Records], 1979.

Content descriptions

General Note: Program notes by M.A. Feldman.

Search for related items by subject

Subject: Concertos (Violin)

Search for related items by series

- Columbia Masterworks

Chapter 73. Details

The record shows details such as the cover image, title, author, publication information, and an abstract or summary, if available.

Near the top of the record, users can easily see the number of copies that are currently available in the system and how many current holds are on the title.

If there are other formats and editions of the same work in the database, links to those alternate formats will display. The formats used in this section are based on the configurable catalog icon formats.

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.

> **NOTE** Copies are sorted by (in order): org unit, call number, part label, copy number, and barcode.

73.1. Placing Holds

Holds can be placed on either title results or search results page. If the item is available, it will be

pulled from the shelf and held for you. If all copies at your local library are checked out, you will be placed on a waiting list and you will be notified when items become available.

On title details page, you can select the *Place Hold* link in the upper right corner of the record to reserve the item. You will need your library account user name and password. You may choose to be notified by phone or email.

In the example below, the phone number in your account will automatically show up. Once you select the Enable phone notifications for this hold checkbox, you can supply a different phone number for this hold only. The notification method will be selected automatically if you have set it up in your account references. But you still have a chance to re-select on this screen. You may also suspend the hold temporarily by checking the Suspend box. Click the *Help* beside it for details.

You can view and cancel a hold at anytime. Before your hold is captured, which means an item has been held waiting for you to pick up, you can edit, suspend or activate it. You need log into your patron account to do it. From your account you can also set up a *Cancel if not filled by* date for your hold. *Cancel if not filled by* date means after this date, even though your hold has not been fulfilled you do not need the item anymore.

Place Hold

Harry Potter and the goblet of fire / by J.K. Rowling ; illustrations by Mary GrandPré.

Pickup location: [Example Branch 1 ▲▼]

Notify when hold is ready for pickup?

☑ Yes, by Email

Email Address: jane@yahoo.com

☑ Yes, by Phone

Phone Number: [617-123-4567]

[Submit]   [Cancel]

73.2. Permalink

The record summary page offers a link to a shorter permalink that can be used for sharing the record with others. All URL parameters are stripped from the link with the exception of the locg and copy_depth parameters. Those parameters are maintained so that people can share a link that displays just the holdings from one library/system or displays holdings from all libraries with a specific library's holdings floating to the top.
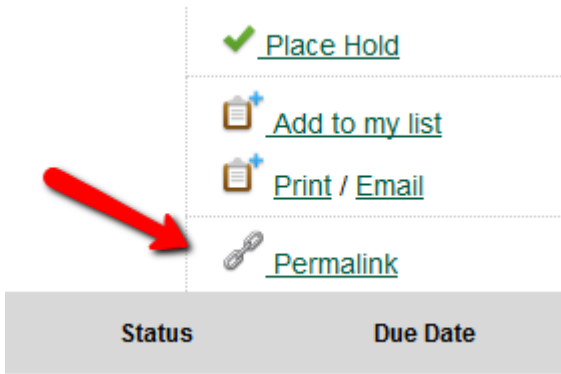
73.3. SMS Call Number

If configured by the library system administrator, you may send yourself the call number via SMS message by clicking on the **Text** link, which appears beside the call number.

WARNING	Carrier charges may apply when using the SMS call number feature.

73.4. 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 top right or left bottom of the page.

Subject: Concertos (Violin)

Search for related items by series

- Columbia Masterworks

▶ **AWARDS, REVIEWS, & SUGGESTED READS**

▶ **SHELF BROWSER**

▶ **MARC RECORD**

◀ **Search Results**   Showing Item 1 of 25   **Next** ▶

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* or *Advanced Search* links in the left-hand sidebar.

Self checkout

Chapter 74. Introduction

Evergreen includes a self check interface designed for libraries that simply want to record item circulation without worrying about security mechanisms like magnetic strips or RFID tags.

Chapter 75. Initializing the self check

The self check interface runs in a web browser. Before patrons can use the self check station, a staff member must initialize the interface by logging in.

1. Open your self check interface page in a web browser. By default, the URL is `https://[hostname]/eg/circ/selfcheck/main`, where *[hostname]* represents the host name of your Evergreen web server.

2. Log in with a staff account with circulation permissions.
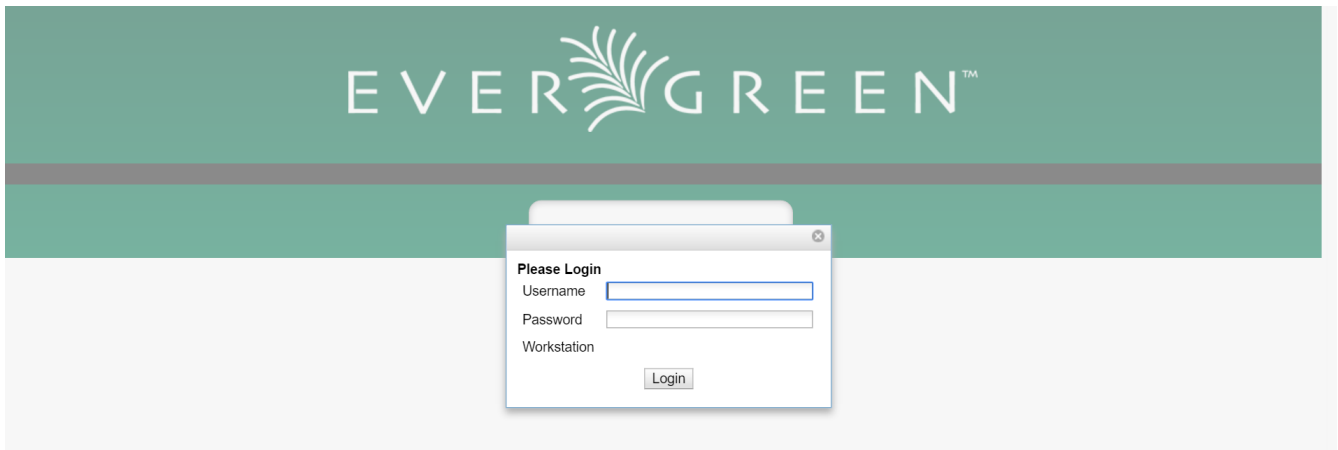
Chapter 76. Basic Check Out

1. Patron scans their barcode.
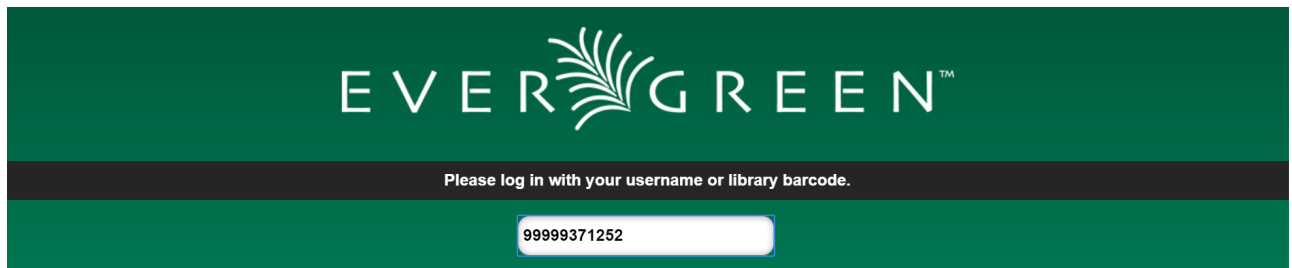
2. *Optional* Patron enters their account password.

3. Patron scans the barcodes for their items *OR* Patron places items, one at a time, on the RFID pad.
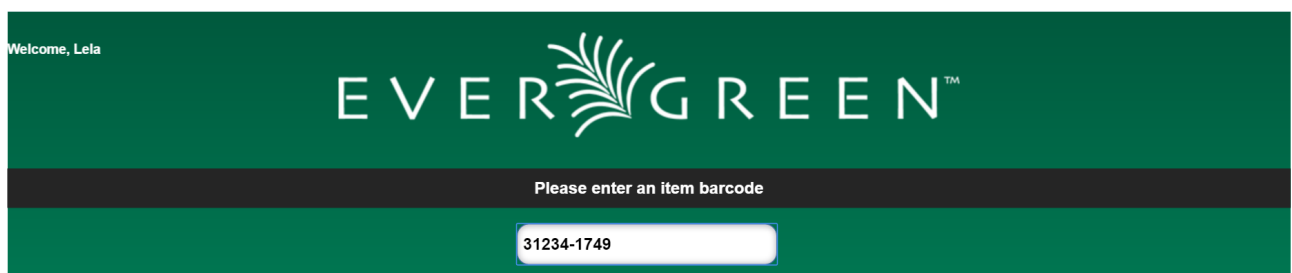
4. Items will be listed below with a check out confirmation message.

5. If a check out fails a message will advise patrons.
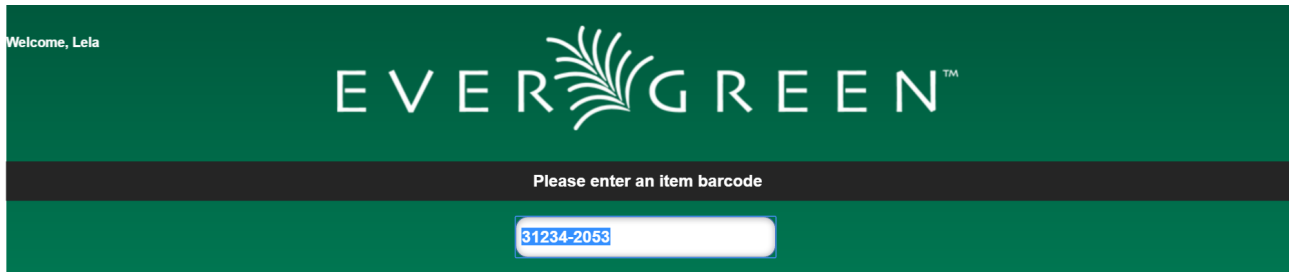
Unable to check out item 31234-2053. Please see staff.

6. Patron clicks **Logout** to print a checkout receipt and logout. *OR* Patron clicks **Logout (No Receipt)** to logout with no receipt.

Unable to check out item 31234-2053. Please see staff.

NOTE

If the 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 logging out.
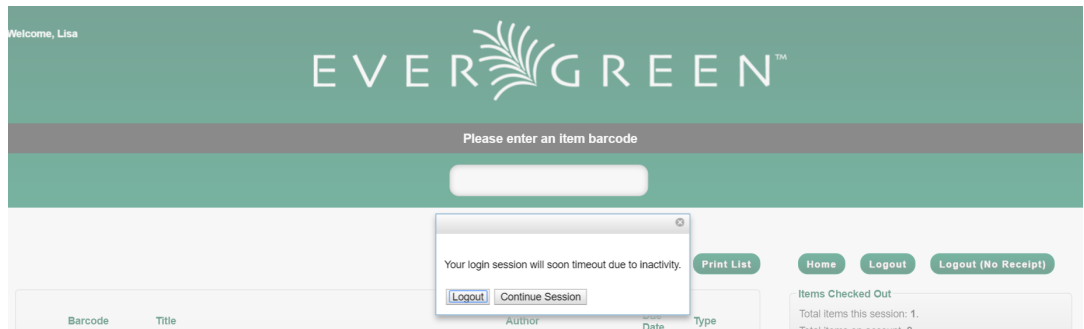
Chapter 77. View Items Out

1. Patrons are able to view the items they currently have checked out by clicking **View Items Out**

2. The items currently checked out will display with their due dates. Using the **Print List** button patrons can print out a receipt listing all of the items they currently have checked out.

Chapter 78. View Holds

1. Patrons are able to view their current holds by clicking **View Holds**

2. Items currently on hold display. Patrons can also see which, if any, items are ready for pickup.

   Using the **Print List** button patrons can print out a receipt listing all of the items they currently have on hold.

Title	Author	Status
Antiquités grecques : or, tableau des moeurs, usages et institutions des grecs ; dans lequel on expose tout ce qui a rapport a leurs religion, gouvernement, lois, magistratures...agriculture, etc. etc	Robinson, John	#1 in line with 9 copies
Correspondance inédite du Prince de Talleyrand et du Roi Louis XVIII, pendant le Congrès de Vienne, publiée sur les manuscrits conservés au Dépôt des Affaires Étrangères	Talleyrand, Charles Maurice de	#1 in line with 9 copies

Chapter 79. View Fines

1. Patrons are able to view the fines they currently owe by clicking **View Details**

2. Current fines owed by the patron display.

Appendix A: Attributions

DIG Contributors

- Hilary Caws-Elwitt, Susquehanna County Library
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Appendix B: Admonitions

- Note

- warning

- caution

- tip

Appendix C: Licensing

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