Using Evergreen's Serials 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 work with serials. 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?*

Serials

Chapter 11. MFHD Records

MARC Format for Holdings Display (MFHD) display in the catalog in addition to holding statements generated by Evergreen from subscriptions created in the Serials Module. The MFHDs are editable as MARC but the holdings statements generated from the control view are system generated. Multiple MFHDs can be created and are tied to Organizational Units.

Chapter 12. Serials Administration

The serials module can be administered under a new menu option: **Administration**→**Serials Administration**. The new Serials Administration menu currently allows staff to configure *Serial Copy Templates* and *Pattern Templates*.

12.1. Serial Copy Templates

Serials copy templates enable you to specify item attributes that should be applied by default to copies of serials. Serials copy templates are associated with distributions in a subscription and are applied when serials copies are received. Serial copy templates can also be used as a binding template to apply specific item attributes to copies that are being bound together.

12.1.1. Creating a Serial Copy Template

To create a serial copy template, go to **Administration**→**Serials Administration**→**Serial Copy Templates**:

1. Click **Create Template** in the upper-right hand corner. A dialog box will appear.

2. Within the dialog box assign the template a *Template Name* and set any item attributes that you want in the template:

   a. **Circulate?**: indicate if the items can circulate.

   b. **Circulation Library**: Select the circulation library from the drop down menu.

   c. **Shelving Location**: Select the shelving location for the item from the drop down menu. This menu is populated from the locations created in Admin→Local Administration→Copy Locations Editor.

   d. **Circulation Modifier**: Select the circulation modifier for the item from the drop down menu. This menu is populated from the modifiers created in Admin→Server Administration→Circulation Modifiers.

   e. **Loan Duration**: Select a loan duration from the drop down menu. This menu is populated from the loan durations created in Admin→Server Administration→Circulation Duration Rules. This field is required.

   f. **Circulate as Type**: Select a Type of record from the drop down menu if you want to control circulation based on the Type fixed field in the MARC bibliographic record. Most libraries choose to control circulation based on Circulation Modifier instead of Circulate as Type in Evergreen.

   g. **Holdable?:** Yes or No-- indicate if holds can be placed on the items.

   h. **Age-based Hold Protection**: Select a rule from the drop down menu. Age-based hold protection allows you to control the extent to which an item can circulate after it has been received. For example, you may want to protect new copies of a serial so that only patrons who check out the item at your branch can use it.

   i. **Fine Level**: Select a fine level from the drop down menu. This menu is populated from the fine levels created in Admin→Server Administration→Circulation Recurring Fine Rules. This

field is required.

j. **Floating**: Select a Floating policy from the drop down menu if the items belong to a floating collection.

k. **Status**: Select a copy status from the Status drop down menu. This menu is populated from the statuses created in Admin → Server Administration → Copy Statuses.

l. **Reference?**: Yes or No-- indicate if the item is a reference item.

m. **OPAC Visible?**: Yes or No-- indicate if the item should be visible in the OPAC.

n. **Price**: Enter the price of the item.

o. **Deposit?**: Yes or No-- indicate if patrons must place a deposit on the copy before they can use it.

p. **Deposit Amount**: Enter a Deposit Amount if patrons must place a deposit on the copy before they can use it.

q. **Quality**: Good or Damaged-- indicate the physical condition of the item.

3. Click **Save**.

4. The new serial copy template will now appear in the list of templates.

| Template Name | New Fiction | | Clear | Save | Close |

Circulate?
◉ Yes ○ No

Status
Available ▾

Circulation Library
APEX ▾

Reference?
○ Yes ◉ No

Shelving Location
Fiction ▾

OPAC Visible?
◉ Yes ○ No

Circulation Modifer
Book ▾

Price

Loan Duration
Normal ▾

Circulate as Type
▾

Deposit?
○ Yes ◉ No

Holdable?
◉ Yes ○ No

Deposit Amount

Age-based Hold Protection
▾

Quality
○ Good ○ Damaged

Fine Level
Normal ▾

Floating
▾

12.1.2. Modifying a Serial Copy Template

To modify a Serial Copy Template:

1. Select the template to modify by checking the box for the template or clicking anywhere on the template row. Go to **Actions→Edit Template** or *right-click* on the template row and select **Edit Template**.

2. The dialog box will appear. Make any changes to the item attributes and click **Save**.

12.1.3. Deleting a Serial Copy Template

To delete a Serial Copy Template:

1. Select the template to modify by checking the box for the template or clicking anywhere on the template row.

2. Go to **Actions**→**Delete Template** or *right-click* on the template row and select **Delete Template**.

NOTE | Serials copy templates that are being used by subscriptions cannot be deleted.

12.2. Prediction Pattern Templates

Prediction pattern templates allow you to create templates for prediction patterns that can be shared with other staff users in your library branch, system, or throughout the consortium. Prediction patterns are used to predict issues on serials subscriptions. Templates can be created in the Administration module, as described below, and can also be created and shared directly in a subscription.

12.2.1. Creating a Prediction Pattern Template

To create a template, go to **Administration**→**Serials Administration**→**Prediction Pattern Templates**:

1. Click **New Record** in the upper-right hand corner. A dialog box called *Prediction Pattern Template* will appear.

2. Assign a *Name* to the template, such as "Monthly", to create a monthly publication pattern.

3. Next to Pattern Code click **Pattern Wizard**. The Prediction Pattern Code Wizard will appear. This wizard has five tabs that will step you through creating a prediction pattern for your publication.

   a. Enumeration Labels

      i. *If the publication does not use enumeration and instead only uses dates*, select the radio button adjacent to *Use Calendar Dates Only* and click **Next** in the upper right-hand corner and go to b. Chronology Display in this document.

      ii. *If the publication uses enumerations (commonly used)*, select the radio button adjacent to *Use enumerations*. The enumerations conform to $a-$h of the 853,854, and 855 MARC tags.

      iii. Enter the first level of enumeration in the field labeled *Level 1*. A common first level enumeration is volume, or "v.". If there are additional levels of enumeration, click **Add Level**.

      iv. A second field labeled *Level 2* will appear. Enter the second level of enumeration in the field. A common second level enumeration is number, or "no.".

         A. Select if the second level of enumeration is a set *Number*, *Varies*, or is *Undetermined.*

         B. If *Number* is selected (commonly used):

            I. Enter the number of bibliographic units per next higher level (e.g. 12 no. per v.). This conforms to $u in the 853, 854, and 855 MARC tags.

            II. Select the radio button for the enumeration scheme: *Restarts at unit completion* or *Increments continuously*. This conforms to $v in the 853, 854, and 855 MARC

tags.

    C. You can add up to six levels of enumeration.

v. Check the box adjacent to *Add alternative enumeration* if the publication uses an alternative enumeration.

vi. Check the box adjacent to *First level enumeration changes during subscription year* to configure calendar changes if needed. A common calendar change is for the first level of enumeration to increment every January.

    A. Select when the Change occurs from the drop down menu: *Start of the month, Specific date*, or *Start of season.*

    B. From the corresponding drop down menu select the specific point in time at which the first level of enumeration should change.

    C. Click **Add more** to add additional calendar changes if needed.

vii. When you have completed the enumerations, click **Next** in the upper right-hand corner.

a. Chronology Display

i. To use chronological captions for the subscription, check the box adjacent to *Use Chronology Captions?*

ii. Choose a chronological unit for the first level. If you want to display the term for the unit selected, such as "Year" and "Month" next to the chronology caption in the catalog, then select the checkbox for Display level descriptor? (not commonly used).

iii. To add additional levels of chronology for display, click **Add level**.

    A. Note: Each level that you add must be a smaller chronological unit than the previous level (e.g. Level 1 = Year, Level 2 = Month).

iv. Check the box adjacent to *Use Alternative Chronology Captions?* If the publication uses alternative chronology.

v. After you have completed the chronology caption, click **Next** in the upper-right hand corner.

a. MFHD Indicators

    i. **Compression Display Options**: Select the appropriate option for compressing or expanding your captions in the catalog from the compressibility and expandability drop down menu. The entries in the drop down menu correspond to the indicator codes and the subfield $w in the 853 tag. Compressibility and expandability correspond to the first indicator in the 853 tag.

    ii. **Caption Evaluation**: Choose the appropriate caption evaluation from the drop down menu. Caption Evaluation corresponds to the second indicator in the 853 tag.

    iii. Click **Next** in the upper right hand corner.

a. Frequency and Regularity

    i. Indicate the frequency of the publication by selecting one of the following radio buttons:

        A. **Pre-selected** and choose the frequency from the drop down menu.

        B. **Use number of issues per year** and enter the total number of issues in the field.

    ii. If the publication has combined, skipped, or special issues, that should be accounted for in the publication pattern, check the box adjacent to *Use specific regularity information?*.

        A. From the first drop down menu, select the appropriate publication information: *Combined*, *Omitted,* or *Published* issues.

        B. From the subsequent drop down menus, select the appropriate frequency and issue information.

        C. Add additional regularity rows as needed.

        D. For a Combined issue, enter the relevant combined issue code. E.g., for a monthly combined issue, enter 02/03 to specify that February and March are combined.

    iii. After you have completed frequency and regularity information, click **Next** in the upper-right hand corner.

a. Review

   i. Review the Pattern Summary to verify that the pattern is correct. You can also click on the expand arrow icon to view the *Raw Pattern Code*.

   ii. If you want to share this pattern, assign it a name and select if it will be shared with your library, the system, or across the consortium.

   iii. Click **Save**.

1. Back in the Prediction Pattern Template dialog box, select the Owning Library, which will default to the workstation library.

2. If you want to share the template, set the Share Depth to indicate how far out into your

consortium the template will be shared.
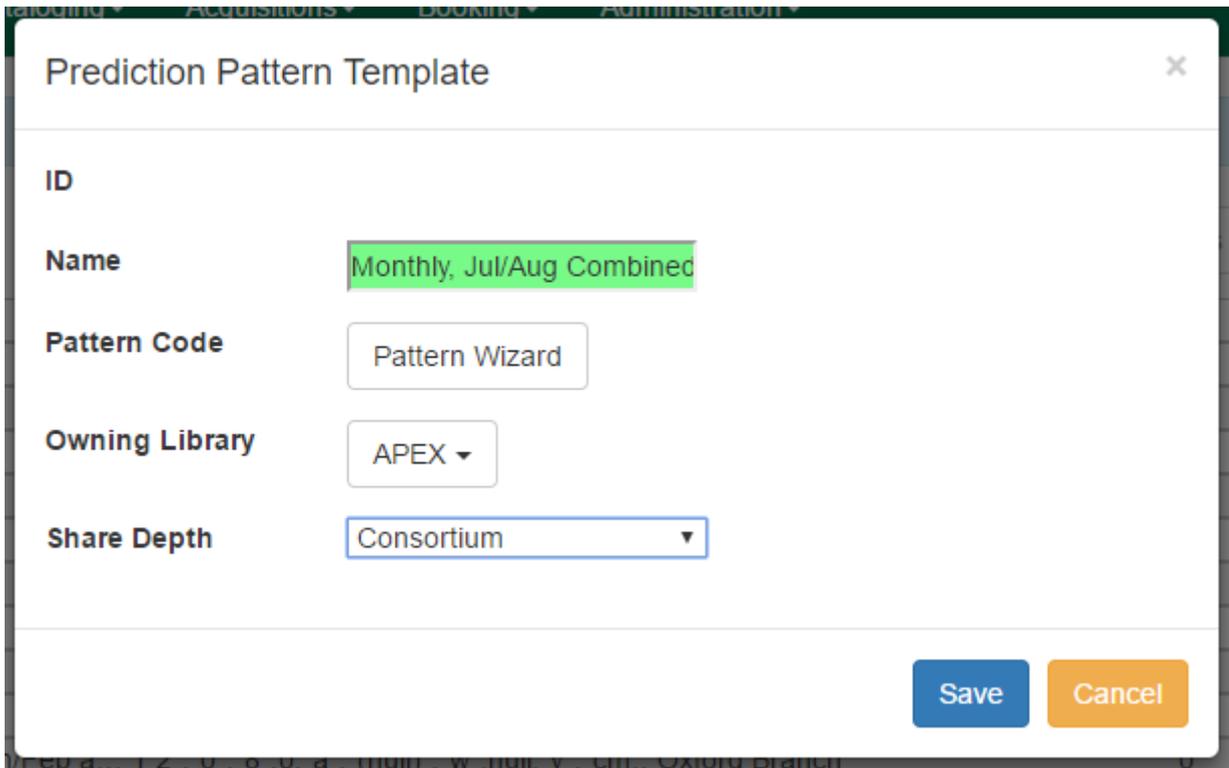
1. The Prediction Pattern will now appear in the list of templates and can be used to create predictions for subscriptions.

NOTE	Prediction Patterns can be edited after creation as long as all predicted issues have the status of "Expected". Once an issue is moved into a different status, the Prediction Pattern cannot be changed.

Chapter 13. Serials Module

The Serials Module can be used to create subscriptions, distributions, streams, and prediction patterns. As well as to generate predictions and receive issues as they come in to the library.

To access the Serials Module, go to a serials record in the catalog, and click on **Serials**→**Manage Subscriptions**. This will open the serials interface for that particular record. In this interface you can:

1. Create and manage subscriptions

2. Create and manage predictions

3. Create and manage issues

4. Create and manage MFHDs

13.1. Create a Subscription

1. From a bibliographic record, go to **Serials**→**Manage Subscriptions**, view the *Manage Subscriptions* tab.

2. Within the *Manage Subscriptions* tab, create a new subscription by clicking **New Subscription**. The subscription editor will appear:

   a. Select the *Owning Library for* the subscription. The owning library indicates the organizational unit(s) whose staff can use this subscription. The rule of parental inheritance applies to this list. For example, if a system is made the owner of a subscription, then users, with appropriate permissions, at the branches within the system could also use this subscription. This field is required.

   b. Enter the date that the subscription begins in the _Start Dat_e field. This field is required.

   c. An *End Date* for the subscription may also be entered, but it is not required.

   d. Optionally, enter an *Expected Offset*. This is the difference between the nominal publishing date of an issue and the date that you expect to receive your copy. For example, if an issue is published the first day of each month, but you receive the copy two days prior to the publication date, then enter "-2 days" into this field.

   e. Next, create a Distribution for the subscription by selecting the Library for the distribution. Distributions identify the branches that will receive copies of a serial.

      i. Note: If the Owning Library of the subscription was set at the branch level, the Library

will be the same as the Owning Library. If the Owning Library of the subscription was set at the system level, the Library will be set to the holdings library.

f. Enter a Label for the distribution. It may be useful to identify the branch to which you are distributing these issues in this field. This field is not publicly visible and only appears when an item is received. There are no limits on the number of characters that can be entered in this field.

g. Select the preferred *OPAC Display for holdings*: Chronological or Enumeration.

h. Select the *Receiving Template* that will be applied to items as they are received. The receiving templates are configured in Administration→Serials Administration→Serial Copy Templates.

i. Next, create a Stream by assigning a label to the stream in the *Send to* field. The stream indicates the number of copies that should be sent to the distribution library. You can click **Add copy stream** if the library will receive multiple copies of the serial.

3. After the subscription, distribution, and copy information is configured, click **Save** and go to the *Manage Predictions* tab to create the prediction pattern that will be used to generate predictions for this title.

NOTE	After creating a subscription, you can use the Actions menu to take a variety of actions with the subscription, such as adding Subscription or Distribution Notes, linking it to an MFHD record, or creating routing lists.

13.2. Create and Manage Predictions

From the *Manage Predictions* tab you can create a new prediction pattern from scratch, use an existing pattern template, or use an existing pattern template as the basis for a new prediction pattern.

13.2.1. Predict Issues Using a New Prediction Pattern

1. Within the *Manage Predictions* tab, *Select [a] subscription* to work on from the drop down menu.

2. To create a new prediction pattern, click **Add New**.

   a. The box next to **Active** will be checked by default.

b. Select the *Type of pattern* from the drop down menu and click **Create Pattern**. The Pattern Wizard will appear.

c. Follow the steps in the section *Creating a Pattern Template* in this documentation to create a new pattern using the wizard.
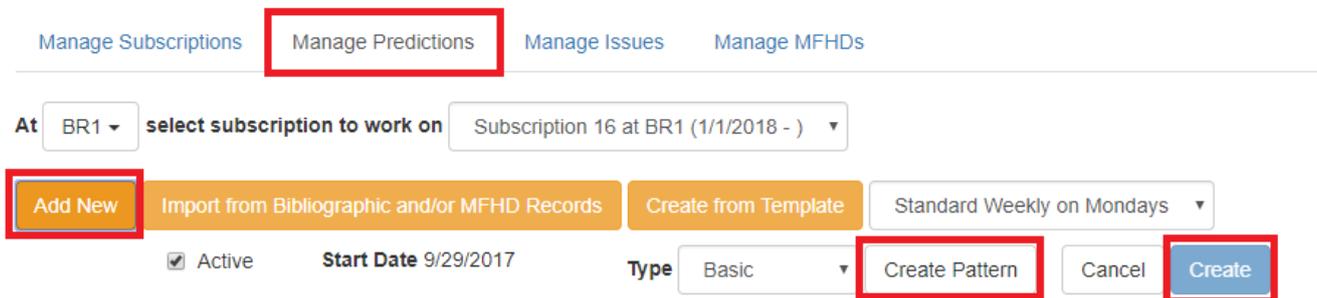
1. After creating the pattern in the wizard, click **Create**. The new prediction pattern will now appear under Existing Prediction Patterns.

2. To create predictions, click **Predict New Issues**.

NOTE You can also predict new issues from the *Manage Issues* tab.
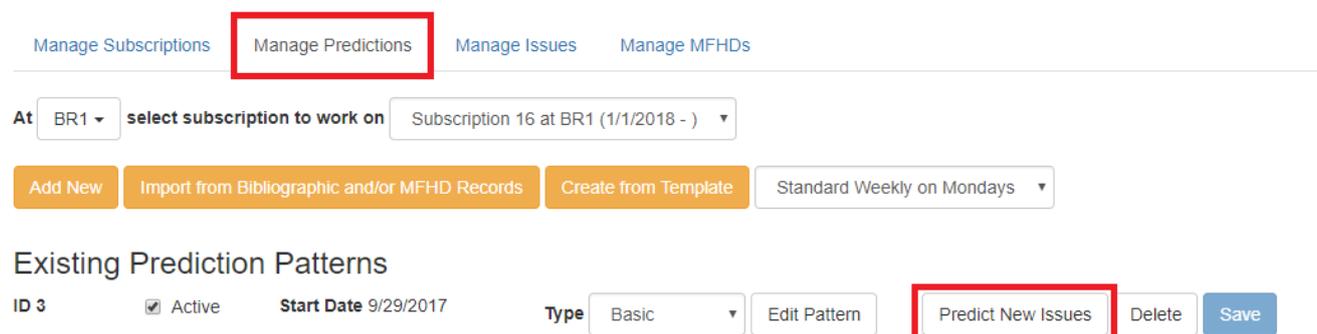
1. A dialog box called *Predict New Issues: Initial Values* will appear.

a. Select the *Publication date* for the subscription. This will be publication date of the first issue you expect to receive.

b. The *Type* will correspond to the type of prediction pattern selected.

c. Enter any *Enumeration labels* for the first expected issue.

d. Enter any *Chronology labels* for the first expected issue.

e. Enter the *Prediction count*. This is the number of issues that you want to predict.

2. Click **Save**.

3. Evergreen will generate the predictions and bring you to the *Manage Issues* tab to review the predicted issues.

13.2.2. Predict Issues Using a Prediction Pattern Template

1. Within the *Manage Predictions* tab, **Select [a] subscription** to work on from the drop down menu.

2. *Select a template* from the drop down menu that appears under the Add New button and click **Create from Template**. The pattern information will appear below the drop down menu.

1. If you want to use the pattern "as is" click **Create**.

   a. If you want to review or modify the pattern, click **Edit Pattern**. The Pattern Wizard will appear.

   b. The Pattern Wizard will be pre-populated with the pattern template selected. Follow the steps in the section Creating a Pattern Template in this documentation to modify the template or click **Next** on each tab to review the template.

   c. After modifying or reviewing the pattern in the wizard, click **Create**. The prediction pattern

will now appear under Existing Prediction Patterns.

2. To create predictions, click **Predict New Issues**.

   a. Note: you can also predict new issues from the *Manage Issues* tab.

3. A dialog box called *Predict New Issues: Initial Values* will appear.

   a. Select the *Publication date* for the subscription. This will be publication date of the first issue you expect to receive.

   b. The *Type* will correspond to the type of prediction pattern selected.

   c. Enter any *Enumeration labels* for the first expected issue.

   d. Enter any *Chronology labels* for the first expected issue.

   e. Enter the *Prediction count*. This is the number of issues that you want to predict.

4. Click **Save**.

5. Evergreen will generate the predictions and bring you to the *Manage Issues* tab to review the predicted issues.

13.2.3. Predict Issues Using a Prediction Pattern from a Bibliographic and/or MFHD Record

Evergreen can also generate a prediction pattern from existing MFHD records attached to a serials record and from MFHD patterns embedded directly in the bibliographic record.

1. Within the *Manage Predictions* tab, **Select [a] subscription** to work on from the drop down menu.

2. Click **Import from Bibliographic and/or MFHD Records**.

1. A dialog box will appear that presents the available MFHD records and the prediction pattern that will be imported.

2. Check the box adjacent to the MFHD record that you would like to import and click **Import**. The new prediction pattern will now appear under *Existing Prediction Patterns*.
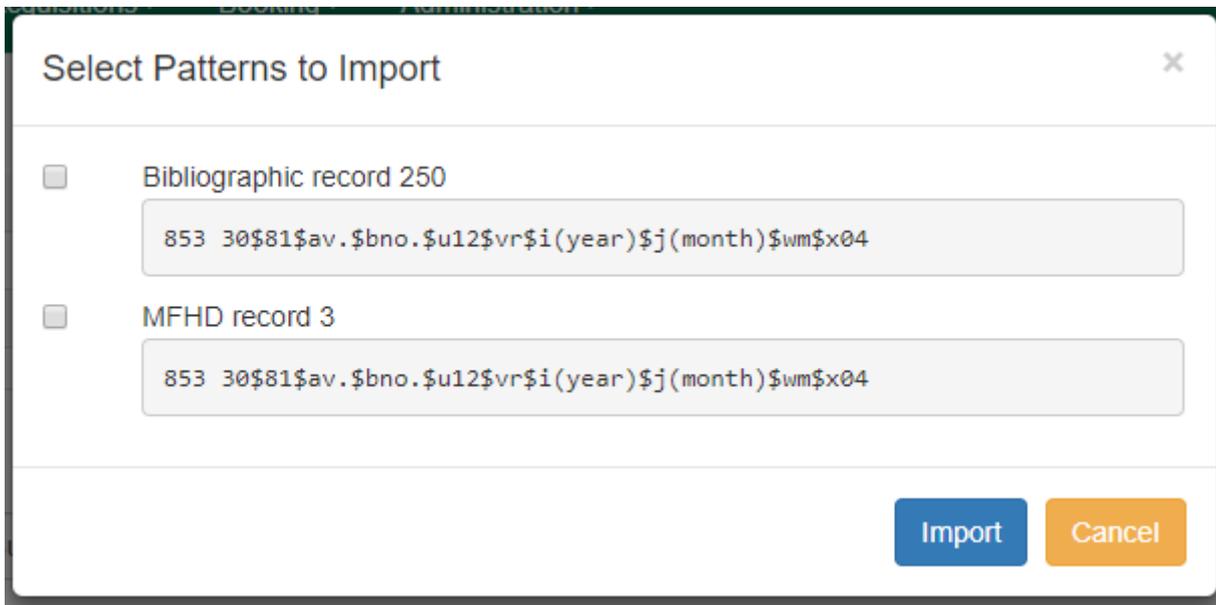
1. If you want to review or modify the pattern, click **Edit Pattern**. The Pattern Wizard will appear.

    a. The Pattern Wizard will be pre-populated with the pattern from the MFHD selected. Follow the steps in the section . Creating a Pattern Template. in this documentation to modify the template or click **Next** on each tab to review the template.

2. To create predictions, click **Predict New Issues**.

    a. Note: you can also predict new issues from the *Manage Issues* tab.

3. A dialog box called *Predict New Issues: Initial Values* will appear.

    a. Select the *Publication date* for the subscription. This will be publication date of the first issue you expect to receive.

    b. The *Type* will correspond to the type of prediction pattern selected.

    c. Enter any *Enumeration labels* for the first expected issue.

    d. Enter any *Chronology labels* for the first expected issue.

    e. Enter the *Prediction count*. This is the number of issues that you want to predict.

4. Click **Save**.

5. Evergreen will generate the predictions and bring you to the *Manage Issues* tab to review the predicted issues.

13.2.4. Manage Issues

After generating predictions in the *Manage Predictions* tab, you will see a list of the predicted issues in the Manage Issues tab. A variety of actions can be taken in this tab, including receiving issues, predicting new issues, adding special issues.

Chapter 14. Receiving

Issues can be received through the *Manage Issues* tab or through the *Quick Receive* option located in the bibliographic record display. While receiving, staff can select if issues should be barcoded during receipt.

14.1. Quick Receive

1. From a serials record in the catalog, go to **Serials**→**Quick Receive**.

2. A dialog box will appear. Select the *Library* and *Subscription* for which you are receiving issues from the drop down menu and click **OK/Continue**.

3. A *Receive items* dialog box will appear with the next expected issue.

   a. To receive the item(s) and barcode them:

      i. The *Copy Location* and *Circulation Modifier* will be pre-populated from the Receive Template associated with the Distribution. Changes can be made to the pre-populated information.

         A. Note: Copy location, call number, and circulation modifier can be applied to multiple copies in batch using the batch modify.

      ii. **Call Number**: Enter a call number. Any item with a barcode must also have a call number.

      iii. **Barcode**: Scan in the barcode that will be affixed to the issue.

      iv. The box adjacent to *Receive the issue* will be checked by default.

      v. Check the box adjacent to *Routing List* to print an existing routing list.

      vi. Click **Save** to receive the issue. The Status of the issue will update to "Received" and a Date Received will be recorded. The barcoded copy will now appear in the holdings area of the catalog and the Holdings Summary in the Issues Held tab in the catalog will reflect the newly received issue.

   b. To receive the item(s) without barcoding them:

      i. Uncheck the box adjacent to *Barcode Items* and click **Save**. The Holdings Summary in the Issues Held tab in the catalog will reflect the newly received issue.

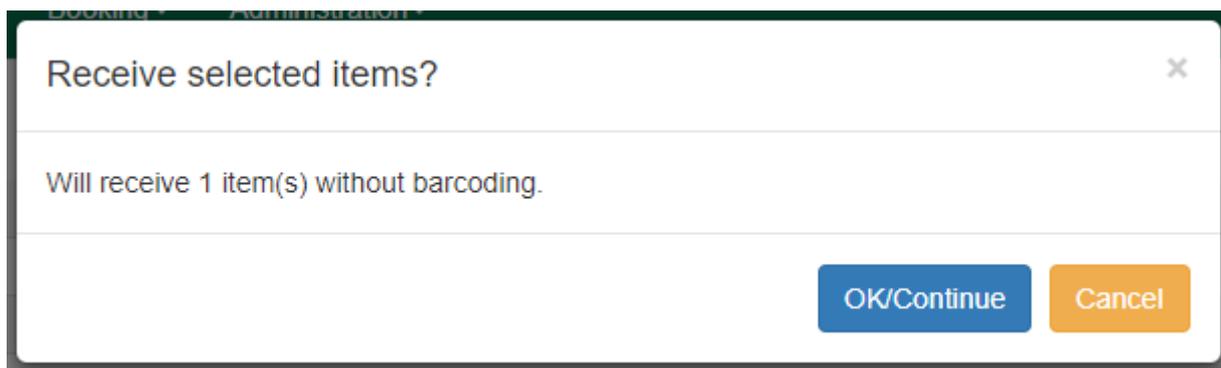# 14.2. Receiving from the Manage Issues tab

The Manage Issues tab can be used to receive the next expected issue and to receive multiple expected issues. This tab can be accessed by retrieving the serial record, going to **Serials→Manage Subscriptions**, and selecting the *Manage Issues* tab.

14.2.1. Receive Next Issue and Barcode

1. Within the *Manage Issues* tab, **Select [a] subscription** to work on from the drop down menu. The list of predicted issues for the subscription will appear.

2. Check the box adjacent to *Barcode on receive.*

3. Click **Receive Next**.

4. A *Receive items* dialog box will appear with the next expected issue and item(s).

5. The *Copy Location* and *Circulation Modifier* will be pre-populated from the Receive Template associated with the Distribution. Changes can be made to the pre-populated information.

6. **Call Number**: Enter a call number. Any item with a barcode must also have a call number.

7. **Barcode**: Scan in the barcode that will be affixed to the item(s).

8. The box to *Receive the item(s)* will be checked by default.

9. Check the box adjacent to *Routing List* to print an existing routing list.

10. Click **Save** to receive the item(s). The Status of the issue will update to "Received" and a Date Received will be recorded. The barcoded item(s) will now appear in the holdings area of the catalog and the Holdings Summary in the Issues Held tab in the catalog will reflect the newly received issue.

14.2.2. Receive Next Issue (no barcode)

1. In the *Manage Issues* tab, make sure the box adjacent to *Barcode on receive* is unchecked and click **Receive Next**.

2. A *Receive items* dialog box will appear with the message "Will receive # item(s) without barcoding."

3. Click **OK/Continue** to receive the issue. The Status of the issue will update to "Received" and a Date Received will be recorded. The Holdings Summary in the Issues Held tab in the catalog will reflect the newly received issue.

14.3. Batch Receiving

Multiple issues can be received at the same time using the *Manage Issues* tab.

14.3.1. Batch Receive and Barcode

1. Within the *Manage Issues tab*, **Select [a] subscription** to work on from the drop down menu. The list of predicted issues for the subscription will appear.

2. Check the box adjacent to *Barcode on receive*.

3. Check the boxes adjacent to the expected issues you want to receive.

4. Go to **Actions→Receive selected** or *right-click* on the rows and select **Receive selected** from the drop down menu.

5. A *Receive items* dialog box will appear with the selected issues and items.

6. The *Copy Location* and *Circulation Modifier* will be pre-populated from the Receive Template associated with the Distribution. Changes can be made to the pre-populated information.

7. **Call Number**: Enter a call number. Any item with a barcode must also have a call number.

8. **Barcode**: Scan in the barcodes that will be affixed to the items.

9. The box to *Receive* the items will be checked by default.

10. Check the box adjacent to *Routing List* to print an existing routing list.

11. Click **Save** to receive the items. The Status of the items will update to "Received" and a Date Received will be recorded. The barcoded items will now appear in the holdings area of the catalog and the Holdings Summary in the Issues Held tab in the catalog will reflect the newly received issues.

14.3.2. Receive multiple issues (no barcode)

1. Within the *Manage Issues* tab, **Select [a] subscription** to work on from the drop down menu. The list of predicted issues for the subscription will appear.

2. Make sure the box next to *Barcode on receive* is unchecked and check the boxes adjacent to the expected issues you want to receive.

3. A *Receive items* dialog box will appear with the message "Will receive # item(s) without

barcoding."

4. Click **OK/Continue** to receive the issues. The Status of the issue will update to "Received" and a Date Received will be recorded. The Holdings Summary in the Issues Held tab in the catalog will reflect the newly received issues.

Chapter 15. Routing Lists

Routing lists enable you to designate specific users and/or departments that serial items need to be routed to upon receiving.

Create a Routing List

1. To create a routing list for a subscription, go to the *Manage Subscriptions* tab for a serials record, select the subscription from the list and go to **Actions**→**Additional Routing**, or *right-click* and select **Additional Routing**. A dialog box will appear where you can create the routing list.

    a. Scan or type in the barcode of the user the items should be routed to in the *Reader (barcode)* field and click **Add Route**. Continue adding barcodes until the list is complete.

    b. To route items to a location, click the radio button next to *Department*, type in the routing location, and click **Add Route**.

    c. A *Note* may be added along with each addition to the list.

    d. The names and departments on the list will appear at the top of the dialog box and can be reordered by clicking the arrows or removed by clicking the x next to each name or department.

2. When the list is complete, click **Update**.

Manage Routing List for Magazines ✕

1.
Drover, James (APEX)
↑ ↓ ×
2.
Washington, Denzel (APEX)
↑ ↓ ×
3.
Reynolds, Lora (CAS-MAIN)
↑ ↓ ×

◉
Reader (barcode):

123456789   Reynolds

○
Department:

Note:

Add Route   Update   Cancel

Routing lists can be printed as items are received (see the documentation on Receiving for more information). They can also be printed directly from the *Manage Issues* tab in a subscription by selecting the item(s) and going to **Actions**→**Print routing lists** or *right-clicking* on the item(s) and selecting **Print routing lists** from the menu.

Chapter 16. Special Issues

16.1. Adding Extra Copies

If the library receives an extra copy of an expected issue, the extra copy can be added to the list of predicted issues so it can be received through the serials module.

To add an extra copy of an expected issue:

1. In the *Manage Issues* tab, select the issuance that precedes the issuance that you received an extra copy of and go to **Actions**→**Add following issue** or *right-click* on the issuance and select **Add following issue** from the menu.

2. A dialog box will appear. Verify that the *Publication date*, *Type*, and *Chronology* labels are correct. The *Enumeration* labels will be filled in automatically when the issue is created.

3. Click **Save** to create the extra copy of the following issue.

4. The extra copy will appear in the list of issues and can be received using your typical workflow.

16.2. Adding Special Issues

If the library receives an unexpected issue of a subscription, such as Summer Issue or Holiday Issue, it can be added to the list of predicted issues as a Special Issue so it can be received through the serials module.

To add a special issue:

1. In the *Manage Issues* tab, click **Add Special Issue**. A dialog box will appear.

2. Enter the *Publication date* of the special issue.

3. Select the *Type* (typically Basic).

4. Add an *Issuance Label* to identify the special issue, such as "Holiday Issue 2017".

5. Click **Save**.

6. The special issue will appear in the list of issues and can be received using your typical workflow.

NOTE	A special issue may also be added as an ad hoc issue by following the instructions for Adding Extra Copies. Enter the Publication date and Type and check the box adjacent to Ad hoc issue? The form will update to allow you to enter an Issuance Label.

Chapter 17. Binding Issues

Apply a binding template:

To bind issues, first a binding template needs to be applied to the associated Distribution.

1. Go to the *Manage Subscriptions* tab and from the grid, select the Distribution(s) with issues you'd like to bind.

2. *Right-click* on the Distribution(s) or go to **Actions** and select **Apply Binding Template**.

3. In the dialog box that appears, select the Serial Copy Template you'd like to use from the dropdown and click **Update**.

To bind received issues together:

1. Go to the *Manage Issues* tab and select the issues you want to bind together.

2. *Right-click* on the issues or go to **Actions** and select **Bind**.

3. The *Bind Items* interface will appear and all items will be represented on the screen. The first item's fields will be editable. *Modify the Call Number* if needed. Replace the **Barcode** and click **Save**.

NOTE	The barcode must be replaced with a new barcode. The binding will fail if you attempt to reuse an existing barcode from one of the items being bound. Evergreen views it as a duplicate barcode.

Chapter 18. Holdings

18.1. System Generated Holdings Statement

As issues are received, Evergreen creates a holding statement in the OPAC based on what is set up in the Caption and Patterns of the subscription. The systems generated holdings can only be edited by changing caption and pattern information and there is no ability to edit the statement as free text.
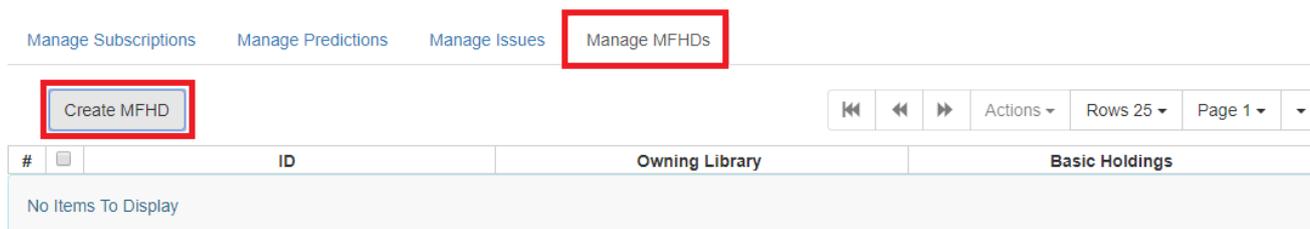
18.2. MARC Format for Holdings Display (MFHD)

Evergreen users can create, edit and delete their own MFHD.

18.2.1. Create an MFHD record

To create a MFHD record:

1. From a serials record in the catalog, go to **Serials**→**Manage MFHDs**. This will bring you to the *Manage MFHD* tab within the serials module.

2. Click **Create MFHD**.

1. A *Create new MFHD* dialog box will appear. *Select the library* for which you are creating the MFHD record and click **Create**.

2. The MFHD record will appear in the list. Go to **Actions**→**Edit MFHD** or *right-click* on the row and select **Edit MFHD** from the drop down menu.

1. The MARC Editor will appear. *Modify the MFHD record* as needed and click **Save**.

2. The Textual Holdings statement will appear in the *Issues Held* tab in the catalog.

| ► Awards, Reviews, & Suggested Reads |
| ▼ Issues Held |

Holdings summary (Example Branch 1)
   Volumes Library holds Vol. 23, No.1 through present

| ► Additional Content |
| ► Shelf Browser |
| ► MARC Record |

18.2.2. Edit a MFHD record

1. Open a serial record, go to **Serials** → **MFHD Record** → **Manage MFHDs** and select the appropriate MFHD.

2. Go to **Actions** or right-click on the MFHD and select **Edit MFHD**.

3. The MARC Editor will appear. *Modify the MFHD record* as needed and click **Save**.

18.2.3. Delete a MFHD Record

1. Open a serial record, go to **Serials** → **MFHD Record** → **Manage MFHDs** and select the appropriate MFHD.

2. Go to **Actions** or right-click on the MFHD and select **Delete Selected MFHDs**.

3. Click **OK/Continue** to delete the record.

Chapter 19. Group Serials Issues in the Template Toolkit OPAC

In previous versions of Evergreen, issues of serials displayed in a list ordered by publication date. The list could be lengthy if the library had extensive holdings of a serial. Using the Template Toolkit OPAC that is available in version 2.2, you can group issues of serials in the OPAC by chronology or enumeration. For example, you might group issues by date published or by volume. Users can expand these hyperlinked groups to view holdings of specific issues. The result is a clean, easy-to-navigate interface for viewing holdings of serials with a large quantity of issues.

> **NOTE** | This feature is only available in the Template Toolkit OPAC.

19.1. Administration

Enable the following organizational unit settings to use this feature:

1. Click **Administration** → **Local Administration** → **Library Settings Editor**.
2. Search or scroll to find **Serials: Default display grouping for serials distributions presented in the OPAC**.
3. Click **Edit**.
4. Enter **enum** to display issues by enumeration, or enter **chron** to display issues in chronological order. This value will become your default setting for display issues in the OPAC.
5. Click **Update Setting**.
6. Search or scroll to find **OPAC: Use fully compressed serials holdings**.
7. Select the value, **True**, to view a compressed holdings statement.
8. Click **Update Setting**.

19.2. Displaying Issues in the OPAC

Your library system has a subscription to the periodical, *Bon Appetit*. The serials librarian has determined that the issues at the Forest Falls branch should display in the OPAC by month and year. The issues at the McKinley branch should display by volume and number. The serials librarian will create two distributions for the serial that will include these groupings.

1. Retrieve the bibliographic record for the serial, and click **Actions for this Record** → **Alternate Serial Control**.
2. Create a **New Subscription** or click on the hyperlinked ID of an existing subscription.
3. Click **New Distribution**.
4. Create a label to identify the distribution.
5. Select the holding library from the drop down menu that will own physical copies of the issues.
6. Select a display grouping. Select **chronology** from the drop down menu.

7. Select a template from the drop down menu to receive copies.

8. Click **Save**.

9. Click **New Distribution** and repeat the process to send issues to the McKinley Branch. Choose **enumeration** in the **Display Grouping** field to display issues by volume and number.

10. Complete the creation of your subscription.

11. Retrieve the record from the catalog.

12. Scroll down to and click the **Issues Held** link. The issues label for each branch appears.

13. Click the hyperlinked issues label.

The issues owned by the Forest Falls branch are grouped by chronology:

The issues owned by the McKinley branch are grouped by enumeration:

Using the Public Access Catalog

Chapter 20. 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* |

20.1. 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**

20.1.1. 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 21. 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.

21.1. 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.

21.2. 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.

21.3. 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*).

21.4. 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.

21.5. 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.

21.5.1. 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.

21.6. 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.

21.7. 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 22. 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 23. 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 24. Search Methodology

24.1. 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*.

24.2. 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 25. 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.

25.1. 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)

25.2. 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.

25.3. 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)

✔ Place Hold

📋 Add to my list

📋 Print / Email

🔗 Permalink

Electronic resources

Link text here - Public note here

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 26. 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.

26.1. 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.

26.2. 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.
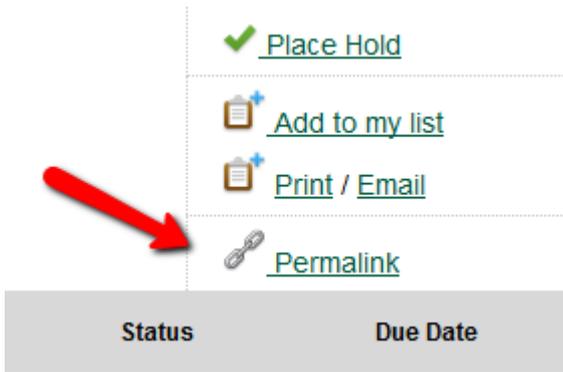
26.3. SMS Call Number

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.	

26.4. 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.

Appendix A: Attributions

DIG Contributors

- Hilary Caws-Elwitt, Susquehanna County Library
- Karen Collier, Kent County Public Library
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Appendix B: Admonitions

- Note

- warning

- caution

- tip

Appendix C: Licensing

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