Evergreen System Administration at your Library

Documentation Interest Group

Table of Contents

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 system administrators at local libraries who use the staff client for their day-to-day work.

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
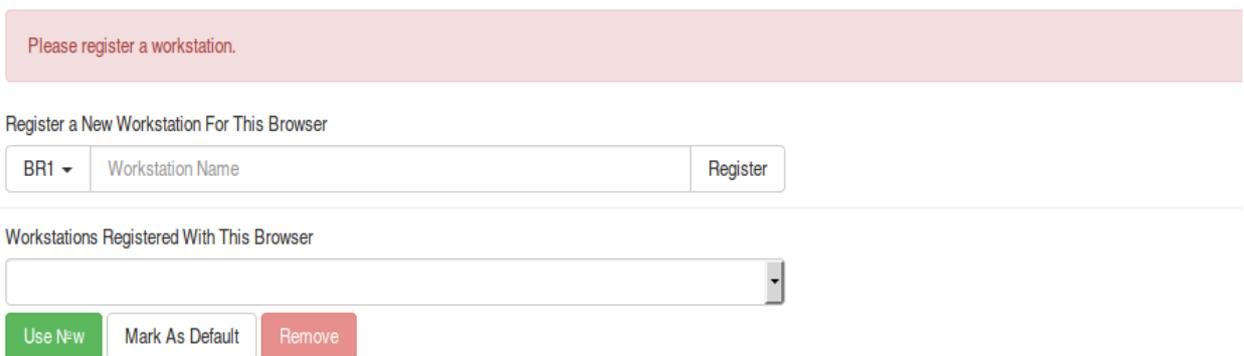
2. Create a unique workstation name.

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?*

Library Settings Editor

Chapter 11. Introduction

With the **Library Settings Editor** one can optionally customize Evergreen's behavior for a particular library or library system. For descriptions of available settings see the Settings Overview table below.

Chapter 12. Editing Library Settings

1. To open the **Library Settings Editor** select **Admin** → **Local Administration** → **Library Settings Editor**.

2. Settings having effects on the same function or module are grouped together. You may browse the list or search for the entry you want to edit. Type in your search term in the filter box. You may clear or re-apply the filter by clicking **Clear Filter** or **Filter**.

3. To edit an entry click **Edit** in the line.

4. Read the instruction in the pop-up window. Make the change. Click **Update Setting** to save the change. Click **Delete Setting** if you wish to delete it.

5. Click **History** to view the previous values, if any, of a setting. You can revert back to an old value by clicking **revert**.

History ⊗

Hold Shelf Status Delay

Date Changed	Location	Original Value	New Value	
2012-06-01T15:59:49-0700	BW	"1 hours"	"5 hours"	Revert
2012-06-01T15:59:42-0700	BW	"1 hours"	"1 hours"	Revert
2012-06-01T15:41:08-0700	BW	"3 hours"	"1 hours"	Revert

NOTE   Please note that different settings may require different data formats, which are listed in the Settings Overview table. Refer to the Data Types table at the bottom of this page for more information.

Chapter 13. Exporting/Importing Library Settings

1. To export library settings, click the **Export** button on the above **Library Setting Editor** screen. Click **Copy** in the pop-up window. Those settings displayed on the screen are copied to the clipboard. Paste the contents to a text editor, such as Notepad. Save the file on your computer.

   Export

   Copy this to your clipboard and save it to a file to export the settings.

   ```
   {"circ.offline.skip_checkout_if_newer_status_changed_time":
   {"org":"10","value":null},"circ.claim_return.copy_status":
   {"org":1,"value":"107"},"cat.default_copy_status_normal":
   {"org":10,"value":"9"},"circ.holds.clear_shelf.copy_status"
   :
   {"org":"10","value":null},"circ.offline.skip_checkin_if_new
   er_status_changed_time":
   {"org":"10","value":null},"circ.missing_pieces.copy_status"
   :
   {"org":"10","value":null},"circ.selfcheck.block_checkout_on
   _copy_status":
   {"org":"10","value":null},"cat.default_copy_status_fast":
   ```

   Copy

2. To import library settings, click the **Import** button on the **Library Settings Editor** screen. Open your previously saved file and copy the contents. Click **Paste** in the pop-up window. Click **Submit**.

   Import

   Paste in your exported settings.

   Paste   Submit
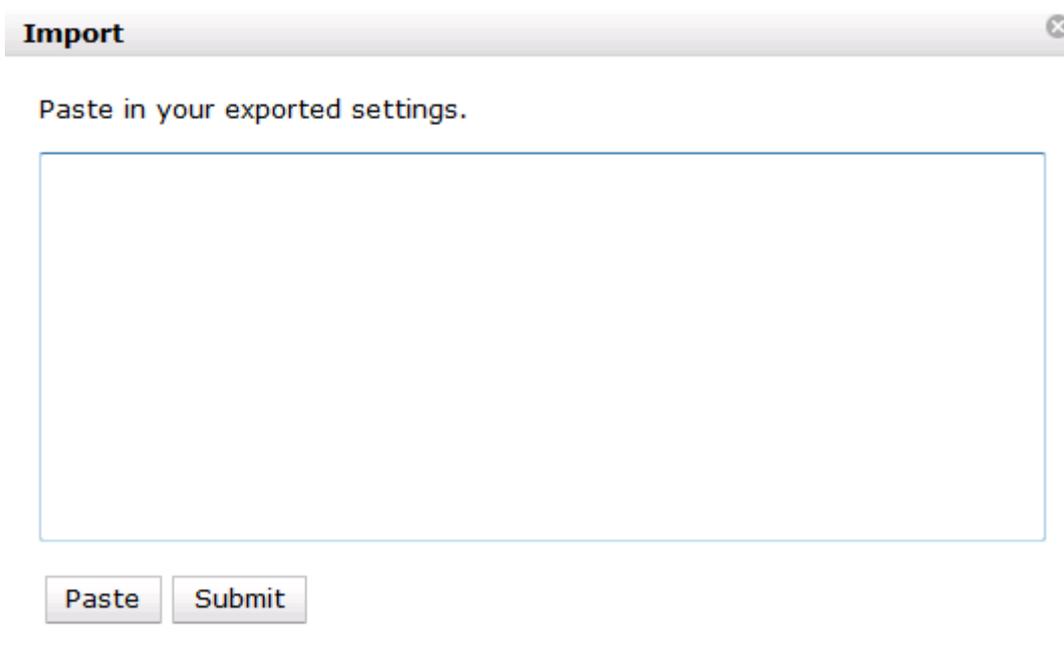
Chapter 14. Settings Overview

The settings are grouped together in separate tables based on functions and modules, which are affected by the setting. They are in the same sequence as you see in the staff client. Each table describes the available settings in the group and shows which can be changed on a per-library basis. At the bottom is the table with a list of data types with details about acceptable settings values.

Table 1. Acquisitions

Setting	Description	Data type	Notes
Allow funds to be rolled over without bringing money along	Allow funds to be rolled over without bringing the money along. This makes money left in the old fund disappear, modeling its return to some outside entity.	True/False	
Allows patrons to create automatic holds from purchase requests.	Allows patrons to create automatic holds from purchase requests.	True/False	
Default circulation modifier	Sets the default circulation modifier for use in acquisitions.	Text	
Default copy location	Sets the default item location(shelving location) for use in acquisitions.	Selection list	
Fund Spending Limit for Block	When the amount remaining in the fund, including spent money and encumbrances, goes below this percentage, attempts to spend from the fund will be blocked.	Number	

Setting	Description	Data type	Notes
Fund Spending Limit for Warning	When the amount remaining in the fund, including spent money and encumbrances, goes below this percentage, attempts to spend from the fund will result in a warning to the staff.	Number	
Rollover Distribution Formulae Funds	During fiscal rollover, update distribution formulae to use new funds	True/False	
Set copy creator as receiver	When receiving an item in acquisitions, set the item "creator" to be the staff that received the item	True/False	
Temporary barcode prefix	Temporary barcode prefix added to temporary item records.	Text	
Temporary call number prefix	Temporary call number prefix	Text	
Upload Activate PO	Activate the purchase order by default during ACQ file upload	True/False	
Upload Create PO	Create a purchase order by default during ACQ file upload	True/False	
Upload Default Insufficient Quality Fall-Thru Profile	Default low-quality fall through profile used during ACQ file upload	Selection List	Match Only Merge and Full Overlay are the selections.
Upload Default Match Set	Default match set to use during ACQ file upload	Selection List	Can be set to authority test or biblio
Upload Default Merge Profile	Default merge profile to use during ACQ file upload	Selection List	Match Only Merge and Full Overlay are the selections.
Upload Default Min. Quality Ratio	Default minimum quality ratio used during ACQ file upload	Number	

Setting	Description	Data type	Notes
Upload Default Provider	Default provider to use during ACQ file upload	Selection List	This list is populated by your Providers.
Upload Import Non Matching by Default	Import non-matching records by default during ACQ file upload	True/False	
Upload Load Items for Imported Records by Default	Load items for imported records by default during ACQ file upload	True/False	
Upload Merge on Best Match by Default	Merge records on best match by default during ACQ file upload	True/False	
Upload Merge on Exact Match by Default	Merge records on exact match by default during ACQ file upload	True/False	
Upload Merge on Single Match by Default	Merge records on single match by default during ACQ file upload	True/False	

Table 2. Booking and Cataloging

Setting	Description	Data type	Notes
Allow email notify	Permit email notification when a reservation is ready for pick-up.	True/false	
Elbow room	Elbow room specifies how far in the future you must make a reservation on an item if that item will have to transit to reach its pick-up location. It secondarily defines how soon a reservation on a given item must start before the check-in process will opportunistically capture it for the reservation shelf.	Duration	

Setting	Description	Data type	Notes
Default Classification Scheme	Defines the default classification scheme for new call numbers: 1 = Generic; 2 = Dewey; 3 = LC	Number	It has effect on call number sorting.
Default copy status (fast add)	Default status when an item is created using the "Fast Item Add" interface.	Selection list	Default: In process
Default copy status (normal)	Default status when an item is created using the normal volume/copy creator interface.	Selection list	
Defines the control number identifier used in 003 and 035 fields		Text	
Delete bib if all items are deleted via Acquisitions line item cancellation.		True/False	
Delete volume with last copy	Automatically delete a volume when the last linked item is deleted.	True/False	Default TRUE
Maximum Parallel Z39.50 Batch Searches	The maximum number of Z39.50 searches that can be in-flight at any given time when performing batch Z39.50 searches	Number	
Maximum Z39.50 Batch Search Results	The maximum number of search results to retrieve and queue for each record + Z39 source during batch Z39.50 searches	Number	

Setting	Description	Data type	Notes
Spine and pocket label font family	Set the preferred font family for spine and pocket labels. You can specify a list of fonts, separated by commas, in order of preference; the system will use the first font it finds with a matching name. For example, "Arial, Helvetica, serif".	Text	
Spine and pocket label font size	Set the default font size for spine and pocket labels	Number	
Spine and pocket label font weight	Set the preferred font weight for spine and pocket labels. You can specify "normal", "bold", "bolder", or "lighter".	Text	
Spine label left margin	Set the left margin for spine labels in number of characters.	Number	
Spine label line width	Set the default line width for spine labels in number of characters. This specifies the boundary at which lines must be wrapped.	Number	
Spine label maximum lines	Set the default maximum number of lines for spine labels.	Number	

Table 3. Circulation

Setting	Description	Data type	Notes
Allow others to use patron account (privacy waiver)	Add a note to a user account indicating that specified people are allowed to place holds, pick up holds, check out items, or view borrowing history for that user account.	True/False	
Auto-extend grace periods	When enabled grace periods will auto-extend. By default this will be only when they are a full day or more and end on a closed date, though other options can alter this.	True/False	
Auto-extending grace periods extend for all closed dates	It works when the above setting "Auto-Extend Grace Periods" is set to TRUE. If enabled, when the grace period falls on a closed date(s), it will be extended past all closed dates that intersect, but within the hard-coded limits (your library's grace period).	True/False	
Auto-extending grace periods include trailing closed dates	It works when the above setting "Auto-Extend Grace Periods" is set to TRUE. If enabled, grace periods will include closed dates that directly follow the last day of the grace period. A backdated check-in with effective date on the closed dates will assume the item is returned after hours on the last day of the grace period.	True/False	Useful when libraries' book drop equipped with AMH.

Setting	Description	Data type	Notes
Block hold request if hold recipient privileges have expired		True/False	
Cap max fine at item price	This prevents the system from charging more than the item price in overdue fines	True/False	
Charge fines on overdue circulations when closed	When set to True, fines will be charged during scheduled closings and normal weekly closed days.	True/False	
Checkout fills related hold	When a patron checks out an item and they have no holds that directly target the item, the system will attempt to find a hold for the patron that could be fulfilled by the checked out item and fulfills it. On the Staff Client you may notice that when a patron checks out an item under a title on which he/she has a hold, the hold will be treated as filled though the item has not been assigned to the patron's hold.	True/false	
Checkout fills related hold on valid copy only	When filling related holds on checkout only match on items that are valid for opportunistic capture for the hold. Without this set a Title or Volume hold could match when the item is not holdable. With this set only holdable items will match.	True/False	

Setting	Description	Data type	Notes
Checkout auto renew age	When an item has been checked out for at least this amount of time, an attempt to check out the item to the patron that it is already checked out to will simply renew the circulation. If the checkout attempt is done within this time frame, Evergreen will prompt for choosing Renewing or Check-in then Checkout the item.	Duration	
Display copy alert for in-house-use	Setting to true for an organization will cause an alert to appear with the copy's alert message, if it has one, when recording in-house-use for the copy.	True/False	
Display copy location check in alert for in-house-use	Setting to true for an organization will cause an alert to display a message indicating that the item needs to be routed to its location if the location has check in alert set to true.	True/False	
Do not change fines/fees on zero-balance LOST transaction	When an item has been marked lost and all fines/fees have been completely paid on the transaction, do not void or reinstate any fines/fees EVEN IF "Void lost item billing when returned" and/or "Void processing fee on lost item return" are enabled	True/False	

Setting	Description	Data type	Notes
Do not include outstanding Claims Returned circulations in lump sum tallies in Patron Display.	In the Patron Display interface, the number of total active circulations for a given patron is presented in the Summary sidebar and underneath the Items Out navigation button. This setting will prevent Claims Returned circulations from counting toward these tallies.	True/False	
Hold shelf status delay	The purpose is to provide an interval of time after an item goes into the on-holds-shelf status before it appears to patrons that it is actually on the holds shelf. This gives staff time to process the item before it shows as ready-for-pick-up.	Duration	
Include Lost circulations in lump sum tallies in Patron Display.	In the Patron Display interface, the number of total active circulations for a given patron is presented in the Summary sidebar and underneath the Items Out navigation button. This setting will include Lost circulations as counting toward these tallies.	True/False	
Invalid patron address penalty	When set, if a patron address is set to invalid, a penalty is applied.	True/False	

Setting	Description	Data type	Notes
Item status for missing pieces	This is the Item Status to use for items that have been marked or scanned as having Missing Pieces. In the absence of this setting, the Damaged status is used.	Selection list	
Load patron from Checkout	When scanning barcodes into Checkout auto-detect if a new patron barcode is scanned and auto-load the new patron.	True/False	
Long-Overdue Check-In Interval Uses Last Activity Date	Use the long-overdue last-activity date instead of the due_date to determine whether the item has been checked out too long to perform long-overdue check-in processing. If set, the system will first check the last payment time, followed by the last billing time, followed by the due date. See also "Long-Overdue Max Return Interval"	True/False	
Long-Overdue Items Usable on Checkin	Long-overdue items are usable on checkin instead of going "home" first	True/False	
Long-Overdue Max Return Interval	Long-overdue check-in processing (voiding fees, re-instating overdues, etc.) will not take place for items that have been overdue for (or have last activity older than) this amount of time	Duration	

Setting	Description	Data type	Notes
Lost check-in generates new overdues	Enabling this setting causes retroactive creation of not-yet-existing overdue fines on lost item check-in, up to the point of check-in time (or max fines is reached). This is different than "restore overdue on lost", because it only creates new overdue fines. Use both settings together to get the full complement of overdue fines for a lost item	True/False	
Lost items usable on checkin	Lost items are usable on checkin instead of going *home* first	True/false	
Max patron claims returned count	When this count is exceeded, a staff override is required to mark the item as claims returned.	Number	
Maximum visible age of User Trigger Events in Staff Interfaces	If this is unset, staff can view User Trigger Events regardless of age. When this is set to an interval, it represents the age of the oldest possible User Trigger Event that can be viewed.	Duration	
Minimum transit checkin interval	In-Transit items checked in this close to the transit start time will be prevented from checking in	Duration	

Setting	Description	Data type	Notes
Number of Retrievable Recent Patrons	Number of most recently accessed patrons that can be re-retrieved in the staff client. A value of 0 or less disables the feature. Defaults to 1.	Number	
Patron merge address delete	Delete address(es) of subordinate user(s) in a patron merge.	True/False	
Patron merge barcode delete	Delete barcode(s) of subordinate user(s) in a patron merge	True/False	
Patron merge deactivate card	Mark barcode(s) of subordinate user(s) in a patron merge as inactive.	True/False	
Patron Registration: Cloned patrons get address copy	If True, in the Patron editor, addresses are copied from the cloned user. If False, addresses are linked from the cloned user which can only be edited from the cloned user record.	True/False	
Printing: custom JavaScript file	Full URL path to a JavaScript File to be loaded when printing. Should implement a print_custom function for DOM manipulation. Can change the value of the do_print variable to false to cancel printing.	Text	
Require matching email address for password reset requests		True/False	
Restore Overdues on Long-Overdue Item Return		True/False	

Setting	Description	Data type	Notes
Restore overdues on lost item return	If true when a lost item is checked in overdue fines are charged (up to the maximum fines amount)	True/False	
Specify search depth for the duplicate patron check in the patron editor	When using the patron registration page, the duplicate patron check will use the configured depth to scope the search for duplicate patrons.	Number	
Suppress hold transits group	To create a group of libraries to suppress Hold Transits among them. All libraries in the group should use the same unique value. Leave it empty if transits should not be suppressed.	Text	
Suppress non-hold transits group	To create a group of libraries to suppress Non-Hold Transits among them. All libraries in the group should use the same unique value. Leave it empty if Non-Hold Transits should not be suppressed.	Text	
Suppress popup-dialogs during check-in.	When set to True, no pop-up window for exceptions on check-in. But the accompanying sound will be played.	True/False	

Setting	Description	Data type	Notes
Target copies for a hold even if copy's circ lib is closed	If this setting is true at a given org unit or one of its ancestors, the hold targeter will target items from this org unit even if the org unit is closed (according to the Org Unit's closed dates.).	True/False	Set the value to True if you want to target items for holds at closed circulating libraries. Set the value to False, or leave it unset, if you do not want to enable this feature.
Target copies for a hold even if copy's circ lib is closed IF the circ lib is the hold's pickup lib	If this setting is true at a given org unit or one of its ancestors, the hold targeter will target items from this org unit even if the org unit is closed (according to the Org Unit's closed dates) IF AND ONLY IF the item's circ lib is the same as the hold's pickup lib.	True/False	Set the value to True if you want to target items for holds at closed circulating libraries when the circulating library of the item and the pickup library of the hold are the same. Set the value to False, or leave it unset, if you do not want to enable this feature.
Truncate fines to max fine amount		True/False	Default:TRUE
Use Lost and Paid copy status	Use Lost and Paid copy status when lost or long overdue billing is paid	True/False	
Void Long-Overdue Item Billing When Returned		True/False	
Void Processing Fee on Long-Overdue Item Return		True/False	
Void longoverdue item billing when claims returned		True/False	
Void longoverdue item processing fee when claims returned		True/False	
Void lost item billing when claims returned		True/False	

Setting	Description	Data type	Notes
Void lost item billing when returned	If true,when a lost item is checked in the item replacement bill (item price) is voided.	True/False	
Void lost item processing fee when claims returned	When an item is marked claims returned that was marked Lost, the item processing fee will be voided.	True/False	
Void lost max interval	Items that have been overdue this long will not result in lost charges being voided when returned, and the overdue fines will not be restored, either. Only applies if **Circ: Void lost item billing** or **Circ: Void processing fee on lost item** are true.	Duration	
Void processing fee on lost item return	Void processing fee when lost item returned	True/False	
Warn when patron account is about to expire	If set, the staff client displays a warning this number of days before the expiry of a patron account. Value is in number of days.	Duration	

Table 4. Credit Card Processing

Setting	Description	Data type	Notes
AuthorizeNet login	Authorize.Net Username	Text	Obtain from Authorize.Net at http://www.authorize.net
AuthorizeNet password	Authorize.Net Password	Text	Obtain from Authorize.Net

Setting	Description	Data type	Notes
AuthorizeNet server	Required if using a developer/test account with Authorize.Net.	Text	Enter the server name from Authorize.Net. This is for use on test or developer account. If using live, leave blank.
AuthorizeNet test mode	Places Authorize.Net transactions in Test Mode	True/False	
Enable AuthorizeNet payments	This actually enables use of Authorize.Net	True/False	
Enable PayPal payments	This will enable use of PayPal payments through the staff client.	True/False	
Enable PayflowPro payments	This will enable the use of PayPal's Payflow Pro. This is not the same as PayPal.	True/False	
Enable Stripe payments	This will enable the use of the stripe credit card processing.	True/False	https://stripe.com
Name default credit processor	This might be "AuthorizeNet", "PayPal", "PayflowPro", or "Stripe".	Text	This sets the company that you will use to process the credit cards.
PayPal login	Enter the PayPal login Username	Text	Obtain from PayPal
PayPal password	Enter the PayPal password.	Text	Obtain from PayPal.
PayPal signature	HASH Signature for PayPal	Text	Enter the HASH obtained from PayPal.
PayPal test mode	Places the PayPal credit card payments in test mode.	True/False	This sends the transactions to PayPal's development.paypal.com server for testing only.
PayflowPro login/merchant ID	Enter the PayflowPro Merchant ID	Text	Obtain from Payflow Pro Partner.

Setting	Description	Data type	Notes
PayflowPro partner	Enter the Partner ID from your Payflow Partner	Text	This will obtained from your Payflow Pro partner. This can be "PayPal" or "VeriSign", sometimes others.
PayflowPro password	Password for PayflowPro	Text	Obtain from Payflow Pro Partner
PayflowPro test mode	Place Payflow Pro in test mode.	True/False	Do not really process transactions, but stay in test mode - uses pilot-payflowpro.paypal.com instead of the usual host.
PayflowPro vendor	Currently the same as the Payflow Pro login.	Text	Obtain from Payflow Pro partner.
Stripe publishable key	Publishable API Key from stripe.	Text	
Stripe secret key	Secret API key from stripe.	Text	

Table 5. Finances

Setting	Description	Data type	Notes
Allow credit card payments	If enabled, patrons will be able to pay fines accrued at this location via credit card.	True/False	
Charge item price when marked damaged	If true Evergreen bills item price to the last patron who checked out the damaged item. Staff receive an alert with patron information and must confirm the billing.	True/false	

Setting	Description	Data type	Notes
Charge lost on zero	If set to True, default item price will be charged when an item is marked lost even though the price in item record is 0.00 (same as no price). If False, only processing fee, if used, will be charged.	True/false	
Charge processing fee for damaged items	Optional processing fee billed to last patron who checked out the damaged item. Staff receive an alert with patron information and must confirm the billing.	Number(Dollar)	Disabled when set to 0
Default item price	Replacement charge for lost items if price is unset in the **Copy Editor**. Does not apply if item price is set to $0	Number(dollars)	
Disable Patron Credit	Do not allow patrons to accrue credit or pay fines/fees with accrued credit	True/False	
Leave transaction open when long overdue balance equals zero	Leave transaction open when long-overdue balance equals zero. This leaves the long-overdue copy on the patron record when it is paid	True/False	
Leave transaction open when lost balance equals zero	Leave transaction open when lost balance equals zero. This leaves the lost item on the patron record when it is paid	True/False	
Long-Overdue Materials Processing Fee	The amount charged in addition to item price when an item is marked Long-Overdue	Number	Currency

Setting	Description	Data type	Notes
Lost materials processing fee	The amount charged in addition to item price when an item is marked lost.	Number	Currency
Maximum Item Price	When charging for lost items, limit the charge to this as a maximum.	Number	Currency
Minimum Item Price	When charging for lost items, charge this amount as a minimum.	Number	Currency
Negative Balance Interval (DEFAULT)	Amount of time after which no negative balances (refunds) are allowed on circulation bills. The "Prohibit negative balance on bills" setting must also be set to "true".	Duration	
Negative Balance Interval for Lost	Amount of time after which no negative balances (refunds) are allowed on bills for lost/long overdue materials. The "Prohibit negative balance on bills for lost materials" setting must also be set to "true".	Duration	
Negative Balance Interval for Overdues	Amount of time after which no negative balances (refunds) are allowed on bills for overdue materials. The "Prohibit negative balance on bills for overdue materials" setting must also be set to "true".	Duration	

Setting	Description	Data type	Notes
Prohibit negative balance on bills (Default)	Default setting to prevent negative balances (refunds) on circulation related bills. Set to "true" to prohibit negative balances at all times or, when used in conjunction with an interval setting, to prohibit negative balances after a set period of time.	True/False	
Prohibit negative balance on bills for lost materials	Prevent negative balances (refunds) on bills for lost/long overdue materials. Set to "true" to prohibit negative balances at all times or, when used in conjunction with an interval setting, to prohibit negative balances after an interval of time.	True/False	
Prohibit negative balance on bills for overdue materials	Prevent negative balances (refunds) on bills for lost/long overdue materials. Set to "true" to prohibit negative balances at all times or, when used in conjunction with an interval setting, to prohibit negative balances after an interval of time.	True/False	
Void Overdue Fines When Items are Marked Long-Overdue	If true overdue fines are voided when an item is marked Long-Overdue	True/False	
Void overdue fines when items are marked lost	If true overdue fines are voided when an item is marked lost	True/False	

Table 6. GUI: Graphic User Interface

Setting	Description	Data type	Notes
Alert on empty bib records	Alert staff when the last item for a record is being deleted.	True/False	
Button bar	If TRUE, the staff client button bar appears by default on all workstations registered to your library; staff can override this setting at each login.	True/False	
Cap results in Patron Search at this number.	The maximum number of results returned per search. If 100 is set up here, any search will return 100 records at most.	Number	
Default Country for New Addresses in Patron Editor	This is the default Country for new addresses in the patron editor.	Text	
Default hotkeyset	Default Hotkeyset for clients (filename without the .keyset). Examples: Default, Minimal, and None	Text	Individual workstations' default overrides this setting.
Default ident type for patron registration	This is the default Ident Type for new users in the patron editor.	Selection list	
Default showing suggested patron registration fields	Instead of All fields, show just suggested fields in patron registration by default.	True/False	

Setting	Description	Data type	Notes
Disable the ability to save list column configurations locally.	GUI: Disable the ability to save list column configurations locally. If set, columns may still be manipulated, however, the changes do not persist. Also, existing local configurations are ignored if this setting is true.	True/False	
Enable Experimental Angular Staff Catalog	Adds an entry to the Web client's search menu so that staff can experiment with the new Angular Staff Catalog.	True/False	
Example for Day_phone field on patron registration	The example on validation on the Day_phone field in patron registration.	Text	
Example for Email field on patron registration	The example on validation on the Email field in patron registration.	Text	
Example for Evening-phone on patron registration	The example on validation on the Evening-phone field in patron registration.	Text	
Example for Other-phone on patron registration	The example on validation on the Other-phone field in patron registration.	Text	
Example for phone fields on patron registration	The example on validation on phone fields in patron registration. Applies to all phone fields without their own setting.	Text	
Example for Postal Code field on patron registration	The example on validation on the Postal Code field in patron registration.	Text	

Setting	Description	Data type	Notes
Format Dates with this pattern.	Format Dates with this pattern (examples: "yyyy-MM-dd" for "2010-04-26, "MMM d, yyyy" for "Apr 26, 2010"). Formats are effective in display (not editing) area.	Text	
Format Times with this pattern.	Format Times with this pattern *(examples: "h:m:s.SSS a z" for "2:07:20.666 PM Eastern Daylight Time", "HH:mm" for "14:07")*. Formats are effective in display (not editing) area.	Text	
GUI: Hide these fields within the Item Attribute Editor.	Sets which fields in the Item Attribute Editor to hide in the staff client.	Text	This is useful to hide attributes that are not used.
Horizontal layout for Volume/Copy Creator/Editor.	The main entry point for this interface is in Holdings Maintenance, Actions for Selected Rows, Edit Item Attributes / Call Numbers / Replace Barcodes. This setting changes the top and bottom panes (if FALSE) for that interface into left and right panes (if TRUE).	True/False	
Idle timeout	If you want staff client windows to be minimized after a certain amount of system idle time, set this to the number of seconds of idle time that you want to allow before minimizing (requires staff client restart).	Number	

Setting	Description	Data type	Notes
Items Out Claims Returned display setting	Value is a numeric code, describing which list the circulation should appear while checked out and whether the circulation should continue to appear in the bottom list, when checked in with outstanding fines. 1 = top list, bottom list. 2 = bottom list, bottom list. 5 = top list, do not display. 6 = bottom list, do not display.	Number	
Items Out Long-Overdue display setting	Value is a numeric code, describing which list the circulation should appear while checked out and whether the circulation should continue to appear in the bottom list, when checked in with outstanding fines. 1 = top list, bottom list. 2 = bottom list, bottom list. 5 = top list, do not display. 6 = bottom list, do not display.	Number	
Items Out Lost display setting	Value is a numeric code, describing which list the circulation should appear while checked out and whether the circulation should continue to appear in the bottom list, when checked in with outstanding fines. 1 = top list, bottom list. 2 = bottom list, bottom list. 5 = top list, do not display. 6 = bottom list, do not display.	Number	

Setting	Description	Data type	Notes
Max user activity entries to retrieve (staff client)	Sets the maximum number of recent user activity entries to retrieve for display in the staff client.	Number	
Maximum previous checkouts displayed	The maximum number of previous circulations the staff client will display when investigating item details	Number	
Patron circulation summary is horizontal		True/False	
Record in-house use: # of uses threshold for Are You Sure? dialog.	In the Record In-House Use interface, a submission attempt will warn if the # of uses field exceeds the value of this setting.	Number	
Record In-House Use: Maximum # of uses allowed per entry.	The # of uses entry in the Record In-House Use interface may not exceed the value of this setting.	Number	
Regex for barcodes on patron registration	The Regular Expression for validation on barcodes in patron registration.	Regular Expression	
Regex for Day_phone field on patron registration	The Regular Expression for validation on the Day_phone field in patron registration. Note: The first capture group will be used for the "last 4 digits of phone number" as patron password feature, if enabled. Ex: "[2-9]\d{2}-\d{3}-(\d{4})(x\d+)?" will ignore the extension on a NANP number.	Regular expression	

Setting	Description	Data type	Notes
Regex for Email field on patron registration	The Regular Expression on validation on the Email field in patron registration.	Regular expression	
Regex for Evening-phone on patron registration	The Regular Expression on validation on the Evening-phone field in patron registration.	Regular expression	
Regex for Other-phone on patron registration	The Regular Expression on validation on the Other-phone field in patron registration.	Regular expression	
Regex for phone fields on patron registration	The Regular Expression on validation on phone fields in patron registration. Applies to all phone fields without their own setting.	Regular expression	`^(?:(?:\+?1\s*(?:[.-]\s*)?)?(?:\(\s*([2-9]1[02-9]|[2-9][02-8]1|[2-9][02-8][02-9])\s*\)|([2-9]1[02-9]|[2-9][02-8]1|[2-9][02-8][02-9]))\s*(?:[.-]\s*)?)?([2-9]1[02-9]|[2-9][02-9]1|[2-9][02-9]{2})\s*(?:[.-]\s*)?([0-9]{4})(?:\s*(?:#|x\.?|ext\.?|extension)\s*(\d+))?$` is a US phone number
Regex for Postal Code field on patron registration	The Regular Expression on validation on the Postal Code field in patron registration.	Regular expression	
Require at least one address for Patron Registration	Enforces a requirement for having at least one address for a patron during registration. If set to False, you need to delete the empty address before saving the record. If set to True, deletion is not allowed.	True/False	

Setting	Description	Data type	Notes
Require XXXXX field on patron registration	The XXXXX field will be required on the patron registration screen.	True/False	XXXXX can be Country, State, Day-phone, Evening-phone, Other-phone, DOB, Email, or Prefix.
Require staff initials for entry/edit of patron standing penalties and messages.	Appends staff initials and edit date into patron standing penalties and messages.	True/False	
Require staff initials for entry/edit of patron notes.	Appends staff initials and edit date into patron note content.	True/False	
Require staff initials for entry/edit of copy notes.	Appends staff initials and edit date into copy note content.	True/False	
Show billing tab first when bills are present	If true accounts for patrons with bills will open to the billing tab instead of check out	True/false	
Show XXXXX field on patron registration	The XXXXX field will be shown on the patron registration screen. Showing a field makes it appear with required fields even when not required. If the field is required this setting is ignored.	True/False	
Suggest XXXXX field on patron registration	The XXXXX field will be suggested on the patron registration screen. Suggesting a field makes it appear when suggested fields are shown. If the field is shown or required this setting is ignored.	True/False	
Juvenile account requires parent/guardian	When this setting is set to true, a value will be required in the patron editor when the juvenile flag is active.	True/False	

Setting	Description	Data type	Notes
Toggle off the patron summary sidebar after first view.	When true, the patron summary sidebar will collapse after a new patron sub-interface is selected.	True/False	
URL for remote directory containing list column settings.	The format and naming convention for the files found in this directory match those in the local settings directory for a given workstation. An administrator could create the desired settings locally and then copy all the tree_columns_for_* files to the remote directory.	Text	
Uncheck bills by default in the patron billing interface	Uncheck bills by default in the patron billing interface, and focus on the Uncheck All button instead of the Payment Received field.	True/False	
Unified Volume/Item Creator/Editor	If True, combines the Volume/Copy Creator and Item Attribute Editor in some instances.	True/False	
Work Log: maximum actions logged	Maximum entries for "Most Recent Staff Actions" section of the Work Log interface.	Number	
Work Log: maximum patrons logged	Maximum entries for "Most Recently Affected Patrons..." section of the Work Log interface.	Number	

Table 7. Global

Setting	Description	Data type	Notes
Allow multiple username changes	If enabled (and Lock Usernames is not set) patrons will be allowed to change their username when it does not look like a barcode. Otherwise username changing in the OPAC will only be allowed when the patron's username looks like a barcode.	True/False	Default TRUE.
Global default locale		Number	
Lock Usernames	If enabled username changing via the OPAC will be disabled.	Default FALSE	
Password format	Defines acceptable format for OPAC account passwords	Regular expression	Default requires that passwords "be at least 7 characters in length,contain at least one letter (a-z/A-Z), and contain at least one number.
Patron barcode format	Defines acceptable format for patron barcodes	Regular expression	
Patron username format	Regular expression defining the patron username format, used for patron registration and self-service username changing only	Regular expression	

Table 8. Holds

Setting	Description	Data type	Notes
Behind desk pickup supported	If a branch supports both a public holds shelf and behind-the-desk pickups, set this value to true. This gives the patron the option to enable behind-the-desk pickups for their holds by selecting Hold is behind Circ Desk flag in patron record.	True/False	
Best-hold selection sort order	Defines the sort order of holds when selecting a hold to fill using a given copy at capture time	Selection list	
Block renewal of items needed for holds	When an item could fulfill a hold, do not allow the current patron to renew	True/False	
Cancelled holds display age	Show all cancelled holds that were cancelled within this amount of time	Duration	
Cancelled holds display count	How many cancelled holds to show in patron holds interfaces	Number	
Clear shelf copy status	Any copies that have not been put into reshelving, in-transit, or on-holds-shelf (for a new hold) during the clear shelf process will be put into this status. This is basically a purgatory status for copies waiting to be pulled from the shelf and processed by hand	Selection list	

Setting	Description	Data type	Notes
Default estimated wait	When predicting the amount of time a patron will be waiting for a hold to be fulfilled, this is the default estimated length of time to assume an item will be checked out.	Duration	
Default hold shelf expire interval	Hold Shelf Expiry Time is calculated and inserted into hold record based on this interval when capturing a hold.	Duration	
Expire alert interval	Time before a hold expires at which to send an email notifying the patron	Duration	
Expire interval	Amount of time until an unfulfilled hold expires	Duration	
FIFO	Force holds to a more strict First-In, First-Out capture. Default is SAVE-GAS, which gives priority to holds with pickup location the same as checkin library.	True/False	Applies only to multi-branch libraries. Default is SAVE-GAS.
Hard boundary		Number	
Hard stalling interval		Duration	
Has local copy alert	If there is an available item at the requesting library that could fulfill a hold during hold placement time, alert the patron.	True/False	

Setting	Description	Data type	Notes
Has local copy block	If there is an available item at the requesting library that could fulfill a hold during hold placement time, do not allow the hold to be placed.	True/False	
Max foreign-circulation time	Time a item can spend circulating away from its circ lib before returning there to fill a hold	Duration	For multi-branch libraries.
Maximum library target attempts	When this value is set and greater than 0, the system will only attempt to find a item at each possible branch the configured number of times	Number	For multi-branch libraries.
Minimum estimated wait	When predicting the amount of time a patron will be waiting for a hold to be fulfilled, this is the minimum estimated length of time to assume an item will be checked out.	Duration	
Org unit target weight	Org Units can be organized into hold target groups based on a weight. Potential items from org units with the same weight are chosen at random.	Number	
Reset request time on un-cancel	When a hold is uncancelled, reset the request time to push it to the end of the queue	True/False	
Skip for hold targeting	When true, don't target any items at this org unit for holds	True/False	

Setting	Description	Data type	Notes
Soft boundary	Holds will not be filled by items outside this boundary if there are holdable items within it.	Number	
Soft stalling interval	For this amount of time, holds will not be opportunistically captured at non-pickup branches.	Duration	For multiple branch libraries
Use Active Date for age protection	When calculating age protection rules use the Active date instead of the Creation Date.	True/False	Default TRUE
Use weight-based hold targeting	Use library weight based hold targeting	True/False	

Table 9. Library

Setting	Description	Data type	Notes
Change reshelving status interval	Amount of time to wait before changing an item from "Reshelving" status to "available"	Duration	The default is at midnight each night for items with "Reshelving" status for over 24 hours.
Claim never checked out: mark copy as missing	When a circ is marked as claims-never-checked-out, mark the item as missing	True/False	
Claim return copy status	Claims returned copies are put into this status. Default is to leave the copy in the Checked Out status	Selection list	
Courier code	Courier Code for the library. Available in transit slip templates as the %courier_code% macro.	Text	

Setting	Description	Data type	Notes
Juvenile age threshold	Upper cut-off age for patrons to be considered juvenile, calculated from date of birth in patron accounts	Duration (years)	
Library information URL (such as "http://example.com/about.html")	URL for information on this library, such as contact information, hours of operation, and directions. Use a complete URL, such as "http://example.com/hours.html".	Text	
Mark item damaged voids overdues	When an item is marked damaged, overdue fines on the most recent circulation are voided.	True/False	
Pre-cat item circ lib	Override the default circ lib of "here" with a pre-configured circ lib for pre-cat items. The value should be the "shortname" (aka policy name) of the org unit	Text	
Telephony: Arbitrary line(s) to include in each notice callfile	This overrides lines from opensrf.xml. Line(s) must be valid for your target server and platform (e.g. Asterisk 1.4).	Text	

Table 10. OPAC

Setting	Description	Data type	Notes
Allow Patron Self-Registration	Allow patrons to self-register, creating pending user accounts	True/False	

Setting	Description	Data type	Notes
Allow pending addresses	If true patrons can edit their addresses in the OPAC. Changes must be approved by staff	True/False	
Auto-Override Permitted Hold Blocks (Patrons)	This will allow patrons with the permission "HOLD_ITEM_CHECKED_OUT.override" to automatically override permitted holds.	True/False	When a patron places a hold in the OPAC that fails, and the patron has the permission to override the failed hold, this automatically overrides the failed hold rather than requiring the patron to manually override the hold. Default is False.
Jump to details on 1 hit (OPAC)	When a search yields only 1 result, jump directly to the record details page. This setting only affects the public OPAC	True/False	
Jump to details on 1 hit (staff client)	When a search yields only 1 result, jump directly to the record details page. This setting only affects the PAC within the staff client	True/False	
OPAC: Number of staff client saved searches to display on left side of results and record details pages	If unset, the OPAC (only when wrapped in the staff client!) will default to showing you your ten most recent searches on the left side of the results and record details pages. If you actually don't want to see this feature at all, set this value to zero at the top of your organizational tree.	Number	

Setting	Description	Data type	Notes
OPAC: Org Unit is not a hold pickup library	If set, this org unit will not be offered to the patron as an option for a hold pickup location. This setting has no affect on searching or hold targeting.	True/False	
Org unit hiding depth	This will hide certain org units in the public OPAC if the Original Location (url param "ol") for the OPAC inherits this setting. This setting specifies an org unit depth, that together with the OPAC Original Location determines which section of the Org Hierarchy should be visible in the OPAC. For example, a stock Evergreen installation will have a 3-tier hierarchy (Consortium/System/Branch), where System has a depth of 1 and Branch has a depth of 2. If this setting contains a depth of 1 in such an installation, then every library in the System in which the Original Location belongs will be visible, and everything else will be hidden. A depth of 0 will effectively make every org visible. The embedded OPAC in the staff client ignores this setting.	Number	

Setting	Description	Data type	Notes
Paging shortcut links for OPAC Browse	The characters in this string, in order, will be used as shortcut links for quick paging in the OPAC browse interface. Any sequence surrounded by asterisks will be taken as a whole label, not split into individual labels at the character level, but only the first character will serve as the basis of the search.	Text	
Patron Self-Reg. Display Timeout	Number of seconds to wait before reloading the patron self-registration interface to clear sensitive data	Duration	
Patron Self-Reg. Expire Interval	If set, this is the amount of time a pending user account will be allowed to sit in the database. After this time, the pending user information will be purged	Duration	
Payment history age limit	The OPAC should not display payments by patrons that are older than any interval defined here.	Duration	
Tag Circulated Items in Results	When a user is both logged in and has opted in to circulation history tracking, turning on this setting will cause previous (or currently) circulated items to be highlighted in search results	True/False	

Setting	Description	Data type	Notes
Tag Circulated Items in Results	When a user is both logged in and has opted in to circulation history tracking, turning on this setting will cause previous (or currently) circulated items to be highlighted in search results.	True/False	Default TRUE
Use fully compressed serial holdings	Show fully compressed serial holdings for all libraries at and below the current context unit	True/False	
Warn patrons when adding to a temporary book list	Present a warning dialogue when a patron adds a book to the temporary book list.	True/False	

Table 11. Offline and Program

Setting	Description	Data type	Notes
Skip offline checkin if newer item Status Changed Time.	Skip offline checkin transaction (raise exception when processing) if item Status Changed Time is newer than the recorded transaction time. WARNING: The Reshelving to Available status rollover will trigger this.	True/False	
Skip offline checkout if newer item Status Changed Time.	Skip offline checkout transaction (raise exception when processing) if item Status Changed Time is newer than the recorded transaction time. WARNING: The Reshelving to Available status rollover will trigger this.	True/False	

Setting	Description	Data type	Notes
Skip offline renewal if newer item Status Changed Time.	Skip offline renewal transaction (raise exception when processing) if item Status Changed Time is newer than the recorded transaction time. WARNING: The Reshelving to Available status rollover will trigger this.	True/False	
Disable automatic print attempt type list	Disable automatic print attempts from staff client interfaces for the receipt types in this list. Possible values: "Checkout", "Bill Pay", "Hold Slip", "Transit Slip", and "Hold/Transit Slip". This is different from the Auto-Print checkbox in the pertinent interfaces in that it disables automatic print attempts altogether, rather than encouraging silent printing by suppressing the print dialogue. The Auto-Print checkbox in these interfaces have no effect on the behavior for this setting. In the case of the Hold, Transit, and Hold/Transit slips, this also suppresses the alert dialogues that precede the print dialogue (the ones that offer Print and Do Not Print as options).	Text	

Setting	Description	Data type	Notes
Retain empty bib records	Retain a bib record even when all attached copies are deleted	True/False	
Sending email address for patron notices	This email address is for automatically generated patron notices (e.g. email overdues, email holds notification). It is good practice to set up a generic account, like info@nameofyourlibrary.org, so that one person's individual email inbox doesn't get cluttered with emails that were not delivered.	Text	

Table 12. Receipt Templates and SMS Text Message

Setting	Description	Data type	Notes
Content of alert_text include	Text/HTML/Macros to be inserted into receipt templates in place of %INCLUDE(alert_text)%	Text	
Content of event_text include	Text/HTML/Macros to be inserted into receipt templates in place of %INCLUDE(event_text)%	Text	
Content of footer_text include	Text/HTML/Macros to be inserted into receipt templates in place of %INCLUDE(footer_text)%	Text	
Content of header_text include	Text/HTML/Macros to be inserted into receipt templates in place of %INCLUDE(header_text)%	Text	

Setting	Description	Data type	Notes
Content of notice_text include	Text/HTML/Macros to be inserted into receipt templates in place of %INCLUDE(notice_text)%	Text	
Disable auth requirement for texting call numbers.	Disable authentication requirement for sending call number information via SMS from the OPAC.	True/False	
Enable features that send SMS text messages.	Current features that use SMS include hold-ready-for-pickup notifications and a "Send Text" action for call numbers in the OPAC. If this setting is not enabled, the SMS options will not be offered to the user. Unless you are carefully silo-ing patrons and their use of the OPAC, the context org for this setting should be the top org in the org hierarchy, otherwise patrons can trample their user settings when jumping between orgs.	True/False	

Table 13. Security

Setting	Description	Data type	Notes
Default level of patrons' internet access	Enter numbers 1 (Filtered), 2 (Unfiltered), or 3 (No Access)	Number	

Setting	Description	Data type	Notes
Maximum concurrently active self-serve password reset requests	Prevent the creation of new self-serve password reset requests until the number of active requests drops back below this number.	Number	
Maximum concurrently active self-serve password reset requests per user	When a user has more than this number of concurrently active self-serve password reset requests for their account, prevent the user from creating any new self-serve password reset requests until the number of active requests for the user drops back below this number.	Number	
OPAC Inactivity Timeout (in seconds)	Number of seconds of inactivity before OPAC accounts are automatically logged out.	Number	
Obscure the Date of Birth field	When true, the Date of Birth column in patron lists will default to Not Visible, and in the Patron Summary sidebar the value will display as unless the field label is clicked.	True/False	
Offline: Patron usernames allowed	During offline circulations, allow patrons to identify themselves with usernames in addition to barcode. For this setting to work, a barcode format must also be defined	True/False	

Setting	Description	Data type	Notes
Patron opt-in boundary	This determines at which depth above which patrons must be opted in, and below which patrons will be assumed to be opted in.	Text	
Patron opt-in default	This is the default depth at which a patron is opted in; it is calculated as an org unit relative to the current workstation.	Text	
Patron: password from phone #	If true the last 4 digits of the patron's phone number is the password for new accounts (password must still be changed at first OPAC login)	True/false	
Persistent login duration	How long a persistent login lasts, e.g. *2 weeks*	Duration	
Self-serve password reset request time-to-live	Length of time (in seconds) a self-serve password reset request should remain active.	Duration	
Staff login inactivity timeout (in seconds)	Number of seconds of inactivity before staff client prompts for login and password.	Number	

Table 14. Self Check and Others

Setting	Description	Data type	Notes
Audio Alerts	Use audio alerts for selfcheck events.	True/false	
Block copy checkout status	List of copy status IDs that will block checkout even if the generic COPY_NOT_AVAILABLE event is overridden.	Number	Look up copy status ID from Server Admin.

Setting	Description	Data type	Notes
Patron login timeout (in seconds)	Number of seconds of inactivity before the patron is logged out of the selfcheck interface.	Duration	
Pop-up alert for errors	If true, checkout/renewal errors will cause a pop-up window in addition to the on-screen message.	True/False	
Require Patron Password	If true, patrons will be required to enter their password in addition to their username/barcode to log into the selfcheck interface.	True/False	This replaced "Require patron password"
Require patron password		True/False	This was replaced by "Require Patron Password" and is currently invalid.
Selfcheck override events list	List of checkout/renewal events that the selfcheck interface should automatically override instead instead of alerting and stopping the transaction.	Text	
Workstation Required	All selfcheck stations must use a workstation.	True/False	
Default display grouping for serials distributions presented in the OPAC.	Default display grouping for serials distributions presented in the OPAC. This can be "enum" or "chron".	Text	

Setting	Description	Data type	Notes
Previous issuance copy location	When a serial issuance is received, copies (units) of the previous issuance will be automatically moved into the configured shelving location.	Selection List	
Maximum redirect lookups	For URLs returning 3XX redirects, this is the maximum number of redirects we will follow before giving up.	Number	
Maximum wait time (in seconds) for a URL to lookup	If we exceed the wait time, the URL is marked as a "timeout" and the system moves on to the next URL	Duration	
Number of URLs to test in parallel	URLs are tested in batches. This number defines the size of each batch and it directly relates to the number of back-end processes performing URL verification.	Number	
Number of seconds to wait between URL test attempts	Throttling mechanism for batch URL verification runs. Each running process will wait this number of seconds after a URL test before performing the next.	Duration	

Table 15. Vandelay

Setting	Description	Data type	Notes
Default Record Match Set	Sets the Default Record Match set	Selection List	Populated by the Vandelay Record Match Sets
Vandelay Default Barcode Prefix	Apply this prefix to any auto-generated item barcode	Text	

Setting	Description	Data type	Notes
Vandelay Default Call Number Prefix	Apply this prefix to any auto-generated item call numbers.	Text	
Vandelay Default Circulation Modifier	Default circulation modifier value for imported items	Selection List	Populated by your Circulation Modifiers.
Vandelay Default Copy Location	Default copy location value for imported items	Selection List	Populated from Shelving Locations
Vandelay Generate Default Barcodes	Auto-generate default item barcodes when no item barcode is present	True/False	
Vandelay Generate Default Call Numbers	Auto-generate default item call numbers when no item call number is present	True/False	These are pulled from the MARC Record.

14.1. Data Types

Acceptable formats for each setting type are listed below. Quotation marks are never required when updating settings in the staff client.

Table 16. Data Types in the Library Settings Editor

Data type	Formatting
True/False	Boolean True/False drop down
Number	Enter a numerical value (decimals allowed in price settings)
Duration	Enter a number followed by a space and any of the following units: minutes, hours, days, months (30 minutes, 2 days, etc)
Selection list	Choose from a drop-down list of options (e.g. copy status, copy location)
Text	Free text

Organizational Unit administration

Chapter 15. Describing your organization

Your Evergreen system is almost ready to go. You'll need to add each of the libraries that will be using your Evergreen system. If you're doing this for a consortium, you'll have to add your consortium as a whole, and all the libraries and branches that are members of the consortium. In this chapter, we'll talk about how to get the Evergreen system to see all your libraries, how to set each one up, and how to edit all the details of each one.

15.1. Organization Unit Types

The term *Organization Unit Types* refers to levels in the hierarchy of your library system(s). Examples could include: All-Encompassing Consortium, Library System, Branch, Bookmobile, Sub-Branch, etc.

You can add or remove organizational unit types, and rename them as needed to match the organizational hierarchy that matches the libraries using your installation of Evergreen. Organizational unit types should never have proper names since they are only generic types.

When working with configuration, settings, and permissions, it is very important to be careful of the Organization Unit **Context Location** - this is the organizational unit to which the configuration settings are being applied. If, for example, a setting is applied at the Consortium context location, all child units will inherit that setting. If a specific branch location is selected, only that branch and its child units will have the setting applied. The levels of the hierarchy to which settings can be applied are often referred to in terms of "depth" in various configuration interfaces. In a typical hierarchy, the consortium has a depth of 0, the system is 1, the branch is 2, and any bookmobiles or sub-branches is 3.

15.1.1. Create and edit Organization Unit Types

1. Open **Administration** > **Server Administration** > **Organization Types**.
2. In the left panel, expand the **Organization Unit Types** hierarchy.
3. Click on a organization type to edit the existing type or to add a new organization unit.
4. A form opens in the right panel, displaying the data for the selected organization unit.
5. Edit the fields as required and click **Save**.

To create a new dependent organization unit, click **New Child**. The new child organization unit will appear in the left panel list below the parent. Highlight the new unit and edit the data as needed, click **Save**

15.2. Organizational Units

Organizational Units are the specific instances of the organization unit types that make up your library's hierarchy. These will have distinctive proper names such as Main Street Branch or Townsville Campus.

15.2.1. Remove or edit default Organizational Units

After installing the Evergreen software, the default CONS, SYS1, BR1, etc., organizational units remain. These must be removed or edited to reflect actual library entities.

15.2.2. Create and edit Organizational Units

1. Open **Administration** > **Server Administration** > **Organizational Units**.

2. In the left panel, expand the the Organizational Units hierarchy, select a unit.

3. A form opens in the right panel, displaying the data for the selected organizational unit.

4. To edit the existing, default organizational unit, enter system or library specific data in the form; complete all three tabs: Main Settings, Hours of Operation, Addresses.

5. Click **Save**.

To create a new dependent organizational unit, click **New Child**. The new child will appear in the hierarchy list below the parent unit. Click on the new unit and edit the data, click **Save**

15.2.3. Organizational Unit data

The **Addresses** tab allows you to enter library contact information. Library Phone number, email address, and addresses are used in patron email notifications, hold slips, and transit slips. The Library address tab is broken out into four address types: Physical Address, Holds Address, Mailing Address, ILL Address.

The **Hours of Operation** tab is where you enter regular, weekly hours. Holiday and other closures are set in the **Closed Dates Editor**. Hours of operation and closed dates impact due dates and fine accrual.

15.2.4. After Changing Organization Unit Data

After you change Org Unit data, you must run the autogen.sh script. This script updates the Evergreen organization tree and fieldmapper IDL. You will get unpredictable results if you don't run this after making changes.

Run this script as the **opensrf** Linux account.

```
autogen.sh
```

15.3. Standing Penalties

In versions of Evergreen prior to 2.3, the following penalty types were available by default. When applied to user accounts, these penalties prevented users from completing the following actions:

- **CIRC** - Users cannot check out items

- **HOLD** - Users cannot place holds on items

- **RENEW** - Users cannot renew items

In version 2.3, two new penalty types are available in Evergreen:

- **CAPTURE** - This penalty prevents a user's holds from being captured. If the *HOLD* penalty has not been applied to a user's account, then the patron can place a hold, but the targeted item will not appear on a pull list and will not be captured for a hold if it is checked in.

- **FULFILL** - This penalty prevents a user from checking out an item that is on hold. If the *HOLD* and *CAPTURE* penalties have not been applied to a user's account, then the user can place a hold on an item, and the item can be captured for a hold. However, when he tries to check out the item, the circulator will see a pop up box with the name of the penalty type, *FULFILL*. The circulator must correct the problem with the account or must override the penalty to check out the item.

Ordering materials

Chapter 16. Introduction

Acquisitions allows you to order materials, track the expenditure of your collections funds, track invoices and set up policies for manual claiming. In this chapter, we're going to be describing how to use the most essential functions of acquisitions in the Evergreen system.

Chapter 17. When should libraries use acquisitions?

- When you want to track spending of your collections budget.

- When you want to use Evergreen to place orders electronically with your vendors.

- When you want to import large batches of records to quickly get your on-order titles into the system.

If your library simply wants to add on-order items to the catalog so that patrons can view and place holds on titles that have not yet arrived, acquisitions may be more than you need. Adding those on-order records via cataloging is a simpler option that works well for this use case.

Below are the basic administrative settings to be configured to get started with acquisitions. At a minimum, a library must configure **Funding Sources**, **Funds**, and **Providers** to use acquisitions.

Chapter 18. Managing Funds

18.1. Funding Sources (Required)

Funding sources allow you to specify the sources that contribute monies to your fund(s). You can create as few or as many funding sources as you need. These can be used to track exact amounts for accounts in your general ledger.

Example funding sources might be:

- A municipal allocation for your materials budget;
- A trust fund used for collections;
- A revolving account that is used to replace lost materials;
- Grant funds to be used for collections.

Funding sources are not tied to fiscal or calendar years, so you can continue to add money to the same funding source over multiple years, e.g. County Funding. Alternatively, you can name funding sources by year, e.g. County Funding 2010 and County Funding 2011, and apply credits each year to the matching source.

1. To create a funding source, select **Administration** → **Acquisitions Administration** → **Funding Sources**. Click the **New Funding Source** button. Give the funding source a name, an owning library, and code. You should also identify the type of currency that is used for the fund.

2. You must add money to the funding source before you can use it. Click the hyperlinked name of the funding source and then click the **Apply Credit** button. Add the amount of funds you need to add. The **Note** field is optional.

18.2. Funds (Required)

Funds allow you to allocate credits toward specific purchases. They typically are used to track spending and purchases for specific collections. Some libraries may choose to define very broad funds for their collections (e.g. children's materials, adult materials) while others may choose to define more specific funds (e.g. adult non-fiction DVDs for BR1).

If your library does not wish to track fund accounting, you can create one large generic fund and use that fund for all of your purchases.

1. To create a fund, select **Administration** → **Acquisitions Administration** → **Funds**. Click the **New Fund** button. Give the fund a name and code.

2. The **Year** can either be the fiscal or calendar year for the fund.

3. If you are a multi-branch library that will be ordering titles for multiple branches, you should select the system as the owning **Org Unit**, even if this fund will only be used for collections at a specific branch. If you are a one-branch library or if your branches do their own ordering, you can select the branch as the owning **Org Unit**.

4. Select the **Currency Type** that will be used for this fund.

5. You must select the **Active** checkbox to use the fund.

6. Enter a **Balance Stop Percent**. The balance stop percent prevents you from making purchases when only a specified amount of the fund remains. For example, if you want to spend 95 percent of your funds, leaving a five percent balance in the fund, then you would enter 95 in the field. When the fund reaches its balance stop percent, it will appear in red when you apply funds to copies.

7. Enter a **Balance Warning Percent**. The balance warning percent gives you a warning that the fund is low. You can specify any percent. For example, if you want to spend 90 percent of your funds and be warned when the fund has only 10 percent of its balance remaining, then enter 90 in the field. When the fund reaches its balance warning percent, it will appear in yellow when you apply funds to copies.

8. Check the **Propagate** box to propagate funds. When you propagate a fund, the system will create a new fund for the following fiscal year with the same parameters as your current fund. All of the settings transfer except for the year and the amount of money in the fund. Propagation occurs during the fiscal year close-out operation.

9. Check the **Rollover** box if you want to roll over remaining encumbrances and funds into the same fund next year. If you need the ability to roll over encumbrances without rolling over funds, go to the **Library Settings Editor** (**Administration → Local Administration → Library Settings Editor**) and set **Allow funds to be rolled over without bringing the money along** to **True**.

10. You must add money to the fund before you can begin using it. Click the hyperlinked name of the fund. Click the **Create Allocation button**. Select a **Funding Source** from which the allocation will be drawn and then enter an amount for the allocation. The **Note** field is optional.

18.3. Fund Tags (Optional)

You can apply tags to funds so that you can group funds for easy reporting. For example, you have three funds for children's materials: Children's Board Books, Children's DVDs, and Children's CDs. Assign a fund tag of children's to each fund. When you need to report on the amount that has been spent on all children's materials, you can run a report on the fund tag to find total expenditures on children's materials rather than reporting on each individual fund.

1. To create a fund tag, select **Administration → Acquisitions Administration → Fund Tags**. Click the **New Fund Tag** button. Select a owning library and add the name for the fund tag.

2. To apply a fund tag to a fund, select **Administration → Acquisitions Administration → Funds**. Click on the hyperlinked name for the fund. Click the **Tags** tab and then click the **Add Tag** button. Select the tag from the dropdown menu.

For convenience when propagating or rolling over a fund for a new fiscal year, fund tags will be copied from the current fund to the new year's fund.

Chapter 19. Ordering

19.1. Providers (Required)

Providers are the vendors from whom you order titles.

1. To add a provider record, select **Administration** → **Acquisitions Administration** → **Providers**.

2. Enter information about the provider. At a minimum, you need to add a **Provider Name**, **Code**, **Owner**, and **Currency**. You also need to select the **Active** checkbox to use the provider.

19.2. Distribution Formulas (Optional)

If you are ordering for a multi-branch library system, distribution formulas are a useful way to specify the number of items that should be distributed to specific branches and item locations.

1. To create a distribution formula, select **Administration** → **Acquisitions Administration** → **Distribution Formulas**. Click the **New Formula** button. Enter the formula name and select the owning library. Ignore the **Skip Count** field.

2. Click **New Entry**. Select an Owning Library from the drop down menu. This indicates the branch that will receive the items.

3. Select a Shelving Location from the drop down menu.

4. In the Item Count field, enter the number of items that should be distributed to that branch and copy location. You can enter the number or use the arrows on the right side of the field.

5. Keep adding entries until the distribution formula is complete.

19.3. Helpful acquisitions Library Settings

There are several acquisitions Library Settings available that will help with acquisitions workflow. These settings can be found at **Administration** → **Local Administration** → **Library Settings Editor**.

- Default circulation modifier - Automatically applies a default circulation modifier to all of your acquisitions items. Useful if you use a specific circulation modifier for on-order items.

- Default copy location - Automatically applies a default item location (e.g. On Order) to acquisitions items.

- Temporary barcode prefix - Applies a unique prefix to the barcode that is automatically generated during the acquisitions process.

- Temporary call number prefix - Applies a unique prefix to the start of the call number that is automatically generated during the acquisitions process.

19.4. Preparing for order record loading

If your library is planning to upload order records in a batch, you need to add some information to

your provider records so that Evergreen knows how to map the item data contained in the order record.

1. Retrieve the record for the provider that has supplied the order records by selecting **Administration → Acquisitions Administration → Providers**. Click on the hyperlinked Provider name.

2. In the top frame, add the MARC tag that contains your holdings data in the **Holdings Tag** field (this tag can also be entered at the time you create the provider record.)

3. To map the tag's subfields to the appropriate copy data, click the **Holding Subfield** tab. Click the **New Holding Subfield** button and select the copy data that you are mapping. Add the subfield that contains that data and click **Save**.

Holding Subfield

Back Next

✓	#	Provider	Name	Subfield	
☐	1	bt	quantity	q	
☐	2	bt	estimated_price	p	
☐	3	bt	owning_lib	b	
☐	4	bt	fund_code	u	
☐	5	bt	copy_location	t	
☐	6	bt	circ_modifier	g	

4. If your vendor is sending other data in a MARC tag that needs to be mapped to a field in acquisitions, you can do so by clicking the Attribute Definitions tab. As an example, if you need to import the PO Name, you could set up an attribute definition by adding an XPath similar to:

```
code => purchase_order
xpath => //*[@tag="962"]/*[@code="p"]
Is Identifier => false
```

where 962 is the holdings tag and p is the subfield that contains the PO Name.

19.5. Preparing to send electronic orders from Evergreen

If your library wants to transmit electronic order information to a vendor, you will need to configure your server to use EDI. You need to install the EDI translator and EDI scripts on your server by following the instructions in the command line system administration manual.

Configure your provider's EDI information by selecting **Administration → Acquisitions Administration → EDI Accounts**. Click **New Account** Button. Give the account a name in the **Label** box.

1. **Host** is the vendor-assigned FTP/SFTP/SSH hostname.

2. **Username** is the vendor-assigned FTP/SFTP/SSH username.

3. **Password** is the vendor-assigned FTP/SFTP/SSH password.

4. **Account** This field enables you to add a supplemental password for entry to a remote system after log in has been completed. This field is optional for the ILS but may be required by your provider.

5. **Owner** is the organizational unit who owns the EDI account

6. **Last Activity** is the date of last activity for the account

7. **Provider** is a link to the codes for the Provider record.

8. **Path** is the path on the vendor's server where Evergreen will deposit its outgoing order files.

9. **Incoming Directory** is the path on the vendor's server where Evergreen will retrieve incoming order responses and invoices.

10. **Vendor Account Number** is the Vendor assigned account number.

11. **Vendor Assigned Code** is usually a sub-account designation. It can be used with or without the Vendor Account Number.

You now need to add this **EDI Account** and the **SAN** code to the provider's record.

1. Select **Administration → Acquisitions Administration → Providers**.

2. Click the hyperlinked Provider name.

3. Select the account you just created in the **EDI Default** field.

4. Add the vendor-provided SAN code to the **SAN** field.

The last step is to add your library's SAN code to Evergreen.

1. Select **Administration → Server Administration → Organizational Units**.

2. Select your library from the organizational hierarchy in the left pane.

3. Click the **Addresses** tab and add your library's SAN code to the **SAN** field.

Chapter 20. Acquisitions Administration

20.1. Acquisitions Settings

Several setting in the Library Settings area of the Administration module pertain to functions in the Acquisitions module. You can access these settings by clicking *Administration* → *Local Administration* → *Library Settings Editor*.

- CAT: Delete bib if all copies are deleted via Acquisitions lineitem cancellation - If you cancel a line item, then all of the on order copies in the catalog are deleted. If, when you cancel a line item, you also want to delete the bib record, then set this setting to TRUE.

- Allow funds to be rolled over without bringing the money along - enables you to move a fund's encumbrances from one year to the next without moving unspent money. Unused money is not added to the next year's fund and is not available for use.

- Allows patrons to create automatic holds from purchase requests.

- Default circulation modifier - This modifier would be applied to items that are created in the acquisitions module

- Default copy location - This copy location would be applied to items that are created in the acquisitions module

- Fund Spending Limit for Block - When the amount remaining in the fund, including spent money and encumbrances, goes below this percentage, attempts to spend from the fund will be blocked.

- Fund Spending Limit for Warning - When the amount remaining in the fund, including spent money and encumbrances, goes below this percentage, attempts to spend from the fund will result in a warning to the staff.

- Rollover Distribution Formulae Funds - When set to true, during fiscal rollover, all distribution formulae will update to use new funds.

- Set copy creator as receiver - When receiving a copy in acquisitions, set the copy "creator" to be the staff that received the copy

- Temporary barcode prefix - Temporary barcode prefix for items that are created in the acquisitions module

- Temporary call number prefix - Temporary call number prefix for items that are created in the acquisitions module

20.2. Cancel/Delay reasons

The Cancel reasons link enables you to predefine the reasons for which a line item or a PO can be cancelled. A default list of reasons appears, but you can add custom reasons to this list. Applying the cancel reason will prevent the item from appearing in a claims list and will allow you to cancel

debits associated with the purchase. Cancel reasons also enable you to delay a purchase. For example, you could create a cancel reason of *back ordered*, and you could choose to keep the debits associated with the purchase.

20.2.1. Create a cancel/delay reason

1. To add a new cancel reason, click *Administration → Acquisitions Administration → Cancel reasons*.

2. Click *New Cancel Reason*.

3. Select a using library from the drop-down menu. The using library indicates the organizational units whose staff can use this cancel reason. This menu is populated with the shortnames that you created for your libraries in the organizational units tree (See Administration → Server Administration → Organizational Units.)

4. Create a label for the cancel reason. This label will appear when you select a cancel reason on an item or a PO.

5. Create a description of the cancel reason. This is a free text field and can comprise any text of your choosing.

6. If you want to retain the debits associated with the cancelled purchase, click the box adjacent to Keep Debits→

7. Click *Save*.

20.2.2. Delete a custom cancel/delay reason

You can delete custom cancel reason.

1. Select the checkbox for the custom cancel reason that should be deleted.

2. Click the *Delete Selected* button.

TIP	You cannot select the checkbox for any of the default cancel reasons because the system expects those reasons to be available to handle EDI order responses.

20.3. Claiming

Currently, all claiming is manual, but the admin module enables you to build claim policies and specify the action(s) that users should take to claim items.

20.3.1. Create a claim policy

The claim policy link enables you to name the claim policy and specify the organization that owns it.

1. To create a claim policy, click *Administration → Acquisitions Administration → Claim Policies*.

2. Create a claim policy name. No limits exist on the number of characters that can be entered in

this field.

3. Select an org unit from the drop-down menu. The org unit indicates the organizational units whose staff can use this claim policy. This menu is populated with the shortnames that you created for your libraries in the organizational units tree (See Administration → Server Administration → Organizational Units).

NOTE   The rule of parental inheritance applies to this list.

4. Enter a description. No limits exist on the number of characters that can be entered in this field.

5. Click *Save*.

20.3.2. Create a claim type

The claim type link enables you to specify the reason for a type of claim.

1. To create a claim type, click *Administration → Acquisitions Administration → Claim types*.

2. Create a claim type. No limits exist on the number of characters that can be entered in this field.

3. Select an org unit from the drop-down menu. The org unit indicates the organizational units whose staff can use this claim type. This menu is populated with the shortnames that you created for your libraries in the organizational units tree (See Administration → Server Administration → Organizational Units).

NOTE   The rule of parental inheritance applies to this list.

4. Enter a description. No limits exist on the number of characters that can be entered in this field.

5. Click *Save*.

20.3.3. Create a claim event type

The claim event type describes the physical action that should occur when an item needs to be claimed. For example, the user should notify the vendor via email that the library is claiming an item.

1. To access the claim event types, click *Administration → Acquisitions Administration → Claim event type*.

2. Enter a code for the claim event type. No limits exist on the number of characters that can be entered in this field.

3. Select an org unit from the drop-down menu. The org unit indicates the organizational units whose staff can use this event type. This menu is populated with the shortnames that you created for your libraries in the organizational units tree (See Administration → Server Administration → Organizational Units).

NOTE   The rule of parental inheritance applies to this list.

4. Enter a description. No limits exist on the number of characters that can be entered in this field.

5. If this claim is initiated by the user, then check the box adjacent to Library Initiated.

NOTE	Currently, all claims are initiated by a user. The ILS cannot automatically claim an issue.

6. Click *Save.*

20.3.4. Create a claim policy action

The claim policy action enables you to specify how long a user should wait before claiming the item.

1. To access claim policy actions, click *Administration → Acquisitions Administration → Claim Policy Actions.*

2. Select an Action (Event Type) from the drop-down menu.

3. Enter an action interval. This field indicates how long a user should wait before claiming the item.

4. In the Claim Policy ID field, select a claim policy from the drop-down menu.

5. Click *Save.*

NOTE	You can create claim cycles by adding multiple claim policy actions to a claim policy.

20.4. Currency Types

Currency types can be created and applied to funds in the administrative module. When a fund is applied to a copy or line item for purchase, the item will be purchased in the currency associated with that fund.

20.4.1. Create a currency type

1. To create a new currency type, click *Administration → Acquisitions Administration → Currency types.*

2. Enter the currency code. No limits exist on the number of characters that can be entered in this field.

3. Enter the name of the currency type in Currency Label field. No limits exist on the number of characters that can be entered in this field.

4. Click Save.

20.4.2. Edit a currency type

1. To edit a currency type, click your cursor in the row that you want to edit. The row will turn blue.

2. Double click. The pop-up box will appear, and you can edit the fields.

3. After making changes, click Save.

| NOTE | From the currency types interface, you can delete currencies that have never been applied to funds or used to make purchases. |

20.5. Distribution Formulas

Distribution formulas allow you to specify the number of copies that should be distributed to specific branches. They can also serve as templates allowing you to predefine settings for your copies. You can create and reuse formulas as needed.

20.5.1. Create a distribution formula

1. Click *Administration → Acquisitions Administration → Distribution Formulas*.

2. Click *New Formula*.

3. Enter a Formula Name. No limits exist on the number of characters that can be entered in this field.

4. Choose a Formula Owner from the drop-down menu. The Formula Owner indicates the organizational units whose staff can use this formula. This menu is populated with the shortnames that you created for your libraries in the organizational units tree (See Administration → Server Administration → Organizational Units).

| NOTE | The rule of parental inheritance applies to this list. |

5. Ignore the Skip Count field which is currently not used.

6. Click *Save*.

7. Click *New Entry*.

8. Select an Owning Library from the drop-down menu. This indicates the branch that will receive the items. This menu is populated with the shortnames that you created for your libraries in the organizational units tree (See *Administration → Server Administration → Organizational Units*).

9. Select/enter any of the following copy details you want to predefine in the distribution formula.
   ◦ Copy Location
   ◦ Fund
   ◦ Circ Modifier
   ◦ Collection Code

10. In the Item Count field, enter the number of items that should be distributed to the branch. You can enter the number or use the arrows on the right side of the field.

11. Click *Apply Changes*. The screen will reload.

12. To view the changes to your formula, click Administration → Acquisitions Administration → Distribution Formulas. The item_count will reflect the entries to your distribution formula.

NOTE	To edit the Formula Name, click the hyperlinked name of the formula in the top left corner. A pop-up box will enable you to enter a new formula name.

20.5.2. Edit a distribution formula

To edit a distribution formula, click the hyperlinked title of the formula.

20.6. Electronic Data Interchange

Many libraries use Electronic Data Interchange (EDI) accounts to send purchase orders and receive invoices from providers electronically. In Evergreen users can setup EDI accounts and manage EDI messages in the admin module. EDI messages and notes can be viewed in the acquisitions module. See also the command line system administration manual, which includes some initial setup steps that are required for use of EDI.

20.6.1. Entering SANs (Standard Address Numbers)

For EDI to work your library must have a SAN and each of your providers must each supply you with their SAN.

A SAN (Standard Address Number) is a unique 7 digit number that identifies your library.

Entering a Library's SAN

These steps only need to be done once per library.

1. In Evergreen select *Administration → Server Administration → Organizational Units*
2. Find your library in the tree on the left side of the page and click on it to open the settings.

NOTE	Multi-branch library systems will see an entry for each branch but should select their system's top organization unit.

3. Click on the *Address* tab.
4. Click on the *Mailing Address* tab.
5. Enter your library's SAN in the field labeled *SAN*.
6. Click *Save*.

Entering a Provider's SAN

These steps need to be repeated for every provider with which EDI is used.

1. In Evergreen select *Administration → Acquisitions Administration → Providers*.
2. Click the hyperlinked name of the provider you would like to edit.

3. Enter your provider's SAN in the field labeled *SAN*.
4. Click *Save*.

20.6.2. Create an EDI Account

CAUTION	You **must** create your provider before you create an EDI account for the provider.

1. Contact your provider requesting the following information:

   - Host

   - Username

   - Password

   - Path

   - Incoming Directory

   - Provider's SAN

2. In Evergreen select *Administration → Acquisitions Administration → EDI Accounts.*

3. Click *New Account*. A pop-up will appear.
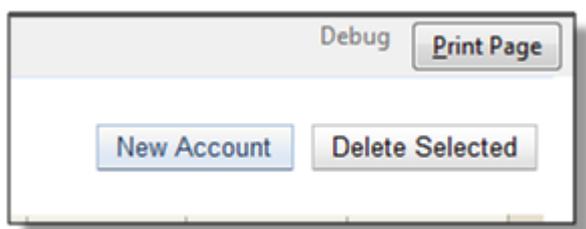
4. Fill in the following fields:

   - In the *Label* field, enter a name for the EDI account.

   - In the *Host* field, enter the requisite FTP or SCP information supplied by your provider. Be sure to include the protocol (e.g. `ftp://ftp.vendorname.com`)

   - In the *Username* field, enter the username supplied by your provider.

   - In the *Password* field, enter the password supplied by your provider.

   - Select your library as the *Owner* from the drop down menu. Multi-branch libraries should select their top level organizational unit.

◦ The *Last Activity* updates automatically with any inbound or outbound communication.

◦ In the *Provider* field, enter the code used in Evergreen for your provider.

◦ In the *Path* field, enter the path supplied by your provider. The path indicates a directory on the provider's server where Evergreen will deposit its outgoing order files.

TIP	If your vendor requests a specific file extension for EDI purchase orders, such as `.ord`, enter the name of the directory, followed by a slash, followed by an asterisk, followed by a period, followed by the extension. For example, if the vendor requests that EDI purchase orders be sent to a directory called `in` with the file extension `.ord`, your path would be `in/*.ord`.

◦ In the *Incoming Directory* field, enter the incoming directory supplied by your provider. This indicates the directory on the vendor's server where Evergreen will retrieve incoming order responses and invoices.

NOTE	Don't worry if your incoming directory is named `out` or `outgoing`. From your vendor's perspective, this directory is outgoing, because it contains files that the vendor is sending to Evergreen. However, from Evergreen's perspective, these files are incoming.

Label	NFIC_ZSP
Host	ftp://ftp.nfic.com
Username	nfic/7777
Password	password
Account	
Owner	ZSP
Last Activity	
Provider	NFICB-TEST
Path	./*.fic
Incoming Directory	acq/
Vendor Account Number	
Vendor Assigned Code	
Cancel	Save

5. Click *Save.*

6. Click on the link in the *Provider* field.

7. Select the EDI account that has just been created from the *EDI Default* drop down menu.

8. Click *Save*.

20.6.3. EDI Messages

The EDI Messages screen displays all incoming and outgoing messages between the library and its providers. To see details of a particular EDI message, including the raw EDIFACT message, double click on a message entry. To find a specific EDI message, the Filter options can be useful. Outside the Admin interface, EDI messages that pertain to a specific purchase order can be viewed from the purchase order interface (See *Acquisitions → Purchase Orders*).

20.7. Exchange Rates

Exchange rates define the rate of exchange between currencies. Evergreen will automatically calculate exchange rates for purchases. Evergreen assumes that the currency of the purchasing fund is identical to the currency of the provider, but it provides for two unique situations: If the currency of the fund that is used for the purchase is different from the currency of the provider as listed in the provider profile, then Evergreen will use the exchange rate to calculate the price of the item in the currency of the fund and debit the fund accordingly. When money is transferred between funds that use different currency types, Evergreen will automatically use the exchange rate to convert the money to the currency of the receiving fund. During such transfers, however, staff can override the automatic conversion by providing an explicit amount to credit to the receiving fund.

20.7.1. Create an exchange rate

1. To create a new exchange rate, click *Administration → Acquisitions Administration → Exchange Rates*.

2. Click New Exchange Rate.

3. Enter the From Currency from the drop-down menu populated by the currency types.

4. Enter the To Currency from the drop-down menu populated by the currency types.

5. Enter the exchange Ratio.

6. Click *Save*.

20.7.2. Edit an exchange rate

Edit an exchange rate just as you would edit a currency type.

20.8. MARC Federated Search

The MARC Federated Search enables you to import bibliographic records into a selection list or purchase order from a Z39.50 source.

1. Click *Acquisitions → MARC Federated Search*.

2. Check the boxes of Z39.50 services that you want to search. Your local Evergreen Catalog is checked by default. Click Submit.

Search Sources

- [✓] Evergreen Catalog
- [ ] OCLC
- [✓] Library of Congress
- [ ] ‡biblios.net

Search Fields

Author	
ISBN	978-1439164631
ISSN	
Item Type	
LCCN	
Publication Date	
Publisher	
Title	left neglected
Title Control Number	
Hits Per Source	10

[Submit] [Clear Form]

3. A list of results will appear. Click the *Copies* link to add copy information to the line item. See Line Item Features for more information.

4. Click the Notes link to add notes or line item alerts to the line item. See Line Item Features for more information.

5. Enter a price in the *Estimated Price* field.

6. You can save the line item(s) to a selection list by checking the box on the line item and clicking *Actions → Save Items to Selection List*. You can also create a purchase order from the line item(s) by checking the box on the line item and clicking *Actions → Create Purchase Order*.

Items	Notes	Actions	Status	Estimated Price
Copies(0) Notes(0)		-- Actions -- ▼	ew	

20.9. Fund Tags

You can apply tags to funds so that you can group funds for easy reporting. For example, you have three funds for children's materials: Children's Board Books, Children's DVDs, and Children's CDs. Assign a fund tag of *children's* to each fund. When you need to report on the amount that has been spent on all children's materials, you can run a report on the fund tag to find total expenditures on children's materials rather than reporting on each individual fund.

Create a Fund Tag

1. To create a fund tag, click *Administration → Acquisitions Administration → Fund Tags*.

2. Click *New Fund Tag*. No limits exist on the number of characters that can be entered in this field.

3. Select a Fund Tag Owner from the drop-down menu. The owner indicates the organizational unit(s) whose staff can use this fund tag. This menu is populated with the shortnames that you created for your libraries in the organizational units tree (See Administration → Server Administration → Organizational Units).

> **NOTE** The rule of parental inheritance applies to this list.

4. Enter a Fund Tag Name. No limits exist on the number of characters that can be entered in this field.

5. Click *Save*.

20.10. Funding Sources

Funding sources allow you to specify the sources that contribute monies to your fund(s). You can create as few or as many funding sources as you need. These can be used to track exact amounts for accounts in your general ledger. You can then use funds to track spending and purchases for specific collections.

20.10.1. Create a funding source

1. To create a new funding source, click *Administration → Acquisitions Administration → Funding Source.*

2. Enter a funding source name. No limits exist on the number of characters that can be entered in this field.

3. Select an owner from the drop-down menu. The owner indicates the organizational unit(s) whose staff can use this funding source. This menu is populated with the shortnames that you created for your libraries in the organizational units tree (See Administration → Server Administration → Organizational Units).

> **NOTE** The rule of parental inheritance applies to this list. For example, if a system is made the owner of a funding source, then users with appropriate permissions at the branches within the system could also use the funding source.

4. Create a code for the source. No limits exist on the number of characters that can be entered in this field.

5. Select a currency from the drop-down menu. This menu is populated from the choices in the Currency Types interface.

6. Click *Save*.

20.10.2. Allocate credits to funding sources

1. Apply a credit to this funding source.

2. Enter the amount of money that the funding source contributes to the organization. Funding sources are not tied to fiscal or calendar years, so you can continue to add money to the same funding source over multiple years, e.g. County Funding. Alternatively, you can name funding sources by year, e.g. County Funding 2010 and County Funding 2011, and apply credits each year to the matching source.

3. To apply a credit, click on the hyperlinked name of the funding source. The Funding Source Details will appear.

4. Click *Apply Credit*.

5. Enter an amount to apply to this funding source.

6. Enter a note. This field is optional.

7. Click *Apply*.

20.10.3. Allocate credits to funds

If you have already set up your funds, then you can then click the Allocate to Fund button to apply credits from the funding sources to the funds. If you have not yet set up your funds, or you need to add a new one, you can allocate credits to funds from the funds interface. See section 1.2 for more information.

1. To allocate credits to funds, click *Allocate to Fund*.

2. Enter the amount that you want to allocate.

3. Enter a note. This field is optional.

4. Click *Apply*.

20.10.4. Track debits and credits

You can track credits to and allocations from each funding source. These amounts are updated when credits and allocations are made in the Funding Source Details. Access the Funding Source Details by clicking on the hyperlinked name of the Funding Source.

20.11. Funds

Funds allow you to allocate credits toward specific purchases. In the funds interface, you can create funds; allocate credits from funding sources to funds; transfer money between funds; and apply fund tags to funds. Funds are created for a specific year, either fiscal or calendar. These funds are owned by org units. At the top of the funds interface, you can set a contextual org unit and year. The drop-down menu at the top of the screen enables you to focus on funds that are owned by specific organizational units during specific years.

20.11.1. Create a fund

1. To create a new fund, click *Administration → Acquisitions Administration → Funds*.

2. Enter a name for the fund. No limits exist on the number of characters that can be entered in this field.

3. Create a code for the fund. No limits exist on the number of characters that can be entered in this field.

4. Enter a year for the fund. This can be a fiscal year or a calendar year. The format of the year is YYYY.

5. Select an org unit from the drop-down menu. The org unit indicates the organizational units whose staff can use this fund. This menu is populated with the shortnames that you created for your libraries in the organizational units tree (See Administration → Server Administration → Organizational Units).

NOTE	The rule of parental inheritance applies to this list. See section

6. Select a currency type from the drop-down menu. This menu is comprised of entries in the currency types menu. When a fund is applied to a line item or copy, the price of the item will be encumbered in the currency associated with the fund.

7. Click the Active box to activate this fund. You cannot make purchases from this fund if it is not active.

8. Enter a Balance Stop Percent. The balance stop percent prevents you from making purchases when only a specified amount of the fund remains. For example, if you want to spend 95 percent of your funds, leaving a five percent balance in the fund, then you would enter 95 in the field. When the fund reaches its balance stop percent, it will appear in red when you apply funds to copies.

9. Enter a Balance Warning Percent. The balance warning percent gives you a warning that the fund is low. You can specify any percent. For example, if you want to spend 90 percent of your funds and be warned when the fund has only 10 percent of its balance remaining, then enter 90 in the field. When the fund reaches its balance warning percent, it will appear in yellow when you apply funds to copies.

10. Check the Propagate box to propagate funds. When you propagate a fund, the ILS will create a new fund for the following fiscal year with the same parameters as your current fund. All of the settings transfer except for the year and the amount of money in the fund. Propagation occurs during the fiscal year close-out operation.

11. Check the Rollover box if you want to roll over remaining funds into the same fund next year. You should also check this box if you only want to roll over encumbrances into next year's fund.

12. Click *Save*.

20.11.2. Allocate credits from funding sources to funds

Credits can be applied to funds from funding sources using the fund interface. The credits that you apply to the fund can be applied later to purchases.

1. To access funds, click *Administration → Acquisitions Administration → Funds*.

2. Click the hyperlinked name of the fund.

3. To add a credit to the fund, click the Create Allocation tab.

4. Choose a Funding Source from the drop-down menu.

5. Enter an amount that you want to apply to the fund from the funding source.

6. Enter a note. This field is optional.

7. Click *Apply*.

20.11.3. Transfer credits between funds

The credits that you allocate to funds can be transferred between funds if desired. In the following example, you can transfer $500.00 from the Young Adult Fiction fund to the Children's DVD fund.

1. To access funds, click *Administration → Acquisitions Administration → Funds*.

2. Click the hyperlinked name of the originating fund.

3. The Fund Details screen appears. Click Transfer Money.

4. Enter the amount that you would like to transfer.

5. From the drop-down menu, select the destination fund.

6. Add a note. This field is optional.

7. Click *Transfer*.

20.11.4. Track balances and expenditures

The Fund Details allows you to track the fund's balance, encumbrances, and amount spent. It also allows you to track allocations from the funding source(s), debits, and fund tags.

1. To access the fund details, click on the hyperlinked name of the fund that you created.

2. The Summary allows you to track the following:

3. Balance - The balance is calculated by subtracting both items that have been invoiced and encumbrances from the total allocated to the fund.

4. Total Allocated - This amount is the total amount allocated from the Funding Source.

5. Spent Balance - This balance is calculated by subtracting only the items that have been invoiced from the total allocated to the fund. It does not include encumbrances.

6. Total Debits - The total debits are calculated by adding the cost of items that have been invoiced and encumbrances.

7. Total Spent - The total spent is calculated by adding the cost of items that have been invoiced. It does not include encumbrances.

8. Total Encumbered - The total encumbered is calculated by adding all encumbrances.

20.11.5. Fund reporting

A core source, Fund Summary, is available in the reports interface. This core source enables librarians to easily run a report on fund activity. Fields that are accessible in this interface include Remaining Balance, Total Allocated, Total Encumbered, and Total Spent.
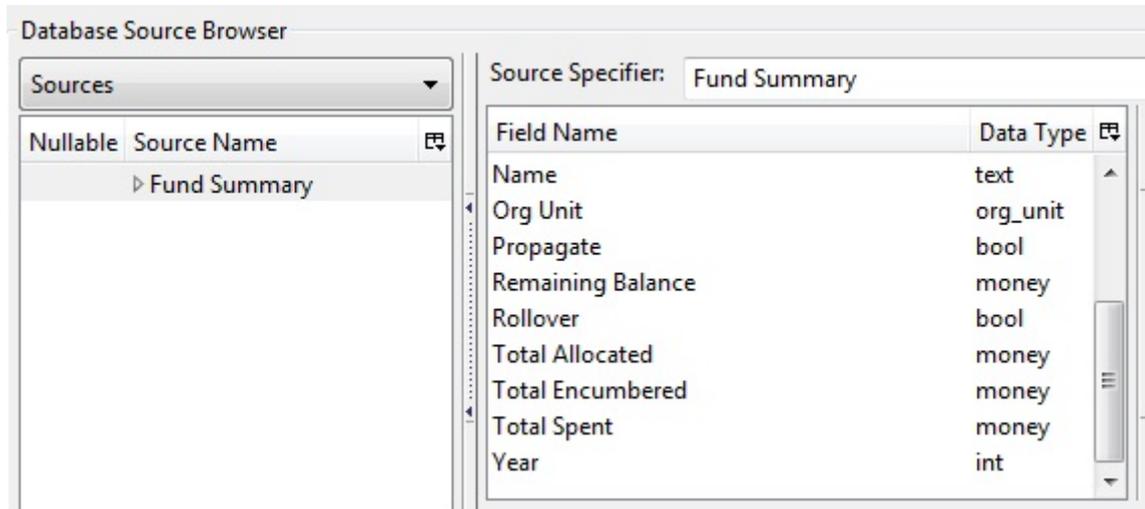
20.11.6. Edit a fund

Edit a fund just as you would edit a currency type.

20.11.7. Perform fiscal year close-out operation

The Fiscal Year Close-Out Operation allows you to deactivate funds for the current year and create analogous funds for the next year. It transfers encumbrances to the analogous funds, and it rolls over any remaining funds if you checked the rollover box when creating the fund.

1. To access the year end closeout of a fund, click Administration → Server Administration → Acquisitions → Funds.

2. Click *Fund Propagation and Rollover*.

3. Check the box adjacent to *Perform Fiscal Year Close-Out Operation.*

4. For funds that have the "Rollover" setting enabled, if you want to move the fund's encumbrances to the next year without moving unspent money, check the box adjacent to *Limit Fiscal Year Close-out Operation to Encumbrances.*

NOTE	The *Limit Fiscal Year Close-out Operation to Encumbrances* will only display if the *Allow funds to be rolled over without bringing the money along* Library Setting has been enabled. This setting is available in the Library Setting Editor accessible via *Administration → Local Administration → Library Settings Editor*.

5. Notice that the context org unit reflects the context org unit that you selected at the top of the Funds screen.

6. If you want to perform the close-out operation on the context org unit and its child units, then check the box adjacent to Include Funds for Descendant Org Units.

7. Check the box adjacent to dry run if you want to test changes to the funds before they are enacted. Evergreen will generate a summary of the changes that would occur during the selected operations. No data will be changed.

8. Click *Process*.

9. Evergreen will begin the propagation process. Evergreen will make a clone of each fund, but it will increment the year by 1.

20.12. Invoice menus

Invoice menus allow you to create drop-down menus that appear on invoices. You can create an invoice item type or invoice payment method.

20.12.1. Invoice item type

The invoice item type allows you to enter the types of additional charges that you can add to an invoice. Examples of additional charge types might include taxes or processing fees. Charges for bibliographic items are listed separately from these additional charges. A default list of charge types displays, but you can add custom charge types to this list. Invoice item types can also be used when adding non-bibliographic items to a purchase order. When invoiced, the invoice item type will copy from the purchase order to the invoice.

1. To create a new charge type, click *Administration → Acquisitions Administration → Invoice Item*

Type.

2. Click *New Invoice Item Type.*

3. Create a code for the charge type. No limits exist on the number of characters that can be entered in this field.

4. Create a label. No limits exist on the number of characters that can be entered in this field. The text in this field appears in the drop-down menu on the invoice.

5. If items on the invoice were purchased with the monies in multiple funds, then you can divide the additional charge across funds. Check the box adjacent to Prorate→ if you want to prorate the charge across funds.

6. Click *Save.*

20.12.2. Invoice payment method

The invoice payment method allows you to predefine the type(s) of invoices and payment method(s) that you accept. The text that you enter in the admin module will appear as a drop-down menu in the invoice type and payment method fields on the invoice.

1. To create a new invoice payment method, click *Administration → Acquisitions Administration → Invoice Payment Method.*

2. Click *New Invoice Payment Method.*

3. Create a code for the invoice payment method. No limits exist on the number of characters that can be entered in this field.

4. Create a name for the invoice payment method. No limits exist on the number of characters that can be entered in this field. The text in this field appears in the drop-down menu on the invoice.

5. Click *Save.*

Payment methods can be deleted from this screen.

20.13. Line Item Features

Line item alerts are predefined text that can be added to line items that are on selection lists or purchase orders. You can define the alerts from which staff can choose. Line item alerts appear in a pop-up box when the line item, or any of its copies, are marked as received.

20.13.1. Create a line item alert

1. To create a line item alert, click *Administration → Acquisitions Administration → Line Item Alerts.*

2. Click *New Line Item Alert Text.*

3. Create a code for the text. No limits exist on the number of characters that can be entered in this field.

4. Create a description for the text. No limits exist on the number of characters that can be entered

in this field.

5. Select an owning library from the drop-down menu. The owning library indicates the organizational units whose staff can use this alert. This menu is populated with the shortnames that you created for your libraries in the organizational units tree (See Administration → Server Administration → Organizational Units).

6. Click *Save*.

20.13.2. Line item MARC attribute definitions

Line item attributes define the fields that Evergreen needs to extract from the bibliographic records that are in the acquisitions database to display in the catalog. Also, these attributes will appear as fields in the New Brief Record interface. You will be able to enter information for the brief record in the fields where attributes have been defined.

20.14. Providers

Providers are vendors. You can create a provider profile that includes contact information for the provider, holdings information, invoices, and other information.

20.14.1. Create a provider

1. To create a new provider, click *Administration → Acquisitions Administration → Providers*.

2. Enter the provider name.

3. Create a code for the provider. No limits exist on the number of characters that can be entered in this field.

4. Select an owner from the drop-down menu. The owner indicates the organizational units whose staff can use this provider. This menu is populated with the shortnames that you created for your libraries in the organizational units tree (See Administration → Server Administration → Organizational Units).

   | NOTE | The rule of parental inheritance applies to this list. |

5. Select a currency from the drop-down menu. This drop-down list is populated by the list of currencies available in the currency types.

6. A provider must be active in order for purchases to be made from that provider. To activate the provider, check the box adjacent to Active. To deactivate a vendor, uncheck the box.

7. Add the default # of copies that are typically ordered through the provider. This number will automatically populate the line item's *Copies* box on any PO's associated with this provider. If another quantity is entered during the selection or ordering process, it will override this default. If no number is specified, the default number of copies will be zero.

8. Select a default claim policy from the drop-down box. This list is derived from the claim policies that can be created

9. Select an EDI default. This list is derived from the EDI accounts that can be created.

10. Enter the provider's email address.

11. In the Fax Phone field, enter the provider's fax number.

12. In the holdings tag field, enter the tag in which the provider places holdings data.

13. In the phone field, enter the provider's phone number.

14. If prepayment is required to purchase from this provider, then check the box adjacent to prepayment required.

15. Enter the Standard Address Number (SAN) for your provider.

16. Enter the web address for the provider's website in the URL field.

17. Click Save.

20.14.2. Add contact and holdings information to providers

After you save the provider profile, the screen reloads so that you can save additional information about the provider. You can also access this screen by clicking the hyperlinked name of the provider on the Providers screen. The tabs allow you to add a provider address and contact, attribute definitions, and holding subfields. You can also view invoices associated with the provider.

1. Enter a Provider Address, and click Save.

   NOTE | Required fields for the provider address are: Street 1, city, state, country, post code. You may have multiple valid addresses.

2. Enter the Provider Contact, and click Save.

3. Your vendor may include information that is specific to your organization in MARC tags. You can specify the types of information that should be entered in each MARC tag. Enter attribute definitions to correlate MARC tags with the information that they should contain in incoming vendor records. Some technical knowledge is required to enter XPath information. As an example, if you need to import the PO Name, you could set up an attribute definition by adding an XPath similar to:

```
code => purchase_order
xpath => //*[@tag="962"]/*[@code="p"]
Is Identifier => false
```

   where 962 is the holdings tag and p is the subfield that contains the PO Name.

4. You may have entered a holdings tag when you created the provider profile. You can also enter holdings subfields. Holdings subfields allow you to specify subfields within the holdings tag to which your vendor adds holdings information, such as quantity ordered, fund, and estimated price.

5. Click invoices to access invoices associated with a provider.

20.14.3. Edit a provider

Edit a provider just as you would edit a currency type.

You can delete providers only if no purchase orders have been assigned to them.

Cataloging administration

Chapter 21. Authorities

21.1. Authority Control Sets

The tags and subfields that display in authority records in Evergreen are proscribed by control sets. The Library of Congress control set is the default control set in Evergreen. You can create customized control sets for authority records. Also, you can define thesauri and authority fields for these control sets.

Patrons and staff will be able to browse authorities in the OPAC. The following fields are browsable by default: author, series, subject, title, and topic. You will be able to add custom browse axes in addition to these default fields.

You can specify the MARC tags and subfields that an authority record should contain. The Library of Congress control set exists in the staff client by default. The control sets feature enables librarians to add or customize new control sets.

To access existing control sets, click **Administration** → **Server Administration** → **Authority Control Sets**.
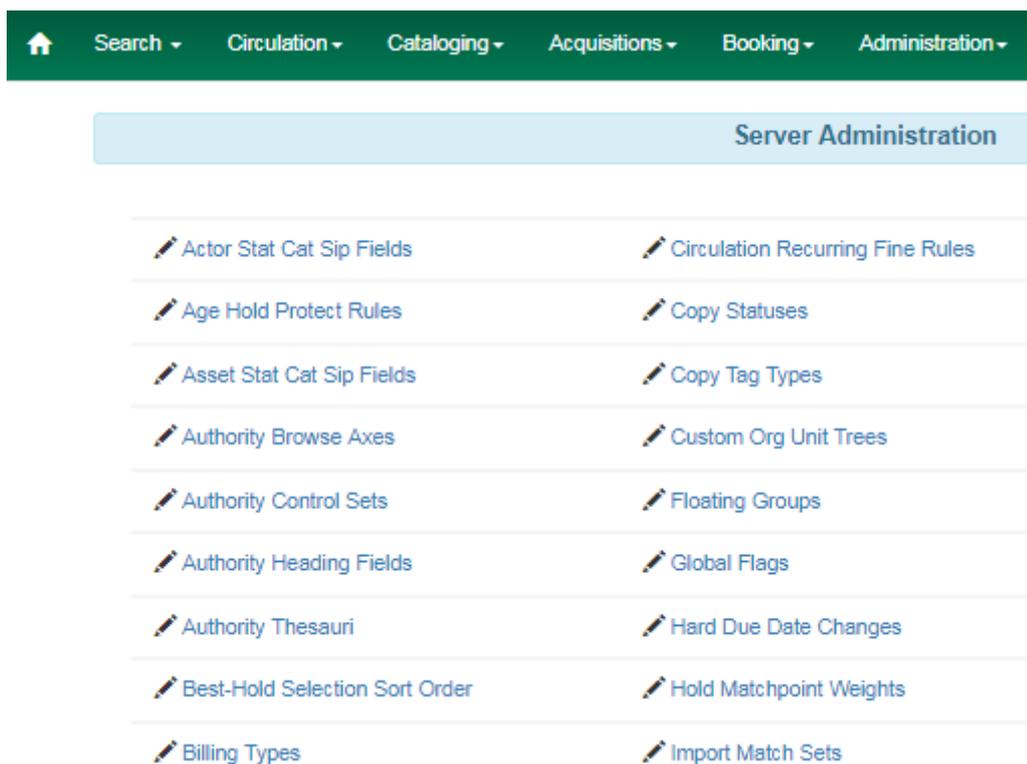
21.1.1. Add a Control Set

1. Click **Administration** → **Server Administration** → **Authority Control Sets**.
2. Click **New Control Set**.
3. Add a **Name** to the control set. Enter any number of characters.
4. Add a **Description** of the control set. Enter any number of characters.
5. Click **Save**.
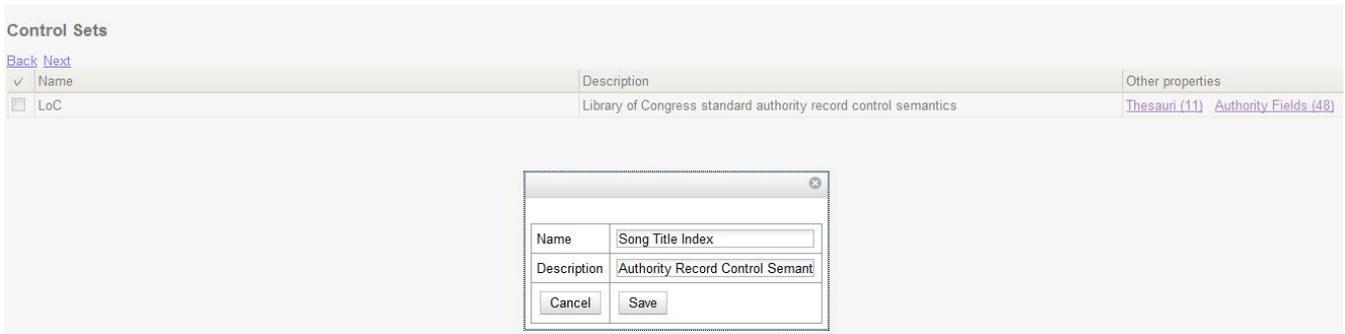
21.2. Thesauri

A thesaurus describes the semantic rules that govern the meaning of words in a MARC record. The thesaurus code, which indicates the specific thesaurus that should control a MARC record, is encoded in a fixed field using the mnemonic Subj in the authority record. Eleven thesauri associated with the Library of Congress control set exist by default in the staff client.

To access an existing thesaurus, click **Administration** → **Server Administration** → **Authority Control Sets**, and choose the hyperlinked thesaurus that you want to access, or click **Administration** → **Server Administration** → **Authority Thesauri**.

21.2.1. Add a Thesaurus

1. Click **Administration** → **Server Administration** → **Authority Control Sets**, and choose the hyperlinked thesaurus that you want to access, or click **Admin** → **Server Administration** → **Authority Thesauri**.

2. Click **New Thesaurus**.

3. Add a **Thesaurus Code**. Enter any single, upper case character. This character will be entered in the fixed fields of the MARC record.

4. Add a **Name** to the thesaurus. Enter any number of characters.

5. Add a **Description** of the thesaurus. Enter any number of characters.
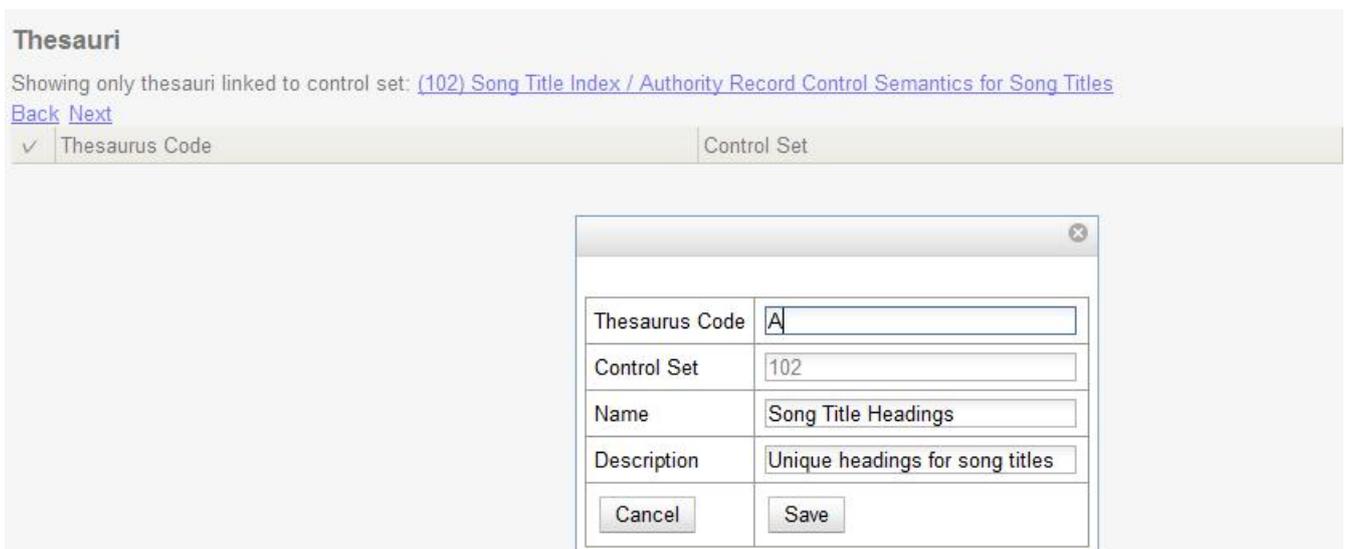
21.3. Authority Fields

Authority fields indicate the tags and subfields that should be entered in the authority record. Authority fields also enable you to specify the type of data that should be entered in a tag. For example, in an authority record governed by a Library of Congress control set, the 100 tag would contain a "Heading - Personal Name." Authority fields also enable you to create the corresponding tag in the bibliographic record that would contain the same data.

21.3.1. Create an Authority Field

1. Click **Administration** → **Server Administration** → **Authority Control Sets**.

2. Click **Authority Fields**. The number in parentheses indicates the number of authority fields that have been created for the control set.

3. Click **New Authority Field**.

4. Add a **Name** to the authority field. Enter any number of characters.

5. Add a **Description** to describe the type of data that should be entered in this tag. Enter any number of characters.

6. Select a **Main Entry** if you are linking the tag(s) to another entry.

7. Add a **Tag** in the authority record.

8. Add a subfield in the authority record. Multiple subfields should be entered without commas or spaces.

9. Add a **Non-filing indicator** (either 1 or 2) to denote which indicator contains non-filing information. Leave empty if not applicable.

10. Click **Save**.

11. Create the corresponding tag in the bibliographic record that should contain this information. Click the **None** link in the **Controlled Bib Fields** column.

12. Click **New Control Set Bib Field**.

13. Add the corresponding tag in the bibliographic record.

14. Click **Save**.

21.4. Browse Axes

Authority records can be browsed, by default, along five axes: author, series, subject, title, and topic. Use the **Browse Axes** feature to create additional axes.

21.4.1. Create a new Browse Axis

1. Click **Administration** → **Server Administration** → **Authority Browse Axes**

2. Click **New Browse Axis**.

3. Add a **code**. Do not enter any spaces.

4. Add a **name** to the axis that will appear in the OPAC. Enter any number of characters.

5. Add a **description** of the axis. Enter any number of characters.

6. Add a **sorter attribute**. The sorter attribute indicates the order in which the results will be displayed.

7. Assign the axis to an authority so that users can find the authority record when browsing authorities. Click **Administration** → **Server Administration** → **Authority Control Sets**.

8. Choose the control set to which you will add the axis. Click **Authority Fields**.

9. Click the link in the **Axes** column of the tag of your choice.

10. Click **New Browse Axis-Authority Field Map**.

11. Select an **Axis** from the drop down menu.

12. Click **Save**.

Browse Axis-Authority Field Maps

Showing only browse axis-authority field maps linked to authority field: Song Title (660 ‡abcdef) Song Title
Back Next

| ✓ | Axis |
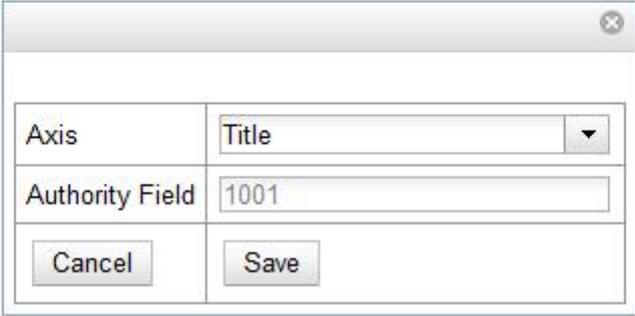
Axis	Title ▼
Authority Field	1001
Cancel	Save

Permissions to use this Feature

To use authority control sets, you will need the following permissions:

- CREATE_AUTHORITY_CONTROL_SET
- UPDATE_AUTHORITY_CONTROL_SET
- DELETE_AUTHORITY_CONTROL_SET

Chapter 22. Call Number Prefixes and Suffixes

You can configure call number prefixes and suffixes in the Admin module. This feature ensures more precise cataloging because each cataloger will have access to an identical drop down menu of call number prefixes and suffixes that are used at his library. In addition, it may streamline cataloging workflow. Catalogers can use a drop down menu to enter call number prefixes and suffixes rather than entering them manually. You can also run reports on call number prefixes and suffixes that would facilitate collection development and maintenance.

22.1. Configure call number prefixes

Call number prefixes are codes that precede a call number.

To configure call number prefixes:

1. Select **Administration** → **Server Administration** → **Call Number Prefixes**.
2. Click **New Prefix**.
3. Enter the **call number label** that will appear on the item.
4. Select the **owning library** from the drop down menu. Staff at this library, and its descendant org units, with the appropriate permissions, will be able to apply this call number prefix.
5. Click **Save**.

22.2. Configure call number suffixes

Call number suffixes are codes that succeed a call number.

To configure call number suffixes:

1. Select **Administration** → **Server Administration** → **Call Number Suffixes**.

2. Click **New Suffix**.

3. Enter the **call number label** that will appear on the item.

4. Select the **owning library** from the drop down menu. Staff at this library, and its descendant org units, with the appropriate permissions, will be able to apply this call number suffix.

5. Click **Save**.

22.3. Apply Call Number Prefixes and Suffixes

You can apply call number prefixes and suffixes to items from a pre-configured list in the Holdings Editor.

Chapter 23. Statistical Categories Editor

This is where you configure your statistical categories (stat cats). Stat cats are a way to save and report on additional information that doesn't fit elsewhere in Evergreen's default records. It is possible to have stat cats for copies or patrons.

1. Click **Administration** → **Local Administration** → **Statistical Categories Editor.**

2. To create a new stat cat, enter the name of the category and select either *patron* or *copy* from the **Type** dropdown menu. Each category type has a number of options you may set.

Copy Statistical Categories

Copy stat cats appear in the *Holdings Editor*. You might use copy stat cats to track books you have bought from a specific vendor, or donations.

An example of the *Create a new statistical category* controls for copies:

- *OPAC Visibility*: Should the category be displayed in the OPAC?

- *Required*: Must the category be assigned a value when editing the item attributes?

- *Archive with Circs*: Should the category and its values for the copy be archived with aged circulation data?

- *SIP Field*: Select the SIP field identifier that will contain the category and its value

- *SIP Format*: Specify the SIP format string

Some sample copy stat cats:

Statistical Category Name	Owning Library	OPAC Visibility	Required	SIP Field	SIP Format	Circ Archive	Entries	Add Entry	Edit
Special Collection	Example Branch 1	Off	On			Off	Genealogy ▼	Add	Edit

To add an entry, select *Add*. Due to a known bug, individual entries for stat cats cannot be edited in the web client.

Stat cats can be edited or deleted by clicking on *Edit*.

This is how the copy stat cats appear in the *Holdings Editor*:

You can use the *Filter by Library* selector to display copy stat cats owned by a particular library:

Patron Statistical Categories

Patron stat cats can be used to keep track of information such as a patron's school affiliation, membership in a group like the Friends of the Library, or patron preferences. They appear in the fourth section of the *Patron Registration* or *Edit Patron* screen, under the label *Statistical Categories*.

An example of the *Create a new statistical category* controls for patrons:

- *OPAC Visibility*: Should the category be displayed in the OPAC?
- *Required*: Must the category be assigned a value when registering a new patron or editing an existing one?
- *Archive with Circs*: Should the category and its values for the patron be archived with aged circulation data?
- *Allow Free Text*: May the person registering/editing the patron information supply their own value for the category?

- *Show in Summary*: Display the category and its value in the patron summary view?

- *SIP Field*: Select the SIP field identifier that will contain the category and its value

- *SIP Format*: Specify the SIP format string

WARNING	*WARNING* If you make a category **required** and also **disallow free text**, make sure that you populate an entry list for the category so that the user may select a value. Failure to do so will result in an unsubmittable patron registration/edit form!

Some sample patron stat cats:

To add an entry, click on *Add* in the category row under the *Add Entry* column:

Stat cats can be edited or deleted by clicking on *Edit*.

Due to a known bug, individual entries for stat cats cannot be edited in the web client.

An **organizational unit** (consortium, library system branch library, sub library, etc.) may create their own categories and entries, or supplement categories defined by a higher-level org unit with their own entries.

An entry can be set as the **default** entry for a category and for an org unit. If an entry is set as the default, it will be automatically selected in the patron edit screen, provided no other value has been previously set for the patron. Only one default may be set per category for any given org unit.

Lower-level org unit defaults override defaults set for higher-level org units; but in the absence of a default set for a given org unit, the nearest parent org unit default will be selected.

Default entries for the focus location org unit are marked with an asterisk in the entry dropdowns.

This is how patron stat cats appear in the patron registration/edit screen:

The yellow highlight denotes a stat cat that is required, and you will not be allowed to save or create a patron unless a value is entered.

To remove a stat cat value, select the text in the right-hand box and use your keyboard's backspace or delete key.

Chapter 24. MARC Import Remove Fields

MARC Import Remove Fields allows staff to configure MARC tags to be automatically removed from bibliographic records when they are imported into Evergreen. This feature allows specific MARC tags to be removed from records that are imported through three different interfaces:

- Cataloging → Import Record from Z39.50

- Cataloging → MARC Batch Import/Export

- Acquisitions → Load MARC Order Records

24.1. Create a MARC Import Remove Fields profile

To create a MARC Import Remove Fields profile, go to **Administration** → **Server Administration** → **MARC Import Remove Fields**.

1. Click **New Field Group**.

2. Assign the Field Group a **Label**. This label will appear in the import interfaces.

3. Assign an Org Unit **Owner**.

4. Check the box next to **Always Apply** if you want Evergreen to apply this Remove Fields profile to all MARC records that are imported through the three affected interfaces. If you do not select **Always Apply**, staff will have the option to choose which Remove Fields profile to use when importing records.

5. Click **Save**.

6. The profile that you created will now appear in the list of MARC Import Remove Fields.

7. Click on the hyperlinked **ID** number. This will bring you into the Remove Fields profile to configure the MARC tags to be removed.

8. Click **New Field**.

9. In the **Field**, enter the MARC tag to be removed.

10. Click **Save**.

11. Add **New Fields** until you have configured all the tags needed for this profile.

12. Click **Return to Groups** to go back to the list of Remove Field profiles.
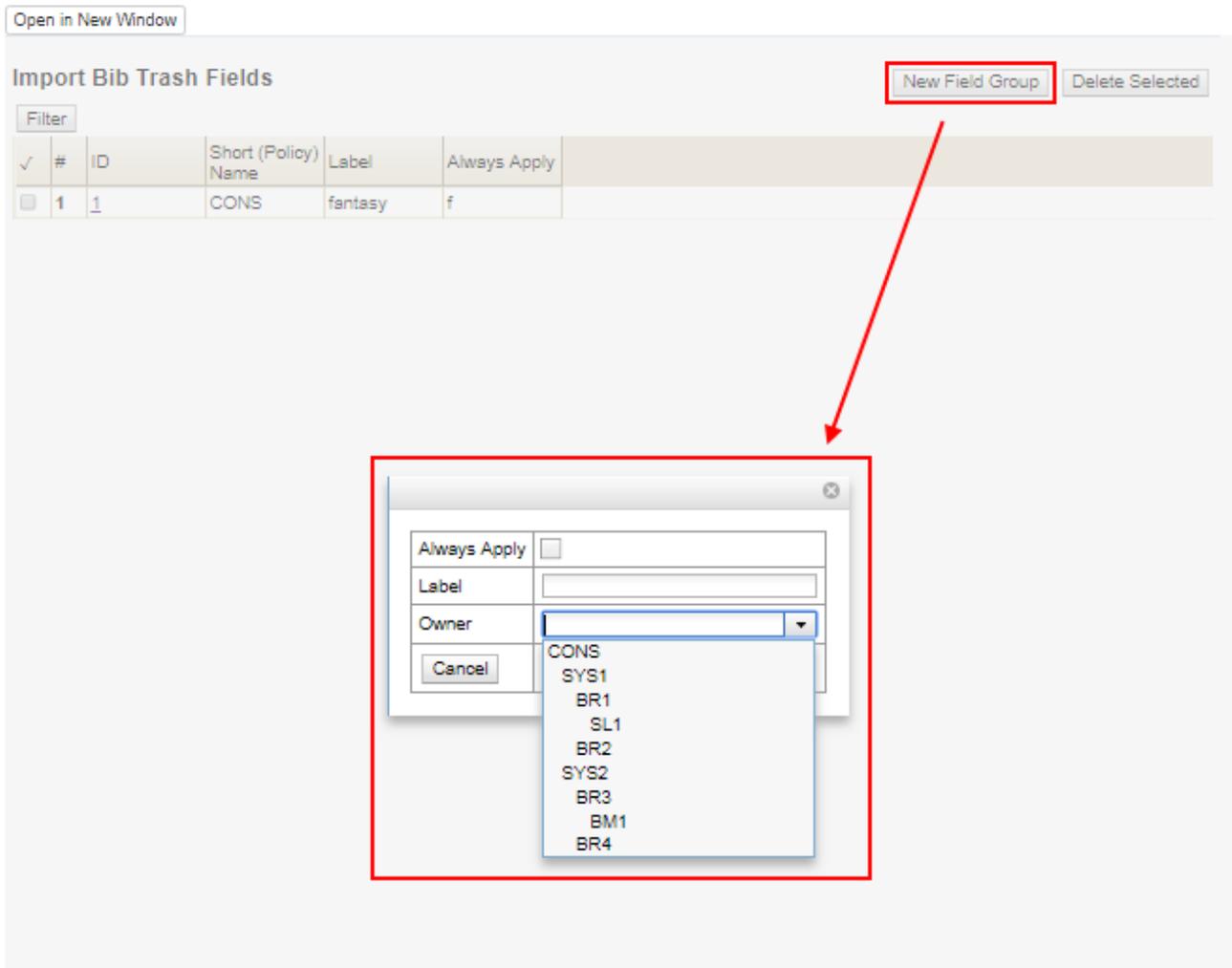
24.2. Import Options

The Label for each of the MARC Import Remove Fields profiles will appear on the three affected import screens. To select a profile, check the box next to the desired Label before importing the records.

Cataloging → Import Record from Z39.50

Cataloging → MARC Batch Import/Export

Evergreen MARC File Upload

Record Type	Bibliographic Records ▾	
Create a New Upload Queue	[_____]	or Add to an Existing Queue [_____ ▾]
Record Match Set	[_____ ▾]	
Holdings Import Profile	[_____ ▾]	
Select a Record Source	oclc ▾	

Record Import Actions

Merge Profile	[_____ ▾]
Import Non-Matching Records	☐
Merge On Exact Match (901c)	☐
Merge On Single Match	☐
Merge On Best Match	☐
Best/Single Match Minimum Quality Ratio	0.0 New Record Quality / Quality of Best Match
Insufficient Quality Fall-Through Profile	[_____ ▾]
Remove MARC Field Groups	☐ Local (APEX) ☐ OCLC (APEX)

File to Upload:	[_____] Browse… Upload

Acquisitions → Load MARC Order Records

24.3. Permissions to use this Feature

The following permissions are required to use this feature:

- CREATE_IMPORT_TRASH_FIELD
- UPDATE_IMPORT_TRASH_FIELD
- DELETE_IMPORT_TRASH_FIELD

Chapter 25. Item Tags (Digital Bookplates)

Item Tags allow staff to apply custom, pre-defined labels or tags to items. Item tags are visible in the public catalog and are searchable in both the staff client and public catalog based on configuration. This feature was designed to be used for Digital Bookplates to attach donation or memorial information to items, but may be used for broader purposes to tag items.

25.1. Administration

New Permissions:

- ADMIN_COPY_TAG_TYPES: required to create a new tag type under **Server Administration**→**Item Tag Types**
- ADMIN_COPY_TAG: required to create a new tag under **Local Administration**→**Item Tags**

> **NOTE** The existing permission UPDATE_COPY is required to assign a tag to a item

New Library Settings:

- OPAC: Enable Digital Bookplate Search: when set to *True* for a given org unit, the digital bookplate search option will be available in the catalog.

25.2. Creating item Tags

There are two components to this feature: Item Tag Types and Item Tags.

Item Tag Types are used to define the type of tag, such as "Bookplates" or "Local History Notes", as well as the organizational unit scope for use of the tag type.

Item Tags are associated with a Item Tag Type and are used to configure the list of tags that can be applied to copies, such as a list of memorial or donation labels, that are applicable to a particular organizational unit.

25.2.1. Create Item Tag Types

1. Go to **Administration**→**Server Administration**→**Item Tag Types**.
2. In the upper left hand corner, click **New Record**. A dialog box will appear. Assign the following to create a new Item Tag Type:
   a. **Code**: a code to identify the item tag type.
   b. **Label**: a label that will appear in drop down menus to identify the item tag type.
   c. **Owner**: the organizational unit that can see and use the item tag type.
3. Click **Save** and the new Item Tag Type will appear in the list. Next create the associated Item Tags.
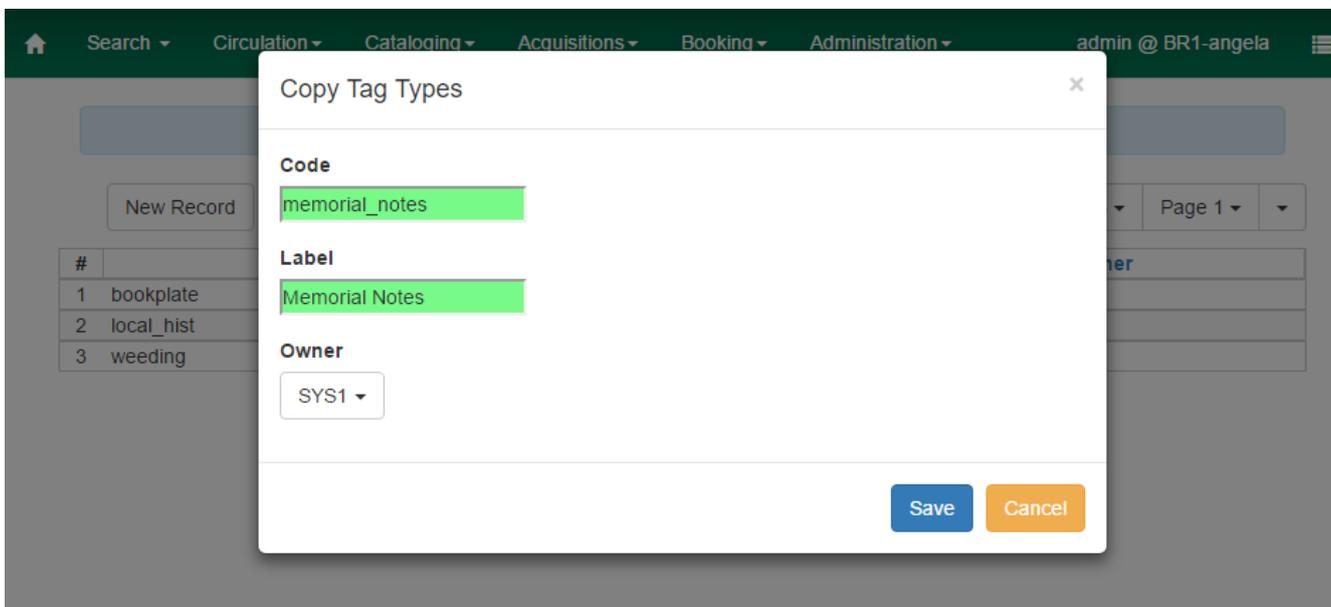
25.2.2. Create Item Tags

1. Go to **Administration**→**Local Administration**→**Item Tags**.

2. In the upper left hand corner, click **New Record**. A dialog box will appear. Assign the following to create a new Item Tag:

   a. **Item Tag Type**: select the Item Tag Type with which you want to associate the new Item Tag.

   b. **Label**: assign a label to the new item tag.

   c. **Value**: assign a value to the new item tag. This will display in the catalog.

   d. **Staff Note**: a note may be added to guide staff in when to apply the item tag.

   e. **Is OPAC Visible?**: If a item tag is OPAC Visible, it can be searched for and viewed in the OPAC and the staff catalog. If a item tag is not OPAC Visible, it can only be searched for and viewed in the staff catalog.

   f. **Owner**: select the organization unit at which this tag can be seen and used.

3. Click **Save** and the new Item Tag will appear in the list.

25.3. Managing Item Tags

25.3.1. Editing Tags

Existing item tags can be edited by selecting a tag and clicking **Actions**→**Edit Record** or right-clicking on a tag and selecting **Edit Record**. The dialog box will appear and you can modify the item tag. Click **Save** to save any changes. Changes will be propagated to any items that the tag has been attached to.

25.3.2. Deleting Tags

Existing item tags can be deleted by selecting a tag and clicking **Actions**→**Delete Record** or right-clicking on a tag and selecting **Delete Record**. Deleting a tag will delete the tag from any items it was attached to in the catalog.

Chapter 26. MARC Record Attributes

The MARC Record Attribute Definitions support the ingesting, indexing, searching, filtering, and delivering of bibliographic record attributes.

To Access the MARC Record Attributes, click **Administration** → **Server Administration** → **MARC Record Attributes**

26.1. Managing Fixed Field Drop-down Context Menus

The MARC Editor includes Fixed Field Drop-down Context Menus, which make it easier for catalogers to select the right values for fixed fields in both Bibliographic and Authority records. You can use the MARC Record Attributes interface to modify these dropdowns to make them better suited for catalogers in your consortium.

To edit these menus, you can follow these steps:

1. Click **Administration** → **Server Administration** → **MARC Record Attributes**.

2. If there's not already a dropdown for your fixed field, click **New Attr. Definition** and fill out the form using other fixed field attribute definitions as a model.

3. If you can find an attribute definition for your fixed field in the list, click the "Manage" link in the Coded Value Maps column.

4. Click **New Map**.

5. In the SVF Attribute field, type the name of the Attribute you identified in steps 2-3.

6. In the code field, type the actual value that will go into the fixed field (typically 1-4 characters). You can add an option to keep that fixed field empty by typing a space into this field.

7. In the value field, type the short description you'd like your catalogers to see in the dropdown menu.

8. Optional: add a longer description of this value in the Description field.

9. Check the OPAC Visible checkbox.

26.2. Multi Valued Fields and Composite Record Attributes

Multi Valued Fields and **Composite Record Attributes** expands upon the Record Attribute Definitions feature to include capturing all occurrences of multi-valued elements in a record. **Multi Valued Fields** allows users to say that a bibliographic record contains multiple entries for a particular record attribute. **Composite Record Attributes** supports the application of a more complicated and nested form of structure to a record attribute definition.

26.2.1. Multi Valued Fields

Multi Valued Fields allows for the capturing of multi-valued elements of a bibliographic record. Through the use of Multi Valued Fields, Evergreen recognizes that records are capable of storing multiple values. Multi Valued Fields are represented in the Record Attribute Definitions interface by a column named **Multi-valued?**. With **Multi-valued?** set to **True**, Evergreen will recognize the bibliographic records in the database that have multiple values mapping to the record attribute definition; it will also track and search on those values in the catalog. This feature will be particularly handy for bibliographic records representing a Blu-ray / DVD combo pack, since both format types can be displayed in the OPAC (if both formats were cataloged in the record).

To edit an existing record attribute definition and set the **Multi-valued?** field to **True**:

1. Click **Administration** on the menu bar

2. Click **Server Administration**, then click **MARC Record Attributes**

3. Double-click on the row of the record attribute definition that needs to be edited

4. Select the **Multi-valued?** checkbox

5. Click **Save**

26.2.2. Composite Record Attributes

Composite Record Attributes build on top of Evergreen's ability to support record attributes that

contain multiple entries. The Composite Record Attributes feature enables administrators to take a record attribute definition and apply a more complicated and nested form of structure to that particular record attribute. Two new Record Attribute Definitions columns have been added to facilitate the management of the Composite Record Attributes. The **Composite attribute?** column designates whether or not a particular record attribute definition is also a composite record attribute. The **Coded Value Maps** column contains a **Manage** link in each row that allows users to manage the Coded Value Maps for the record attributes.

26.2.3. Coded Value Maps

To manage the Coded Value Maps of a particular record attribute definition, click the **Manage** link located under the Coded Value Maps column for that record attribute. This will open the Coded Value Maps interface. What administrators see on the Coded Value Maps screen does not define the structure of the composite record attribute; they must go into the **Composite Attribute Entry Definitions** screen to view this information.

Within the Coded Value Maps screen, there is a column named **Composite Definition**. The **Composite Definition** column contains a **Manage** link that allows users to configure and to edit Composite Record Attribute definitions. In order to enable the **Manage** link (i.e. have the **Manage** link display as an option under the **Composite Definition** column), the **Composite attribute?** column (located back in the Record Attributes Definition page) must be set to **True**.

To edit an existing record attribute definition and set the **Composite attribute?** field to True:

1. Click **Administration** on the menu bar

2. Click **Server Administration**, then click **MARC Record Attributes**

3. Double-click on the row of the record attribute definition that needs to be edited

4. Select the **Composite attribute?** checkbox

5. Click **Save**

Now that the **Composite attribute?** value is set to **True**, click on the **Manage** link located under the **Coded Value Maps** column for the edited record attribute definition. Back in the Coded Value Maps screen, a **Manage** link should now be exposed under the **Composite Definition** column. Clicking on a specific coded value's **Manage** link will take the user into the **Composite Attribute Entry Definitions** screen for that specified coded value.

26.2.4. Composite Attribute Entry Definitions

The Composite Attribute Entry Definitions screen is where administrators can locally define and edit Composite Record Attributes for specific coded values. For example: administrators can further refine and distinguish the way a "book" should be defined within their database, by bringing together the right combination of attributes together to truly define what a "book" is in their database.

The top of the Composite Attribute Entry Definitions screen shows a parenthetically defined view of the **Composite Data Expression**. Below the Composite Data Expression is the **Composite Data Tree**. The Composite Data Tree is structured off of Boolean Operators, including the support of NOT operations. This nested form can be as deeply defined as it needs to be within the site's database.

To modify the **Composite Attribute Entry Definition**, any Boolean Operator can be deleted or have a coded value appended to it. The appended coded value can be any number of Coded Value

Maps from any other Record Attribute Definition. So, administrators can choose from all the other existing record attribute definitions and create new nested structures to define entirely new data types.

To modify the **Composite Attribute Entry Definition**:

1. Click **Add Child** for the specific Boolean Operator that needs to be modified, and a new window will open
2. Select which **Record Attribute** needs to be represented in the structure under that particular Boolean Operator
3. Select the **Attribute Type** from the dropdown options
4. Select the **Value** of the Attribute Type from the dropdown options (dropdown options will be based on the Attribute Type selected)
5. Click **Submit**
6. The **Composite Data Expression** should now include the modification
7. Once all modifications have been made, click **Save Changes** on the Composite Attribute Entry Definitions page

26.2.5. Search and Icon Formats

Search and Icon Formats

The table below shows all the search and icon formats. In some cases they vary slightly, with the icon format being more restrictive. This is so that things such as a search for "All Books" will include Large Print books yet Large Print books will not show both a "Book" and "Large Print Book" icon.

In the table below "Icon Format Only" portions of the definition are italicized and in square brackets: [*Icon format only data*]

The definitions use the fixed field types at the end of this document.

Icon	Search Label/Icon Label	Definition
	Blu-ray	VR Format:s

	All books/Book	Item Type: a,t Bib Level: a,c,d,m NOT: Item Form: a,b,c,f,o,q,r,s *[,d]*
	Braille	Item Type: a Item Form: f
	Cassette audiobook	Item Type: i SR Format: l
	Audiocassette music recording	Item Type: j SR Format: l
	CD audiobook	Item Type: i SR Format: f
	CD music recording	Item Type: j SR Format: f
	DVD	VR Format: v
	E-audio	Item Type: i Item Form: o,q,s
	E-book	Item Type: a,t Bib Level: a,c,d,m Item Form: o,q,s
	Equipment, games, toys	Item Type: r
	E-video	Item Type: g Item Form: o,q,s
	Kit	Item Type: o,p
	Large print book	Item Type: a,t Bib Level: a,c,d,m Item Form: d
	Map	Item Type: e,f

	Microform	Item Form: a,b,c
	All music/Music sound recording (unknown format)	Item Type: j *[NOT: SR Format: a,b,c,d,e,f,l]*
	Phonograph music recording	Item Type: j SR Format: a,b,c,d,e
	Phonograph spoken recording	Item Type: i SR Format: a,b,c,d,e
	Picture	Item type: k
	Music score	Item type: c,d
	Serials and magazines	Bib Level: b,s
	Software and video games	Item Type: m
	VHS	VR Format: b

Record Types

This table shows the record types currently used in determining elements of search and icon formats. They are based on a combination of the MARC Record Type (LDR 06) and Bibliographic Level (LDR 07) fixed fields.

Record Type	LDR 06	LDR 07
BKS	a,t	a,c,d,m
MAP	e,f	a,b,c,d,i, m,s
MIX	p	c,d,i
REC	i,j	a,b,c,d,i, m,s
SCO	c,d	a,b,c,d,i, m,s
SER	a	b,i,s
VIS	g,k,r,o	a,b,c,d,i, m,s

Fixed Field Types

This table details the fixed field types currently used for determining search and icon formats. See the record types section above for how the system determines them.

Label	Record Type	Tag	Position
Item Type	ANY	LDR	06
Bib Level	ANY	LDR	07
Item Format	BKS	006	06
		008	23
	MAP	006	12
		008	29
	MIX	006	06
		008	23
	REC	006	06
		008	23
	SCO	006	06
		008	23
	SER	006	06
		008	23
	VIS	006	12
		008	29
SR Format	ANY	007s	03
VR Format	ANY	007v	04

Chapter 27. Z39.50 Servers

27.1. Restrict Z39.50 Sources by Permission Group

In Evergreen versions preceding 2.2, all users with cataloging privileges could view all of the Z39.50 servers that were available for use in the staff client. In Evergreen version 2.2, you can use a permission to restrict users' access to Z39.50 servers. You can apply a permission to the Z39.50 servers to restrict access to that server, and then assign that permission to users or groups so that they can access the restricted servers.

27.1.1. Administrative Settings

You can add a permission to limit use of Z39.50 servers, or you can use an existing permission.

NOTE	You must be authorized to add permission types at the database level to add a new permission.

Add a new permission:

1) Create a permission at the database level.

2) Click **Administration → Server Administration → Permissions** to add a permission to the staff client.

3) In the **New Permission** field, enter the text that describes the new permission.
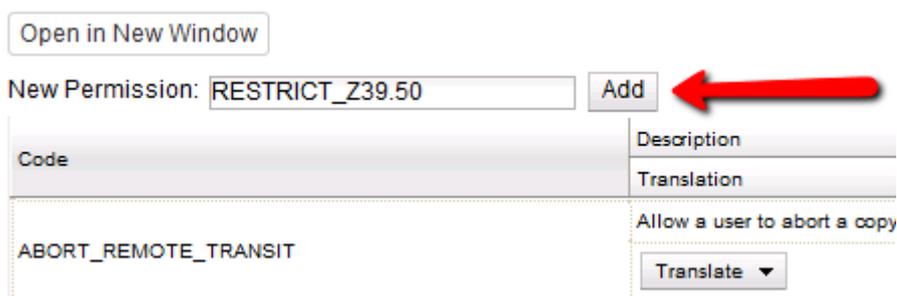
4) Click **Add**.

5) The new permission appears in the list of permissions.

27.1.2. Restrict Z39.50 Sources by Permission Group

1) Click **Administration → Server Administration → Z39.50 Servers**

2) Click **New Z39.50 Server**, or double click on an existing Z39.50 server to restrict its use.

3) Select the permission that you added to restrict Z39.50 use from the drop down menu.

4) Click **Save**.

5) Add the permission that you created to a user or user group so that they can access the restricted server.

6) Users that log in to the staff client and have that permission will be able to see the restricted Z39.50 server.

NOTE	As an alternative to creating a new permission to restrict use, you can use a preexisting permission. For example, your library uses a permission group called SuperCat, and only members in this group should have access to a restricted Z39.50 source. Identify a permission that is unique to the SuperCat group (e.g. CREATE_MARC) and apply that permission to the restricted Z39.50 server. Because these users are in the only group with the permission, they will be the only group w/ access to the restricted server.

27.2. Storing Z39.50 Server Credentials

Staff have the option to apply Z39.50 login credentials to each Z39.50 server at different levels of the organizational unit hierarchy. Credentials can be set at the library branch or system level, or for an entire consortium. When credentials are set for a Z39.50 server, searches of the Z39.50 server will use the stored credentials. If a staff member provides alternate credentials in the Z39.50 search interface, the supplied credentials will override the stored ones. Staff have the ability to apply new credentials or clear existing ones in this interface. For security purposes, it is not possible for staff to retrieve or report on passwords.

To set up stored credentials for a Z39.50 server:

1) Go to **Administration** → **Server Administration** → **Z39.50 Servers**.

2) Select a **Z39.50 Source** by clicking on the hyperlinked source name. This will take you the Z39.50 Attributes for the source.

3) At the top of the screen, select the **org unit** for which you would like to configure the credentials.

4) Enter the **Username** and **Password**, and click **Apply Credentials**.

Z39.50 Attributes for oclc

New   Delete Selected   Clone Attributes From Source

Return to Sources

Credentials for APEX ▼   Username [   ]   Password [   ]

Apply Credentials   Clear Stored Credentials

Filter

✓	#	Z39.50 Source	Name	Label	Code	Format	Truncation	
☐	1	oclc	title	Title	4	6	0	
☐	2	oclc	isbn	ISBN	7	6	0	
☐	3	oclc	issn	ISSN	8	1	0	
☐	4	oclc	lccn	LCCN	9	1	0	
☐	5	oclc	tcn	Title Control Number	12	1	0	
☐	6	oclc	pubdate	Publication Date	31	1	0	
☐	7	oclc	item_type	Item Type	1001	1	0	
☐	8	oclc	author	Author	1003	6	0	
☐	9	oclc	publisher	Publisher	1018	6	0	

Chapter 28. Administering shelving locations

28.1. Creating new shelving locations

1. Click *Administration*.

2. Click *Local Administration*.

3. Click *Shelving Locations Editor*.

4. Type the name of the shelving location.

5. In *OPAC Visible*, choose whether you would like items in this shelving location to appear in the catalog.

6. In *Hold Verify*,

7. In *Checkin Alert*, choose whether you would like a routing alert to appear when an item in this location is checked in. This is intended for special locations, such as *Display*, that may require special handling, or that temporarily contain items that are not normally in that location.

NOTE	By default, these alerts will only display when an item is checked in, *not* when it is used to record an in-house use.

   To also display these alerts when an item in your location is scanned for in-house use, go to Administration > Local Administration > Library Settings Editor and set *Display shelving location check in alert for in-house-use* to True.

8. If you would like a prefix or suffix to be added to the call numbers of every volume in this location, enter it.

9. If you would like, add a URL to the *URL* field. When a URL is entered in this field, the associated shelving location will display as a link in the Public Catalog summary display. This link can be useful for retrieving maps or other directions to the shelving location to aid users in finding material.

10. If you would like to override any item-level circulation/hold policies to make sure that items in your new location can't circulate or be holdable, choose *No* in the appropriate field. If you choose *Yes*, Evergreen will use the typical circulation and hold policies to determine circulation abilities.

28.2. Deleting shelving locations

You may only delete a shelving location if: . it doesn't contain any items, or . it only contains deleted items.

Evergreen preserves shelving locations in the database, so no statistical information is lost when a shelving location is deleted.

28.3. Modifying shelving location order

1. Go to *Administration.*
2. Go to *Local Administration.*
3. Click *Shelving Location Order.*
4. Drag and drop the locations until you are satisfied with their order.
5. Click *Apply changes.*

28.4. Shelving location groups

> ## Use case
>
> Mayberry Public Library provides a scope allowing users to search for all children's materials in their library. The library's children's scope incorporates several shelving locations used at the library, including Picture Books, Children's Fiction, Children's Non-Fiction, Easy Readers, and Children's DVDs. The library also builds a similar scope for YA materials that incorporates several shelving locations.

This feature allows staff to create and name sets of shelving locations to use as a search filter in the catalog. OPAC-visible groups will display within the library selector in the Public Catalog. When a user selects a group and performs a search, the set of results will be limited to records that have items in one of the shelving locations within the group. Groups can live at any level of the library hierarchy and may include shelving locations from any parent org unit or child org unit.

NOTE	To work with Shelving Location Groups, you will need the ADMIN_COPY_LOCATION_GROUP permission.

28.4.1. Create a Shelving Location Group

1. Click Administration → Local Administration → Shelving Location Groups.
2. At the top of the screen is a drop down menu that displays the org unit tree. Select the unit within the org tree to which you want to add a shelving location group. The shelving locations associated with the org unit appear in the Shelving Locations column.
3. In the column called *Location Groups*, click *New*.
4. Choose how you want the shelving location group to display to patrons in the catalog's org unit tree in the OPAC. By default, when you add a new shelving location group, the group displays in the org unit tree beneath any branches or sub-libraries of its parental org unit. If you check the box adjacent to Display above orgs, then the group will appear above the branches or sub-libraries of its parental org unit.
5. To make the shelving location group visible to users searching the public catalog, check the box adjacent to Is OPAC visible?
6. Enter a *Name* for the shelving location group.

7. Click Save. The name of the Shelving Location Group appears in the Location Groups.

8. Select the shelving locations that you want to add to the group, and click Add. The shelving locations will populate the middle column, Group Entries.

9. The shelving location group is now visible in the org unit tree in the catalog. Search the catalog to retrieve results from any of the shelving locations that you added to the shelving location group.

28.4.2. Order Shelving Location Groups

If you create more than one shelving location group, then you can order the groups in the org unit tree.

1. Click Administration → Local Administration → Shelving Location Groups.

2. Three icons appear next to each location group. Click on the icons to drag the shelving location groups into the order in which you would like them to appear in the catalog.

3. Search the catalog to view the reorder of the shelving location groups.

Chapter 29. Importing materials in the staff client

Evergreen exists to connect users to the materials represented by bibliographic records, call numbers, and copies — so getting these materials into your Evergreen system is vital to a successful system. There are two primary means of getting materials into Evergreen:

- The Evergreen staff client offers the **MARC Batch Importer**, which is a flexible interface primarily used for small batches of records;

- Alternately, import scripts can load data directly into the database, which is a highly flexible but much more complex method of loading materials suitable for large batches of records such as the initial migration from your legacy library system.

29.1. Staff client batch record imports

The staff client has a utility for importing batches of bibliographic and item records available through **Cataloging** > **MARC Batch Import/Export**. In addition to importing new records, this interface can be used to match incoming records to existing records in the database, add or overlay MARC fields in the existing record, and add copies to those records.

The MARC Batch Import interface may also be colloquially referred to as "Vandelay" in the Evergreen community, referring to this interface's internals in the system.You will also see this name used in several places in the editor. For instance, when you click on the **Record Match Sets**, the title on the screen will be **Vandelay Match Sets**.

29.1.1. When to use the MARC Batch Importer

- When importing in batches of up to 500 to 1,000 records.

- When you need the system to match those incoming records to existing records and overlay or add fields to the existing record.

- When you need to add items to existing records in the system.

WARNING	If you are importing items that do not have barcodes or call numbers, you must enable the *Vandelay Generate Default Barcodes* and *Vandelay Default Barcode Prefix (vandelay.item.barcode.prefix)* settings.

29.1.2. Record Match Sets

Click the **Record Match Sets** button to identify how Evergreen should match incoming records to existing records in the system.

These record match sets can be used when importing records through the MARC Batch Importer or when importing order records through the Acquisitions Load MARC Order Records interface.

Common match points used when creating a match set include:

- MARC tag 020a (ISBN)

- MARC tag 022a (ISSN)

- MARC tag 024a (UPC)

- MARC tag 028a (Publisher number)

29.1.3. Create Match Sets

1. On the **Record Match Sets** screen, click **New Match Set** to create a set of record match points. Give the set a **Name**. Assign the **Owning Library** from the dropdown list. The **Match Set Type** should remain as **biblio**. Click **Save**.

2. If you don't see your new set in the list, in the upper left corner of the staff client window, click the **Reload** button.

3. If you had to reload, click the **Record Match Sets** button to get back to that screen. Find your new set in the list and click its name. (The name will appear to be a hyperlink.) This will bring you to the **Vandelay Match Set Editor**.

4. Create an expression that will define the match points for the incoming record. You can choose from two areas to create a match: Record Attribute (MARC fixed fields) or MARC Tag and Subfield. You can use the Boolean operators AND and OR to combine these elements to create a match set.

5. When adding a Record Attribute or MARC tag/subfield, you also can enter a Match Score. The Match Score indicates the relative importance of that match point as Evergreen evaluates an incoming record against an existing record. You can enter any integer into this field. The number that you enter is only important as it relates to other match points.

   Recommended practice is that you create a match score of one (1) for the least important match point and assign increasing match points to the power of 2 to working points in increasing importance.

6. After creating a match point, drag the completed match point under the folder with the appropriately-named Boolean folder under the Expression tree.
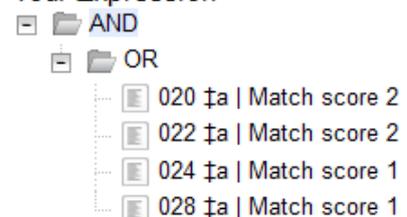
7. Click **Save Changes to Expression**.

29.1.4. Quality Metrics

- Quality metrics provide a mechanism for Evergreen to measure the quality of records and to make importing decisions based on quality.

- Metrics are configured in the match set editor.

- Quality metrics are not required when creating a match set.

- You can use a value in a record attribute (MARC fixed fields) or a MARC tag as your quality metric.

- The encoding level record attribute can be one indicator of record quality.

Quality	Record Attribute	Tag	Subfield	Value
1	enc_level			E
2	enc_level			J
3	enc_level			3
4	enc_level			7
5	enc_level			5
6	enc_level			M
7	enc_level			2
8	enc_level			K
9	enc_level			8
10	enc_level			L
11	enc_level			I
12	enc_level			4
13	enc_level			1
14	enc_level			

29.1.5. Import Item Attributes

If you are importing items with your records, you will need to map the data in your holdings tag to fields in the item record. Click the **Holdings Import Profile** button to map this information.

1. Click the **New Definition** button to create a new mapping for the holdings tag.

2. Add a **Name** for the definition.

3. Use the **Tag** field to identify the MARC tag that contains your holdings information.

4. Add the subfields that contain specific item information to the appropriate item field.

5. At a minimum, you should add the subfields that identify the **Circulating Library**, the **Owning Library**, the **Call Number** and the **Barcode**.

6. For more details, see the full list of import fields.

NOTE	All fields (except for Name and Tag) can contain a MARC subfield code (such as "a") or an XPATH query. You can also use the related library settings to set defaults for some of these fields.

29.1.6. Overlay/Merge Profiles

If Evergreen finds a match for an incoming record in the database, you need to identify which fields should be replaced, which should be preserved, and which should be added to the record. Click the **Merge/Overlay Profiles** button to create a profile that contains this information.

These overlay/merge profiles can be used when importing records through the MARC Batch Importer or when importing order records through the Acquisitions Load MARC Order Records interface.

Evergreen comes pre-installed with two default profiles:

- **Default merge** - No fields from incoming record are added to match. This profile is useful for item loads or for order record uploads.

- **Default overlay** - Incoming record will replace existing record.

You can customize the overlay/merge behavior with a new profile by clicking the **New Merge Profile** button. Available options for handling the fields include:

- **Preserve specification** - fields in the existing record that should be preserved.

- **Replace specification** - fields in existing record that should be replaced by those in the incoming record.

- **Add specification** - fields from incoming record that should be added to existing record (in addition to any already there.)

- **Remove specification** - fields that should be removed from incoming record.

You can add multiple tags to these specifications, separating each tag with a comma.

29.1.7. Importing the records

After making the above configurations, you are now ready to import your records.

1. Click the **Import Records** button

2. Provide a unique name for the queue where the records will be loaded

3. Identify the match set that should be used for matching

4. If you are importing items, identify the **Import Item Attributes** definition in the Holdings Import Profile

5. Select a record source

6. Select the overlay/merge profile that defines which fields should be replaced, added or preserved

7. Identify which records should be imported, the options are:

   ◦ **Import Non-Matching Records** will automatically import records that have no match in the system

   ◦ **Merge on Exact Match** will automatically import records that match on the 901c (record ID)

   ◦ **Merge on Single Match** will automatically import records when there is only one match in the system

   ◦ **Merge on Best Match** will automatically import records for the best match in the system; the best match will be determined by the combined total of the records match point scores

You do not need to select any of these import options at this step. You may also opt to review the records first in the import queue and then import them.

- **Best Single Match Minimum Quality Ratio** should only be changed if quality metrics were used in the match set

   ◦ Set to 0.0 to import a record regardless of record quality

   ◦ Set to 1.0 if the incoming record must be of equal or higher quality than the existing record to be imported

   ◦ Set to 1.1 if the incoming record must be of higher quality than the existing record to be imported

   ◦ **Insufficient Quality Fall-Through Profile** can also be used with quality metrics. If an incoming record does not meet the standards of the minimum quality ratio, you can identify a back-up merge profile to be used for those records. For example, you may want to use the default overlay profile for high-quality records but use the default merge profile for lower quality records.

Circulation administration

Chapter 30. Circulation policies

This section discusses the initial setup and subsequent troubleshooting and refinement of circulation policies.

30.1. Borrowing items: who, what, for how long

Circulation policies pull together user, library, and item data to determine how library materials circulate, such as: which patrons, from what libraries can borrow what types of materials, for how long, and with what overdue fines.

Individual elements of the circulation policies are configured using specific interfaces, and should be configured prior to setting up the circulation policies.

30.1.1. Data elements that affect your circulation policies

There are a few data elements which must be considered when setting up your circulation policies.

Copy data

Several fields set via the holdings editor are commonly used to affect the circulation of an item.

- **Circulation modifier** - Circulation modifiers are fields used to control circulation policies on specific groups of items. They can be added to items during the cataloging process. New circulation modifiers can be created in the staff client by navigating to **Administration** → **Server Administration** → **Circulation Modifiers**.

- **Circulate?** flag - The circulate? flag in the holdings editor can be set to False to disallow an item from circulating.

- **Reference?** flag - The reference? flag in the holdings editor can also be used as a data element in circulation policies.

Shelving location data

- To get to the Shelving Locations Editor, navigate to **Administration** → **Local Administration** → **Shelving Locations Editor**.

- Set *OPAC Visible* to "No" to hide all items in a shelving location from the public catalog. (You can also hide individual items using the Copy Editor.)

- Set *Hold Verify* to "Yes" if when an item checks in you want to always ask for staff confirmation before capturing a hold.

- Set *Checkin Alert* to "Yes" to allow routing alerts to display when items are checked in.

- Set *Holdable* to "No" to prevent items in an entire shelving location from being placed on hold.

- Set *Circulate* to "No" to disallow circulating items in an entire shelving location.

- If you delete a shelving location, it will be removed from display in the staff client and the catalog, but it will remain in the database. This allows you to treat a shelving location as deleted without losing statistical information for circulations related to that shelving location.

Copy Locations Editor

- Shelving locations can also be used as a data element in circulation policies.

User data

Finally, several characteristics of specific patrons can affect circulation policies. You can modify these characteristics in a patron's record (**Search → Search for Patrons**, select a patron, choose **Edit** tab) or when registering a new patron (**Circulation → Register Patron**).

- The user permission group is also commonly used as a data element in circulation policies.
- Other user data that can be used for circulation policies include the **juvenile** flag in the user record.

30.1.2. Circulation Rules

Loan duration describes the length of time for a checkout. You can also identify the maximum renewals that can be placed on an item.

You can find Circulation Duration Rules by navigating to **Administration → Server Administration → Circulation Duration Rules**.

Circ Duration Rules

✓	#	name	max_renewals	shrt	normal	extended
☐	1	21d_1r	1	21 days	21 days	21 days
☐	2	21d_0r	0	21 days	21 days	21 days
☐	3	14d_1r	1	14 days	14 days	14 days
☐	4	3d_0r	0	3 days	3 days	3 days
☐	5	7d_0r	0	7 days	7 days	7 days
☐	6	1d_0r	0	1 day	1 day	1 day
☐	7	2d_0r	0	2 days	2 days	2 days
☐	8	35d_1r	1	35 days	35 days	35 days
☐	9	21d_3r	3	21 days	21 days	21 days
☐	10	7d_1r	1	7 days	7 days	7 days
☐	11	2d_1r	1	2 days	2 days	2 days
☐	12	14d_2r	2	14 days	14 days	14 days

Recurring fine describes the amount assessed for daily and hourly fines as well as fines set for other regular intervals. You can also identify any grace periods that should be applied before the fine starts accruing.

You can find Recurring Fine Rules by navigating to **Administration** → **Server Administration** → **Circulation Recurring Fine Rules**.

Recurring Fine Rules

✓	#	name	recurrence_int	low	normal	high	grace_period
☐	1	10c_pd	1 day	0.10	0.10	0.10	00:00:00
☐	2	2d_pd	1 day	2.00	2.00	2.00	00:00:00
☐	3	1d_pd	1 day	1.00	1.00	1.00	00:00:00
☐	4	10d_pd	1 day	10.00	10.00	10.00	00:00:00
☐	5	50c_pd	1 day	0.50	0.50	0.50	00:00:00
☐	6	0c_pd	1 day	0.00	0.00	0.00	00:00:00
☐	7	5c_pd	1 day	0.05	0.05	0.05	00:00:00
☐	8	5d_pd	1 day	5.00	5.00	5.00	00:00:00
☐	9	25c_pd	1 day	0.25	0.25	0.25	00:00:00
☐	10	25d_pd	1 day	25.00	25.00	25.00	00:00:00
☐	11	15c_pd	1 day	0.15	0.15	0.15	00:00:00
☐	12	20c_pd	1 day	0.20	0.20	0.20	00:00:00
☐	13	3d_pd	1 day	3.00	3.00	3.00	00:00:00

Max fine describes the maximum amount of fines that will be assessed for a specific circulation. Set the **Is Percent** field to True if the maximum fine should be a percentage of the item's price.

You can find Circ Max Fine Rules by navigating to **Administration** → **Server Administration** → **Circulation Max Fine Rules**.

Circ Max Fine Rules

✓	#	Rule Name	Max Fine Amount	Is Percent
☐	1	10d_max_fine	10.00	False
☐	2	40d_max_fine	40.00	False
☐	3	5d_max_fine	5.00	False
☐	4	999d_max_fine	999.00	False
☐	5	0d_max_fine	0.00	False
☐	6	2d_max_fine	2.00	False
☐	7	25d_max_fine	25.00	False
☐	8	100d_max_fine	100.00	False
☐	9	30d_max_fine	30.00	False
☐	10	6d_max_fine	6.00	False
☐	11	22d_max_fine	22.00	False
☐	12	150d_max_fine	150.00	False
☐	13	20d_max_fine	20.00	False
☐	14	15d_max_fine	15.00	False
☐	15	50d_max_fine	50.00	False

These rules generally cause the most variation between organizational units.

Loan duration and recurring fine rate are designed with 3 levels: short, normal, and extended loan duration, and low, normal, and high recurring fine rate. These values are applied to specific items, when item records are created.

When naming these rules, give them a name that clearly identifies what the rule does. This will make it easier to select the correct rule when creating your circ policies.

Circulation Limit Sets

Circulation Limit Sets allow you to limit the maximum number of items for different types of materials that a patron can check out at one time. Evergreen supports creating these limits based on circulation modifiers, shelving locations, or circulation limit groups, which allow you to create limits based on MARC data. The below instructions will allow you to create limits based on circulation modifiers.

- Configure the circulation limit sets by selecting **Administration** → **Local Administration** → **Circulation Limit Sets**.
- **Items Out** - The maximum number of items circulated to a patron at the same time.
- **Min Depth** - Enter the minimum depth in the org tree that Evergreen will consider as valid circulation libraries for counting items out. The min depth is based on org unit type depths. For

example, if you want the items in all of the circulating libraries in your consortium to be eligible for restriction by this limit set when it is applied to a circulation policy, then enter a zero (0) in this field.

- **Global** - Check the box adjacent to Global if you want all of the org units in your consortium to be restricted by this limit set when it is applied to a circulation policy. Otherwise, Evergreen will only apply the limit to the direct ancestors and descendants of the owning library.

- **Linked Limit Groups** - Add any circulation modifiers, shelving locations, or circ limit groups that should be part of this limit set.

Example Your library (BR1) allows patrons to check out up to 5 videos at one time. This checkout limit should apply when your library's videos are checked out at any library in the consortium. Items with DVD, BLURAY, and VHS circ modifiers should be included in this maximum checkout count.

To create this limit set, you would add 5 to the **Items Out** field, 0 to the **Min Depth** field and select the **Global** flag. Add the DVD, BLURAY and VHS circ modifiers to the limit set.

30.1.3. Creating Circulation Policies

Once you have identified your data elements that will drive circulation policies and have created your circulation rules, you are ready to begin creating your circulation policies.

If you are managing a small number of rules, you can create and manage circulation policies in the staff client via **Administration** → **Local Administration** → **Circulation Policies**. However, if you are managing a large number of policies, it is easier to create and locate rules directly in the database by updating **config.circ_matrix_matchpoint**.

The **config.circ_matrix_matchpoint** table is central to the configuration of circulation parameters. It collects the main set of data used to determine what rules apply to any given circulation. It is useful for us to think of their columns in terms of *match* columns, those that are used to match the particulars of a given circulation transaction, and *result* columns, those that return the various parameters that are applied to the matching transaction.

- Circulation policies by checkout library or owning library?
  - If your policies should follow the rules of the library that checks out the item, select the checkout library as the **Org Unit (org_unit)**.
  - If your policies should follow the rules of the library that owns the item, select the consortium as the **Org Unit (org_unit)** and select the owning library as the **Item Circ Lib (copy_circ_lib)**.

- Renewal policies can be created by setting **Renewals? (is_renewal)** to True.

- You can apply the duration rules, recurring fine rules, maximum fine rules, and circulation sets created in the above sets when creating the circulation policy.

Best practices for creating policies

- Start by replacing the default consortium-level circ policy with one that contains a majority of your libraries' duration, recurring fine, and max fine rules. This first rule will serve as a default

for all materials and permission groups.

- If many libraries in your consortium have rules that differ from the default for particular materials or people, set a consortium-wide policy for that circ modifier or that permission group.

- After setting these consortium defaults, if a library has a circulation rule that differs from the default, you can then create a rule for that library. You only need to change the parameters that are different from the default parameters. The rule will inherit the values for the other parameters from that default consortium rule.

- Try to avoid unnecessary repetition.

- Try to get as much agreement as possible among the libraries in your consortium.

Example 1

org_unit	duration_rule	recurring_fine_rule	max_fine_rule
CONS	21_day_2_renew	NONE	NONE
SYS1	NULL	25_cents	3_dollars

In this example, the consortium has decided on a 21_day_2_renew loan rule for general materials, i.e. books, etc. Most members do not charge overdue fines. System 1 charges 25 cents per day to a maximum of $3.00, but otherwise uses the default circulation duration.

Example 2

org_unit	grp	circ_modifier	circulate	duration_rule	recurring_fine_rule	max_fine_rule
CONS	Users	book	TRUE	21_day_2_renew	5_cents	2_dollars
CONS	Users	dvd	FALSE	14_day_1_renew	25_cents	5_dollars
CONS	Users	music	TRUE	14_day_2_renew	10_cents	3_dollars

This example includes a basic set of fields and creates a situation where items with a circ modifier of "book" or "music" can be checked out, but "dvd" items will not circulate. The associated rules would apply during checkouts.

Example 3

org_unit	grp	circ_modifier	circulate	duration_rule	recurring_fine_rule	max_fine_rule
CONS	Users	book	TRUE	21_day_2_renew	5_cents	2_dollars
CONS	Users	dvd	FALSE	14_day_1_renew	25_cents	5_dollars
SYS1	Adult	dvd	TRUE	14_day_1_renew	25_cents	5_dollars
CONS	Users	music	TRUE	14_day_2_renew	10_cents	3_dollars
SYS2	Users	music	FALSE	14_day_2_renew	10_cents	3_dollars
BR3	Users	music	TRUE	14_day_2_renew	10_cents	3_dollars

This example builds on the earlier example and adds some more complicated options.

It is still true that "book" and "music" items can be checked out, while "dvd" is not circulated. However, now we have added new rules that state that "Adult" patrons of "SYS1" can circulate "dvd" items.

Settings Relevant to Circulation

The following circulation settings, available via **Administration** → **Local Administration** → **Library Settings Editor**, can also affect your circulation duration, renewals and fine policy.

- **Auto-Extend Grace Periods** - When enabled, grace periods will auto-extend. By default this will be only when they are a full day or more and end on a closed date, though other options can alter this.

- **Auto-Extending Grace Periods extend for all closed dates** - If enabled and Grace Periods auto-extending is turned on, grace periods will extend past all closed dates they intersect, within hard-coded limits.

- **Auto-Extending Grace Periods include trailing closed dates** - If enabled and Grace Periods auto-extending is turned on, grace periods will include closed dates that directly follow the last day of the grace period.

- **Checkout auto renew age** - When an item has been checked out for at least this amount of time, an attempt to check out the item to the patron that it is already checked out to will simply renew the circulation.

- **Cap Max Fine at Item Price** - This prevents the system from charging more than the item price in overdue fines.

- **Lost Item Billing: New Min/Max Price Settings** - Patrons will be billed at least the Min Price and at most the Max price, even if the item's price is outside that range. To set a fixed price for all lost items, set min and max to the same amount.

- **Charge fines on overdue circulations when closed** - Normally, fines are not charged when a library is closed. When set to True, fines will be charged during scheduled closings and normal weekly closed days.

30.1.4. Autorenewals in Evergreen

Introduction

Circulation policies in Evergreen can now be configured to automatically renew items checked out on patron accounts. Circulations will be renewed automatically and patrons will not need to log in to their OPAC accounts or ask library staff to renew materials.

Autorenewals are set in the Circulation Duration Rules, which allows this feature to be applied to selected circulation policies. Effectively, this makes autorenewals configurable by patron group, organizational unit or library, and circulation modifier.

Configure Autorenewals

Autorenewals are configured in **Administration** → **Server Administration** → **Circulation Duration Rules**.

Enter the number of automatic renewals allowed in the new field called *max_auto_renewals.* The field called *max_renewals* will still set the maximum number of manual renewals, whether staff or patron initiated. Typically, the *max_renewals* value will be greater than *max_auto_renewals,* so that even if no more autorenewals are allowed, a patron may still renew via the OPAC.

The Circulation Duration Rule can then be applied to specific circulation policies (**Administration** → **Local Administration** → **Circulation Policies**) to implement autorenewals in Evergreen.

Autorenewal Notices and Action Triggers

Two new action triggers have been added to Evergreen for use with autorenewals. They can be found and configured in **Administration** → **Local Administration** → **Notifications/Action Triggers**.

- Autorenew
  - Uses the checkout.due hook to automatically renew circulations before they are due.
  - Autorenewals will not occur if the item has holds, exceeds the maximum number of autorenewals allowed, or if the patron has been blocked from renewing items.
- AutorenewNotify
  - Email notification to inform patrons when their materials are automatically renewed or, if they are not automatically renewed due to meeting one of the criteria listed above.
  - This notice can also be configured as an SMS notification.
  - This notice does not change or interact with the Courtesy Notice (Pre-due Notice) that is also available in Evergreen. Libraries should evaluate whether they want to use both Courtesy Notices and Autorenewal notices.

Sample of successful autorenewal notification:

Dear Frey, Annie
Your library would like to let you know about your currently borrowed item(s):

Item# 1
Title: Piano concerto in C major, op. 39
Author: Busoni, Ferruccio
Due Date: 2018-08-01
Status: Loan Renewed. Now Due: 2018-08-08

Sample of blocked autorewal notification:

Dear Langley, Victor
Your library would like to let you know about your currently borrowed item(s):

Item# 1
Title: Beethoven : concertos and overtures
Author: Fiske, Roger
Due Date: 2018-08-03
Status: Not Renewed. Reason: MAX_AUTO_RENEWALS_REACHED : Circulation has no more auto-renewals remaining

Autorenewals in Patron Accounts

A new column called *AutoRenewalsRemaining* indicates how many autorenewals are available for a transaction.

30.1.5. Circulation Limit Sets

Maximum Checkout by Shelving Location

This feature enables you to specify the maximum number of checkouts of items by shelving location and is an addition to the circulation limit sets. Circulation limit sets refine circulation policies by limiting the number of items that users can check out. Circulation limit sets are linked by name to circulation policies.

To limit checkouts by shelving location:

1. Click **Administration** → **Local Administration** → **Circulation Limit Sets**.

2. Click **New** to create a new circulation limit set.

3. In the **Owning Library** field, select the library that can create and edit this limit set.

4. Enter a **Name** for the circulation set. You will select the **Name** to link the circulation limit set to a circulation policy.

5. Enter the number of **Items Out** that a user can take from this shelving location.

6. Enter the **Min Depth**, or the minimum depth in the org tree that Evergreen will consider as valid circulation libraries for counting items out. The min depth is based on org unit type depths. For example, if you want the items in all of the circulating libraries in your consortium to be eligible for restriction by this limit set when it is applied to a circulation policy, then enter a zero (0) in this field.

7. Check the box adjacent to **Global Flag** if you want all of the org units in your consortium to be restricted by this limit set when it is applied to a circulation policy. Otherwise, Evergreen will only apply the limit to the direct ancestors and descendants of the owning library.

8. Enter a brief **Description** of the circulation limit set.

9. Click **Save**.

To link the circulation limit set to a circulation policy:

1. Click **Administration** → **Local Administration** → **Circulation Policies**

2. Select an existing circulation policy, or create a new one.

3. Scroll down to the **Linked Limit Sets**.

4. Select the **Name** of the limit set that you want to add to the circulation policy.

5. Click **Add**.

6. Click **Save**.

Circulate?	True ▼
Duration Rule	default ▼
Renewals Override	
Hard Due Date	▼
Recurring Fine Rule	default ▼
Grace Period Override	
Max Fine Rule	default ▼
Minimum Available Copy/Hold Ratio	
Minimum Total Copy/Hold Ratio	
Script Test	

Linked Limit Sets

| Name | Fallthrough | Active | Remove |
| A/V Materials ▼ | Add | | |

Cancel   Save

30.2. Hold-driven recalls

In academic libraries, it is common for groups like faculty and graduate students to have extended loan periods (for example, 120 days), while others have more common loan periods such as 3 weeks. In these environments, it is desirable to have a hold placed on an item that has been loaned out for an extended period to trigger a *recall*, which:

1. Truncates the loan period

2. Sets the remaining available renewals to 0

3. *Optionally*: Changes the fines associated with overdues for the new due date

4. *Optionally*: Notifies the current patron of the recall, including the new due date and fine level

30.2.1. Enabling hold-driven recalls

By default, holds do not trigger recalls. To enable hold-driven recalls of circulating items, library settings must be changed as follows:

1. Click **Administration → Local Administration → Library Settings Editor.**

2. Set the **Recalls: Circulation duration that triggers a recall (recall threshold)** setting. The recall threshold is specified as an interval (for example, "21 days"); any items with a loan duration of less that this interval are not considered for a recall.

3. Set the **Recalls: Truncated loan period (return interval)** setting. The return interval is

specified as an interval (for example, "7 days"). The due date on the recalled item is changed to be the greater of either the recall threshold or the return interval.

4. *Optionally*: Set the **Recalls: An array of fine amount, fine interval, and maximum fine** setting. If set, this applies the specified fine rules to the current circulation period for the recalled item.

When a hold is placed and no available items are found by the hold targeter, the recall logic checks to see if the recall threshold and return interval settings are set; if so, then the hold targeter checks the currently checked-out items to determine if any of the currently circulating items at the designated pickup library have a loan duration longer than the recall threshold. If so, then the eligible item with the due date nearest to the current date is recalled.

30.2.2. Editing the item recall notification email template

The template for the item recall notification email is contained in the *Item Recall Email Notice* template, found under **Administration** → **Local Administration** → **Notifications / Action Triggers**.

Chapter 31. Item Status

To navigate to the item status editor from the staff client menu, select **Administration** → **Server Administration** → **Item Statuses**.

The Item Status Editor is used to add, edit and delete statuses of items in your system.

For each status, you can set the following properties:

- Holdable - If checked, users can place holds on items in this status, provided there are no other flags or rules preventing holds. If unchecked, users cannot place holds on items in this status.

- OPAC Visible - If checked, items in this status will be visible in the public catalog. If unchecked, items in this status will not be visible in the public catalog, but they will be visible when using the catalog in the staff client.

- Sets item active - If checked, moving an item that does not yet have an active date to this status will set the active date. If the item already has an active date, then no changes will be made to the active date. If unchecked, this status will never set the item's active date.

- Is Available - If checked, items with this status will appear in catalog searches where "limit to available" is selected as a search filter. Also, items with this status will check out without status warnings. By default, the "Available" and "Reshelving" statuses have the "Is Available" flag set. The flag may be applied to local/custom statuses via the item status admin interface.

Evergreen comes pre-loaded with a number of item statuses.

Table 17. Stock item statuses and default settings

ID	Name	Holdable	OPAC Visible	Sets copy active
0	Available	true	true	true
1	Checked out	true	true	true
2	Bindery	false	false	false
3	Lost	false	false	false
4	Missing	false	false	false
5	In process	true	true	false
6	In transit	true	true	false
7	Reshelving	true	true	true
8	On holds shelf	true	true	true
9	On order	true	true	false
10	ILL	false	false	true
11	Cataloging	false	false	false
12	Reserves	false	true	true

ID	Name	Holdable	OPAC Visible	Sets copy active
13	Discard/Weed	false	false	false
14	Damaged	false	false	false
15	On reservation shelf	false	false	true
16	Long Overdue	false	false	false
17	Lost and Paid	false	false	false

31.1. Adding Item Statuses

1. In the *New Status* field, enter the name of the new status you wish to add.

2. Click *Add*.

3. Locate your new status and check the *Holdable* check box if you wish to allow users to place holds on items in this status. Check *OPAC Visible* if you wish for this status to appear in the public catalog. Check *Sets copy active* if you wish for this status to set the active date for new items.

4. Click *Save Changes* at the bottom of the screen to save changes to the new status.

31.2. Deleting Item Statuses

1. Highlight the statuses you wish to delete. Ctrl-click to select more than one status.

2. Click *Delete Selected*.

3. Click *OK* to verify.

NOTE You will not be able to delete statuses if items currently exist with that status.

31.3. Editing Item Statuses

1. Double click on a status name to change its name. Enter the new name.

2. To change whether a status is holdable, visible in the OPAC, or sets the item's active date, check or uncheck the relevant checkbox.

3. Once you have finished editing the statuses, remember to click Save Changes.

Chapter 32. Circulating uncataloged materials

32.1. Introduction

This section discusses settings for circulating items that are not cataloged. Evergreen offers two ways to circulate an item that is not in the catalog:

- Pre-cataloged items (also known as on-the-fly items) have a barcode, as well as some basic metadata which staff members enter at the time of checkout. These are represented in Evergreen with an item record which has to be manually deleted or transferred when it is no longer needed.

- Non-cataloged items (also known as ephemeral items) do not have barcodes, have no metadata, and are not represented with an item record. No fines accrue on these materials, but Evergreen does collect statistics on these circulations.

32.2. Pre-cataloged item settings

By default, when a pre-cataloged item is created, Evergreen sets the *Circ Library* field to the library where it was checked out. You may change this so that the circ library is set to a different library. This can be helpful in cases where the cataloger who fixes pre-cataloged items is at another library, and you'd like all pre-cataloged items to be routed to that cataloger's library when they are returned.

To change this setting:

1. Go to Administration > Local Administration > Library Settings Editor.

2. Choose *Pre-cat Item Circ Lib*.

3. Click *Edit*.

4. Select the appropriate context. For example, if all pre-cataloged items in your system should have the same circ library, you should choose your system as the context.

5. Type in the shortname of the library that should be in the circ lib field. Make sure to type this correctly, or Evergreen won't be able to create pre-cataloged items.

NOTE	Evergreen always sets the owning library of pre-cataloged items to be the consortium.

32.3. Non-cataloged item settings

In Evergreen, libraries may elect to create their own local non-cataloged item types. For example,

you may choose to circulate non-cataloged paperbacks or magazine back-issues, but not wish to catalog them.

32.3.1. Adding a new non-cataloged type

1. Go to Administration > Local Administration > Non-Cataloged Types Editor.

2. Under *Create a new non-cataloged type*, start filling out the appropriate information.

3. Choose an appropriate duration. This period of time will be used to calculate a due date that is displayed to the patron on the patron's receipt and *My Account* view in the public catalog. The item will be automatically removed from the *My Account* view the day after the due date.

4. The *Circulate In-House?* checkbox is only for your records. This checkbox does not affect how these materials circulate.

5. Click the *Create* button when you are done.

32.3.2. Deleting a non-cataloged type

1. Go to Administration > Local Administration > Non-Cataloged Types Editor.

2. Click the *Delete* button next to the type you wish to delete. Note that if any non-cataloged items of this type have ever been entered, you will not be able to delete it.

Chapter 33. Patron registration administration

33.1. Email addresses

It's possible to set up the patron registration form to either allow or disallow users to enter multiple email addresses for a single patron, separated by a comma.

To do this, go to Administration → Local Administration → Library Settings Editor. Search for the setting called `ui.patron.edit.au.email.regex`.

If you'd like to allow multiple email addresses, set this value to `^(?:(?:\b[^@,\s]+@[^@,\s]+\.[^@.,\s]+\b)(?:,\s?(?!$)|$))*$`

If you'd like to disallow multiple email addresses, set this value to `^(?:\b[^@,\s]+@[^@,\s]+\.[^@.,\s]+\b)$`

33.2. Parent/guardian field

In addition to the standard "show" and "suggest" visibility settings, the guardian field has a library setting called *ui.patron.edit.guardian_required_for_juv* ("GUI: Juvenile account requires parent/guardian"). When this setting is set to true, a value will be required in the patron editor when the juvenile flag is active.

33.3. Privacy waiver

Patrons who wish to authorize other people to use their account may now do so via the OPAC. In the Search and History Preferences tab under Account Preferences, a section labeled "Allow others to use my account" allows patrons to enter a name and indicate that the specified person is allowed to place holds, pickup holds, view borrowing history, or check out items on their account. This information is displayed to circulation staff in the patron account summary in the web client. (Staff may also add, edit, and remove entries via the patron editor.)

You can use the library setting called "Allow others to use patron account (privacy waiver)," to enable or disable this feature.

Chapter 34. Patron self-registration administration

34.1. Library Settings

Three Library Settings are specific to patron self-registration:

- OPAC: Allow Patron Self-Registration must be set to `True` to enable use of this feature.
- OPAC: Patron Self-Reg. Expire Interval allows each library to set the amount of time after which pending patron accounts should be deleted.
- OPAC: Patron Self-Reg. Display Timeout allows each library to set the amount of time after which the patron self-registration screen will timeout in the OPAC. The default is 5 minutes.

Several more Library Settings can be used to determine if a field should be required or hidden in the self-registration form:

- GUI: Require day_phone field on patron registration
- GUI: Show day_phone on patron registration
- GUI: Require dob (date of birth) field on patron registration
- GUI: Show dob field on patron registration
- GUI: Require email field on patron registration
- GUI: Show email field on patron registration
- GUI: Require State field on patron registration
- GUI: Show State field on patron registration
- GUI: Require county field on patron registration
- GUI: Show county field on patron registration [New Setting]

Several more Library Settings can be used to verify values in certain fields and provide examples for data format on the registration form:

- Global: Patron username format
- GUI: Regex for phone fields on patron registration OR GUI: Regex for day_phone field on patron registration
- GUI: Regex for email field on patron registration
- GUI: Regex for post_code field on patron registration
- GUI: Example for email field on patron registration
- GUI: Example for post_code field on patron registration
- GUI: Example for day_phone field on patron registration OR GUI: Example for phone fields on patron registration

Chapter 35. Holds, transits, and resource sharing

35.1. Age hold protection

Age hold protection prevents new items from filling holds requested for pickup at a library other than the owning library for a specified period of time.

You can define the protection period in **Administration** → **Server Administration** → **Age Hold Protect Rules**.

The protection period when applied to a item record can start with the item record create date (default) or active date. You can change this setting in **Administration** → **Local Administration** → **Library Settings Editor**: Use Active Date for Age Protection.

In addition to time period, you can set the proximity value to define which organizational units are allowed to act as pickup libraries. The proximity values affect holds as follows:

- "0" allows only holds where pickup library = owning library
- "1" allows holds where pickup library = owning library, parent, and child organizational units
- "2" allows holds where pickup library = owning library, parent, child, and/or sibling organizational units

Age protection only applies to individual item records. You cannot configure age protection rules in hold policies.

35.1.1. Active date display in OPAC

If a library uses the item's active date to calculate holds age protection, the active date will display with the item details instead of the create date in the staff client view of the catalog. Libraries that do not enable the *Use Active Date for Age Protection* library setting will continue to display the create date.

35.2. Best-Hold Selection Sort Order

Best-Hold Selection Sort Order allows libraries to configure customized rules for Evergreen to use to select the best hold to fill at opportunistic capture. When an item is captured for a hold upon check-in, Evergreen evaluates the holds in the system that the item could fill. Evergreen uses a set of rules, or a Best-Hold Selection Sort Order, to determine the best hold to fill with the item. In previous version of Evergreen, there were two sets of rules for Evergreen to use to determine the best hold to fulfill: Traditional and FIFO (First In, First Out). Traditional uses Org Unit Proximity to identify the nearest hold to fill. FIFO follows a strict order of first-in, first-out rules. This feature allows new, custom Best-Hold Selection Sort Orders to be created. Existing Best-Hold Selection Sort Orders can also be modified.

35.2.1. Preconfigured Best-Hold Orders

Evergreen comes with six preconfigured Best-Hold Selection Sort Orders to choose from:

- Traditional
- Traditional with Holds-go-home
- Traditional with Holds-always-go-home
- FIFO
- FIFO with Holds-go-home
- FIFO with Holds-always-go-home

The Holds-go-home and Holds-always-go-home options allow libraries to determine how long they want to allow items to transit outside of the item's home library, before it must return to its home library to fulfill any holds that are to be picked up there. Libraries can set this time limit in the library setting **Holds: Max foreign-circulation time**. The Library Settings Editor can be found under **Administration → Local Administration → Library Settings Editor**.

35.2.2. Create a New Best-Hold Selection Sort Order

To create a new Best-Hold Selection Sort Order, go to **Administration → Server Administration → Best-Hold Selection Sort Order**.

1. Click **Create New**.

2. Assign your Best-Hold Selection Sort Order a **Name**.

3. Next, use the **Move Up** and **Move Down** buttons to arrange the fields in the order that you would like Evergreen to check when looking for the best hold to fill with an item at opportunistic capture.

4. Click **Save Changes** to create your custom Best-Hold Selection Sort Order.

35.2.3. Edit an Existing Best-Hold Selection Sort Order

To edit an existing Best-Hold Selection Sort Order, go to **Administration → Server Administration → Best-Hold Selection Sort Order**.

1. Click **Edit Existing**.

2. Choose the Best-Hold Selection Sort Order that you would like to edit from the drop down menu.

3. Next, use the **Move Up** and **Move Down** buttons to arrange the fields in the new order that you would like Evergreen to check when looking for the best hold to fill with an item at opportunistic capture.

4. Click **Save Changes** to save your edits.

35.2.4. Choosing the Best-Hold Selection Sort Order

The Best-Hold Selection Sort Order can be set for an Org Unit in the **Library Settings Editor**.

To select the Best-Hold Selection Sort Order that your Org Unit will use:

1. Go to **Administration → Local Administration → Library Settings Editor**.

2. Locate the setting **Holds: Best-hold selection sort order**, and click **Edit**.

3. Choose the **Context** org unit for this setting.

4. Select the Best-hold selection sort order, or **Value**, from the drop down menu.

5. Click **Update Setting**.

35.2.5. Permissions to use this Feature

To administer the custom Best-Hold Selection Sort Order interface, you need the following permission:

- ADMIN_HOLD_CAPTURE_SORT

35.3. Org Unit Proximity Adjustments

35.3.1. Org Unit Proximity Adjustments

Org Unit Proximity Adjustments allow libraries to indicate lending preferences for holds between libraries in an Evergreen consortium. When a hold is placed in Evergreen, the hold targeter looks for items that can fill the hold. One factor that the hold targeter uses to choose the best item to fill the hold is the distance, or proximity, between the capturing library and the pickup library for the request. The proximity is based on the number of steps through the org tree that it takes to get from one org unit to another.
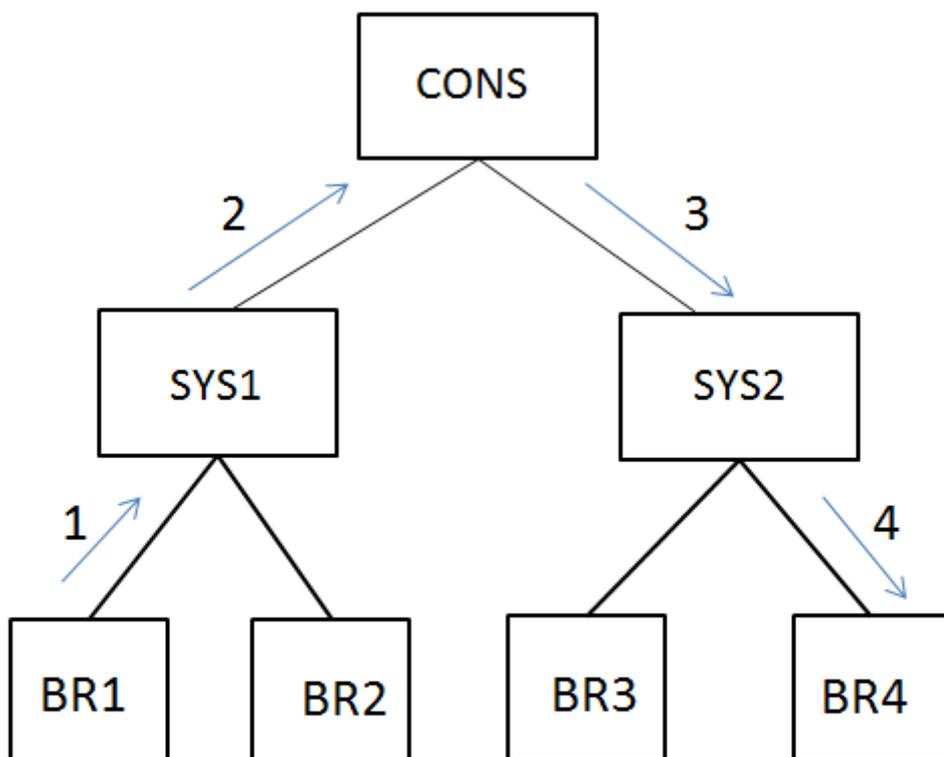
Org Unit Proximity between BR1 and BR4 = 4

Org Unit Proximity Adjustments allow libraries to customize the distances between org units, which provides more control over which libraries are looked at when targeting copies to fill a hold. Evergreen can also be configured to take Org Unit Proximity Adjustments into account during opportunistic capture through the creation of a custom Best-Hold Selection Sort Order. See documentation here for more information on Best-Hold Selection Sort Order.

An Org Unit Proximity Adjustment can be created to tell Evergreen which libraries to look at first for items to fill a hold or which library to look at last. This may be useful for accounting for true transit costs or physical distances between libraries. It can also be used to identify libraries that have special lending agreements or preferences. Org Unit Proximity Adjustments can be created for all holds between two org units, or they can be created for holds on specific Shelving Locations and Circulation Modifiers.

35.3.2. Absolute and Relative Adjustments

Two types of proximity adjustments can be created in Evergreen: Absolute adjustments and Relative adjustments.

Absolute proximity adjustments allow you to replace the default proximity distance between two org units. An absolute adjustment could be made to tell the hold targeter to look at a specific library or library system first to find an item to fill a hold, before looking elsewhere in the consortium.

Relative proximity adjustments allows the proximity between org units to be treated as closer or farther from one another than the default distance. A relative proximity adjustment could be used to identify a library that has limited hours or slow transit times to tell the hold targeter to look at that library last for items to fill a hold.

35.3.3. Create an Org Unit Proximity Adjustment

To create an Org Unit Proximity Adjustment between two libraries:

1. In the Administration menu choose **Server Administration → Org Unit Proximity Adjustments**.

2. Click **New OU Proximity Adjustment**.

3. Choose an **Item Circ Lib** from the drop down menu.

4. Choose a **Hold Request Lib** from the drop down menu.

5. If this proximity adjustment applies to a specific shelving location, select the appropriate **Shelving Location** from the drop down menu.

6. If this proximity adjustment applies to a specific material type, select the appropriate **Circ Modifier** from the drop down menu.

7. If this is an Absolute proximity adjustment, check the box next to **Absolute adjustment?** If you leave the box blank, a relative proximity adjustment will be applied.

8. Enter the **Proximity Adjustment** between the **Item Circulating Library** and the **Request Library**.

9. Click **Save**.

This will create a one-way proximity adjustment between Org Units. In this example this adjustment will apply to items requested at by a patron BR4 and filled at BR1. To create the reciprocal proximity adjustment, for items requested at BR1 and filled at BR4, create a second proximity adjustment between the two Org Units.

35.3.4. Permissions to use this Feature

To create Org Unit Proximity Adjustments, you will need the following permission:

- ADMIN_PROXIMITY_ADJUSTMENT

35.4. Floating Groups

Before floating groups items could float or not. If they floated then they floated everywhere, with no restrictions.

After floating groups where an item will float is defined by what group it has been assigned to.

35.4.1. Floating Groups

Each floating group comes with a name and a manual flag, plus zero or more group members. The name is used solely for selection and display purposes.

The manual flag dictates whether or not the "Manual Floating Active" checkin modifier needs to be active for an item to float. This allows for greater control over when items float. It also prevents automated checkins via SIP2 from triggering floats.

Floating Group Members

Each member of a floating group references an org unit and has a stop depth, an optional max depth, and an exclude flag.

Org Unit

The org unit and all descendants are included, unless max depth is set, in which case the tree is cut off at the max depth.

Stop Depth

The stop depth is the highest point from the current item circ library to the checkin library for the item that will be traversed. If the item has to go higher than the stop depth on the tree the member rule in question is ignored.

Max Depth

As mentioned with the org unit, the max depth is the furthest down on the tree from the org unit that gets included. This is based on the entire tree, not just off of the org unit. So in the default tree a max depth of 1 will stop at the system level no matter if org unit is set to CONS or SYS1.

Exclude

Exclude, if set, causes floating to not happen for the member. Excludes always take priority, so you can remove an org unit from floating without having to worry about other rules overriding it.

35.4.2. Examples

Float Everywhere

This is a default floating rule to emulate the previous floating behavior for new installs and upgrades.

One member:

- Org Unit: CONS
- Stop Depth: 0
- Max Depth: Unset
- Exclude: Off

Float Within System

This would permit an item to float anywhere within a system, but would return to the system if it was returned elsewhere.

One member:

- Org Unit: CONS
- Stop Depth: 1
- Max Depth: Unset
- Exclude: Off

Float To All Branches

This would permit an item to float to any branch, but not to sublibraries or bookmobiles.

One member:

- Org Unit: CONS
- Stop Depth: 0
- Max Depth: 2
- Exclude: Off

Float To All Branches Within System

This would permit an item to float to any branch in a system, but not to sublibraries or bookmobiles, and returning to the system if returned elsewhere.

One member:

- Org Unit: CONS
- Stop Depth: 1
- Max Depth: 2
- Exclude: Off

Float Between BR1 and BR3

This would permit an item to float between BR1 and BR3 specifically, excluding sublibraries and bookmobiles.

It would consist of two members, identical other than the org unit:

- Org Unit: BR1 / BR3
- Stop Depth: 0
- Max Depth: 2
- Exclude: Off

Float Everywhere Except BM1

This would allow an item to float anywhere except for BM1. It accomplishes this with two members.

The first includes all org units, just like Float Everywhere:

- Org Unit: CONS
- Stop Depth: 0
- Max Depth: Unset
- Exclude: Off

The second excludes BM1:

- Org Unit: BM1

- Stop Depth: 0

- Max Depth: Unset

- Exclude: On

That works because excludes are applied first.

Float into, but not out of, BR2

This would allow an item to float into BR2, but once there it would never leave. Why you would want to allow items to float to but not from a single library I dunno, but here it is. This takes advantage of the fact that the rules say where we can float **to**, but outside of stop depth don't care where we are floating **from**.

One member:

- Org Unit: BR2

- Stop Depth: 0

- Max Depth: Unset

- Exclude: Off

Chapter 36. Working with money

This section discusses how to manage and report on payments accepted by your library's circulation processes.

36.1. Accepting credit card payments

Evergreen can interface with services like Authorize.net, stripe, PayPal, or Payflow to allow users to pay fines and other charges in the Public Catalog. Credit card settings can be configured in the Library Settings Editor.

36.2. Cash Reports

Cash reports are useful for quickly getting information about money that your library has collected from patrons. This can be helpful in a few different scenarios, such as:

1. Reconciling a cash drawer at the end of the day.

2. Seeing how popular a specific payment type is (perhaps when evaluating a food-for-fines program).

To use the cash reports,

1. Under the *Administration* menu, choose *Local Administration.*

2. Click *Cash reports.*

3. Select the time period and library you are interested in. This interface defaults to showing payments accepted during the current day.

4. Click *Submit.*

TIP	You can click on the names of columns to sort the reports.

TIP	You need the *VIEW_TRANSACTION* permission to view these reports.

NOTE	These payments are divided into two different types: *Desk payments* — in which a staff member simply accepted a credit card, check, or cash payment — and *User payments* — in which a staff member had to make a specific decision about whether to accept a payment of goods or work; or forgave or granted credit to a particular patron.

36.3. Setting limits on allowed payment amounts

Two new settings have been added to prevent library staff from accidentally clearing all patron bills by scanning a barcode into the Payment Amount field, or accidentally entering the amount without a decimal point (such as you would when using a cash register).

Both settings are available via the Library Settings Editor. The Payment amount threshold for Are

You Sure? dialog (`ui.circ.billing.amount_warn`) setting identifies the amount above which staff will be asked if they're sure they want to apply the payment. The Maximum payment amount allowed (`ui.circ.billing.amount_limit`) setting identifies the maximum amount of money that can be accepted through the staff client.

These settings only affect the staff client, not credit cards accepted through the public catalog, or direct API calls from third party tools.

Chapter 37. User buckets

37.1. 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.

37.2. 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.

37.3. 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.

37.4. 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.

Chapter 38. Circulation timesavers and workflows

This section describes specific settings that may increase efficiency or accuracy at some libraries, but might not be suitable for every library.

38.1. Barcode Completion

The Barcode Completion feature gives users the ability to only enter the unique part of patron and item barcodes. This can significantly reduce the amount of typing required for manual barcode input.

This feature can also be used if there is a difference between what the barcode scanner outputs and what is stored in the database, as long as the barcode that is stored has more characters then what the scanner is outputting. Barcode Completion is additive only; you cannot use it to match a stored barcode that has less characters than what is entered. For example, if your barcode scanners previously output **a123123b** and now exclude the prefix and suffix, you could match both formats using Barcode Completion rules.

Because this feature adds an extra database search for each enabled rule to the process of looking up a barcode, it can add extra delays to the check-out process. Please test in your environment before using in production.

38.1.1. Scoping and Permissions

Local Administrator permission is needed to access the admin interface of the Barcode Completion feature.

Each rule requires an owner org unit, which is how scoping of the rules is handled. Rules are applied for staff users with the same org unit or descendants of that org unit.

38.1.2. Access Points

The admin interface for Barcode Completion is located under **Administration** → **Local Administration** → **Barcode Completion**.

The barcode completion functionality is available at the following interfaces.

Check Out Step 1: Lookup Patron by Barcode

| Check Out | Items Out | Holds | Bills | Messages | Edit | Other ▾ |

| Patron Barcode | Patron Barcode | Submit |

Check Out Step 2: Scanning Item Barcodes

Anderson, Leon

| Check Out | Items Out (1) | Holds (0 / 0) | Bills ($ |

| Profile | Patrons |
| Home Library | BR1 |

| Barcode ▾ | | Submit |

Staff Client Place Hold from Catalog

Search the Catalog   Advanced Search   Browse the Catalog

Search: [ ]   **Type:** Keyword ▾   **Format:** All Formats

[Refine My Original Search]

Place Hold

◉ Place hold for patron by barcode: [ ]   **Patron Search**

◯ Place this hold for me (Administrator System Account)

Blueberry girl / written by Neil Gaiman ; illustrated by Charles Vess.

Advanced Hold Options

Pickup location: Example Consortium ▾

Check In

Item Status

NOTE	Barcode completion is also available during check out if library setting "Load patron from Checkout" is set. (Automatically detects if an actor/user barcode is scanned during check out, and starts a new check out session using that user.)

NOTE	Barcode Completion does not work in the **Search for Patron [by Name]** interface.

38.1.3. Multiple Matches

If multiple barcodes are matched, say if you have both "123" and "00000123" as valid barcodes, you will receive a list of all the barcodes that match all the rules that you have configured. It doesn't stop after the first rule that matches, or after the first valid barcode is found.
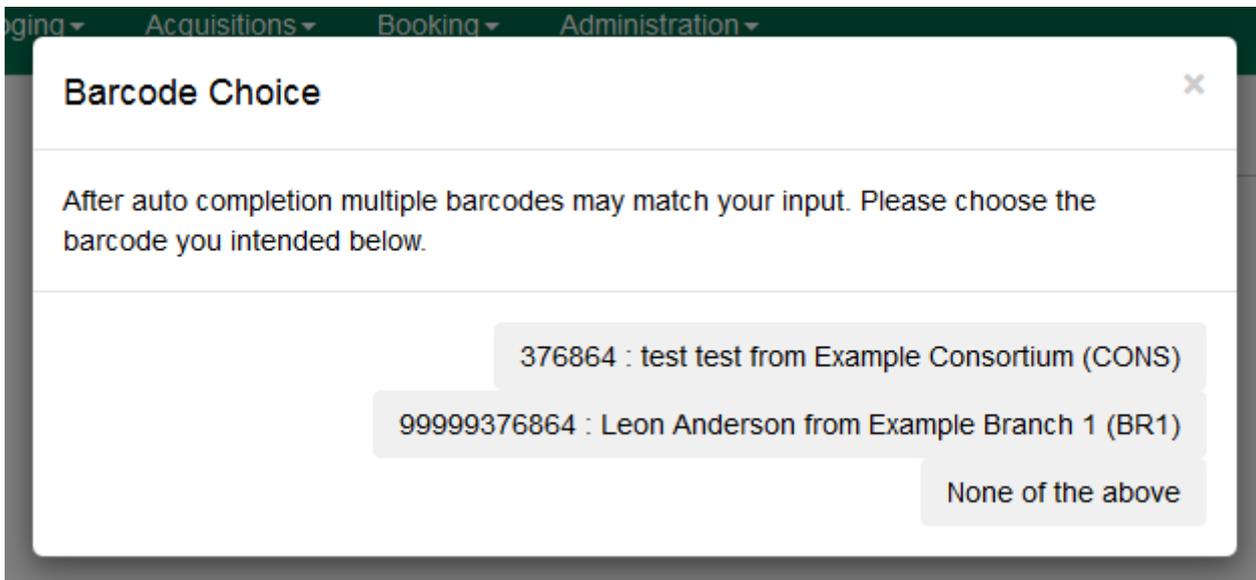
38.1.4. Barcode Completion Data Fields

The following data fields can be set for each Barcode Completion rule.

Table 18. Barcode Completion Fields

Active	Check to indicate entry is active. **Required**
Owner	Setting applies to this Org Unit and to all children. **Required**
Prefix	Sequence that appears at the beginning of barcode.
Suffix	Sequence that appears at the end of barcode.
Length	Total length of barcode.
Padding	Character that pads out non-unique characters in the barcode.
Padding At End	Check if the padding starts at the end of the barcode.
Applies to Items	Check if entry applies to item barcodes.
Applies to Users	Check if entry applies to user barcodes.

Length and Padding

Length and Padding are related, you cannot use one without the other. If a barcode has to be a certain length, then it needs to be able to be padded out to that length. If a barcode has padding, then we need to know the max length that we need to pad out to. If length is set to blank or zero, or padding is left blank then they are both ignored.

Applies to Items/Users

One or both of these options must be checked for the rule to have any effect.

Barcode Completion Configuration

Back Next Filter

Active	☐
Owner	⌄

Prefix	
Suffix	
Length	
Padding	
Padding At End	☐

Applies to Items	☐
Applies to Users	☐

Cancel   Save

38.1.5. Create, Update, Filter, Delete/Disable Rules

In the Barcode Completion admin interface at **Administration** → **Local Administration** → **Barcode Completion** you can create, update and disable rules.

Create Rules

To create a new rule click on the **New** button in the upper right corner. When you are are done with editing the new rule click the **Save** button. If you want to cancel the new rule creation click the **Cancel** button.

Update Rules

To edit a rule double click on the rule in the main list.

Filter Rules

It may be useful to filter the rules list if there are a large number of rules. Click on the **filter** link to bring up the **Filter Results** dialog box. You can filter on any of the data fields and you can setup multiple filter rules. Click **Apply** to enable the filter rules, only the rows that match will now be

displayed.

To clear out the filter rules, delete all of the filter rules by clicking the **X** next to each rule, and then click **Apply**.

Delete/Disable Rules

It isn't possible to delete a rule from the database from the admin interface. If a rule is no longer needed set **Active** to "False" to disable it. To keep the number of rules down, reuse inactive rules when creating new rules.

38.1.6. Examples

In all these examples, the unique part of the barcode is **123**. So that is all that users will need to type to match the full barcode.

Barcode With Prefix and Padding

Barcode: **4545000123**

To match this 10 character barcode by only typing in **123** we need the following settings.

- **Active** - Checked
- **Owner** - Set to your org unit.
- **Prefix** - 4545 - This is the prefix that the barcode starts with.
- **Length** - 10 - Total length of the barcode.
- **Padding** - 0 - Zeros will be used to pad out non significant parts of the barcode.
- **Applies to Items** and/or **Applies to Users** - Checked

The system takes the **123** that you entered and adds the prefix to the beginning of it. Then adds zeros between the prefix and your number to pad it out to 10 characters. Then it searches the database for that barcode.

Barcode With Suffix

Barcode: **123000book**

To match this 10 character barcode by only typing in **123** we need the following settings.

- **Active** - Checked
- **Owner** - Set to your org unit.
- **Suffix** - book - This is the suffix that the barcode ends with.
- **Length** - 10 - Total length of the barcode.
- **Padding** - 0 - Zeros will be used to pad out non significant parts of the barcode.
- **Padding at End** - Checked
- **Applies to Items** and/or **Applies to Users** - Checked

The system takes the **123** that you entered and adds the suffix to the end of it. Then adds zeros between your number and the suffix to pad it out to 10 characters. Then it searches the database for that barcode.

Barcode With Left Padding

Barcode: **0000000123**

To match this 10 character barcode by only typing in **123** we need the following settings.

- **Active** - Checked
- **Owner** - Set to your org unit.
- **Length** - 10 - Total length of the barcode.
- **Padding** - 0 - Zeros will be used to pad out non significant parts of the barcode.
- **Applies to Items** and/or **Applies to Users** - Checked

The system takes the **123** that you entered, then adds zeros between your number and the left to pad it out to 10 characters. Then it searches the database for that barcode.

Barcode With Right Padding

Barcode: **1230000000**

To match this 10 character barcode by only typing in **123** we need the following settings.

- **Active** - Checked
- **Owner** - Set to your org unit.
- **Length** - 10 - Total length of the barcode.
- **Padding** - 0 - Zeros will be used to pad out non significant parts of the barcode.
- **Padding at End** - Checked
- **Applies to Items** and/or **Applies to Users** - Checked

The system takes the **123** that you entered, then adds zeros between your number and the right to pad it out to 10 characters. Then it searches the database for that barcode.

Barcode of any Length with Prefix and Suffix

Barcode: **a123b**

To match this 5 character barcode by only typing in **123** we need the following settings. This use of Barcode Completion doesn't save many keystrokes, but it does allow you to handle the case where your barcode scanners at one point were set to output a prefix and suffix which was stored in the database. Now your barcode scanners no longer include the prefix and suffix. These settings will simply add the prefix and suffix to any barcode entered and search for that.

- **Active** - Checked
- **Owner** - Set to your org unit.

- **Length/Padding** - 0/null - Set the length to 0 and/or leave the padding blank.
- **Prefix** - a - This is the prefix that the barcode starts with.
- **Suffix** - b - This is the suffix that the barcode starts with.
- **Applies to Items** and/or **Applies to Users** - Checked

The system takes the **123** that you entered, then adds the prefix and suffix specified. Then it searches the database for that barcode. Because no length or padding was entered, this rule will add the prefix and suffix to any barcode that is entered and then search for that valid barcode.

38.1.7. Testing

To test this feature, setup the rules that you want, then setup items/users with barcodes that should match. Then try scanning the short version of those barcodes in the various supported access points.

38.2. Address Alert

The Address Alert module gives administrators the ability to notify staff with a custom message when addresses with certain patterns are entered in patron records.

This feature only serves to provide pertinent information to your library system's circulation staff during the registration process. An alert will not prevent the new patron account from being registered and the information will not be permanently associated with the patron account.

To access the Address Alert module, select **Administration** → **Local Administration** → **Address Alerts**.

| NOTE | You must have Local Administrator permissions or ADMIN_ADDRESS_ALERT permission to access the Address Alert module. |

38.2.1. General Usage Examples

- Alert staff when an address for a large apartment is entered to prompt them to ask for unit number.
- Alert staff when the address of a hotel or other temporary housing is entered.
- Alert staff when an address for a different country is entered.
- Alert staff when a specific city or zip code is entered if that city or zip code needs to be handled in a special way. If you have a neighboring city that you don't have a reciprocal relationship with, you could notify staff that a fee card is required for this customer.

38.2.2. Access Control and Scoping

Each address alert is tied to an Org Unit and will only be matched against staff client instances of that Org Unit and its children.

When viewing the address alerts you will only see the alerts associated with the specific org unit selected in the **"Context Org Unit"** selection box. You won't see alerts associated with parent org units, so the list of alerts isn't a list of all alerts that may effect your org unit, only of the ones that you can edit.

The specific permission that controls access to configuring this feature is ADMIN_ADDRESS_ALERT. Local Administrator level users will already have this permission. It is possible for the Local Administrator to grant this permission to other staff.

38.2.3. Adding a new Address Alert

How to add an address to the alert list:

1. Log into the Evergreen Staff Client using a Local Administrator account or another account that has been granted the proper permission.

2. Click on Administration → Local Administration → Address Alerts.

3. Click "New Address Alert."

4. A form will open with the following fields to fill out:

Table 19. New Address Alert Fields

Field	Description
Owner	Which Org Unit owns this alert. Set this to your system or branch.
Active	Check-box that controls if the alert is active or not. Inactive alerts are not processed.
Match All Fields	Check-box that controls if all the fields need to match to trigger the alert(checked), or only at least one field needs to match(unchecked).
Alert Message	Message that will be displayed to staff when this alert is triggered.
Street (1)	Street 1 field regular expression.
Street (2)	Street 2 field regular expression.
City	City regular expression.
County	County regular expression.
State	State regular expression.
Country	County regular expression.
Postal Code	Postal Code regular expression.
Address Alert ID	Displays the internal database id for alert after the alert has been saved.
Billing Address	Check-box that specifies that the alert will only match a billing address if checked.

Mailing Address	Check-box that specifies that the alert will only match a mailing address if checked.

5. Click save once you have finished.

38.2.4. Editing an Address Alert

To make changes to an existing alert, double click on the alert in the list. The editing form will appear, make your changes and click save or cancel when you are done.

If you don't see your alerts, make sure the **"Context Org Unit"** selection box has the correct Org Unit selected.

38.2.5. Deleting an Address Alert

To delete an alert or many alerts, click the selection check-box for all alerts you would like to delete. Then click the "Delete Selected" button at the top of the screen.

38.2.6. Staff View of Address Alerts

When an Address Alert is triggered by a matching address the staff will see the address block highlighted with a red dashed line, along with an **"Address Alert"** block which contains the alert message.

Here is an example of what staff would see.

38.2.7. Regular Expressions / Wildcards

All of the patterns entered to match the various address fields are evaluated as case-insensitive regular expressions by default.

NOTE	Address Alerts use POSIX Regular Expressions included in the PostgreSQL database engine. See the PostgreSQL documentation for full details.

If you want to do a case-sensitive match you need to prepend the pattern with "(?c)"

The simplest regular expression that acts as a wildcard is ".*", that matches any type of character zero or more times.

38.2.8. Examples

Apartment address

Match an apartment address to prompt for unit number.

1. Choose **Owner** Org Unit.

2. Active = Checked

3. Match All Fields = Checked

4. Alert Message = "This is a large apartment building, Please ask customer for unit number."

5. Street (1) = "1212 Evergreen Lane.*"

6. City = "mytown"

All addresses on street

Match all addresses on a certain street. Matches ave and avenue because of ending wildcard.

1. Choose **Owner** Org Unit.

2. Active = Checked

3. Match All Fields = Checked

4. Alert Message = "This street is in a different county, please setup reciprocal card."

5. Street (1) = ".* Evergreen Ave.*"

6. City = "mytown"

Match list of cities

Match several different cities with one alert. Could be used if certain cities don't have reciprocal agreements. Note the use of parentheses and the | character to separate the different options.

1. Choose **Owner** Org Unit.

2. Active = Checked

3. Match All Fields = Checked

4. Alert Message = "Customer must purchase a Fee card."

5. City = "(Emeryville|San Jose|San Francisco)"

38.2.9. Development

Links to resources with more information on how and why this feature was developed and where the various source files are located.

- Launchpad ticket for the feature request and development of address alerts - https://bugs.launchpad.net/evergreen/+bug/898248

Chapter 39. Library closures

This section describes both everyday closures and specific details suitable for school and academic libraries that operate on a term or semester system.

39.1. Setting regular library hours

You may do this in *Administration > Server Administration > Organizational Units*.

The **Hours of Operation** tab is where you enter regular, weekly hours. Holiday and other closures are set in the **Closed Dates Editor**. Hours of operation and closed dates impact due dates and fine accrual.

39.2. Set closed dates using the Closed Dates Editor

These dates are in addition to your regular weekly closed days. Both regular closed days and those entered in the Closed Dates Editor affect due dates and fines:

- **Due dates.** Due dates that would fall on closed days are automatically pushed forward to the next open day. Likewise, if an item is checked out at 8pm, for example, and would normally be due on a day when the library closes before 8pm, Evergreen pushes the due date forward to the next open day.
- **Overdue fines.** Overdue fines may not be charged on days when the library is closed. This fine behavior depends on how the *Charge fines on overdue circulations when closed* setting is configured in the Library Settings Editor.

Closed dates do not affect the processing delays for Action/Triggers. For example, if your library has a trigger event that marks items as lost after 30 days, that 30 day period will include both open and closed dates.

39.2.1. Adding a closure

1. Select *Administration > Local Administration*.
2. Select *Closed Dates Editor*.
3. Select type of closure: typically Single Day or Multiple Day.
4. Click the Calendar gadget to select the All Day date or starting and ending dates.
5. Enter a Reason for closure (optional).
6. Click **Apply to all of my libraries** if your organizational unit has children units that will also be closed. This will add closed date entries to all of those child libraries.

NOTE	By default, creating a closed date in a parent organizational unit does *not* also close the child unit. For example, adding a system-level closure will not also close all of that system's branches, unless you check the **Apply to all of my libraries** box.

7. Click **Save**.

Now that your organizational structure is established, you can begin configuring permissions for the staff users of your Evergreen system.

39.2.2. Detailed closure

If your closed dates include a portion of a business day, you should create a detailed closing.

1. Select *Administration → Local Administration*.

2. Select *Closed Dates Editor*.

3. Select *Add Detailed Closing*.

4. Enter applicable dates, times, and a descriptive reason for the closing.

5. Click Save.

6. Check the Apply to all of my libraries box if your library is a multi-branch system and the closing applies to all of your branches.

Chapter 40. Emergency Closing Handler

40.1. Introduction

The **Closed Dates Editor** now includes an Emergency Closing feature that allows libraries to shift due dates and expiry dates to the next open day. Overdue fines will be automatically voided for the day(s) the library is marked closed. Once an Emergency Closing is processed, it is permanent and cannot be rolled back.

40.2. Administration

40.2.1. Permissions

To create an Emergency Closing, the EMERGENCY_CLOSING permission needs to be granted to the user for all locations to be affected by an emergency closing.

40.3. Create an emergency closing

The Emergency Closing feature is located within the **Closed Dates Editor** screen, which can be accessed via **Administration → Local Administration → Closed Dates Editor**.

Within the closed dates editor screen, scheduled closed dates are listed and can be scoped by specific org unit and date. The date filter in the upper right-hand corner will show upcoming library closings on or after the selected date in the filter.

Select **Add closing** to begin the emergency closing process. A pop-up will appear with fields to fill out.

Library - Using the dropdown window, select the org unit which will be closing.

Apply to all of my libraries - When selected, this checkbox will apply the emergency closing date to the selected org unit and any associated child org unit(s).

Closing Type - The following Closing Type options are available in a drop down window: * One full day * Multiple days * Detailed closing

The *Multiple days* and *Detailed closing* options will display different date options (e.g. start and end dates) in the next field if selected.

Date - Select which day or days the library will be closed.

NOTE	**NOTE** The Closed Dates editor is now date-aware. If a selected closed date is either in the past, or nearer in time than the end of the longest configured circulation period, staff will see a notification that says "Possible Emergency Closing" in both the dialog box and in the bottom right-hand corner.

Reason - Label the reason for library closing accordingly, e.g. 3/15 Snow Day

40.3.1. Emergency Closing Handler

When a date is chosen that is nearer in time than the end of the longest configured circulation period or in the past, then a **Possible Emergency Closing** message will appear in the pop-up and in the bottom right-hand corner of the screen. Below the Possible Emergency Closing message, two checkboxes appear: **Emergency** and **Process Immediately**.

NOTE	**NOTE** The **Emergency** checkbox must still be manually selected in order to actually set the closing as an Emergency Closing.

By selecting the **Emergency** checkbox, the system will void any overdue fines incurred for that emergency closed day or days and push back any of the following dates to the next open day as determined by the library's settings: * item due dates * shelf expire times * booking start times

When selecting the **Process Immediately** checkbox, Evergreen will enact the Emergency Closing changes immediately once the Emergency Closed Date information is saved. If Process Immediately is not selected at the time of creation, staff will need to go back and edit the closing later, or the Emergency processing will not occur.

Upon clicking **OK**, a progress bar will appear on-screen. After completion, the Closed Dates Editor screen will update, and under the Emergency Closing Processing Summary column, the number of affected/processed Circulations, Holds, and Reservations will be listed.

40.3.2. Editing Closing to process Emergency Closing

If **Process immediately** is not selected during an Emergency Closing event creation, staff will need to edit the existing Emergency Closing event and process the affected items.

In the Closed Dates Editor screen, select the existing Emergency Closing event listed. Then, go to **Actions → Edit closing**.
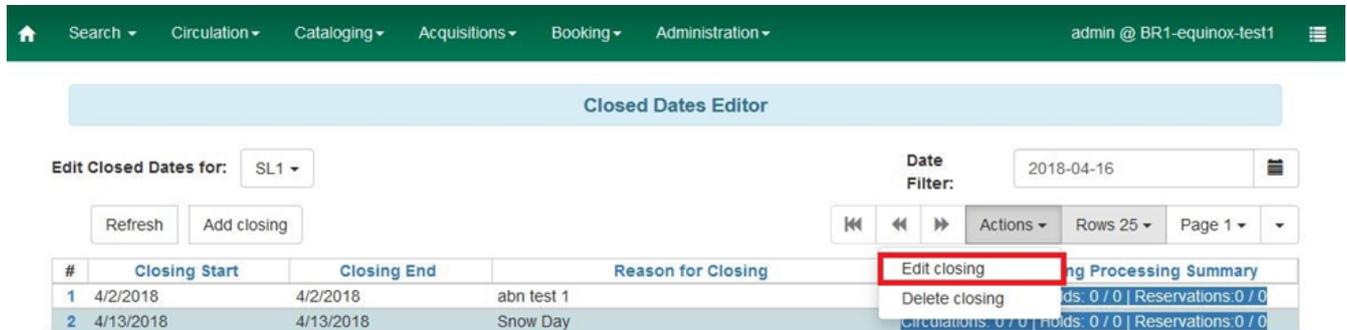
A pop-up display will appear with the same format as creating a Closed Dates event with the Emergency checkbox checked and the Process Immediately un-checked at the bottom. Select the **Process immediately** checkbox, and then **OK**. A progress bar will appear on-screen, the Emergency Closing processing will take occur, and the Closed Dates Editor display will update.

40.4. Hard due dates

This feature allows you to specify a specific due date within your circulation policies. This is particularly useful for academic and school libraries, who may wish to make certain items due at the end of a semester or term.

NOTE	To work with hard due dates, you will need the CREATE_CIRC_DURATION, UPDATE_CIRC_DURATION, and DELETE_CIRC_DURATION permissions at the *consortium* level.

40.4.1. Creating a hard due date

Setting up hard due dates is a two-step process. You must first create a hard due date, and then populate it with specific values.

To create a hard due date:

1. Click **Administration** → **Server Administration** → **Hard Due Date Changes**.
2. Click **New Hard Due Date**.
3. In the **Name** field, enter a name for your hard due date. Note that each hard due date can have multiple values, so it's best to use a generic name here, such as "End of semester."
4. In the **Owner** field, select the appropriate org unit for your new hard due date.
5. In the **Current Ceiling Date** field, select any value. This field is required, but its value will be overwritten in subsequent steps, so you may enter an arbitrary date here.
6. Check the **Always Use?** checkbox if you want items to only receive the due dates you specify, regardless of when they would ordinarily be due. If you leave this box unchecked, your specified due dates will serve as "ceiling" values that limit, rather than override, other circulation rules. In other words, with this box checked, items may be due only on the specified dates. With the box unchecked, items may be due *on or before* the specified dates, simply not after.
7. Click **Save**.

To add date values to your hard due date:

1. Click the hyperlinked name of the due date you just created.
2. Click on **New Hard Due Date Value**
3. In the **Ceiling Date** field, enter the specific date you would like items to be due.
4. In the **Active Date** field, enter the date you want this specific due date value to take effect.
5. Click **Save**.
6. Each Hard Due Date can include multiple values. For example, you can repeat these steps to enter specific due dates for several semesters using this same screen.

After creating a hard due date and assigning it values, you can apply it by adding it to a circulation policy.

Chapter 41. Booking Module Administration

41.1. Creating Bookable Non-Bibliographic Resources

Staff with the required permissions (Circulator and above) can create bookable non-bibliographic resources such as laptops, projectors, and meeting rooms.

The following pieces make up a non-bibliographic resource:

- Resource Type
- Resource Attribute
- Resource Attribute Values
- Resource
- Resource Attribute Map

You need to create resource types and resource attributes (features of the resource types), and add booking items (resources) to individual resource type. Each resource attribute may have multiple values. You need to link the applicable features (resource attributes and values) to individual item (resource) through the Resource Attribute Map. Before you create resources (booking items) you need to have a resource type and associated resource attributes and values, if any, for them.

41.1.1. Create New Resource Type

1) Select Administration → Booking Administration → Resource Types.

2) A list of current resource types will appear. Use Back and Next buttons to browse the whole list.

✓	Resource Type Name	Fine Interval	Fine Amount	Owning Library	Catalog Item	Transferable	Inter-booking and Inter-circulation Interval	Max Fine Amount
☐	Dora's box		0.00	BPR	True	True		
☐	Double Fudge		0.00	BPR	True	True		
☐	Ereader	1 day	3.00	BPR	False	False	01:00:00	10.00
☐	Horse		0.00	BPR	True	True		
☐	Projector	03:00:00	2.00	BPR	False	False	00:15:00	20.00
☐	Room		0.00	BPR	False	False	00:20:00	
☐	Superfudge		0.00	BPR	True	True		
☐	Video Connector	02:00:00	0.50	BPR	False	False	00:15:00	5.00

NOTE You may also see cataloged items in the list. Those items have been marked bookable or booked before.

3) To create a new resource type, click New Resource Type in the top right corner, .
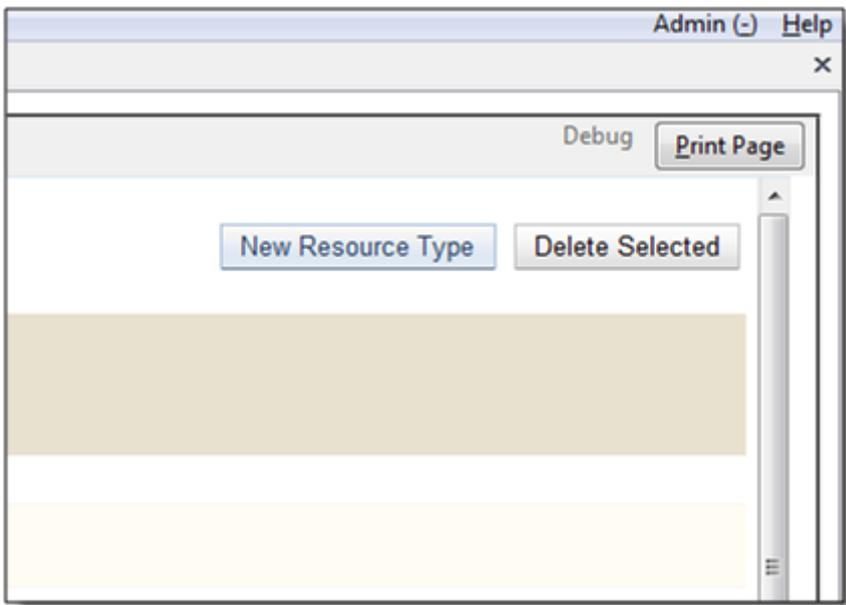
4) A box will appear in which you create your new type of resource.

- Resource Type Name - Give your resource a name.

- Fine Interval - How often will fines be charged? This period can be input in several ways:

NOTE	- second(s), minute(s), hour(s), day(s), week(s), month(s), year(s)
	- sec(s), min(s)
	- s, m, h
	- 00:00:30, 00:01:00, 01:00:00

- Fine Amount - The amount that will be charged at each Fine Interval.

- Owning Library - The home library of the resource.

- Catalog Item - (Function not currently available.)

- Transferable - This allows the item to be transferred between libraries.

- Inter-booking and Inter-circulation Interval - The amount of time required by your library between the return of a resource and a new reservation for the resource. This interval uses * the same input conventions as the Fine Interval.

- Max Fine Amount - The amount at which fines will stop generating.

5) Click Save when you have entered the needed information.

6) The new resource type will appear in the list.

✓	Resource Type Name	Fine Interval	Fine Amount	Owning Library	Catalog Item	Transferable	Inter-booking and Inter-circulation Interval	Max Fine Amount
☐	Dora's box		0.00	BPR	True	True		
☐	Double Fudge		0.00	BPR	True	True		
☐	Ereader	1 day	3.00	BPR	False	False	01:00:00	10.00
☐	Horse		0.00	BPR	True	True		
☐	Laptop	02:00:00	0.50	BPR	False	False	00:15:00	20.00
☐	Projector	03:00:00	2.00	BPR	False	False	00:15:00	20.00
☐	Room		0.00	BPR	False	False	00:20:00	
☐	Superfudge		0.00	BPR	True	True		
☐	Video Connector	02:00:00	0.50	BPR	False	False	00:15:00	5.00

41.1.2. Create New Resource Attribute

1) Select Administration → Booking Administration → Resource Attributes.

2) Click New Resource Attribute in the top right corner.

3) A box will appear in which you can add the attributes of the resource. Attributes are categories of descriptive information that are provided to the staff member when the booking request is made. For example, an attribute of a projector may be the type of projector. Other attributes might be the number of seats available in a room, or the computing platform of a laptop.

- Resource Attribute Name - Give your attribute a name.
- Owning Library - The home library of the resource.
- Resource Type - Type in the first letter to list then choose the Resource Type to which the Attribute is applicable.

- Is Required - (Function not currently available.)

4) Click Save when the necessary information has been entered.

5) The added attribute will appear in the list.

NOTE	One resource type may have multiple attributes. You may repeat the above procedure to add more.

41.1.3. Create New Resource Attribute Value

1) One resource attribute may have multiple values. To add new attribute value, select Administration → Booking Administration → Resource Attribute Values.

2) Click New Resource Attribute Value in the top right corner.

3) A box will appear in which you assign a value to a particular attribute. Values can be numbers, words, or a combination of them, that describe the particular aspects of the resource that have been defined as Attributes. As all values appear on the same list for selection, values should be as unique as possible. For example, a laptop may have a computing platform that is either PC or Mac.
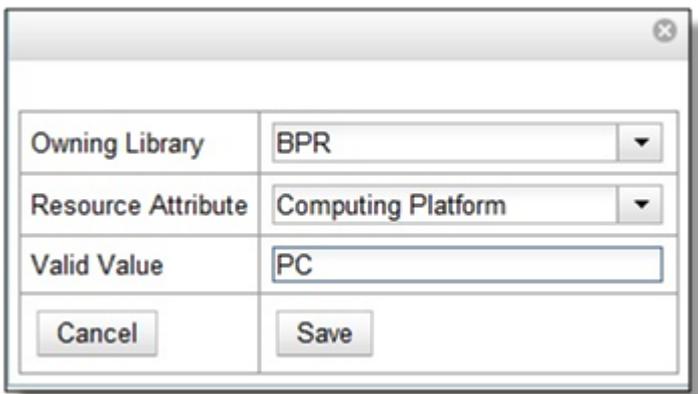
- Owning Library - The home library of the resource.
- Resource Attribute - The attribute you wish to assign the value to.
- Valid Value - Enter the value for your attribute.

4) Click Save when the required information has been added.

5) The attribute value will appear in the list. Each attribute should have at least two values attached to it; repeat this process for all applicable attribute values.

41.1.4. Create New Resource

1) Add items to a resource type. Click Administration → Booking Administration → Resources.

2) Click New Resource in the top right corner.

3) A box will appear. Add information for the resource.

- Owning Library - The home library of the resource.

- Resource Type - Type in the first letter of the resource type's name to list then select the resource type for your item.

- Barcode - Barcode for the resource.

- Overbook - This allows a single item to be reserved, picked up, and returned by multiple patrons during overlapping or identical time periods.

- Is Deposit Required - (Function not currently available.)

- Deposit Amount - (Function not currently available.)

- User Fee - (Function not currently available.)

4) Click Save when the required information has been added.

5) The resource will appear in the list.

> **NOTE** One resource type may have multiple resources attached.

41.1.5. Map Resource Attributes and Values to Resources

1) Use Resource Attribute Maps to bring together the resources and their attributes and values. Select Administration → Booking Administration → Resource Attribute Maps.

2) Click New Resource Attribute Map in the right top corner.

3) A box will appear in which you will map your attributes and values to your resources.

- Resource - Enter the barcode of your resource.

- Resource Attribute - Select an attribute that belongs to the Resource Type.

- Attribute Value - Select a value that belongs to your chosen attribute and describes your resource. If your attribute and value do not belong together you will be unable to save.

4) Click Save once you have entered the required information.

| NOTE | A resource may have multiple attributes and values. Repeat the above steps to map all. |

5) The resource attribute map will appear in the list.

Once all attributes have been mapped your resource will be part of a hierarchy similar to the example below.
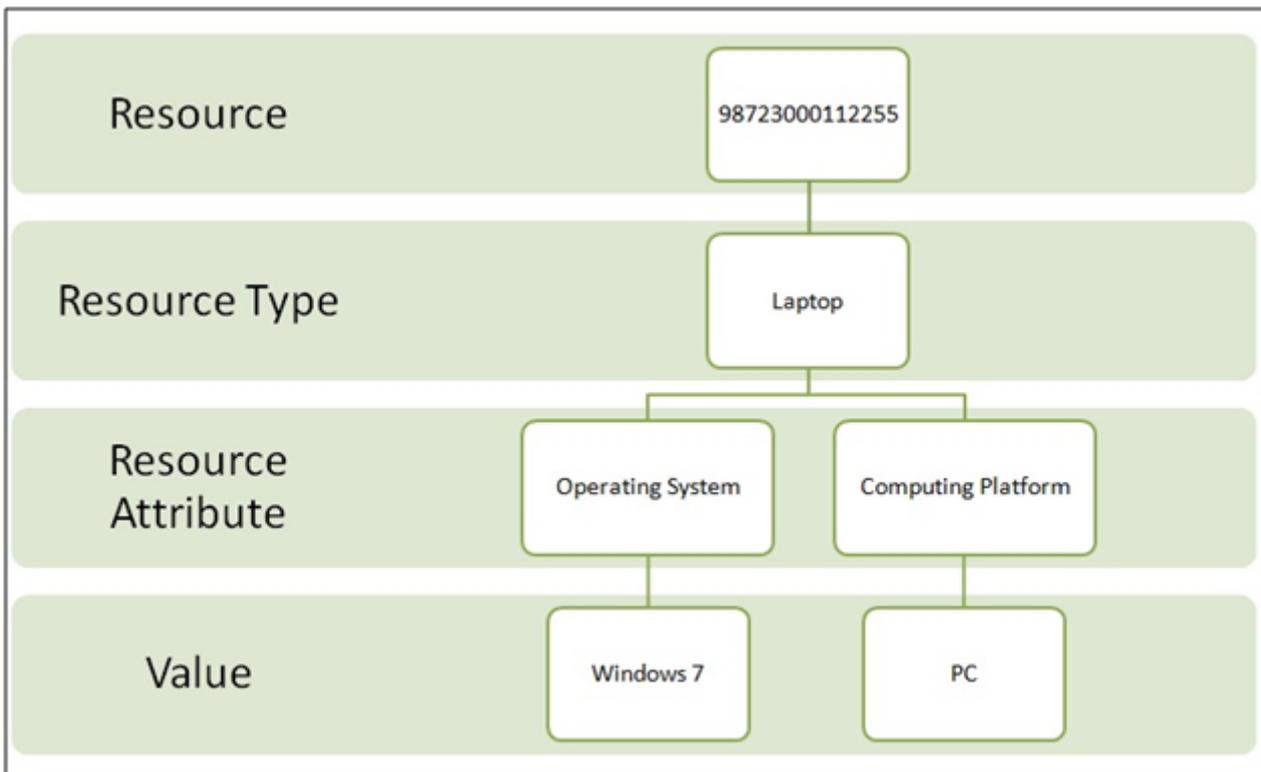
41.2. Editing Non-Bibliographic Resources

Staff with the required permissions can edit aspects of existing non-bibliographic resources. For example, resource type can be edited in the event that the fine amount for a laptop changes from $2.00 to $5.00.

41.2.1. Editing Resource Types

1) Bring up your list of resource types. Select Administration → Booking Administration → Resource Types.

2) A list of current resource types will appear.

3) Double click anywhere on the line of the resource type you would like to edit.

4) The resource type box will appear. Make your changes and click Save.

5) Following the same procedure you may edit Resource Attributes, Attributes Values, Resources and Attribute Map by selecting them on Administration → Booking Administration.

41.3. Deleting Non-bibliographic Resources

1) To delete a booking resource, go to Administration → Booking Administration → Resources.

2) Select the checkbox in front the resource you want to delete. Click Delete Selected. The resource will disappear from the list.

Following the same procedure you may delete Resource Attributes Maps.

You may also delete Resource Attribute Values, Resource Attributes and Resource Types. But you have to delete them in the reverse order when you create them to make sure the entry is not in use when you try to delete it.

This is the deletion order: Resource Attribute Map/Resources → Resource Attribute Values → Resource Attributes → Resource Types.

Chapter 42. Print (Receipt) Templates

The print templates follow W3C HTML standards (see http://w3schools.com/html/default.asp) and can make use of CSS and Angular JS to a certain extent.

The Receipt Template Editor can be found at: **Administration → Workstation → Print Templates**

The Editor can also be found on the default home page of the staff client.

Receipts come in various types: Bills, checkout, items, holds, transits and Payments.

42.1. Receipt Templates

This is a complete list of the receipts currently in use in Evergreen.

List of Receipts

Bills, Current	Listing of current bills on an account.
Bills, Historic	Listing of bills that have had payments made on them. This used on the Bill History Transaction screen.
Bills, Payment	Patron payment receipt
Checkin	List of items that have been entered in to the check-in screen.
Checkout	List of items currently checked out by a patron during the transaction.
Hold Transit Slip	This is printed when a hold goes in-transit to another library.
Hold Shelf Slip	This prints when a hold is fulfilled.
Holds for Bib Record	Prints a list of holds on a Title record.
Holds for Patron	Prints a list of holds on a patron record.
Hold Pull List	Prints the Holds Pull List.
Hold Shelf List	Prints a list of hold that are waiting to be picked up.
In-House Use List	Prints a list of items imputed into In-house use.
Item Status	Prints a list of items imputed into Item Status.

Items Out	Prints the list of items a patron has checked out.
Patron Address	Prints the current patrons address.
Patron Note	Prints a note on a patron's record.
Renew	List of items that have been renewed using the Renew Item Screen.
Transit List	Prints the list of items in-transit from the Transit List.
Transit Slip	This is printed when an items goes in-transit to another location.

42.2. Editing Receipts

To edit a Receipt:

1. Select **Administration** → **Workstation** → **Print Templates**.
2. Choose the Receipt in the drop down list.
3. If you are using Hatch, you can choose different printers for different types of receipts with the Force Content field. If not, leave that field blank. Printer Settings can be set at **Administration** → **Workstation** → **Printer Settings**.

4. Make edits to the Receipt on the right hand side.

5. Click out of the section you are editing to see what your changes will look right on the Left hand side.

6. Click **Save Locally** in the Upper right hand corner.

42.2.1. Formatting Receipts

Print templates use variables for various pieces of information coming from the Evergreen database. These variables deal with everything from the library name to the due date of an item. Information from the database is entered in the templates with curly brackets {{term}}.

Example: {{checkout.title}}

Some print templates have sections that are repeated for each item in a list. For example, the portion of the Checkout print template below repeats every item that is checked out in HTML list format by means of the *ng-repeat* in the li tag.

```
<ol>
<li ng-repeat="checkout in circulations">
<b>{{checkout.title}}</b><br/>
Barcode: {{checkout.copy.barcode}}<br/>
Due: {{checkout.circ.due_date | date:"short"}}<br/>
</li>
</ol>
```

42.2.2. Text Formatting

General text formatting

Goal	Original	Code	Result

Bold (HTML)	hello	hello	**hello**
Bold (CSS)	hello	hello	**hello**
Capitalize	circulation	circulation	Circulation
Currency	1	{{1	currency}}	$1.00

42.2.3. Date Formatting

If you do not format dates, they will appear in a system format which isn't easily readable.

Code	Result
{{today}}	2017-08-01T14:18:51.445Z
{{today	date:'short'}}	8/1/17 10:18 AM
{{today	date:'M/d/yyyy'}}	8/1/2017

42.2.4. Currency Formatting

Add " | currency" after any dollar amount that you wish to display as currency.

Example: `{{xact.summary.balance_owed | currency}}` prints as `$2.50`

42.2.5. Conditional Formatting

You can use Angular JS to only print a line if the data matches. For example:

`<div ng-if="hold.email_notify == 't'">Notify by email: {{patron.email}}</div>`

This will only print the "Notify by email:" line if email notification is enabled for that hold.

Example for checkout print template that will only print the amount a patron owes if there is a balance:

`<span ng-if="patron_money.balance_owed">You owe the library ${{patron_money.balance_owed}}</span>`

See also: https://docs.angularjs.org/api/ng/directive/ngIf

42.2.6. Substrings

To print just a sub-string of a variable, you can use a **limitTo** function. `{{variable | limitTo:limit:begin}}` where **limit** is the number of characters you are wanting, and **begin** (optional) is where you want to start printing those characters. To limit the variable to the first four characters, you can use `{{variable | limitTo:4}}` to get "vari". To limit to the last five characters you can use `{{variable | limitTo:-5}}` to get "iable". And `{{variable | limitTo:3:3}}` will produce

"ria".

Original	Code	Result
The Sisterhood of the Traveling Pants	{{checkout.title | limitTo:10}}	The Sisterhood of th
123456789	{{patron.card.barcode | limitTo:-5}}	56789
Roberts	{{patron.family_name | limitTo:3:3}}	ber

42.2.7. Images

You can use HTML and CSS to add an image to your print template if you have the image uploaded onto a publicly available web server. (It will currently only work with images on a secure (https) site.) For example:

```
<img    src="https://evergreen-ils.org/wp-content/uploads/2013/09/copy-Evergreen_Logo_sm072.jpg"
style="width:150px;padding:5px;">
```

42.2.8. Sort Order

You can sort the items in an ng-repeat block using orderBy. For example, the following will sort a list of holds by the shelving location first, then by the call number:

```
<tr ng-repeat="hold_data in holds | orderBy : ['copy.location.name','volume.label']">
```

42.2.9. Subtotals

You can use Angular JS to add information from each iteration of a loop together to create a subtotal. This involves setting an initial variable before the ng-repeat loop begins, adding an amount to that variable from within each loop, and then displaying the final amount at the end.

```
<div>You checked out the following items:</div>
<br/>
<div ng-init="transactions.subtotal=0">              <!-- <1> -->
<ol>
<div ng-repeat="checkout in circulations">
  <li ng-init="transactions.subtotal=transactions.subtotal -- checkout.copy.price">
<!-- <2> -->
    <b>{{checkout.title}}</b><br/>
    Barcode: {{checkout.copy.barcode}}<br/>
    Due: {{checkout.circ.due_date | date:"M/d/yyyy"}}
  </li>
</div>
</ol>
<div style="font-weight:bold;">Total Amount Owed: {{patron_money.balance_owed |
currency}}</div>
<div style="font-weight:bold;border:1px dotted black; padding:5px;text-align:center;">
You Saved<br/>
{{transactions.subtotal | currency}}<br/>              <!-- <3> -->
by borrowing from the library!</div>
```

① This line sets the variable.

② This adds the list item's price to the variable.

③ This prints the total of the variable.

42.3. Exporting and importing Customized Receipts

Once you have your receipts set up on one machine you can export your receipts, and then load them on to another machine. Just remember to **Save Locally** once you import the receipts on the new machine.

42.3.1. Exporting templates

As you can only save a template on to the computer you are working on you will need to export the template if you have more than one computer that prints out receipts (i.e., more than one computer on the circulation desk, or another computer in the workroom that you use to checkin items or capture holds with)

1. Export.

2. Select the location to save the template to, name the template, and click **Save**.

3. Click OK.

42.3.2. Importing Templates

1. Click Import.

2. Navigate to and select the template that you want to import. Click Open.

3. Click OK.

4. Click **Save Locally**.

5. Click OK.

WARNING	Clearing your browser's cache/temporary files will clear any print template customizations that you make unless you are using Hatch to store your customizations. Be sure to export a copy of your customizations as a backup so that you can import it as needed.

TIP	If you are modifying your templates and you do not see the updates appear on your printed receipt, you may need to go into **Administration** → **Workstation** → **Stored Preferences** and delete the stored preferences related to the print template that you modified (for example, eg.print.template_context.bills_current).

Chapter 43. Self checkout

43.1. 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.

43.2. 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.
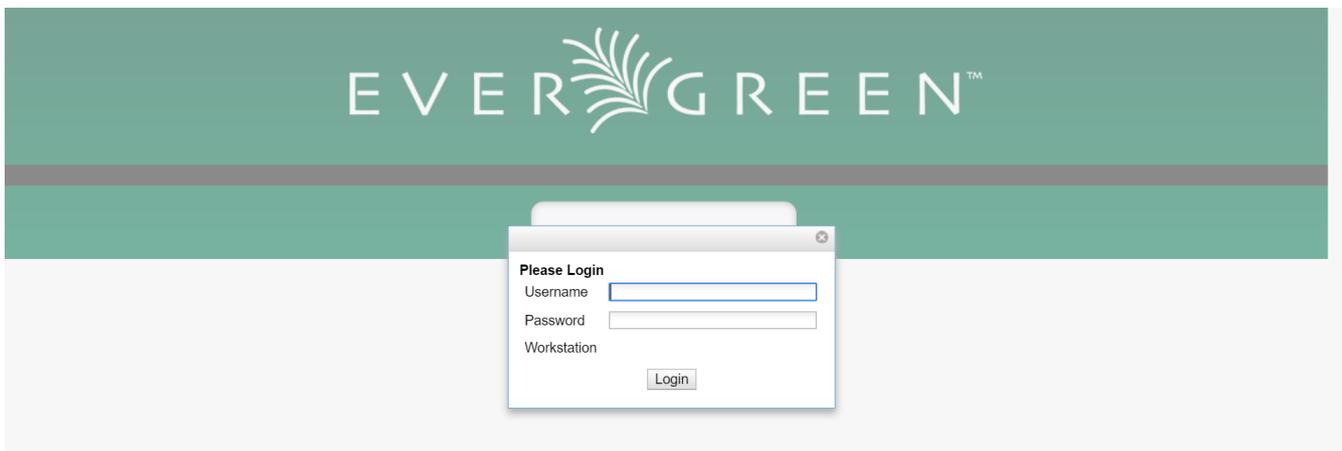
43.2.1. Setting library hours of operation

When the self check prints a receipt, the default template includes the library's hours of operation in the receipt. If the library has no configured hours of operation, the attempt to print a receipt fails and the browser hangs.

43.2.2. Configuring self check behavior

Several library settings control the behavior of the self check:

- **Block copy checkout status**: Prevent the staff user's permission override from enabling patrons to check out items that they would not normally be able to check out, such as the "On reservation shelf" status. The status IDs are found in the `config.copy_status` database table.

- **Patron Login Timeout**: Automatically logs the patron out of the self check after a certain period of inactivity. **NOT CURRENTLY SUPPORTED**

- **Pop-up alert for errors**: In addition to displaying an alert message on the screen, this setting raises patron awareness of possible problems by raising an alert box that the patron must

dismiss before they can check out another item.

- **Require Patron Password**: By default, users can enter either their user name or barcode, without having to enter their password, to access their account. This setting requires patrons to enter their password for additional security.

- **Workstation Required**: If set, the URL must either include a `?ws=[workstation]` parameter, where *[workstation]* is the name of a registered Evergreen workstation, or the staff member must register a new workstation when they login. The workstation parameter ensures that check outs are recorded as occurring at the correct library.

43.3. Using the self check

See the circulation manual for documentation about using the self check interface.

Search Settings

Chapter 44. Adjusting Relevance Ranking and Indexing

44.1. Metabib Class FTS Config Maps

NOTE | These settings will apply to all libraries in your consortium. There is no way to apply these settings to only one library or branch.

- *Field Class* - Reference to a field defined in Administration > Server Administration > MARC Search/Facet Classes.

- *Text Search Config* - Which Text Search config to use

- *Active* - Check this checkbox to use this configuration for searching and indexing.

- *Index Weight* - The FTS index weight to use for this FTS config. Should be A, B, C, or D, defaults to C. You can see the exact numeric values for A, B, C, and D in Administration > Server Administration > MARC Search/Facet Classes.

- *Index Language* - An optional 3-letter code representing the language the record should be set to in order for this FTS config to be used for indexing. should be set to in order for this FTS config to be used for indexing

- *Search Language* - An optional 3-letter code representing what preferred language search should be selected by the end-user in order for this FTS config to be applied to their search.

- *Always Use* - Check this checkbox to override the configuration for a more specific field. For example, if you check this box when entering a setting for the *author* metabib class, it will override any settings you have made for the *author|personal* field in the Administration > Server Administration > Metabib Field FTS Config Maps screen.

44.2. Metabib Field FTS Config Maps

NOTE | These settings will apply to all libraries in your consortium. There is no way to apply these settings to only one library or branch.

- *Metabib Field* - Reference to a field defined in Administration > Server Administration > MARC Search/Facet Fields.

- *Text Search Config* - Which Text Search config to use

- *Active* - Check this checkbox to use this configuration for searching and indexing.

- *Index Weight* - The FTS index weight to use for this FTS config. Should be A, B, C, or D, defaults to C. You can see the exact numeric values for A, B, C, and D in Administration > Server Administration > MARC Search/Facet Classes.

- *Index Language* - An optional 3-letter code representing the language the record should be set to in order for this FTS config to be used for indexing. should be set to in order for this FTS config to be used for indexing

- *Search Language* - An optional 3-letter code representing what preferred language search

should be selected by the end-user in order for this FTS config to be applied to their search.

Chapter 45. Statistical Popularity Badges

Statistical Popularity Badges allow libraries to set popularity parameters that define popularity badges, which bibliographic records can earn if they meet the set criteria. Popularity badges can be based on factors such as circulation and hold activity, bibliographic record age, or material type. The popularity badges that a record earns are used to adjust catalog search results to display more popular titles (as defined by the badges) first. Within the OPAC there are two new sort options called "Most Popular" and "Popularity Adjusted Relevance" which will allow users to sort records based on the popularity assigned by the popularity badges.

45.1. Popularity Rating and Calculation

Popularity badge parameters define the criteria a bibliographic record must meet to earn the badge, as well as which bibliographic records are eligible to earn the badge. For example, the popularity parameter "Circulations Over Time" can be configured to create a badge that is applied to bibliographic records for DVDs. The badge can be configured to look at circulations within the last 2 years, but assign more weight or popularity to circulations from the last 6 months.

Multiple popularity badges may be applied to a bibliographic record. For each applicable popularity badge, the record will be rated on a scale of 1-5, where a 5 indicates the most popular. Evergreen will then assign an overall popularity rating to each bibliographic record by averaging all of the popularity badge points earned by the record. The popularity rating is stored with the record and will be used to rank the record within search results when the popularity badge is within the scope of the search. The popularity badges are recalculated on a regular and configurable basis by a cron job. Popularity badges can also be recalculated by an administrator directly on the server.

45.2. Creating Popularity Badges

There are two main types of popularity badges: point-in-time popularity (PIT), which looks at the popularity of a record at a specific point in time—such as the number of current circulations or the number of open hold requests; and temporal popularity (TP), which looks at the popularity of a record over a period of time—such as the number of circulations in the past year or the number of hold requests placed in the last six months.

The following popularity badge parameters are available for configuration:

- Holds Filled Over Time (TP)

- Holds Requested Over Time (TP)

- Current Hold Count (PIT)

- Circulations Over Time (TP)

- Current Circulation Count (PIT)

- Out/Total Ratio (PIT)

- Holds/Total Ratio (PIT)

- Holds/Holdable Ratio (PIT)

- Percent of Time Circulating (Takes into account all circulations, not specific period of time)

- Bibliographic Record Age (days, newer is better) (TP)

- Publication Age (days, newer is better) (TP)

- On-line Bib has attributes (PIT)

- Bib has attributes and copies (PIT)

- Bib has attributes and copies or URIs (PIT)

- Bib has attributes (PIT)

To create a new Statistical Popularity Badge:

1. Go to **Administration**→**Local Administration**→**Statistical Popularity Badges**.

2. Click on **Actions**→**Add badge**.

3. Fill out the following fields as needed to create the badge:

NOTE	only Name, Scope, Weight, Recalculation Interval, Importance Interval, and Discard Value Count are required

   ◦ **Name:** Library assigned name for badge. Each name must be unique. The name will show up in the OPAC record display. For example: Most Requested Holds for Books-Last 6 Months. Required field.

   ◦ **Description**: Further information to provide context to staff about the badge.

   ◦ **Scope:** Defines the owning organization unit of the badge. Badges will be applied to search result sorting when the Scope is equal to, or an ancestor, of the search location. For example, a branch specific search will include badges where the Scope is the branch, the system, and the consortium. A consortium level search, will include only badges where the Scope is set to the consortium. Item specific badges will apply only to records that have items owned at or below the Scope. Required field.

   ◦ **Weight:** Can be used to indicate that a particular badge is more important than the other badges that the record might earn. The weight value serves as a multiplier of the badge rating. Required field with a default value of 1.

   ◦ **Age Horizon:** Indicates the time frame during which events should be included for calculating the badge. For example, a popularity badge for Most Circulated Items in the Past Two Years would have an Age Horizon of *2 years*. The Age Horizon should be entered as a number followed by *day(s), month(s), year(s),* such as *6 months* or *2 years*. Use with temporal popularity (TP) badges only.

   ◦ **Importance Horizon:** Used in conjunction with Age Horizon, this allows more recent events to be considered more important than older events. A value of zero means that all events included by the Age Horizon will be considered of equal importance. With an Age Horizon of 2 years, an Importance Horizon of *6 months* means that events, such as checkouts, that occurred within the past 6 months will be considered more important than the circulations that occurred earlier within the Age Horizon.

   ◦ **Importance Interval:** Can be used to further divide up the timeframe defined by the Importance Horizon. For example, if the Importance Interval is *1 month, Evergreen will*

combine all of the events within that month for adjustment by the Importance Scale (see below). The Importance Interval should be entered as a number followed by 'day(s), week(s), month(s), year(s), such as *6 months* or *2 years.* Required field.

◦ **Importance Scale:** The Importance Scale can be used to assign additional importance to events that occurred within the most recent Importance Interval. For example, if the Importance Horizon is *6 months* and the Importance Interval is *1 month,* the Importance Scale can be set to *6* to indicate that events that happened within the last month will count 6 times, events that happened 2 months ago will count 5 times, etc. The Importance Scale should be entered as a number followed by *day(s), week(s), month(s), year(s),* such as *6 months* or *2 years.*

◦ **Percentile:** Can be used to assign a badge to only the records that score above a certain percentile. For example, it can be used indicate that you only want to assign the badge to records in the top 5% of results by setting the field to *95.* To optimize the popularity badges, percentile should be set between 95-99 to assign a badge to the top 5%-1% of records.

◦ **Attribute Filter:** Can be used to assign a badge to records that contain a specific Record Attribute. Currently this field can be configured by running a report (see note below) to obtain the JSON data that identifies the Record Attribute. The JSON data from the report output can be copied and pasted into this field. A new interface for creating Composite Record Attributes will be implemented with future development of the web client.

   ▪ To run a report to obtain JSON data for the Attribute Filter, use SVF Record Attribute Coded Value Map as the template Source. For Displayed Fields, add Code, ID, and/or Description from the Source; also display the Definition field from the Composite Definition linked table. This field will display the JSON data in the report output. Filter on the Definition from the Composite Definition liked table and set the Operator to *Is not NULL.*

◦ **Circ Mod Filter:** Apply the badge only to items with a specific circulation modifier. Applies only to item related badges as opposed to "bib record age" badges, for example.

◦ **Bib Source Filter:** Apply the badge only to bibliographic records with a specific source.

◦ **Location Group Filter:** Apply the badge only to items that are part of the specified Shelving Location Group. Applies only to item related badges.

◦ **Recalculation Interval:** Indicates how often the popularity value of the badge should be recalculated for bibliographic records that have earned the badge. Recalculation is controlled by a cron job. Required field with a default value of 1 month.

◦ **Fixed Rating:** Can be used to set a fixed popularity value for all records that earn the badge. For example, the Fixed Rating can be set to 5 to indicate that records earning the badge should always be considered extremely popular.

◦ **Discard Value Count:** Can be used to prevent certain records from earning the badge to make Percentile more accurate by discarding titles that are below the value indicated. For example, if the badge looks at the circulation count over the past 6 months, Discard Value Count can be used to eliminate records that had too few circulations to be considered "popular". If you want to discard records that only had 1-3 circulations over the past 6 months, the Discard Value Count can be set to *3.* Required field with a default value of 0.

◦ **Last Refresh Time:** Displays the last time the badge was recalculated based on the

Recalculation Interval.

- ◦ **Popularity Parameter:** Types of TP and PIT factors described above that can be used to create badges to assign popularity to bibliographic records.

4. Click **OK** to save the badge.

45.3. New Global Flags

OPAC Default Sort: can be used to set a default sort option for the catalog. Users can always override the default by manually selecting a different sort option while searching.

Maximum Popularity Importance Multiplier: used with the Popularity Adjusted Relevance sort option in the OPAC. Provides a scaled adjustment to relevance score based on the popularity rating earned by bibliographic records. See below for more information on how this flag is used.

45.4. Sorting by Popularity in the OPAC

Within the stock OPAC template there is a new option for sorting search results called "Most Popular". Selecting "Most Popular" will first sort the search results based on the popularity rating determined by the popularity badges and will then apply the default "Sort by Relevance". This option will maximize the popularity badges and ensure that the most popular titles appear higher up in the search results.

There is a second new sort option called "Popularity Adjusted Relevance", which can be used to find a balance between popularity and relevance in search results. For example, it can help ensure that records that are popular, but not necessarily relevant to the search, do not supersede records that are both popular and relevant in the search results. It does this by sorting search results using an adjusted version of Relevance sorting. When sorting by relevance, each bibliographic record is assigned a baseline relevance score between 0 and 1, with 0 being not relevant to the search query and 1 being a perfect match. With "Popularity Adjusted Relevance" the baseline relevance is adjusted by a scaled version of the popularity rating assigned to the bibliographic record. The scaled adjustment is controlled by a Global Flag called "Maximum Popularity Importance Multiplier" (MPIM). The MPIM takes the average popularity rating of a bibliographic record (1-5) and creates a scaled adjustment that is applied to the baseline relevance for the record. The adjustment can be between 1.0 and the value set for the MPIM. For example, if the MPIM is set to 1.2, a record with an average popularity badge score of 5 (maximum popularity) would have its relevance multiplied by 1.2—in effect giving it the maximum increase of 20% in relevance. If a record has an average popularity badge score of 2.5, the baseline relevance of the record would be multiplied by 1.1 (due to the popularity score scaling the adjustment to half way between 1.0 and the MPIM of 1.2) and the record would receive a 10% increase in relevance. A record with a popularity badge score of 0 would be multiplied by 1.0 (due to the popularity score being 0) and would not receive a boost in relevance.

45.5. Popularity Badge Example

A popularity badge called "Long Term Holds Requested" has been created which has the following parameters:

Popularity Parameter: Holds Requested Over Time Scope: CONS Weight: 1 (default) Age Horizon: 5 years Percentile: 99 Recalculation Interval: 1 month (default) Discard Value Count: 0 (default)

This popularity badge will rate bibliographic records based on the number of holds that have been placed on it over the past 5 years and will only apply the badge to the top 1% of records (99th percentile).

If a keyword search for harry potter is conducted and the sort option "Most Popular" is selected, Evergreen will apply the popularity rankings earned from badges to the search results.

Title search: harry potter. Sort by: Most Popular.

The popularity badge also appears in the bibliographic record display in the catalog. The name of the badge earned by the record and the popularity rating are displayed in the Record Details.

A popularity badge of 5.0/5.0 has been applied to the most popular bibliographic records where the search term "harry potter" is found in the title. In the image above, the popularity badge has identified records from the Harry Potter series by J.K. Rowling as the most popular titles matching the search and has listed them first in the search results.

Current holds

4 current holds with 310 total copies.

Location	Call Number / Copy Notes	Barcode	Shelving Location	Age Hold Protection	Active/Create Date	Holdable?	Statu
Adams Free Library	J FIC Rowling (Text)	37431000796627 view | edit	Juvenile	None	02/08/2013	Copy hold / Volume hold	Avail
Adams Free Library	J FIC Rowling (Text)	37431000911754 view | edit	Juvenile	None	02/08/2013	Copy hold	Avail

Record details

- **ISBN:** 0590353403 (hardcover) :
- **ISBN:** 9780590353403 (hardcover)
- **Physical Description:** vi, 312 p. : ill. ; 24 cm.
- **Edition:** 1st American ed.
- **Publisher:** New York : A.A. Levine Books, 1998.
- **Badges:**
    - **Long term holds requested**: 5

Content descriptions

General Note:	"Year 1"--Spine. Sequel: Harry Potter and the Chamber of Secrets.
Summary, etc.:	Rescued from the outrageous neglect of his aunt and uncle, a young boy with a great destiny proves his worth while attending Hogwarts School for Witchcraft and Wizardry.

Chapter 46. Multilingual Search in Evergreen

It is now possible to search for items that contain multiple languages in the Evergreen catalog. This will help facilitate searching for bilingual and multilingual materials, including specific translations, alternative languages, and to exclude specific translations from a search.

To identify the language of materials, Evergreen looks at two different fields in the MARC bibliographic record:

- 008/35-37: the language code located in characters 35-37 of the 008 tag
- 041$abdefgm: the 041 tag, subfields $abdefgm, which contain additional language codes

Multilingual searches can be conducted by constructing searches using specific language codes as a filter. To search using specific language codes, use the Record Attribute Definition name *item_lang* followed by the appropriate MARC Code for Languages. For example, *item_lang(spa)* will search only for Spanish language materials.

The language filter can be appended to any search. For example, a title search for *pippi longstocking item_lang(eng,swe)* will search for English or Swedish language publications of the title.
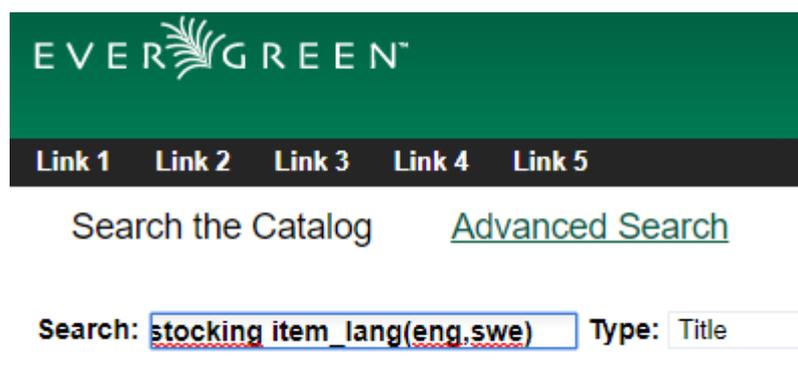
46.1. Search Syntax

To search for materials that contain multiple languages (Boolean AND), the search filters can be constructed in the following ways:

1. Implicit Boolean filtering: *item_lang(eng) item_lang(spa)*
   a. Evergreen assumes a Boolean AND between the search filters
2. Explicit Boolean filtering: *item_lang(eng) && item_lang(spa)*
   a. The double ampersands (&&) explicitly tell Evergreen to apply a Boolean AND to the search filters

To search for materials that contain at least one of the searched languages (Boolean OR), the search filters can be constructed in the following ways:

1. List filtering: *item_lang(eng,spa)*

    a. Listing the language codes, separated by a comma, within the search filter, tells Evergreen to apply a Boolean OR to the search filters

2. Explicit Boolean filtering: *item_lang(eng) || item_lang(spa)*

    a. The double pipes (||) explicitly tell Evergreen to apply a Boolean OR to the search filters

To search for materials that contain a specific language and exclude another language from the search results (Boolean NOT), the search filters can be constructed as follows:

1. Boolean filtering: *item_lang(spa) -item_lang(eng)*

    a. The dash (-) explicitly tells Evergreen to apply a Boolean NOT to the english language search filter. Evergreen assumes a Boolean AND between the search filters.

To exclude multiple languages from search results (Boolean NOT), the search filters can be constructed as follows:

1. Boolean filtering: *-item_lang(eng) -item_lang(spa)*

    a. The dash (-) explicitly tells Evergreen to apply a Boolean NOT to both search filters. Evergreen assumes a Boolean AND between the search filters.

To conduct a search for materials that do not contain at least of the of the languages searched (Boolean "NOT" and "OR"), the search filters can be constructed in the following ways:

1. List filtering: *-item_lang(eng,spa)*

    a. Explicit Boolean filtering: *-item_lang(eng) || -item_lang(spa)*

46.2. Advanced Search

Within the Advanced Search interface, multiple languages can be selected from the Language filter by holding down the Ctrl key on the keyboard and selecting the desired languages. This will apply a Boolean OR operator to the language filters.

46.3. Adding Subfields to the Index

Additional subfields for the 041 tag, such as h, j, k, and n, can be added to the index through the Record Attribute Definitions interface. Any records containing the additional subfields will need to be reingested into the database after making changes to the Record Attribute Definition.

1. Go to **Administration>Server Administration>Record Attribute Definitions**.

2. Click **Next** to locate the *item_lang* record attribute definition.

3. To edit the definition, double click on the item_lang row and the configuration window will appear.

4. In the *MARC Subfields* field, add the subfields you want included in the index.

5. Click **Save**.

Record Attribute Definitions

New Attr. Definition   Delete Selected

✓	#	Name	Label	Composite attribute?	Description	Filter?	Fixed Field	Format	Joiner	MARC Subfields	MARC Tag
☐	1	ff_sl	S/L	False							
☐	2	file	File	False							
☐	3	fmus	FMus	False							
☐	4	freq	Freq	False							
☐	5	gpub	GPub	False							
☐	6	icon_format	OPAC Format Icons	True							
☐	7	ills	Ills	True							
☐	8	ills1	Ills(1)	False							
☐	9	ills2	Ills(2)	False							
☐	10	ills3	Ills(3)	False							
☐	11	ills4	Ills(4)	False							
☐	12	indx	Indx	False							
☐	13	item_form	Form	False							
☐	14	item_lang	Lang	False						abdefgm	041
☐	15	item_type	Type	False							

Name	item_lang
Label	Lang
Composite attribute?	☐
Description	Language
Filter?	✓
Fixed Field	Lang
Format	▼
Joiner	
MARC Subfields	abdefgm
MARC Tag	041
Multi-valued?	✓
Physical Characteristic	
Sorter?	☐
Starting Position	
String Length	
Vocabulary URI	
XPath	

Cancel   Save

227

Chapter 47. Infrastructure Changes to Authority Browse

As part of a larger development and consulting project to improve how authority records are used in public catalog browse, improvements have been made to how authority records are indexed in Evergreen. This will not result in any direct changes to the public catalog, but will create infrastructure for improvements to the browse list. Specifically, a configuration table will be used to specify how browse entries from authority records should be generated. This new tables will supplement the existing authority control set configuration tables but will not replace them.

47.1. Backend functionality

The new configuration table, authority.heading_field, specifies how headings can be extracted from MARC21 authority records. The general mechanism is similar to how config.metabib_field specifies how bibliographic records should be indexed: the XML representation of the MARC21 authority record is first passed through a stylesheet specified by the authority.heading_field definition, then XPath expressions are used to extract the heading for generating browse entries for the authority.simple_heading and metabib.browse_entry tables.

The initial set of definitions supplied for authority.heading_field use the MARCXML to MADS 2.1 stylesheet; this helps ensure that heading strings extracted from authority records will match headings extracted from bibliographic records using the MODS stylesheet.

47.2. Staff User Interface

An interface for configuring authority headings is available in Server Administration in the web-based staff client, under the name "Authority Headings Fields".

When navigated to, the interface looks like this:

Individual heading field definitions can be edited like this:

Authority Heading Fields

1

Heading Type	topical_term
Heading Purpose	main
Heading Field Label	Main Topical Term
Heading XSLT Format	mads21
Heading XPath	/mads21:mads/mads21
Heading Component XPath	//mads21:topic
Related/Variant Type XPath	
Thesaurus XPath	/mads21:mads/mads21
Thesaurus Override XPath	
Joiner string	

Save **Cancel**

The available fields are:

- Heading type: this can be personal_name, corporate_name, meeting_name, uniform_title, named_event, chronology_term, topical_term, geographic_name, genre_form_term, or medium_of_performance_term.

- Heading purpose: this can be main, related, or variant, corresponding to authority record 1XX, 5XX, or 4XX fields respectively.

- Heading field label: Label for use by administrators

- Heading XSLT Format: This core

- Heading XPath: Main XPath expression for selecting a part of the authority record to extract a heading from.

- Heading Component XPath: XPath express for selecting parts of a heading string from the elements selected by Heading XPath.

- Related/Variant Type XPath: Expression used, for variant and related headings, for identifying the specific purpose of the heading (e.g., broader term, narrower term, etc.).

- Thesaurus XPath: Expression used for extracting the thesaurus that controls the heading

- Thesaurus Override XPath: Expression used for identifying the thesaurus that controls a related heading.

- Joiner string: String used to stitch together components of the heading into a single display string. If not set, " — " is used.

It should be noted that unless one has non-standard authority records, it is recommended that changes to the authority heading field definitions be minimized.

Chapter 48. Virtual Index Definitions

Virtual index definitions can be configured in Evergreen to create customized search indexes that make use of data collected by other (real) index definitions. Real index definitions use an XPath expression to indicate the bibliographic data that should be included in the index. Virtual index definitions bring together data collected by other index definitions to create a new, virtual index. They can also use an XPath expression to collect data directly for an index, but they are not required to.

All index definitions can be modified by having other indexes map to them. For example, Genre could be added to the All Subjects field definition in the Subject index. This would allow users to search Genre as part of a Subject search.

48.1. Keyword Virtual Index Definition

Evergreen now uses a virtual index definition for the Keyword index. This allows libraries to customize the keyword search index by specifying which fields are included in the keyword index, as well as how each field should be weighted for relevance ranking in search results. By default, the keyword index contains all of the search fields other than the keyword definition itself. Each field is assigned a weight of 1, with the exception of Title Proper, which is assigned a weight of 8. A match on the Title Proper within a keyword search will be given the higher weight and therefore a higher relevance ranking within search results.

1. To view the stock virtual index definition for keyword searches, go to **Administration>Server Administration>MARC Search/Facet Fields** and select the **Keyword** Search Class.

2. Locate the field labeled "All searchable fields". This is the general keyword index.

3. The weight of a field can be modified by selecting the field and going to **Actions>Edit Record** or right-clicking and selecting **Edit Record**.

    a. The Metabib Field Virtual Map modal will appear. Increase the weight of the field and click **Save**.

48.2. Configuring Virtual Index Definitions

1. To configure a virtual index definition, go to **Administration>Server Administration>MARC Search/Facet Fields**.

    a. This interface now has a *Search Class* filter that allows users to easily select which search class they want to view.

2. Next, locate the field for which you want to create a virtual index definition and click **Manage** under the column labeled *Data Suppliers.*

1. A new tab will open that contains the interface for configuring a virtual index definition. This interface can be used to map real index definitions for inclusion in the virtual index.

1. To create a mapping, click **New Record**. A modal called *Metabib Field Virtual Map* will appear.

2. Select the *Real* index definition and the *Virtual* index definition to which it should be mapped.

3. Assign a *Weight* to the mapping. This allows Evergreen to calculate the weight that should be applied to each field when searched using the virtual index.

    a. The weight assigned to a field within a virtual index can be different than the weight assigned when searching that field directly. For example, the Title Proper field can have a weight of 2 when a user performs a Title search, but a weight of 5 when a user performs a Keyword search (using the virtual index). This can help move title matches on keyword searches higher up in the search results list.

4. Click **Save**.

5. Repeat steps 4-7 until all desired fields are mapped to the virtual index definition.
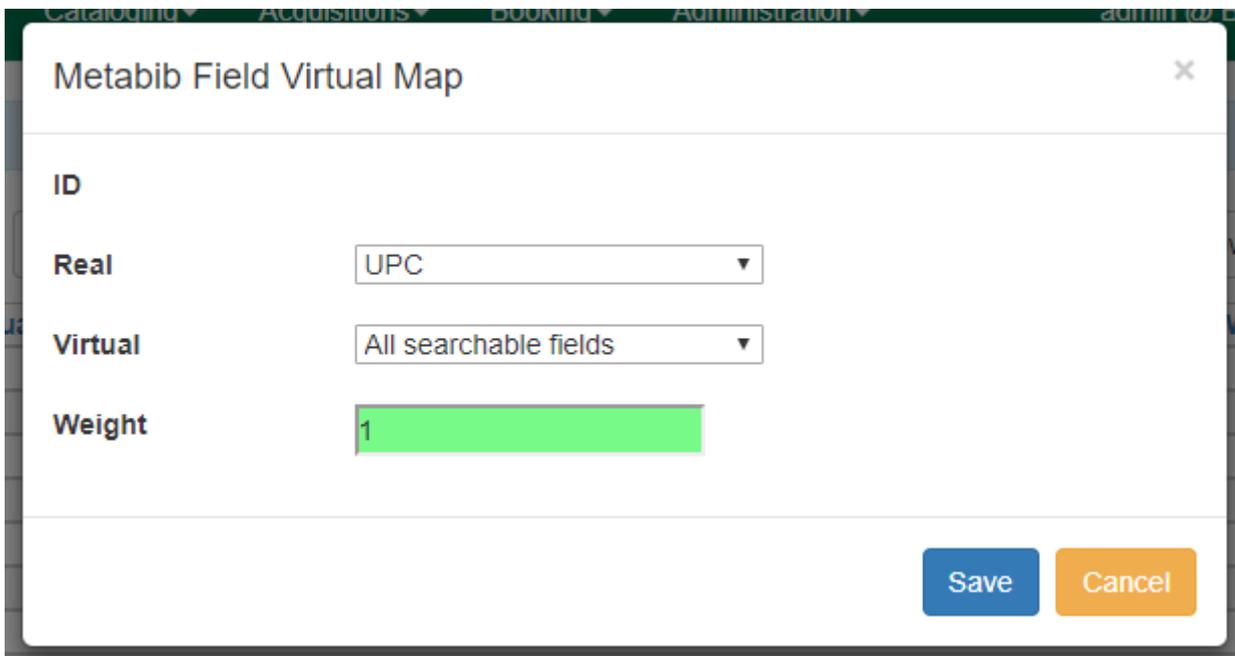
Note: A service restart is required after definitions and mapping are changed. Changes to weight only do not require a restart as they are calculated in real time.

48.3. Search Term Highlighting in Search Results

Search terms are now highlighted on the main OPAC search results page, the bibliographic record detail page, and the metarecord grouped results page. This will help users discern why a certain record was included in the search result set, as well as its relevance to the search. Search terms will be highlighted in both real and virtual fields that were searched. Terms that were stemmed or normalized during searching will also be highlighted. Search term highlighting can be turned off within the OPAC by selecting the checkbox to "Disable Highlighting" in the search results interface.

A keyword search for "piano" returns a set of search results:

The search term is highlighted in the search results and indicates why the records were included in

the search result set. In this example, the search results interface shows the first three records had matching terms in the title field.

Within the record detail page for "The five piano concertos", we can see the search term also matched on the General Note and Subject fields within the bibliographic record.

Patron User Experience Administration

Chapter 49. Introduction

This section describes settings for the OPAC, including patron self-registration and other functionalities.

Chapter 50. SMS Text Messaging

The SMS Text Messaging feature enables users to receive hold notices via text message. Users can opt-in to this hold notification as their default setting for all holds, or they can receive specific hold notifications via text message. Users can also send call numbers and item locations via text message.

50.1. Administrative Setup

You cannot receive text messages from Evergreen by default. You must enable this feature to receive hold notices and item information from Evergreen via text message.

50.1.1. Enable Text Messages

1. Click **Administration → Local Administration → Library Settings Editor.**

2. Select the setting, **Enable features that send SMS text messages.**

3. Set the value to **True,** and click **Update Setting.**

50.1.2. Authenticate Patrons

By default, you must be logged into your OPAC account to send a text message from Evergreen. However, if you turn on this setting, you can text message copy information without having to login to your OPAC account.

To disable the patron login requirement:

1. Click **Administration → Local Administration → Library Settings Editor.**

2. Select the setting, **Disable auth requirement for texting call numbers**.

3. Set the value to **True,** and click **Update Setting.**

50.1.3. Configure SMS Carriers

A list of SMS carriers that can transmit text messages to users is available in the staff client. Library staff can edit this list, or add new carriers.

To add or edit SMS carriers:

1. Click **Administration** → **Server Administration** → **SMS Carriers**.

2. To add a new carrier, click the **New Carrier** button in the top right corner of the screen. To edit an existing carrier, double click in any white space in the carrier's row.

3. Enter a (geographical) **Region**.

4. Enter the carrier's **Name**.

5. Enter an **Email Gateway.** The SMS carrier can provide you with the content for this field. The $number field is converted to the user's phone number when the text message is generated.

6. Check the **Active** box to use this SMS Carrier.

50.1.4. Configure Text Message Templates

Library staff control the content and format of text messages through the templates in Notifications/Action Triggers. Patrons cannot add free text to their text messages.

To configure the text of the SMS text message:

1. Click **Administration** → **Local Administration** → **Notifications/Action Triggers.**

2. Create a new A/T and template, or use or modify an existing template. For example, a default template, "Hold Ready for Pickup SMS Notification," notifies users that the hold is ready for pickup.

3. You can use the default template, or you can edit the template and add content specific to your library. Click the hyperlinked name to edit the Event Environment and Event Parameters. Or double-click the row to edit the hold notice.

```
Event Definitions   Hooks   Reactors   Validators

Trigger Event Definitions                                              N

   Opt-in User Field          [                              ]
   Retention Interval         [                              ]
   Success Cleanup            [ CreateHoldNotification  ▼ ]

                              [%- USE date -%]
                              [%- user = target.0.usr -%]
                              From: [%- params.sender_email || default_sender %]
                              Date: [%- date.format(date.now, '%a, %d %b %Y %T -0000', gmt => 1) %]
                              To: [%- params.recipient_email ||
                              helpers.get_sms_gateway_email(target.0.sms_carrier,target.0.sms_notify) %]
                              Subject: [% target.size %] hold(s) ready
                              Auto-Submitted: auto-generated

                              [% FOR hold IN target %][%-
                                bibxml = helpers.xml_doc( hold.current_copy.call_number.record.marc );
                                title = "";
                                FOR part IN bibxml.findnodes('//*[@tag="245"]/*[@code="a"]');
                                  title = title _ part.textContent;
                                END;
                                author = bibxml.findnodes('//*[@tag="100"]/*[@code="a"]').textContent;
                              %][% hold.usr.first_given_name %]:[% title %] @ [% hold.pickup_lib.name %]
                              [% END %]

   Template
```

50.2. Receiving Holds Notices via Text Message

You can receive notification that your hold is ready for pickup from a text message that is sent to your mobile phone.

1. Login to your account.

2. Search the catalog.

3. Retrieve a record, and click the **Place Hold** link.

4. Select the option to retrieve hold notification via text message.

5. Choose an SMS Carrier from the drop down menu. NOTE: You can enter your SMS carrier and phone number into your **Account Preferences** to skip steps five and six.

6. Enter a phone number.

7. Click **Submit.**

50.3. Sending Copy Details via Text Message

You can search the catalog for an item, and, after retrieving results for the item, click a hyperlink to send the copy information in a text message.

1. Login to your account in the OPAC. NOTE: If you have disabled the setting that requires patron login, then you do not have to login to their accounts to send text messages. See Administrative Setup for more information.

2. Search the catalog, and retrieve a title with copies.

3. Click the **Text** link next to the call number.

Available copies

- 26 copies at Example Consortium.

Current holds

1 current hold with 31 total copies.

Location	Call Number / Copy Notes	Barcode
Example Branch 1	780 B92 (Text)	CONC40000628
Example Branch 1	780 B92 (Text)	CONC41000628
Example Branch 1	ML 2533 B34 C92 (Text)	CONC40000128
Example Branch 1	ML 2533 B34 C92 (Text)	CONC41000128
Example Branch 1	ML 2533 B34 C92 (Text)	CONC42000128
Example Branch 1	ML 2533 B34 C92 (Text)	CONC43000128

4. The text of the SMS Text Message appears.

Text call number

Return to record

From: evergreen@localhost
To:
Subject: Call Number

Call Number: 780 B92
Location: Stacks
Library: Example Branch 1
Title: Violin concerto
Author: Penderecki, Krzysztof,

Mobile carrier: Alaska Communications (USA)
Mobile number: [   ] Hint: use the full 10 digits of your phone #, no spaces, no dashes

Submit

Note: carrier charges may apply

5. Choose an SMS Carrier from the drop down menu. NOTE: You can enter your SMS carrier and phone number into your **Account Preferences** to skip steps five and six.

6. Enter a phone number.

7. Click **Submit**. NOTE: Message and data rates may apply.

8. The number and carrier are converted to an email address, and the text message is sent to your mobile phone. The following confirmation message will appear.

Your message has been sent!

Return to record

From: evergreen@localhost
To: 3525555555@msg.acsalaska.com
Subject: Call Number

Call Number: 780 B92
Location: Stacks
Library: Example Branch 1
Title: Violin concerto
Author: Penderecki, Krzysztof,

Permissions to use this Feature

ADMIN_SMS_CARRIER - Enables users to add/create/delete SMS Carrier entries.

Chapter 51. Library Information Pages

The branch name displayed in the copy details section of the search results page, the record summary page, and the kids catalog record summary page will link to a library information page. This page is located at `http://hostname/eg/opac/library/<SHORTNAME>` and at `http://hostname/eg/opac/library/<ID>`.

Evergreen automatically generates this page based on information entered in **Administration → Server Administration → Organizational Units** (actor.org_unit).

The library information page displays:

- The name of the library
- Opening hours
- E-mail address
- Phone number
- Mailing address
- The branch's parent library system

An Evergreen site can also display a link to the library's web site on the information page.

To display a link:

1. Go to **Administration → Local Administration → Library Settings Editor**.
2. Edit the **Library Information URL** setting for the branch.

NOTE	If you set the URL at the system level, that URL will be used as the link for the system and for all child branches that do not have its own URL set.

3. Enter the URL in the following format: http://example.com/about.html.

An Evergreen site may also opt to link directly from the copy details section of the catalog to the library web site, bypassing the automatically-generated library information page. To do so:

1. Add the library's URL to the **Library Information URL** setting as described above.
2. Go to **Administration → Local Administration → Library Settings Editor**.
3. Set the **Use external "library information URL" in copy table, if available** setting to true.

The library information pages publish schema.org structured data, as do parts of the OPAC bibliographic record views, which can enable search engines and other systems to better understand your libraries and their resources.

Reports

Chapter 52. Introduction

Learn how to create and use reports in Evergreen.

Chapter 53. Folders

There are three main components to reports: *Templates*, *Reports*, and *Output*. Each of these components must be stored in a folder. Folders can be private (accessible to your login only) or shared with other staff at your library, other libraries in your system or consortium. It is also possible to selectively share only certain folders and/or subfolders.

There are two parts to the folders pane. The *My Folders* section contains folders created with your Evergreen account. Folders that other users have shared with you appear in the *Shared Folders* section under the username of the sharing account.
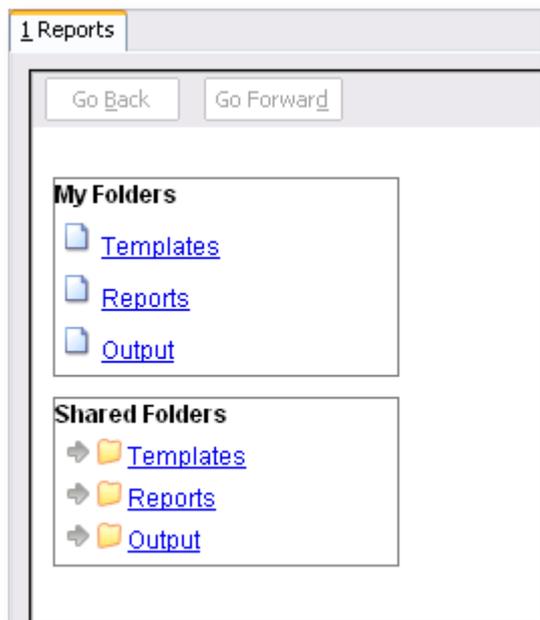
53.1. Creating Folders

Whether you are creating a report from scratch or working from a shared template you must first create at least one folder.

The steps for creating folders are similar for each reporting function. It is easier to create folders for templates, reports, and output all at once at the beginning, though it is possible to do it before each step. This example demonstrates creating a folder for a template.

1. Click on *Templates* in the *My Folders* section.

2. Name the folder. Select *Share* or *Do not share* from the dropdown menu.

3. If you want to share your folder, select who you want to share this folder with from the dropdown menu.

4. Click *Create Sub Folder*.

5. Click *OK*.

6. Next, create a folder for the report definition to be saved to. Click on *Reports*.

7. Repeat steps 2-5 to create a Reports folder also called *Circulation*.

8. Finally, you need to create a folder for the report's output to be saved in. Click on *Output*.

9. Repeat steps 2-5 to create an Output folder named *Circulation*.

TIP	Using a parallel naming scheme for folders in Templates, Reports, and Output helps keep your reports organized and easier to find

The folders you just created will now be visible by clicking the arrows in *My Folders*. Bracketed after the folder name is whom the folder is shared with. For example, *Circulation (BNCLF)* is shared with the North Coast Library Federation. If it is not a shared folder there will be nothing after the folder name. You may create as many folders and sub-folders as you like.

53.2. Managing Folders

Once a folder has been created you can change the name, delete it, create a new subfolder, or change the sharing settings. This example demonstrates changing a folder name; the other choices follow similar steps

1. Click on the folder that you wish to rename.

2. Click *Manage Folder*.

3. Select *Change folder name* from the dropdown menu and click *Go*.

4. Enter the new name and click *Submit*.

5. Click *OK*.

6. You will get a confirmation box that the *Action Succeeded*. Click *OK*.

Chapter 54. Creating Templates

Once you have created a folder, the next step in building a report is to create or clone a template. Templates allow you to run a report more than once without building it anew every time, by changing definitions to suit current requirements. For example, you can create a shared template that reports on circulation at a given library. Then, other libraries can use your template and simply select their own library when they run the report.

It may take several tries to refine a report to give the output that you want. It can be useful to plan out your report on paper before getting started with the reporting tool. Group together related fields and try to identify the key fields that will help you select the correct source.

It may be useful to create complex queries in several steps. For example, first add all fields from the table at the highest source level. Run a report and check to see that you get results that seem reasonable. Then clone the report, add any filters on fields at that level and run another report. Then drill down to the next table and add any required fields. Run another report. Add any filters at that level. Run another report. Continue until you've drilled down to all the fields you need and added all the filters. This might seem time consuming and you will end up cloning your initial report several times. However, it will help you to check the correctness of your results, and will help to debug if you run into problems because you will know exactly what changes caused the problem. Also consider adding extra fields in the intermediate steps to help you check your results for correctness.

This example illustrates creating a template for circulation statistics. This is an example of the most basic template that you can create. The steps required to create a template are the same every time, but the tables chosen, how the data is transformed and displayed, and the filters used will vary depending on your needs.

54.1. Choosing Report Fields

1. Click on the My Folder template folder where you want the template to be saved.
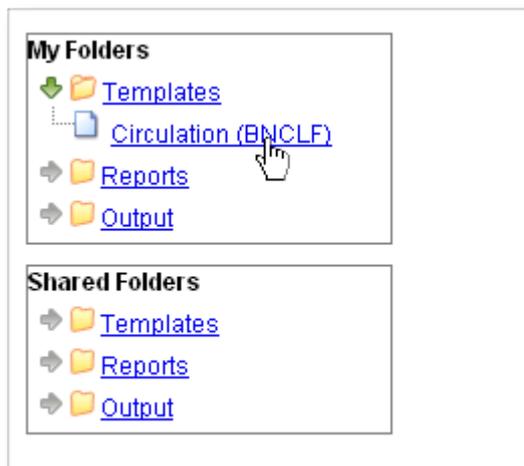
2. Click on Create a new Template for this folder.
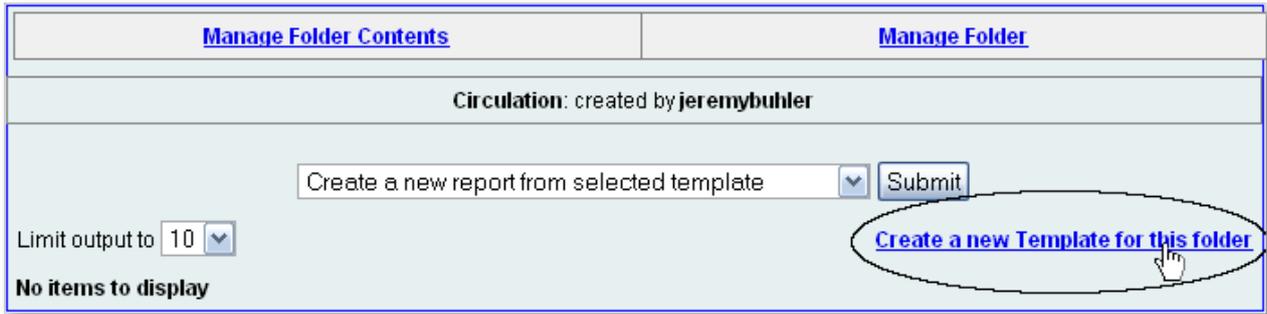
3. You can now see the template creating interface. The upper half of the screen is the *Database Source Browser*. The top left hand pane contains the database *Sources* drop-down list. This is the list of tables available as a starting point for your report. Commonly used sources are *Circulation* (for circ stats and overdue reports), *ILS User* (for patron reports), and *Item* (for reports on a library's holdings).
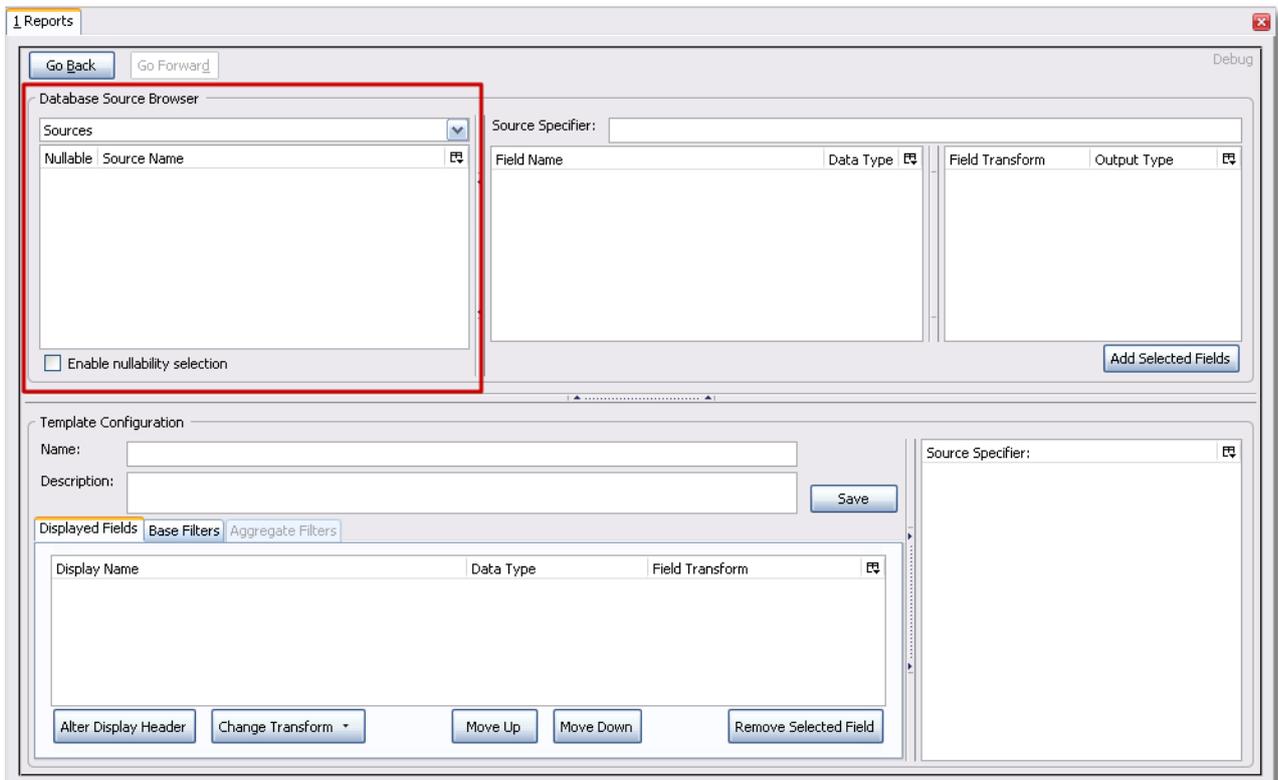
The Enable source nullability checkbox below the sources list is for advanced reporting and should be left unchecked by default.

4. Select *Circulation* in the *Sources* dropdown menu. Note that the *Core Sources* for reporting are listed first, however it is possible to access all available sources at the bottom of this dropdown menu. You may only specify one source per template.
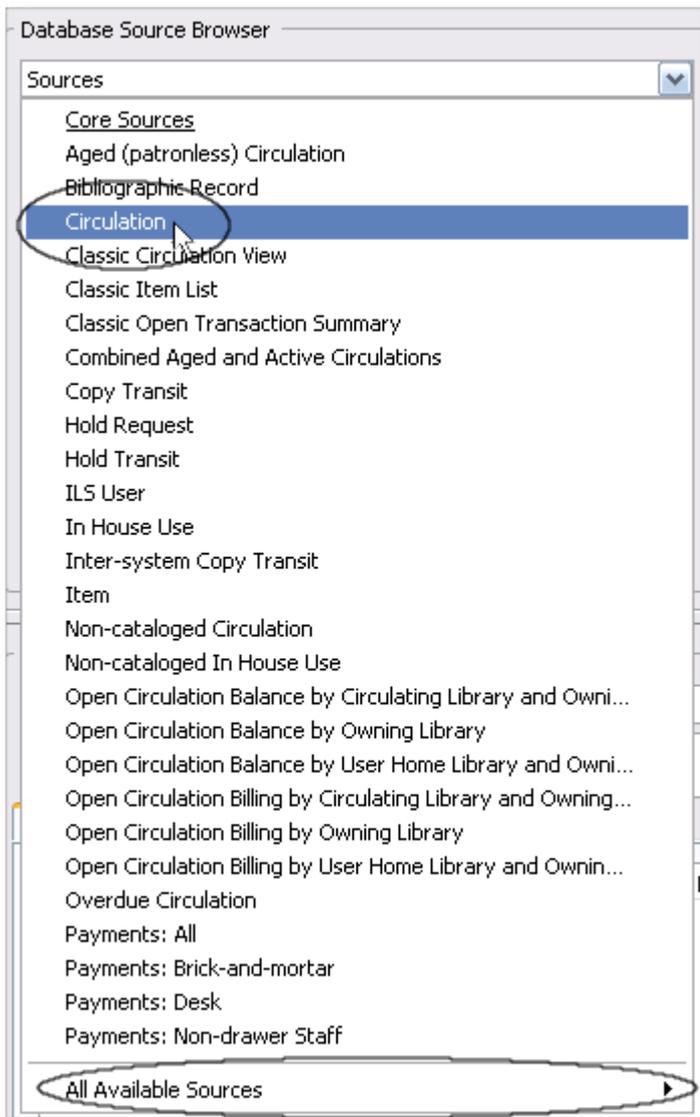
5. Click on *Circulation* to retrieve all the field names in the Field Name pane. Note that the *Source* Specifier (above the middle and right panes) shows the path that you took to get to the specific field.
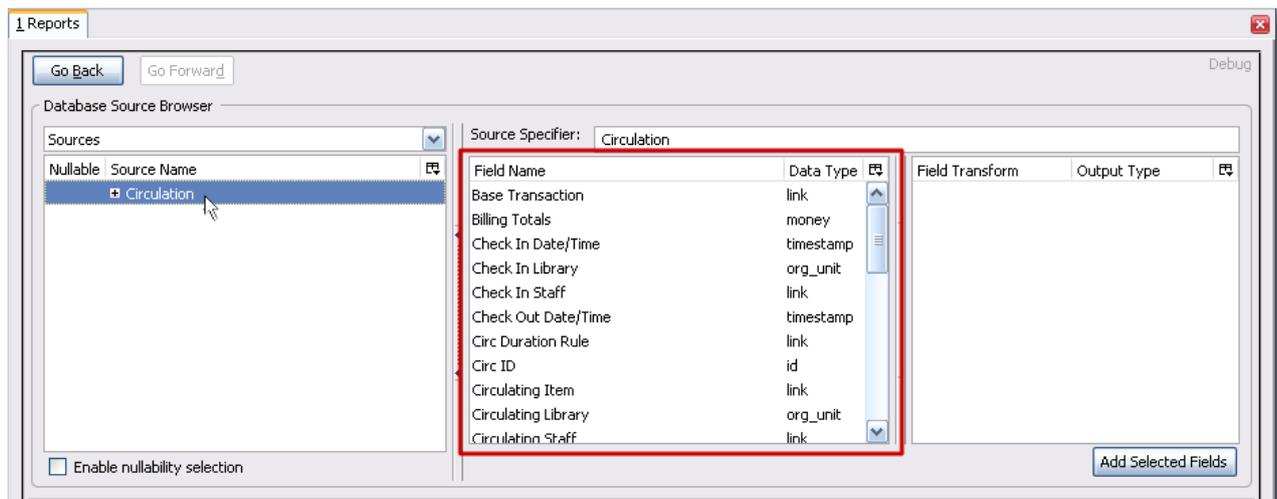
6. Select *Circ ID* in the middle *Field Name* pane, and *Count Distinct* from the right *Field Transform* pane. The *Field Transform* pane is where you choose how to manipulate the data from the selected fields. You are counting the number of circulations.
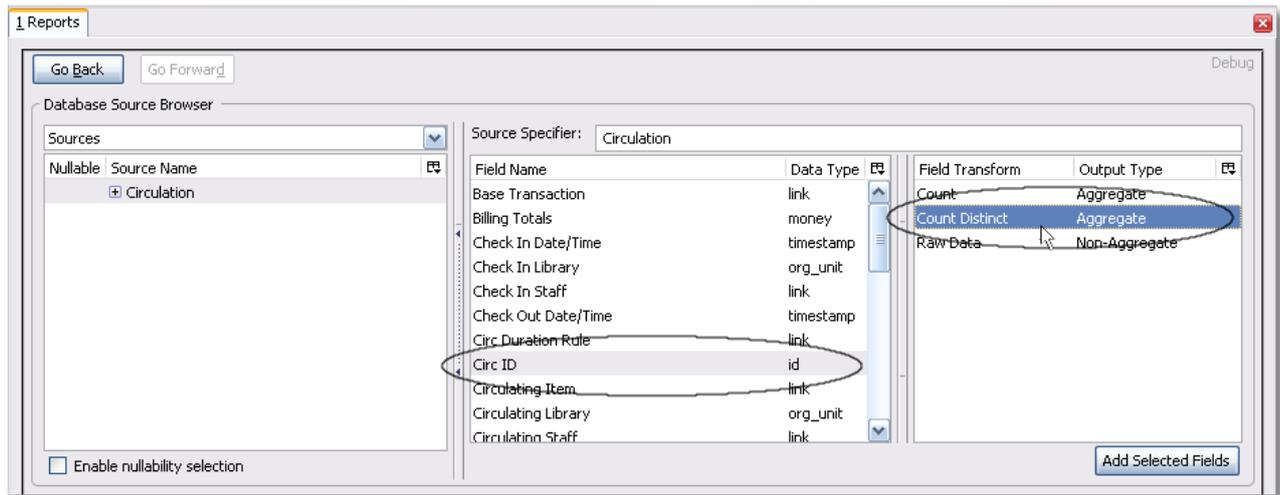
Field Transforms have either an *Aggregate* or *Non-Aggregate* output type. See the section called Field Transforms for more about *Count, _Count Distinct*, and other transform options.

7. Click *Add Selected Fields* underneath the *Field Transform* pane to add this field to your report output. Note that *Circ ID* now shows up in the bottom left hand pane under the *Displayed Fields* tab.
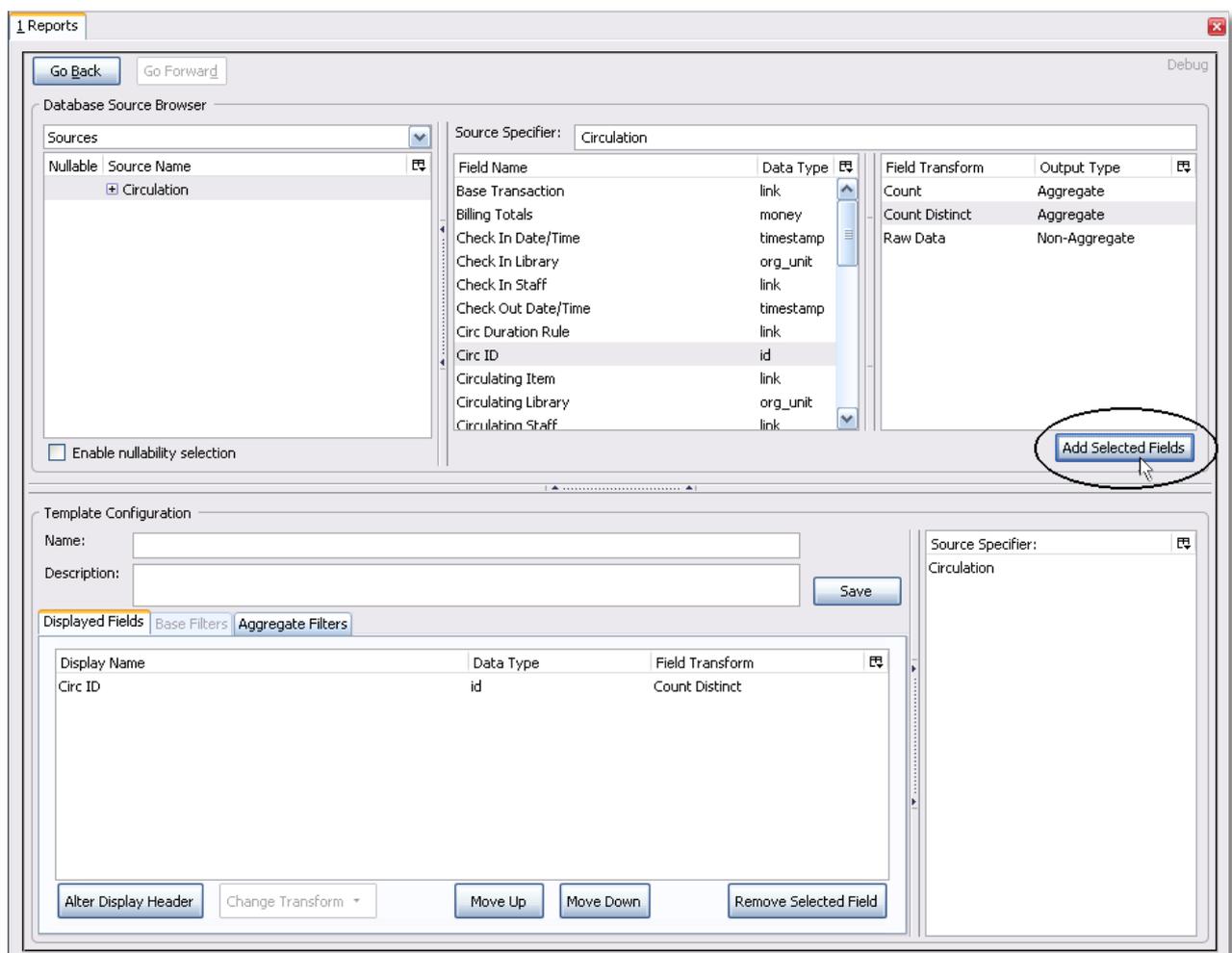
8. *Circ ID* will be the column header in the report output. You can rename default display names to something more meaningful. To do so in this example, select the *Circ ID* row and click *Alter*
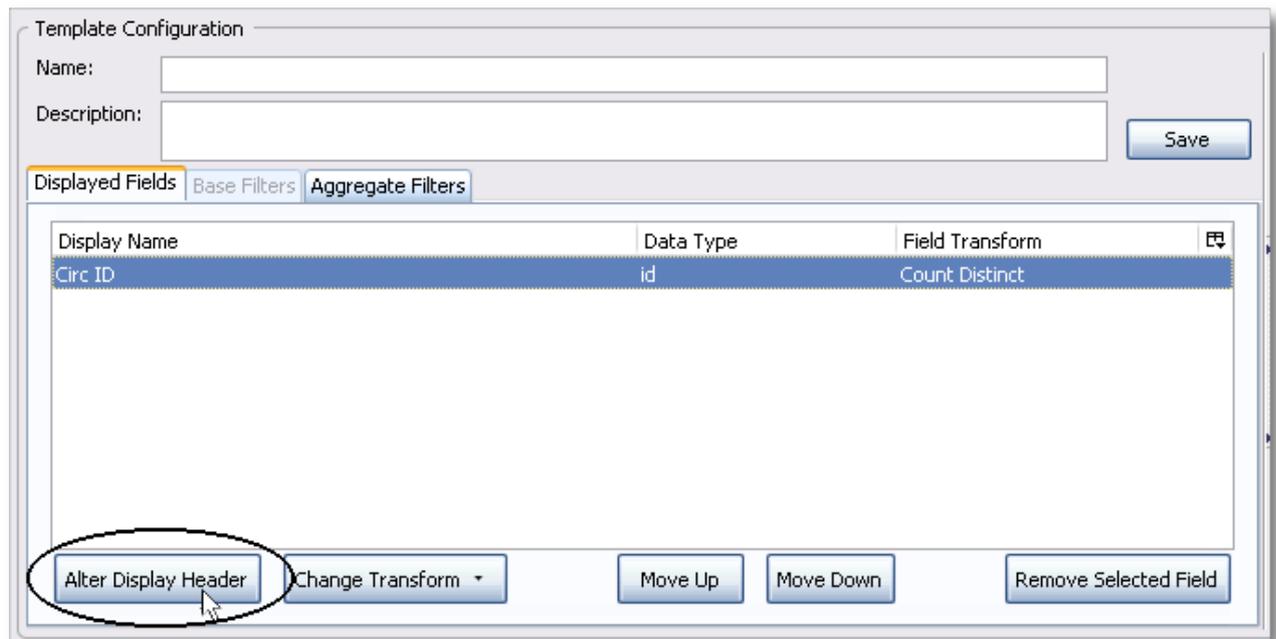
Display Header.

Double-clicking on the displayed field name is a shortcut to altering the display header.

9. Type in the new column header name, for example *Circ count* and click *OK*.
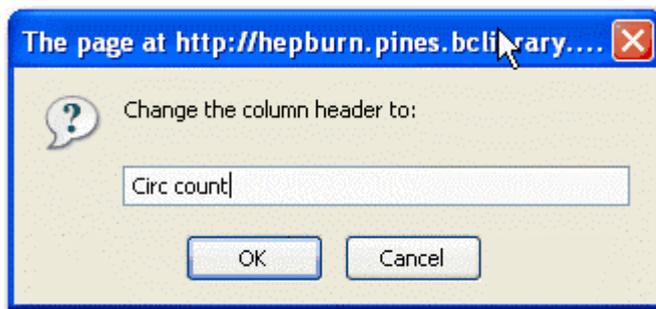
10. Add other data to your report by going back to the *Sources* pane and selecting the desired fields. In this example, we are going to add *Circulating Item -→ Shelving Location* to further refine the circulation report.

In the top left hand *Sources* pane, expand *Circulation*. Depending on your computer you will either click on the + sign or on an arrow to expand the tree.
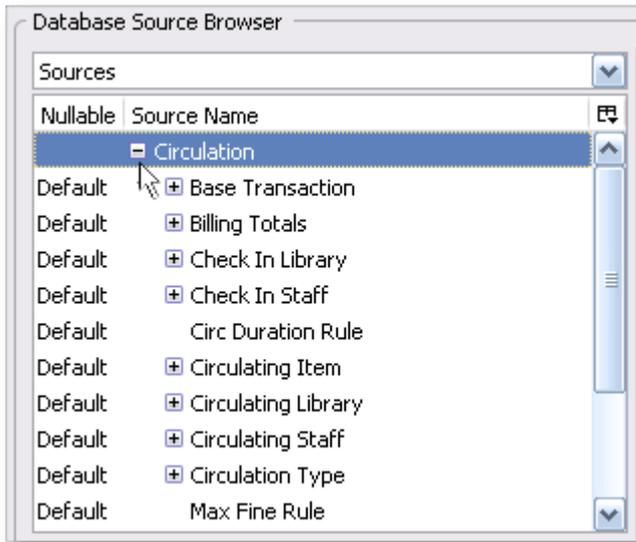
Click on the + or arrow to expand *Circulating Item.* Select *Shelving Location.*
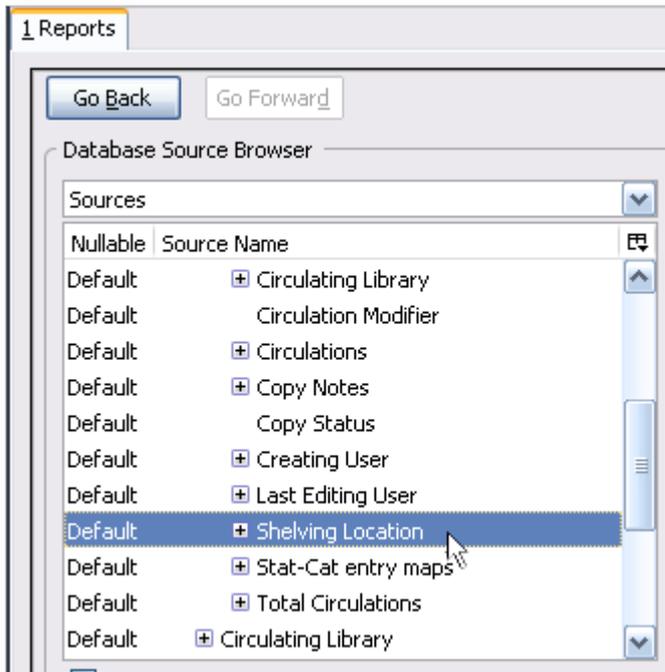
When you are creating a template take the shortest path to the field you need in the left hand Sources pane. Sometimes it is possible to find the same field name further in the file structure, but the shortest path is the most efficient.

In the Field Name pane select Name.
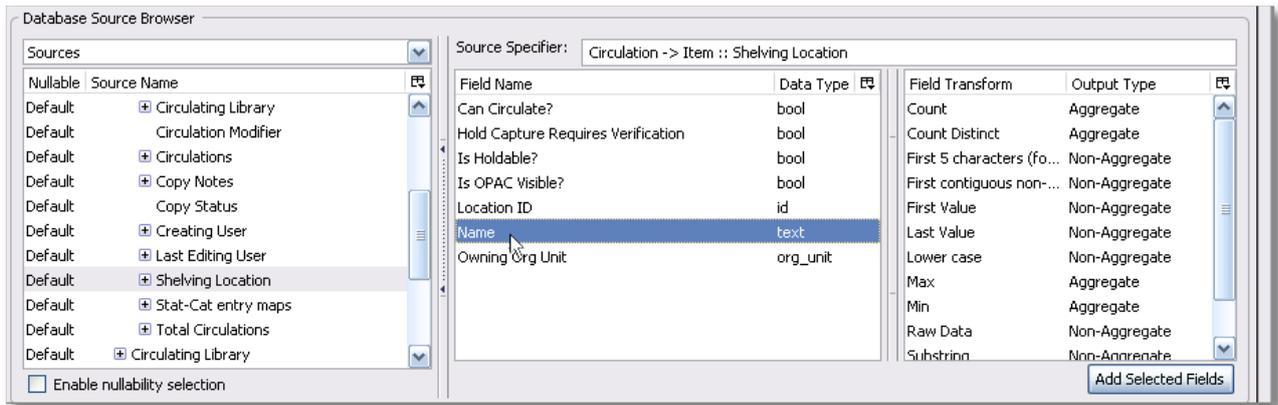
In the upper right *Field Transform* pane, select *Raw Data* and click *Add Selected* Fields. Use *Raw Data* when you do not wish to transform field data in any manner.
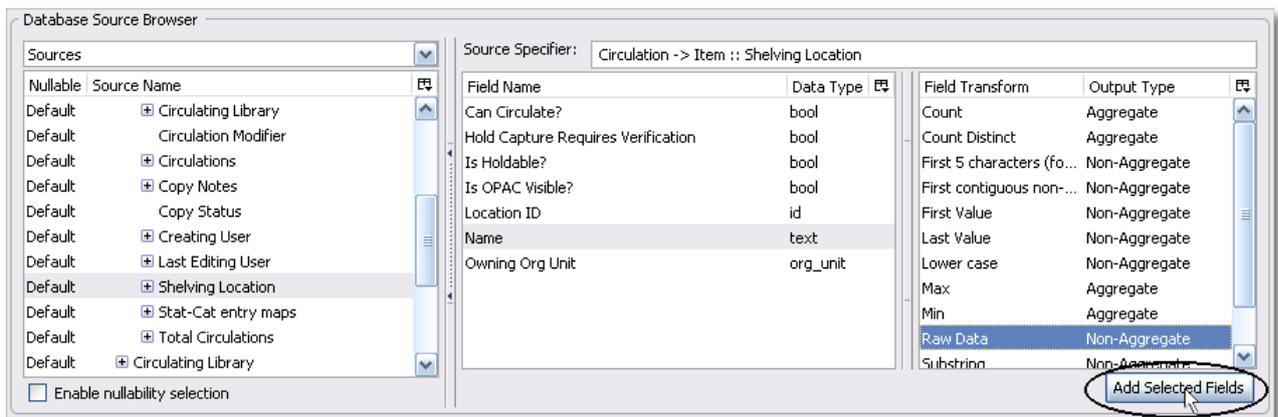
Name will appear in the bottom left pane. Select the Name row and click *Alter Display Header*.
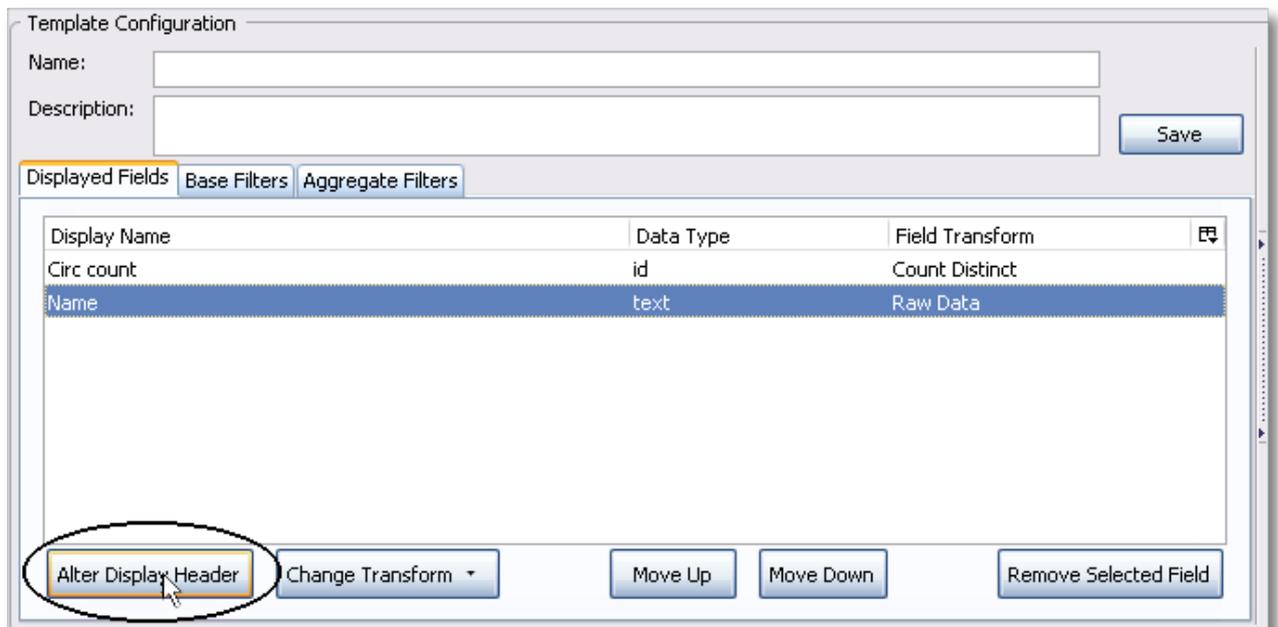
11. Enter a new, more descriptive column header, for example, *Shelving location*. Click *OK*.
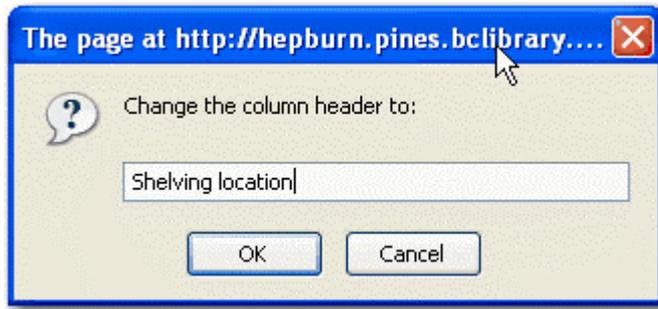
12. Note that the order of rows (top to bottom) will correspond to the order of columns (left to right) on the final report. Select *Shelving location* and click on *Move Up* to move *Shelving location* before *Circ count*.
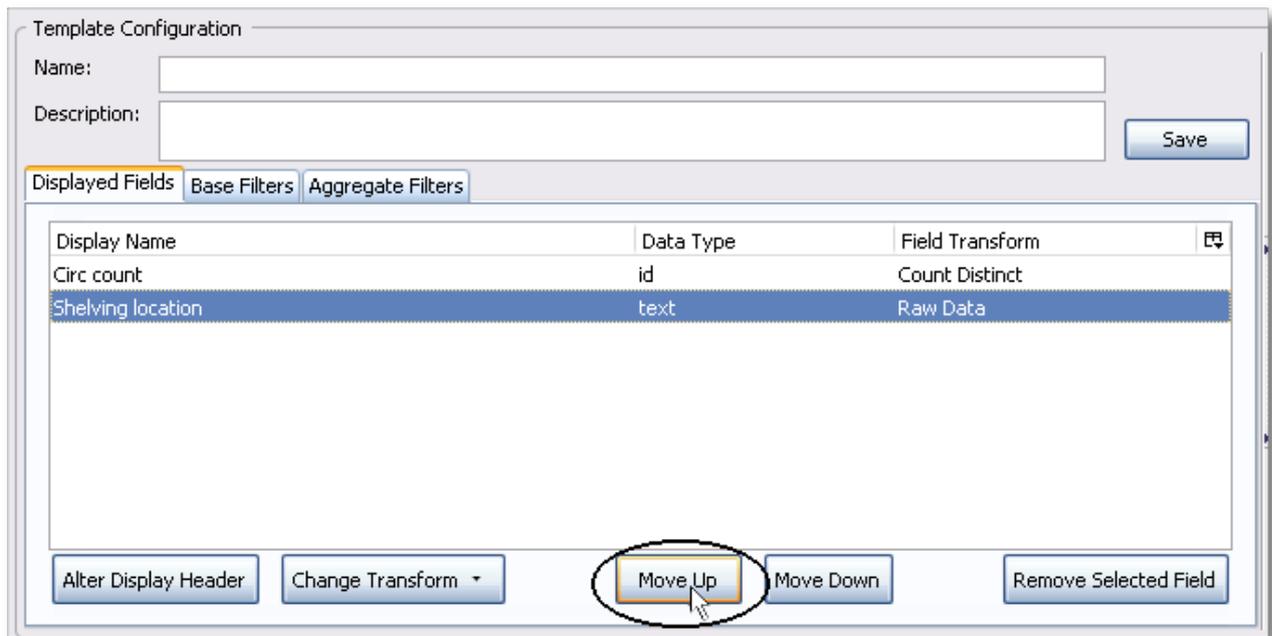
13. Return to the *Sources* pane to add more fields to your template. Under *Sources* click *Circulation*, then select *Check Out Date/Time* from the middle *Field Name* pane.
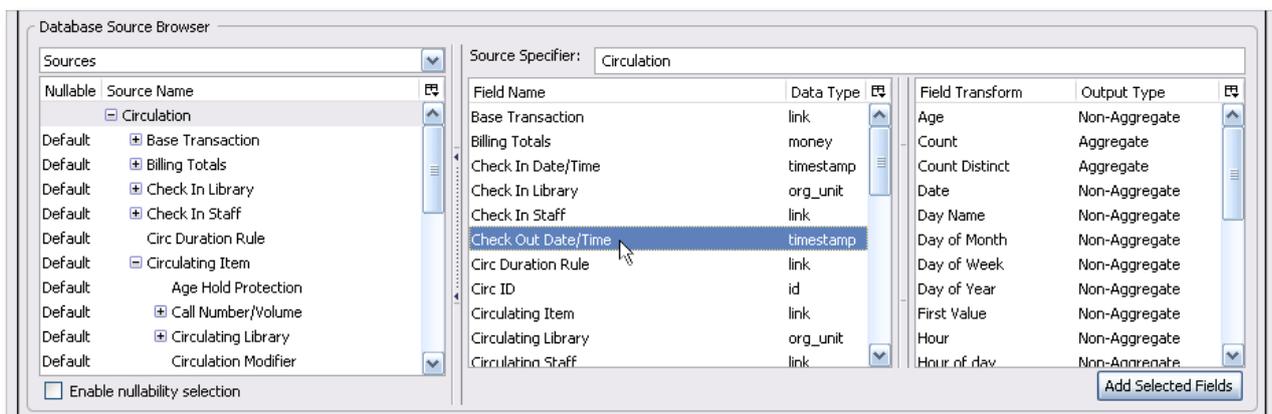
14. Select *Year + Month* in the right hand *Field Transform* pane and click *Add Selected Fields*
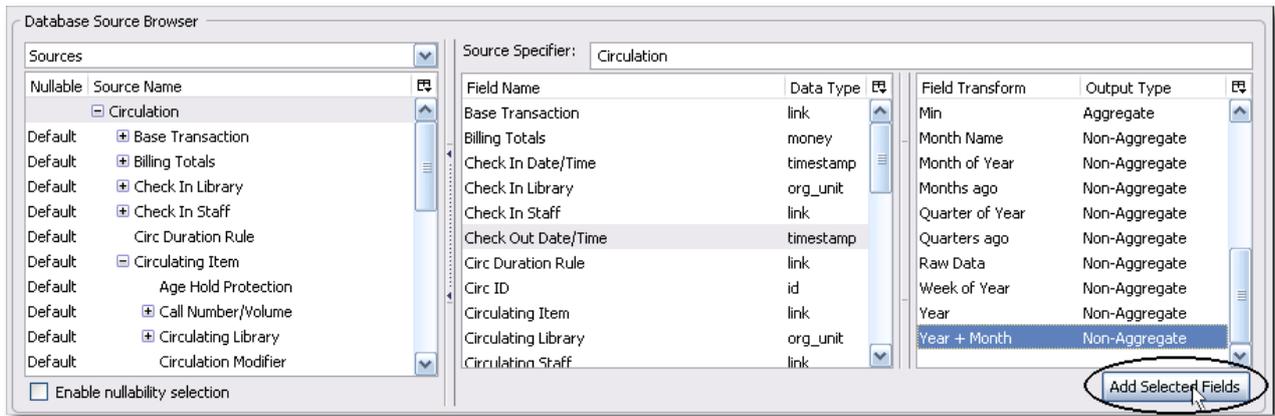
15. *Check Out Date/Time* will appear in the *Displayed Fields* pane. In the report it will appear as a year and month *(YYYY-MM)* corresponding to the selected transform.
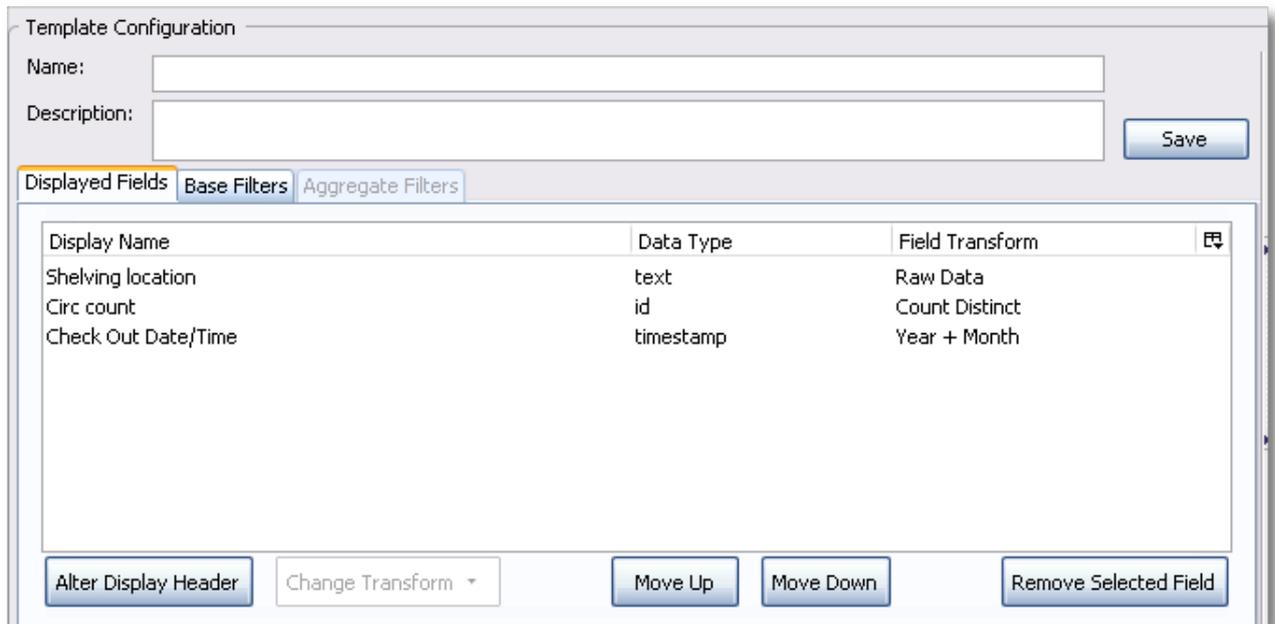
16. Select the *Check Out Date/Time* row. Click *Alter Display Header* and change the column header to *Check out month.*
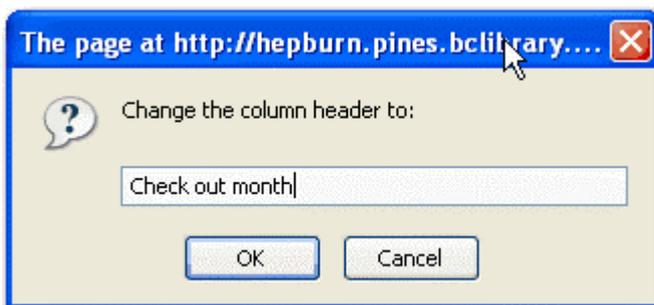
17. Move *Check out month* to the top of the list using the *Move Up* button, so that it will be the first column in an MS Excel spreadsheet or in a chart. Report output will sort by the first column.
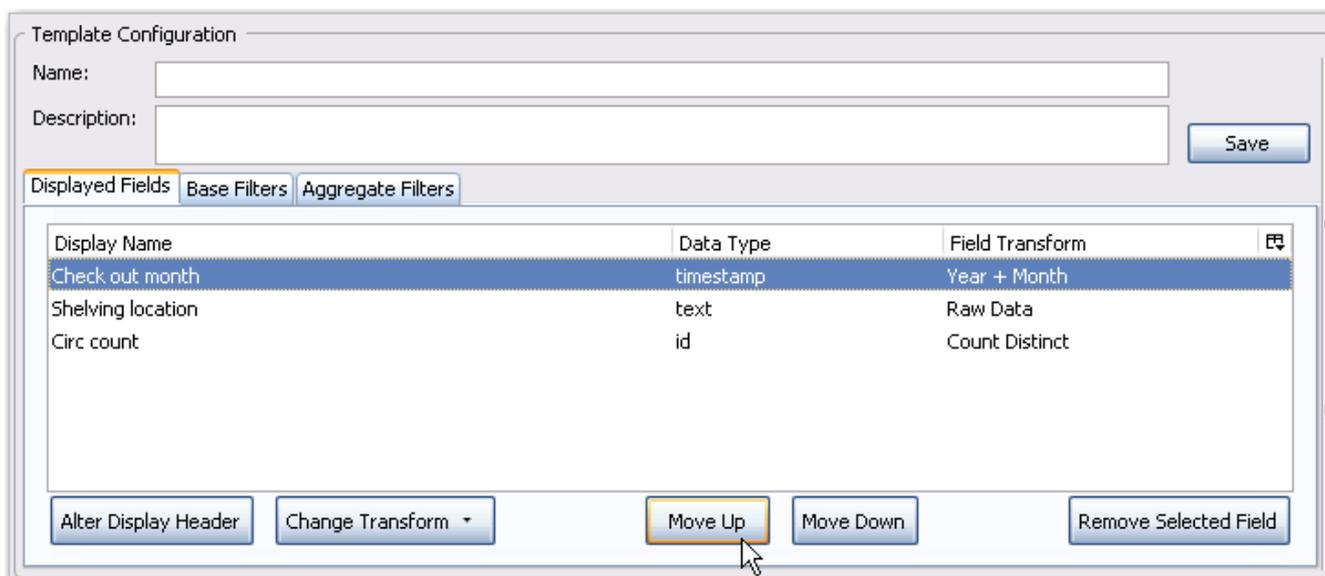
Note the *Change Transform* button in the bottom left hand pane. It has the same function as the upper right *Field Transform* pane for fields that have already been added.

NOTE
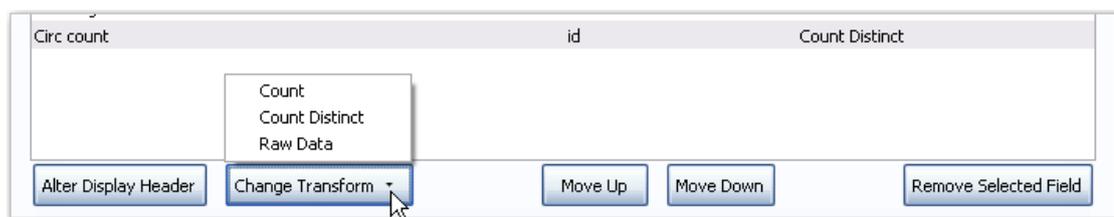
54.2. Applying Filters

Evergreen reports access the entire database, so to limit report output to a single library or library system you need to apply filters.

After following the steps in the previous section you will see three fields in the bottom left hand *Template Configuration* pane. There are three tabs in this pane: *Displayed Fields* (covered in the previous section), *Base Filters* and *Aggregate Filters*. A filter allows you to return only the results that meet the criteria you set.

Base Filters apply to non-aggregate output types, while *Aggregate Filters* are used for aggregate types. In most reports you will be using the *Base Filters* tab. For more information on aggregate and non-aggregate types see the section called "Field Transforms".

There are many available operators when using filters. Some examples are *Equals*, *In list*, is *NULL*, *Between, Greater than* or *equal to*, and so on. *In list* is the most flexible operator, and in this case will allow you flexibility when running a report from this template. For example, it would be

possible to run a report on a list of timestamps (in this case will be trimmed to year and month only), run a report on a single month, or run a report comparing two months. It is also possible to set up recurring reports to run at the end of each month.

In this example we are going to use a Base Filter to filter out one library's circulations for a specified time frame. The time frame in the template will be configured so that you can change it each time you run the report.

54.2.1. Using Base Filters

1. Select the *Base Filters* tab in the bottom *Template Configuration* pane.
2. For this circulation statistics example, select *Circulation* -→ *Check Out Date/Time* -→ *Year + Month* and click on *Add Selected Fields*. You are going to filter on the time period.
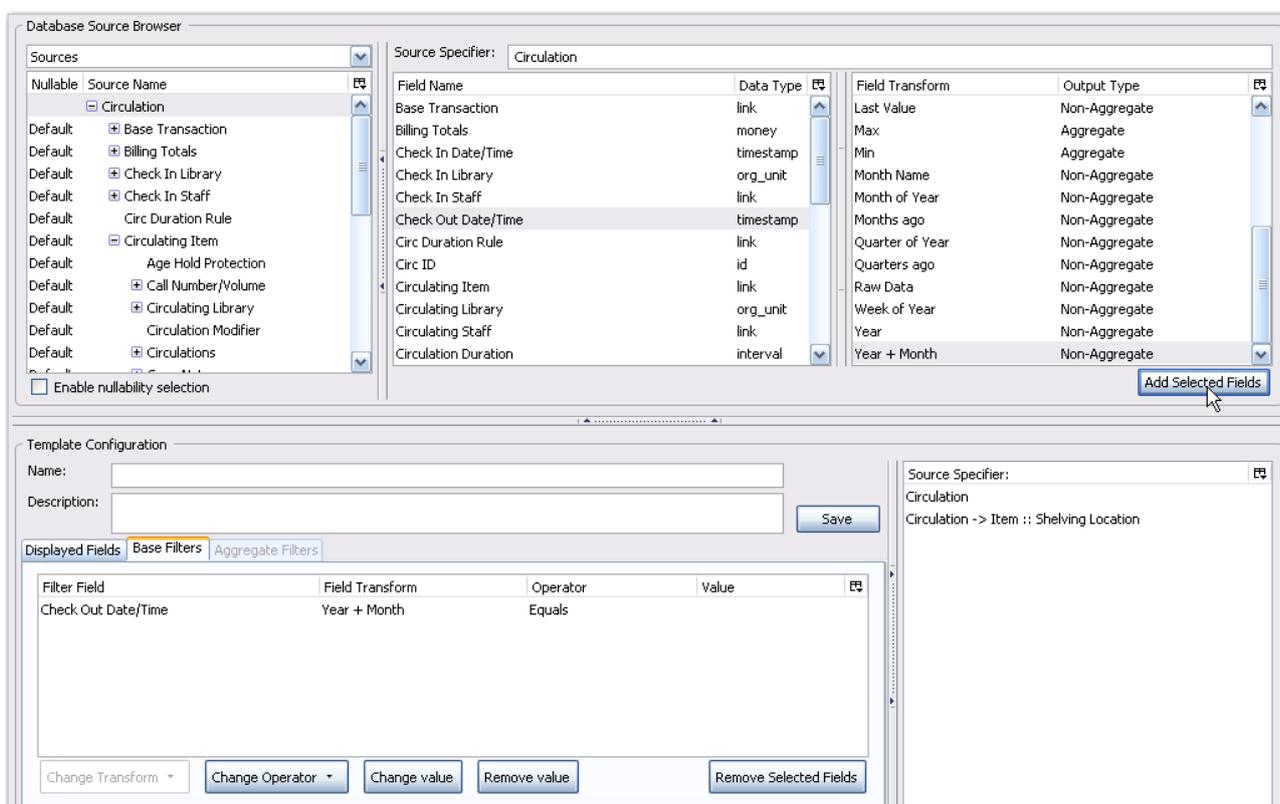
3. Select *Check Out Date/Time*. Click on *Change Operator* and select *In list* from the dropdown menu.
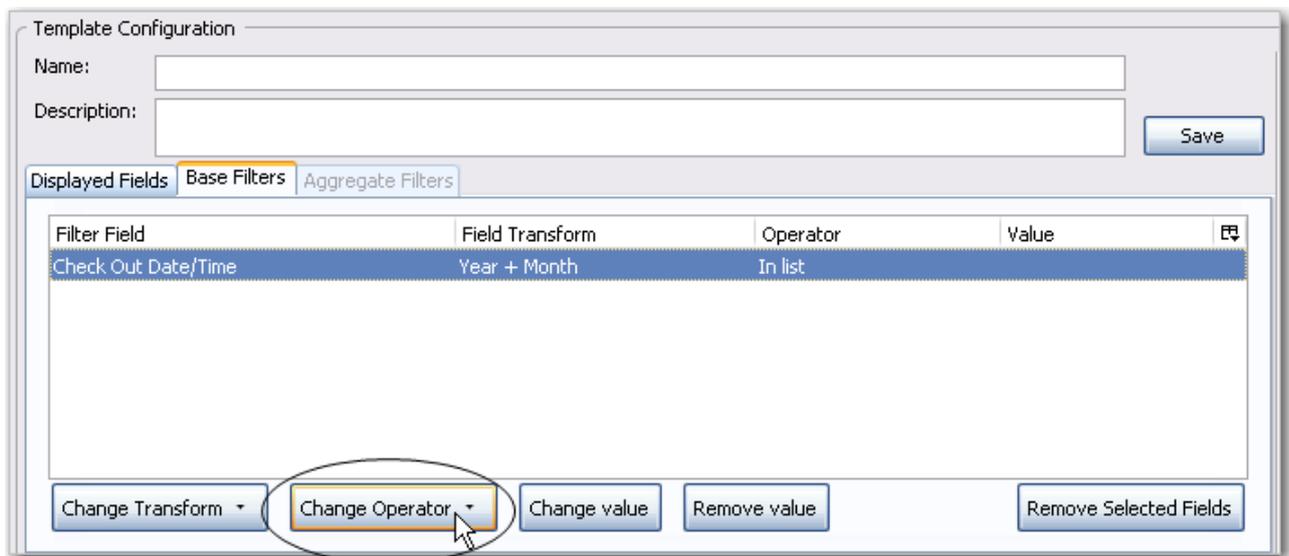
4. To filter on the location of the circulation select *Circulation -→ Circulating library -→ Raw Data* and click on *Add Selected Fields*.
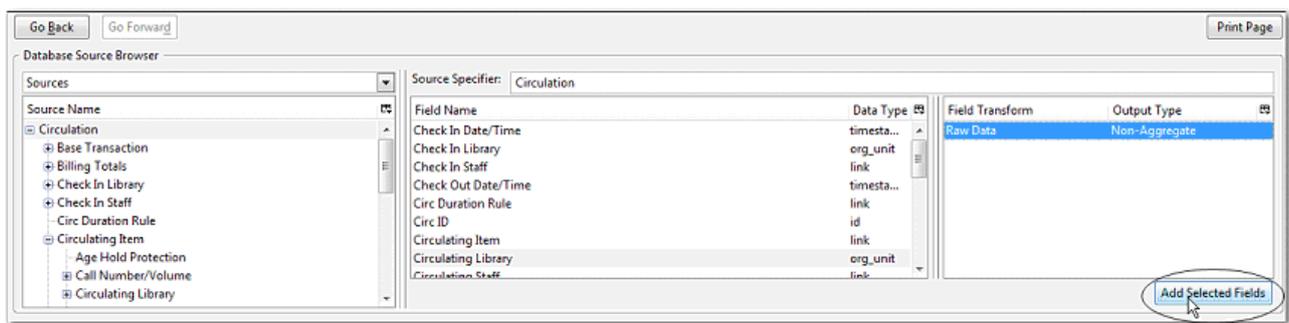
5. Select *Circulating Library* and click on *Change Operator* and select *Equals*. Note that this is a template, so the value for *Equals* will be filled out when you run the report.
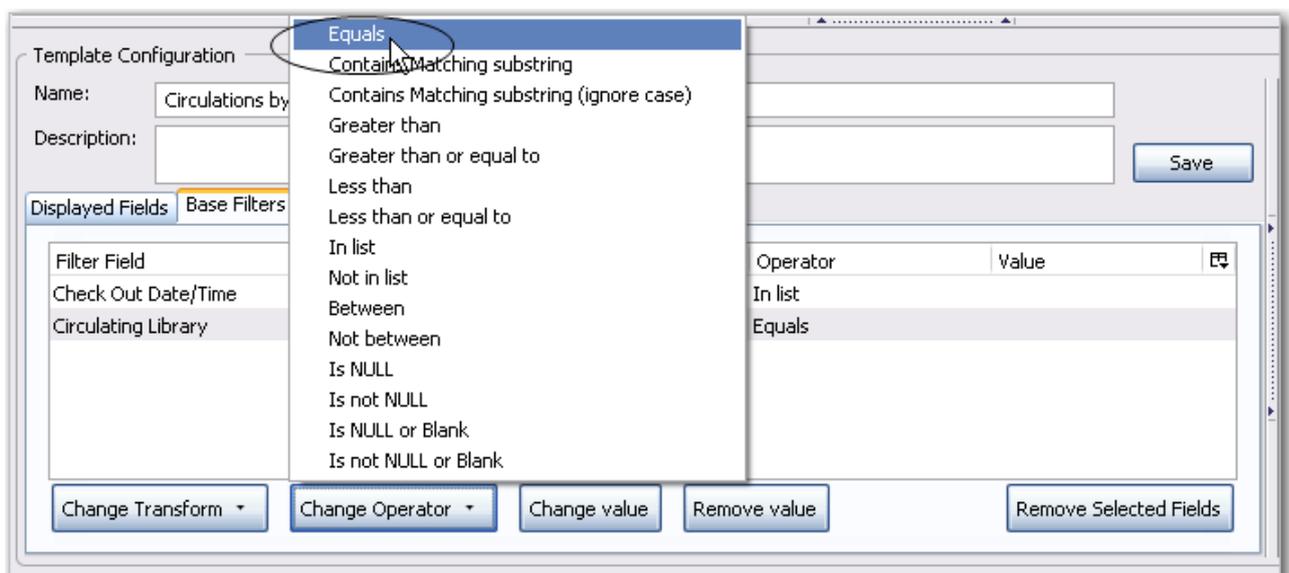
For multi-branch libraries, you would select *Circulating Library* with *In list* as the operator, so you could specify the branch(es) when you run the report. This leaves the template configurable to current requirements. In comparison, sometimes you will want to hardcode true/false values into a template. For example, deleted bibliographic records remain in the database, so perhaps you want to hardcode *deleted=false,* so that deleted records don't show up in the results. You

might want to use *deleted=true*, for a template for a report on deleted items in the last month.

6. Once you have configured your template, you must name and save it. Name this template *Circulations by month for one library*. You can also add a description. In this example, the title is descriptive enough, so a description is not necessary. Click *Save*.
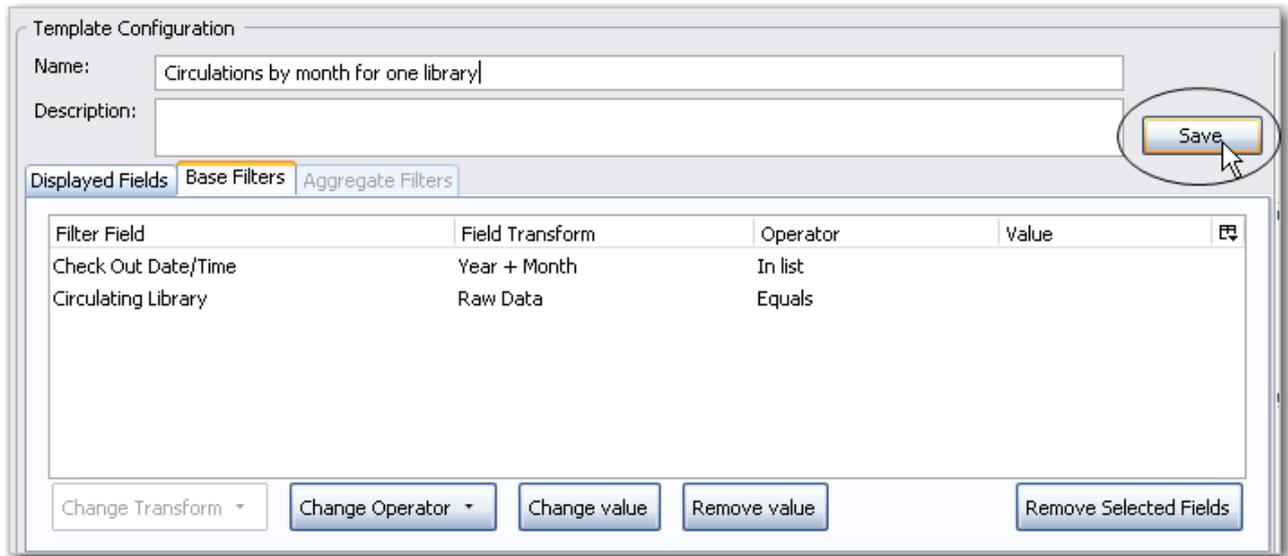
7. Click *OK*.

8. You will get a confirmation dialogue box that the template was successfully saved. Click OK.
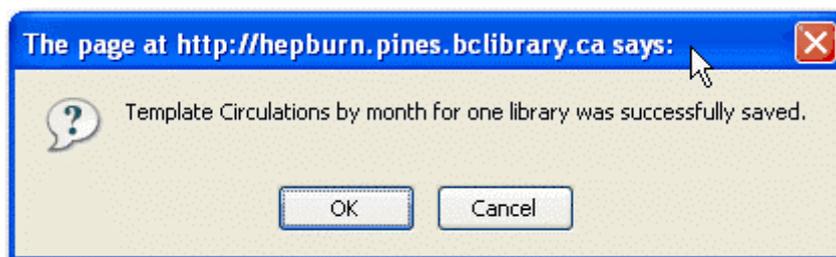
After saving it is not possible to edit a template. To make changes you will need to clone it and edit the clone

The bottom right hand pane is also a source specifier. By selecting one of these rows you will limit the fields that are visible to the sources you have specified. This may be helpful when reviewing templates with many fields. Use **Ctrl+Click** to select or deselect items.

NOTE
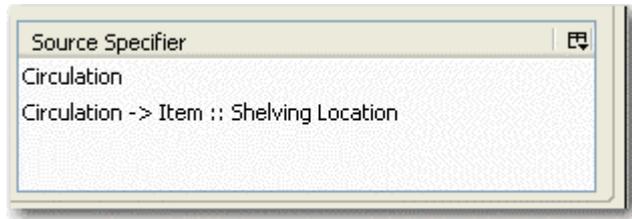
Chapter 55. Generating Reports from Templates

Now you are ready to run the report from the template you have created.

1. In the My Folders section click the arrow next to *Templates* to expand this folder and select *circulation*.

2. Select the box beside *Circulations by month for one library*. Select *Create a new report* from selected template from the dropdown menu. Click *Submit*.
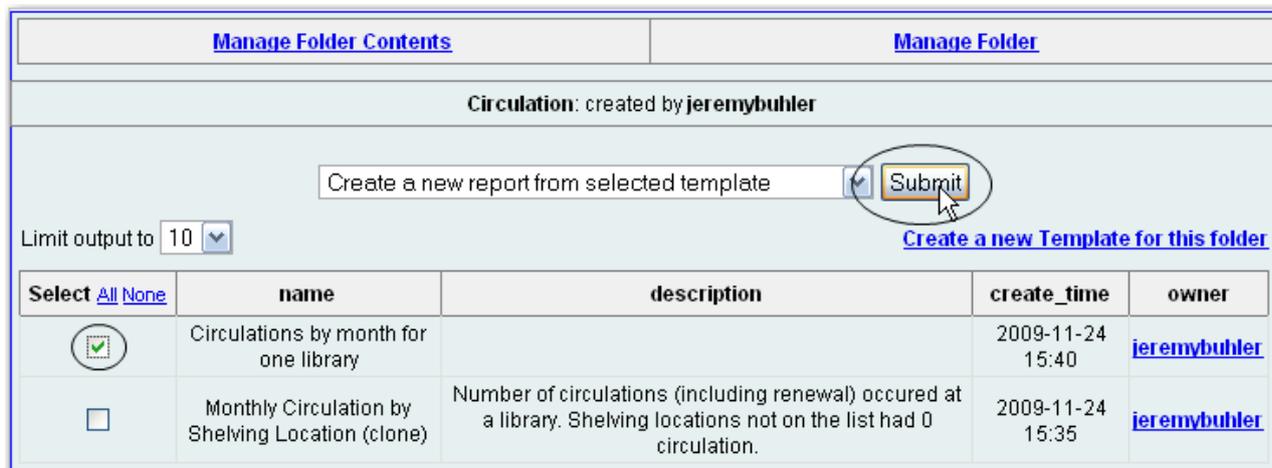
3. Complete the first part of report settings. Only *Report Name* and *Choose a folder...* are required fields.

1) *Template Name*, *Template Creator*, and *Template Description* are for informational purposes only. They are hard coded when the template is created. At the report definition stage it is not possible to change them.

2) *Report Name* is required. Reports stored in the same folder must have unique names.

3) *Report Description* is optional but may help distinguish among similar reports.

4) *Report Columns* lists the columns that will appear in the output. This is derived from the template and cannot be changed during report definition.

5) *Pivot Label Column* and *Pivot Data Column* are optional. Pivot tables are a different way to view data. If you currently use pivot tables in MS Excel it is better to select an Excel output and continue using pivot tables in Excel.

6) You must choose a report folder to store this report definition. Only report folders under My Folders are available. Click on the desired folder to select it.

4. Select values for the *Circulation > Check Out Date/Time*. Use the calendar widget or manually enter the desired dates, then click Add to include the date on the list. You may add multiple dates.

The Transform for this field is Year + Month, so even if you choose a specific date (2009-10-20) it will appear as the corresponding month only (2009-10).

It is possible to select **relative dates**. If you select a relative date 1 month ago you can schedule reports to automatically run each month. If you want to run monthly reports that also show comparative data from one year ago, select a relative date 1 month ago, and 13 months ago.

5. Select a value for the *Circulating Library*.

6. Complete the bottom portion of the report definition interface, then click *Save*.

1) Select one or more output formats. In this example the report output will be available as an Excel spreadsheet, an HTML table (for display in the staff client or browser), and as a bar chart.

2) If you want the report to be recurring, check the box and select the *Recurrence Interval* as described in Recurring Reports. In this example, as this is a report that will only be run once, the *Recurring Report* box is not checked.

3) Select *Run* as soon as possible for immediate output. It is also possible to set up reports that run automatically at future intervals.

4) It is optional to fill out an email address where a completion notice can be sent. The email will contain a link to password-protected report output (staff login required). If you have an email address in your Local System Administrator account it will automatically appear in the email notification box. However, you can enter a different email address or multiple addresses separated by commas.

7. Select a folder for the report's output.

8. You will get a confirmation dialogue box that the Action Succeeded. Click *OK*.
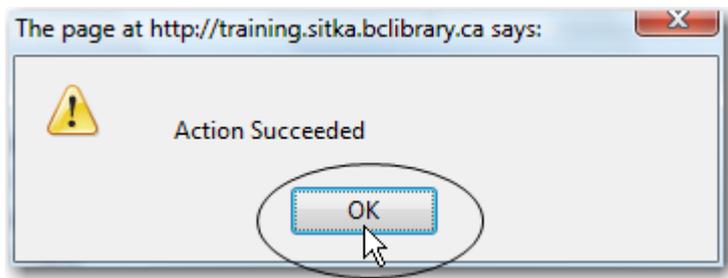
Once saved, reports stay there forever unless you delete them.

55.1. Viewing and Editing Report Parameters

New options to view or edit report parameters are available from the reports folder.

To view the parameters of a report, select the report that you want to view from the **Reports** folder, and click **View**. This will enable you to view the report, including links to external documentation and field hints. However, you cannot make any changes to the report.


To edit the parameters of a report, select the report that you want to view from the **Reports** folder, and click **Edit**. After making changes, you can **Save [the] Report** or **Save as New**. If you **Save the Report**, any subsequent report outputs that are generated from this report will reflect the changes that you have made.

In addition, whenever there is a pending (scheduled, but not yet started) report output, the interface will warn you that the pending output will be modified. At that point, you can either continue or choose the alternate **Save as New** option, leaving the report output untouched.

If, after making changes, you select, **Save as New**, then you have created a new report by cloning and amending a previously existing report. Note that if you create a new report, you will be prompted to rename the new report. Evergreen does not allow two reports with the same name to exist. To view or edit your new report, select the reports folder to which you saved it.

Chapter 56. Viewing Report Output

When a report runs Evergreen sends an email with a link to the output to the address defined in the report. Output is also stored in the specified Output folder and will remain there until manually deleted.

1. To view report output in the staff client, open the reports interface from *Administration -→ Local Administration -→ Reports*

2. Click on Output to expand the folder. Select *Circulation* (where you just saved the circulation report output).
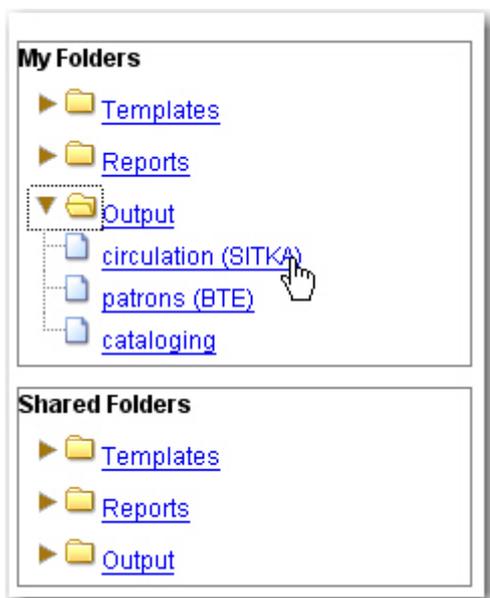
3. View report output is the default selection in the dropdown menu. Select *Recurring Monthly Circ by Location* by clicking the checkbox and click *Submit*.
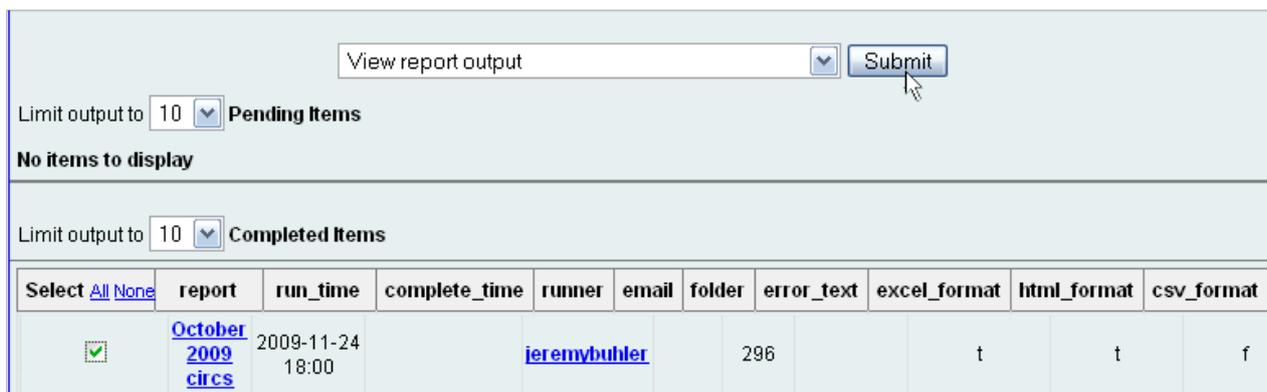
4. A new tab will open for the report output. Select either *Tabular Output* or *Excel Output*. If Bar

Charts was selected during report definition the chart will also appear.

5. Tabular output looks like this:

Check out month	Shelving location	Circ count
2009-10	Adult Fiction	10
2009-10	Adult Fiction - Second Floor	1125
2009-10	Adult Non-Fiction	1188
2009-10	Adult Non-fiction	12
2009-10	Adult Paperbacks - Mystery	1
2009-10	Adult Videos	368
2009-10	Adult Videos - Educational	66
2009-10	Biographies	34
2009-10	CD-ROMs	3
2009-10	CDs	144
2009-10	Children's Videos	232
2009-10	Children's Videos - Educational	2
2009-10	Christmas Storage	5
2009-10	DVDs	981
2009-10	JP Basement Storage	56
2009-10	Juvenile Easy Readers	152
2009-10	Juvenile Fiction	476
2009-10	Juvenile Non-Fiction	199
2009-10	Juvenile Picture Books	634
2009-10	Large Print	73

6. If you want to manipulate, filter or graph this data, Excel output would be more useful. Excel output will generate a ".xlsx" file. Excel output looks like this in Excel:

	A	B	C	D	E
1	Check out month	Shelving location	Circ count		
2	2009-10	Adult Fiction	10		
3	2009-10	Adult Fiction - Second Floor	1125		
4	2009-10	Adult Non-Fiction	1188		
5	2009-10	Adult Non-fiction	12		
6	2009-10	Adult Paperbacks - Mystery	1		
7	2009-10	Adult Videos	368		
8	2009-10	Adult Videos - Educational	66		
9	2009-10	Biographies	34		
10	2009-10	CD-ROMs	3		
11	2009-10	CDs	144		
12	2009-10	Children's Videos	232		
13	2009-10	Children's Videos - Education	2		
14	2009-10	Christmas Storage	5		
15	2009-10	DVDs	981		
16	2009-10	JP Basement Storage	56		
17	2009-10	Juvenile Easy Readers	152		
18	2009-10	Juvenile Fiction	476		
19	2009-10	Juvenile Non-Fiction	199		
20	2009-10	Juvenile Picture Books	634		
21	2009-10	Large Print	73		
22	2009-10	Literacy Collection	4		
23	2009-10	Multilingual Collection	32		
24	2009-10	Multilingual Juvenile French	22		

Chapter 57. Cloning Shared Templates

This chapter describes how to make local copies of shared templates for routine reports or as a starting point for customization. When creating a new template it is a good idea to review the shared templates first: even if the exact template you need does not exist it is often faster to modify an existing template than to build a brand new one. A Local System Administrator account is required to clone templates from the *Shared Folders* section and save them to *My Folders*.

The steps below assume you have already created at least one *Templates* folder. If you haven't done this, please see Creating Folders.

1. Access the reports interface from *Administration → Reports*

2. Under *Shared Folders* expand the *Templates* folder and the subfolder of the report you wish to clone. To expand the folders click on the grey arrow or folder icon. Do not click on the blue underlined hyperlink.

3. Click on the subfolder.

4. Select the template you wish to clone. From the dropdown menu choose *Clone selected templates*, then click *Submit*.

NOTE	By default Evergreen only displays the first 10 items in any folder. To view all content, change the Limit output setting from 10 to All.

5. Choose the folder where you want to save the cloned template, then click *Select Folder*. Only template folders created with your account will be visible. If there are no folders to choose from please see Creating Folders.

6. The cloned template opens in the template editor. From here you may modify the template by adding, removing, or editing fields and filters as described in Creating Templates. *Template Name* and *Description* can also be edited. When satisfied with your changes click *Save*.

7. Click *OK* in the resulting confirmation windows.

Once saved it is not possible to edit a template. To make changes, clone a template and change the clone.

Chapter 58. Running Recurring Reports

Recurring reports are a useful way to save time by scheduling reports that you run on a regular basis, such as monthly circulation and monthly patron registration statistics. When you have set up a report to run on a monthly basis you'll get an email informing you that the report has successfully run. You can click on a link in the email that will take you directly to the report output. You can also access the output through the reporter interface as described in Viewing Report Output.

To set up a monthly recurring report follow the procedure in Generating Reports from Templates but make the changes described below.

1. Select the Recurring Report check-box and set the recurrence interval to 1 month.

2. Do not select Run ASAP. Instead schedule the report to run early on the first day of the next month. Enter the date in *YYYY-MM-DD* format.

3. Ensure there is an email address to receive completion emails. You will receive an email completion notice each month when the output is ready.

4. Select a folder for the report's output.

5. Click Save Report.

6. You will get a confirmation dialogue box that the Action Succeeded. Click OK.

You will get an email on the 1st of each month with a link to the report output. By clicking this link it will open the output in a web browser. It is still possible to login to the staff client and access the output in Output folder.

How to stop or make changes to an existing recurring report? Sometimes you may wish to stop or make changes to a recurring report, e.g. the recurrence interval, generation date, email address to receive completion email, output format/folder or even filter values (such as the number of days overdue). You will need to delete the current report from the report folder, then use the above procedure to set up a new recurring report with the desired changes. Please note that deleting a report also deletes all output associated with it.

TIP	Once you have been on Evergreen for a year, you could set up your recurring monthly reports to show comparative data from one year ago. To do this select relative dates of 1 month ago and 13 months ago.

Chapter 59. Template Terminology

59.1. Data Types

The information in Evergreen's database can be classified in nine data types, formats that describe the type of data and/or its use. These were represented by text-only labels in prior versions of Evergreen. Evergreen 3.0 has replaced the text labels with icons. When building templates in *Reports*, you will find these icons in the Field Name Pane of the template creation interface.

59.1.1. timestamp

An exact date and time (year, month, day, hour, minutes, and seconds). Remember to select the appropriate date/time transform. Raw Data includes second and timezone information, which is usually more than is required for a report.

59.1.2. link

A link to another database table. Link outputs a number that is a meaningful reference for the database but not of much use to a human user. You will usually want to drill further down the tree in the Sources pane and select fields from the linked table. However, in some instances you might want to use a link field. For example, to count the number of patrons who borrowed items you could do a count on the Patron link data.

59.1.3. text

A field of text. You will usually want to use the Raw Data transform.

59.1.4. bool

True or False. Commonly used to filter out deleted item or patron records.

59.1.5. org_unit

Organizational Unit - a number representing a library, library system, or federation. When you want to filter on a library, make sure that the field name is on an org_unit or id data type.

59.1.6. id

A unique number assigned by the database to identify each record. These numbers are meaningful references for the database but not of much use to a human user. Use in displayed fields when counting records or in filters.

59.1.7. money

A monetary amount.

59.1.8. int

Integer (a number)

59.1.9. interval

A period of time.

59.2. Field Transforms

A *Field Transform* tells the reporter how to process a field for output. Different data types have different transform options.

Raw Data. To display a field exactly as it appears in the database use the *Raw Data* transform, available for all data types.

Count and Count Distinct. These transforms apply to the *id* data type and are used to count database records (e.g. for circulation statistics). Use Count to tally the total number of records. Use *Count Distinct* to count the number of unique records, removing duplicates.

To demonstrate the difference between *Count* and *Count Distinct*, consider an example where you want to know the number of active patrons in a given month, where ``active'' means they borrowed at least one item. Each circulation is linked to a *Patron ID*, a number identifying the patron who borrowed the item. If we use the *Count Distinct* transform for Patron IDs we will know the number of unique patrons who circulated at least one book (2 patrons in the table below). If instead, we use *Count*, we will know how many books were circulated, since every circulation is linked to a *patron ID* and duplicate values are also counted. To identify the number of active patrons in this example the *Count Distinct* transform should be used.

Title	Patron ID	Patron Name
Harry Potter and the Chamber of Secrets	001	John Doe
Northern Lights	001	John Doe
Harry Potter and the Philosopher's Stone	222	Jane Doe

Output Type. Note that each transform has either an *Aggregate* or *Non-Aggregate* output type.

Selecting a *Non-Aggregate* output type will return one row of output in your report for each row in the database. Selecting an Aggregate output type will group together several rows of the database and return just one row of output with, say, the average value or the total count for that group. Other common aggregate types include minimum, maximum, and sum.

When used as filters, non-aggregate and aggregate types correspond to *Base* and *Aggregate* filters respectively. To see the difference between a base filter and an aggregate filter, imagine that you are creating a report to count the number of circulations in January. This would require a base filter to specify the month of interest because the month is a non-aggregate output type. Now imagine that you wish to list all items with more than 25 holds. This would require an aggregate filter on the number of holds per item because you must use an aggregate output type to count the holds.

Chapter 60. Template Enhancements

60.1. Documentation URL

You can add a link to local documentation that can help staff create a report template. To add documentation to a report template, click **Admin → Local Administration → Reports**, and create a new report template. A new field, **Documentation URL**, appears in the **Template Configuration** panel. Enter a URL that points to relevant documentation.
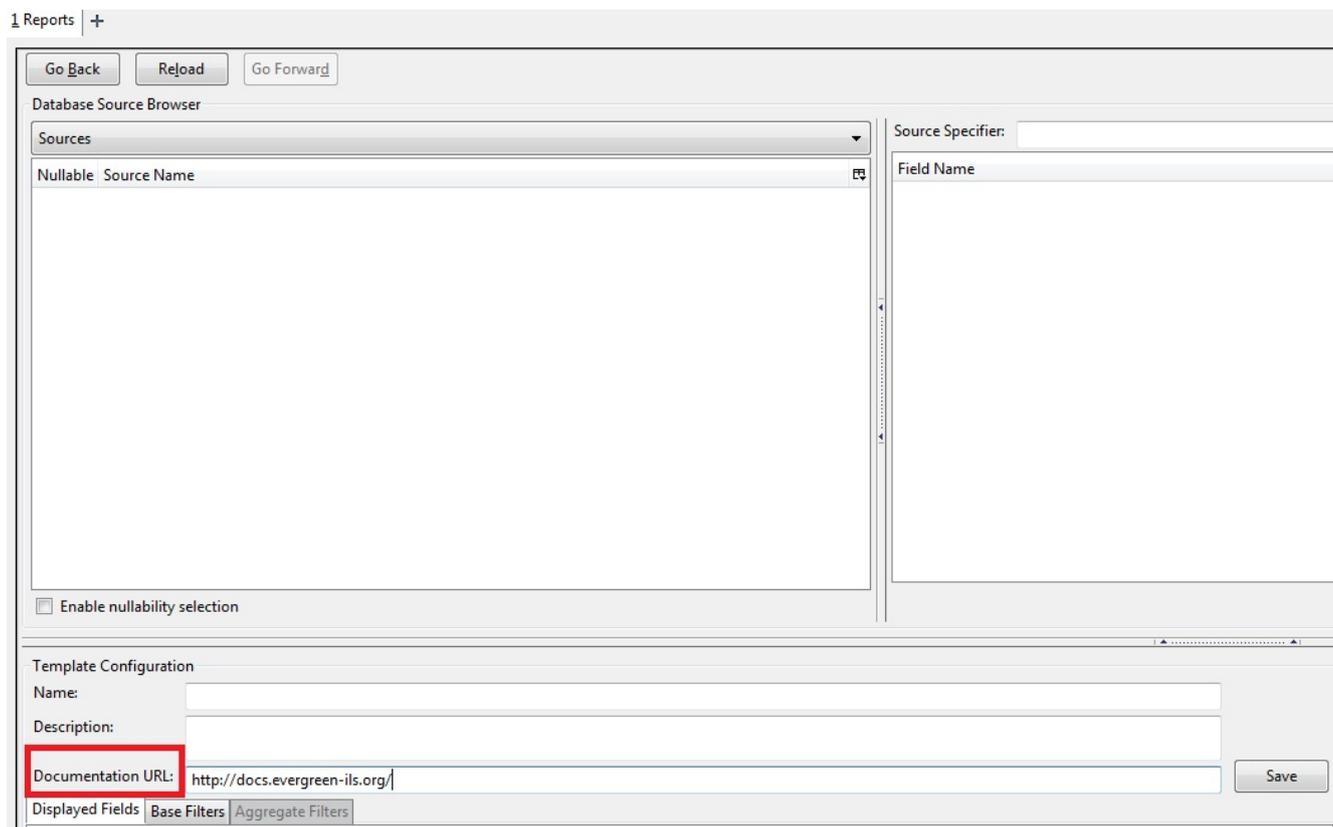
The link to this documentation will also appear in your list of report templates.
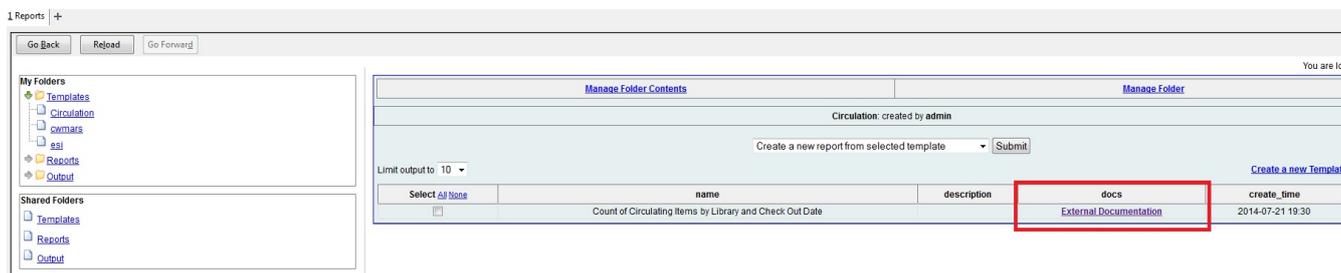
60.2. Field Hints

Descriptive information about fields or filters in a report template can be added to the **Field Hints** portion of the **Template Configuration** panel. For example, a circulation report template might include the field, **Circ ID**. You can add content to the **Field hints** to further define this field for staff and provide a reminder about the type of information that they should select for this field.

To view a field hint, click the **Column Picker**, and select **Field Hint**. The column will be added to

the display.

To add or edit a field hint, select a filter or field, and click **Change Field Hint**. Enter text, and click
Ok.

Chapter 61. Exporting Report Templates Using phpPgAdmin

Once the data is exported. Database Administrators/Systems Administrators can easily import this data into the templates folder to make it available in the client.

61.1. Dump the Entire Reports Template Table

The data exported in this method can create issues importing into a different system if you do not have a matching folder and owner. This is going to export report templates created in your system. The most important fields for importing into the new system are *name*, *description*, and *data*. Data defines the actual structure of the report. The *owner* and *folder* fields will unique to the system they were exported from and will have to be altered to ensure they match the appropriate owner and folder information for the new system.

1. Go to the **Reporter** schema. Report templates are located in the **Template** table
2. Click on the link to the **Template** table
3. Click the **export** button at the top right of the phpPgAdmin screen
4. Make sure the following is selected
   a. *Data Only* (checked)
   b. *Format*: Select *CSV* or *Tabbed* did get the data in a text format
   c. *Download* checked
5. Click *export* button at the bottom
6. A text file will download to your local system

61.2. Dump Data with an SQL Statement

The following statement could be used to grab the data in the folder and dump it with admin account as the owner and the first folder in your system.

```
SELECT 1 as owner, name, description, data, 1 as folder FROM reporter.template
```

or use the following to capture your folder names for export

```
SELECT 1 as owner, t.name, t.description, t.data, f.name as folder
    FROM reporter.template t
    JOIN reporter.template_folder f ON t.folder=f.id
```

1. Run the above query

2. Click the **download** link at the bottom of the page

3. Select the file format (*CSV* or *Tabbed*)

4. Check *download*

5. A text file with the report template data will be downloaded.

Staff administration

Chapter 62. Introduction

This section describes how to administer staff accounts.

Chapter 63. Describing your people

Many different members of your staff will use your Evergreen system to perform the wide variety of tasks required of the library.

When the Evergreen installation was completed, a number of permission groups should have been automatically created. These permission groups are:

- Users
- Patrons
- Staff
- Catalogers
- Circulators
- Acquisitions
- Acquisitions Administrator
- Cataloging Administrator
- Circulation Administrator
- Local Administrator
- Serials
- System Administrator
- Global Administrator
- Data Review
- Volunteers

Each of these permission groups has a different set of permissions connected to them that allow them to do different things with the Evergreen system. Some of the permissions are the same between groups; some are different. These permissions are typically tied to one or more working location (sometimes referred to as a working organizational unit or work OU) which affects where a particular user can exercise the permissions they have been granted.

63.1. Setting the staff user's working location

To grant a working location to a staff user in the staff client:

1. Search for the patron. Select **Search** > **Search for Patrons** from the top menu.

2. When you retrieve the correct patron record, select **Other** > **User Permission Editor** from the upper right corner. The permissions associated with this account appear in the right side of the client, with the **Working Location** list at the top of the screen.

3. The **Working Location** list displays the Organizational Units in your consortium. Select the check box for each Organization Unit where this user needs working permissions. Clear any other check boxes for Organization Units where the user no longer requires working permissions.

4. Scroll all the way to the bottom of the page and click **Save**. This user account is now ready to be used at your library.

As you scroll down the page you will come to the **Permissions** list. These are the permissions that are given through the **Permission Group** that you assigned to this user. Depending on your own permissions, you may also have the ability to grant individual permissions directly to this user.

63.2. Comparing approaches for managing permissions

The Evergreen community uses two different approaches to deal with managing permissions for users:

- **Staff Client**

  Evergreen libraries that are most comfortable using the staff client tend to manage permissions by creating different profiles for each type of user. When you create a new user, the profile you assign to the user determines their basic set of permissions. This approach requires many permission groups that contain overlapping sets of permissions: for example, you might need to create a *Student Circulator* group and a *Student Cataloger* group. Then if a new employee needs to perform both of these roles, you need to create a third *Student Cataloger / Circulator* group representing the set of all of the permissions of the first two groups.

  The advantage to this approach is that you can maintain the permissions entirely within the staff client; a drawback to this approach is that it can be challenging to remember to add a new permission to all of the groups. Another drawback of this approach is that the user profile is also used to determine circulation and hold rules, so the complexity of your circulation and hold rules might increase significantly.

- **Database Access**

  Evergreen libraries that are comfortable manipulating the database directly tend to manage permissions by creating permission groups that reflect discrete roles within a library. At the database level, you can make a user belong to many different permission groups, and that can simplify your permission management efforts. For example, if you create a *Student Circulator* group and a *Student Cataloger* group, and a new employee needs to perform both of these roles, you can simply assign them to both of the groups; you do not need to create an entirely new permission group in this case. An advantage of this approach is that the user profile can represent only the user's borrowing category and requires only the basic *Patrons* permissions, which can simplify your circulation and hold rules.

Permissions and profiles are not carved in stone. As the system administrator, you can change them as needed. You may set and alter the permissions for each permission group in line with what your library, or possibly your consortium, defines as the appropriate needs for each function in the library.

63.3. Managing permissions in the staff client

In this section, we'll show you in the staff client:

- where to find the available permissions

- where to find the existing permission groups

- how to see the permissions associated with each group

- how to add or remove permissions from a group

We also provide an appendix with a listing of suggested minimum permissions for some essential groups. You can compare the existing permissions with these suggested permissions and, if any are missing, you will know how to add them.

63.3.1. Where to find existing permissions and what they mean

In the staff client, in the upper right corner of the screen, click on **Administration** > **Server Administration** > **Permissions**.

The list of available permissions will appear on screen and you can scroll down through them to see permissions that are already available in your default installation of Evergreen.

There are over 500 permissions in the permission list. They appear in two columns: **Code** and **Description**. Code is the name of the permission as it appear in the Evergreen database. Description is a brief note on what the permission allows. All of the most common permissions have easily understandable descriptions.

63.3.2. Where to find existing Permission Groups

In the staff client, in the upper right corner of the screen, navigate to **Administration** > **Server Administration** > **Permission Groups**.

Two panes will open on your screen. The left pane provides a tree view of existing Permission Groups. The right pane contains two tabs: Group Configuration and Group Permissions.

In the left pane, you will find a listing of the existing Permission Groups which were installed by default. Click on the + sign next to any folder to expand the tree and see the groups underneath it. You should see the Permission Groups that were listed at the beginning of this chapter. If you do not and you need them, you will have to create them.

63.3.3. Adding or removing permissions from a Permission Group

First, we will remove a permission from the Staff group.

1. From the list of Permission Groups, click on **Staff**.

2. In the right pane, click on the **Group Permissions** tab. You will now see a list of permissions that this group has.

3. From the list, choose **CREATE_CONTAINER**. This will now be highlighted.

4. Click the **Delete Selected** button. CREATE_CONTAINER will be deleted from the list. The system will not ask for a confirmation. If you delete something by accident, you will have to add it back.

5. Click the **Save Changes** button.

You can select a group of individual items by holding down the *Ctrl* key and clicking on them. You can select a list of items by clicking on the first item, holding down the *Shift* key, and clicking on the last item in the list that you want to select.

Now, we will add the permission we just removed back to the Staff group.

1. From the list of Permission Groups, click on **Staff**.

2. In the right pane, click on the **Group Permissions** tab.

3. Click on the **New Mapping** button. The permission mapping dialog box will appear.

4. From the Permission drop down list, choose **CREATE_CONTAINER**.

5. From the Depth drop down list, choose **Consortium**.

6. Click the checkbox for **Grantable**.

7. Click the **Add Mapping** button. The new permission will now appear in the Group Permissions window.

8. Click the **Save Changes** button.

If you have saved your changes and you don't see them, you may have to click the Reload button in the upper left side of the staff client screen.

63.4. Managing role-based permission groups in the staff client

Main permission groups are granted in the staff client through Edit in the patron record using the Main (Profile) Permission Group field. Additional permission groups can be granted using secondary permission groups.

63.4.1. Secondary Group Permissions

The *Secondary Groups* button functionality enables supplemental permission groups to be added to staff accounts. The **CREATE_USER_GROUP_LINK** and **REMOVE_USER_GROUP_LINK** permissions are required to display and use this feature.

In general when creating a secondary permission group do not grant the permission to login to Evergreen.

Granting Secondary Permissions Groups

1. Open the account of the user you wish to grant secondary permission group to.

2. Click *Edit*.

3. Click *Secondary Groups*, located to the right of the *Main (Profile) Permission Group*.

Main (Profile) Permission Group	Circulators ▾	Secondary Groups

4. From the dropdown menu select one of the secondary permission groups.
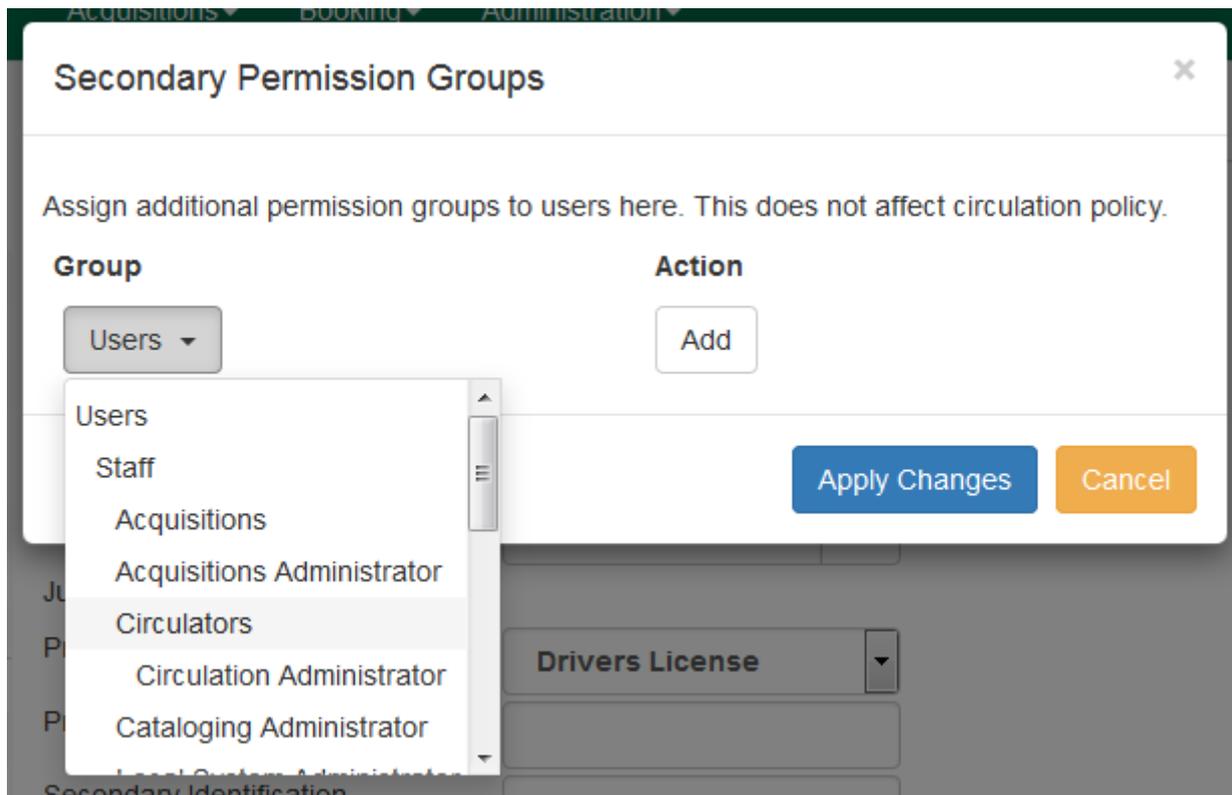
5. Click *Add*.

6. Click *Apply Changes*.
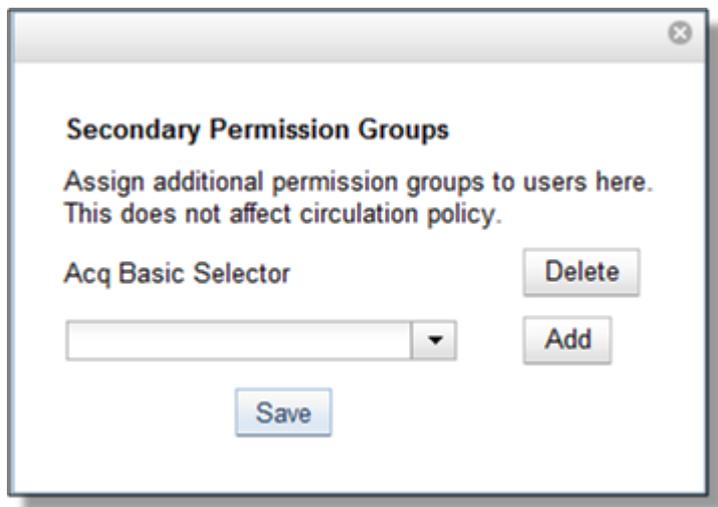
7. Click *Save* in the top right hand corner of the *Edit Screen* to save the user's account.

Removing Secondary Group Permissions

1. Open the account of the user you wish to remove the secondary permission group from.

2. Click *Edit*.

3. Click *Secondary Groups*, located to the right of the *Main (Profile) Permission Group*.

Main (Profile) Permission Group — Circulators ▾ — Secondary Groups

4. Click *Delete* beside the permission group you would like to remove.
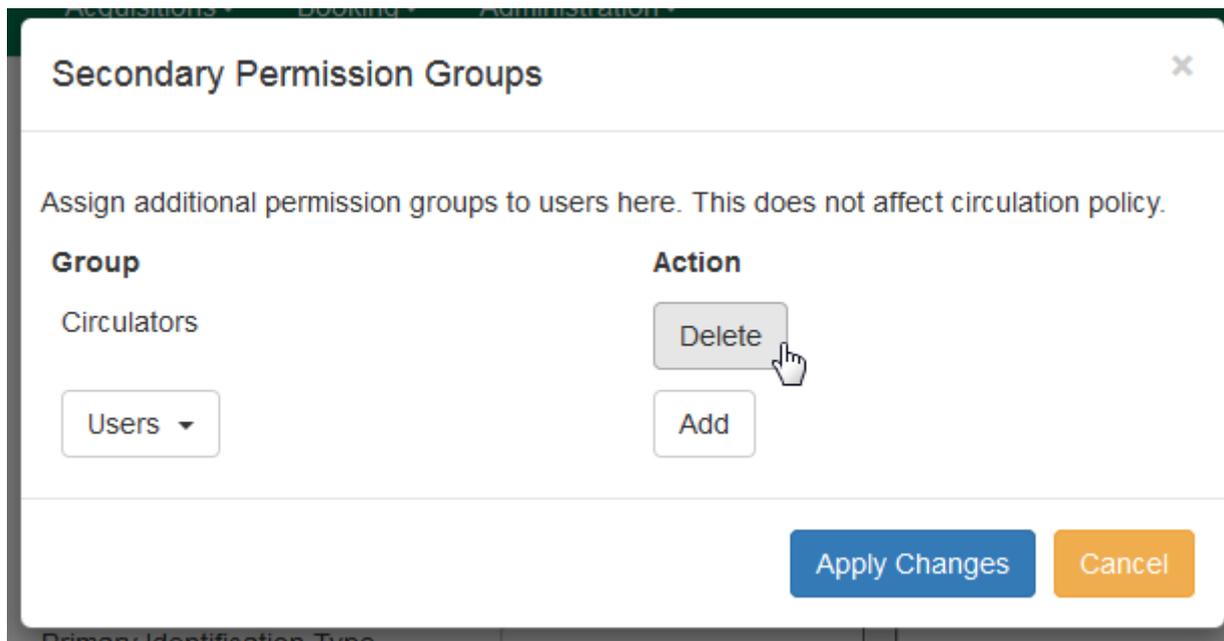
5. Click *Apply Changes*.
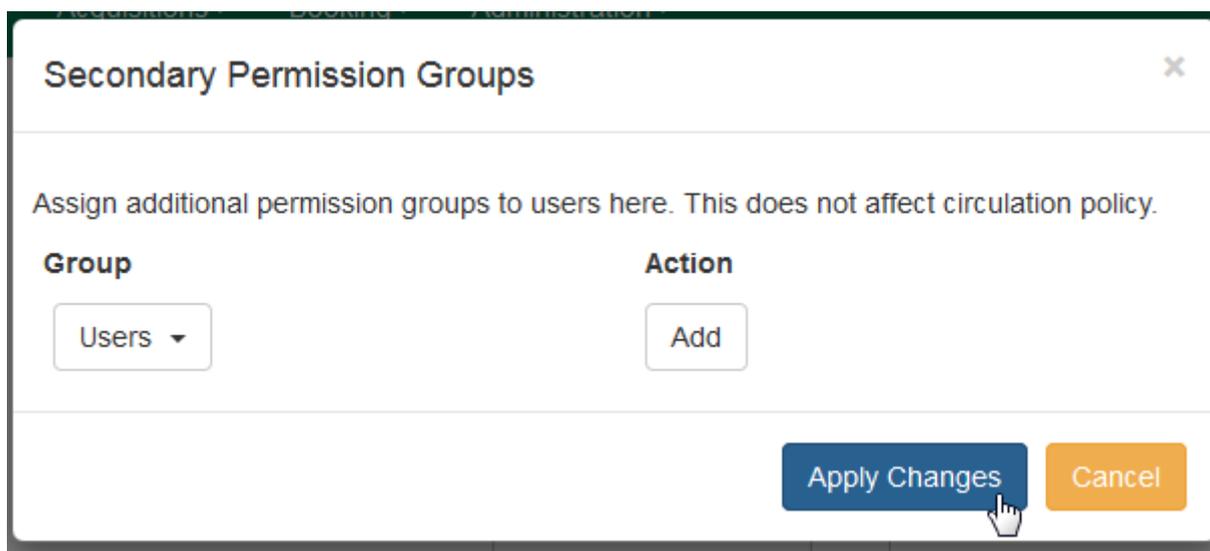
6. Click *Save* in the top right hand corner of the *Edit Screen* to save the user's account.

63.5. Managing role-based permission groups in the database

While the ability to assign a user to multiple permission groups has existed in Evergreen for years, a staff client interface is not currently available to facilitate the work of the Evergreen administrator. However, if you or members of your team are comfortable working directly with the Evergreen database, you can use this approach to separate the borrowing profile of your users from the permissions that you grant to staff, while minimizing the amount of overlapping permissions that you need to manage for a set of permission groups that would otherwise multiply

exponentially to represent all possible combinations of staff roles.

In the following example, we create three new groups:

- a *Student* group used to determine borrowing privileges
- a *Student Cataloger* group representing a limited set of cataloging permissions appropriate for students
- a *Student Circulator* group representing a limited set of circulation permissions appropriate for students

Then we add three new users to our system: one who needs to perform some cataloging duties as a student; one who needs perform some circulation duties as a student; and one who needs to perform both cataloging and circulation duties. This section demonstrates how to add these permissions to the users at the database level.

To create the Student group, add a new row to the *permission.grp_tree* table as a child of the *Patrons* group:

```
INSERT INTO permission.grp_tree (name, parent, usergroup, description,
application_perm)
SELECT 'Students', pgt.id, TRUE, 'Student borrowers',
'group_application.user.patron.student'
FROM permission.grp_tree pgt
 WHERE name = 'Patrons';
```

To create the Student Cataloger group, add a new row to the *permission.grp_tree* table as a child of the *Staff* group:

```
INSERT INTO permission.grp_tree (name, parent, usergroup, description,
application_perm)
SELECT 'Student Catalogers', pgt.id, TRUE, 'Student catalogers',
'group_application.user.staff.student_cataloger'
FROM permission.grp_tree pgt
WHERE name = 'Staff';
```

To create the Student Circulator group, add a new row to the *permission.grp_tree* table as a child of the *Staff* group:

```
INSERT INTO permission.grp_tree (name, parent, usergroup, description,
application_perm)
SELECT 'Student Circulators', pgt.id, TRUE, 'Student circulators',
'group_application.user.staff.student_circulator'
FROM permission.grp_tree pgt
WHERE name = 'Staff';
```

We want to give the Student Catalogers group the ability to work with MARC records at the

consortial level, so we assign the UPDATE_MARC, CREATE_MARC, and IMPORT_MARC permissions at depth 0:

```
WITH pgt AS (
   SELECT id
   FROM permission.grp_tree
   WHERE name = 'Student Catalogers'
)
INSERT INTO permission.grp_perm_map (grp, perm, depth)
SELECT pgt.id, ppl.id, 0
FROM permission.perm_list ppl, pgt
WHERE ppl.code IN ('UPDATE_MARC', 'CREATE_MARC', 'IMPORT_MARC');
```

Similarly, we want to give the Student Circulators group the ability to check out items and record in-house uses at the system level, so we assign the COPY_CHECKOUT and CREATE_IN_HOUSE_USE permissions at depth 1 (overriding the same *Staff* permissions that were granted only at depth 2):

```
WITH pgt AS (
   SELECT id
   FROM permission.grp_tree
   WHERE name = 'Student Circulators'
) INSERT INTO permission.grp_perm_map (grp, perm, depth)
SELECT pgt.id, ppl.id, 1
FROM permission.perm_list ppl, pgt
WHERE ppl.code IN ('COPY_CHECKOUT', 'CREATE_IN_HOUSE_USE');
```

Finally, we want to add our students to the groups. The request may arrive in your inbox from the library along the lines of "Please add Mint Julep as a Student Cataloger, Bloody Caesar as a Student Circulator, and Grass Hopper as a Student Cataloguer / Circulator; I've already created their accounts and given them a work organizational unit." You can translate that into the following SQL to add the users to the pertinent permission groups, adjusting for the inevitable typos in the names of the users.

First, add our Student Cataloger:

```
WITH pgt AS (
   SELECT id FROM permission.grp_tree
   WHERE name = 'Student Catalogers'
)
INSERT INTO permission.usr_grp_map (usr, grp)
SELECT au.id, pgt.id
FROM actor.usr au, pgt
WHERE first_given_name = 'Mint' AND family_name = 'Julep';
```

Next, add the Student Circulator:

```
WITH pgt AS (
  SELECT id FROM permission.grp_tree
  WHERE name = 'Student Circulators'
)
INSERT INTO permission.usr_grp_map (usr, grp)
SELECT au.id, pgt.id
FROM actor.usr au, pgt
WHERE first_given_name = 'Bloody' AND family_name = 'Caesar';
```

Finally, add the all-powerful Student Cataloger / Student Circulator:

```
 WITH pgt AS (
  SELECT id FROM permission.grp_tree
  WHERE name IN ('Student Catalogers', 'Student Circulators')
)
INSERT INTO permission.usr_grp_map (usr, grp)
SELECT au.id, pgt.id
FROM actor.usr au, pgt
WHERE first_given_name = 'Grass' AND family_name = 'Hopper';
```

While adopting this role-based approach might seem labour-intensive when applied to a handful of students in this example, over time it can help keep the permission profiles of your system relatively simple in comparison to the alternative approach of rapidly reproducing permission groups, overlapping permissions, and permissions granted on a one-by-one basis to individual users.

Chapter 64. User and Group Permissions

It is essential to understand how user and group permissions can be used to allow staff to fulfill their roles while ensuring that they only have access to the appropriate level.

Permissions in Evergreen are applied to a specific location and system depth based on the home library of the user. The user will only have that permission within the scope provided by the Depth field in relation to his/her working locations.

Evergreen provides group application permissions in order to restrict which staff members have the ability to assign elevated permissions to a user, and which staff members have the ability to edit users in particular groups.

64.1. Staff Accounts

New staff accounts are created in much the same way as patron accounts, using *Circulation →
Register Patron* or **Shift+F1**. Select one of the staff profiles from the *Profile Group* drop-down menu.
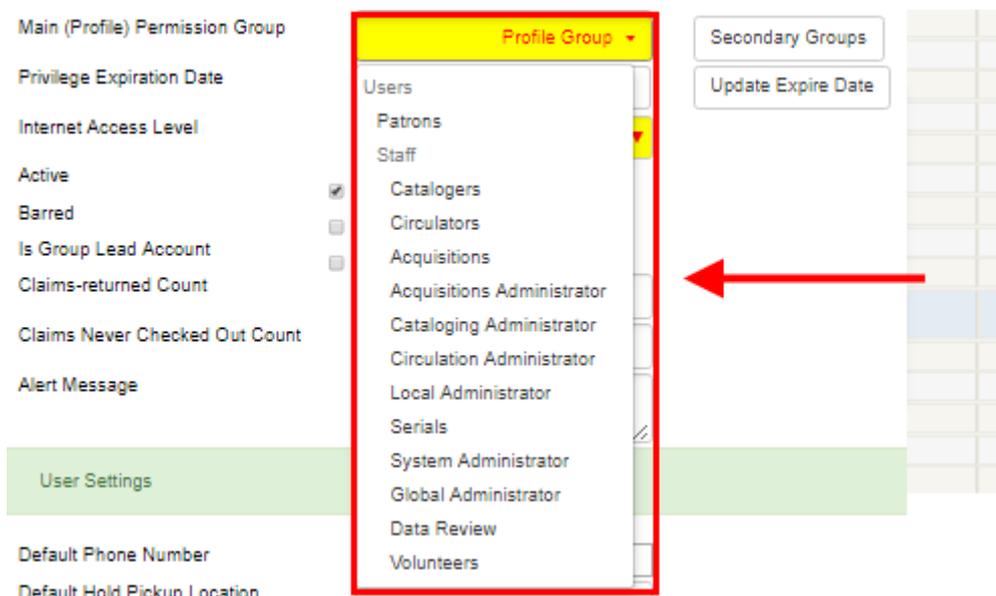
Each new staff account must be assigned a *Working Location* which determines its access level in staff client interfaces.

1. To assign a working location, open the newly created staff account using **F1** (retrieve patron) or **F4** (patron search).

2. Select *Other → User Permission Editor*
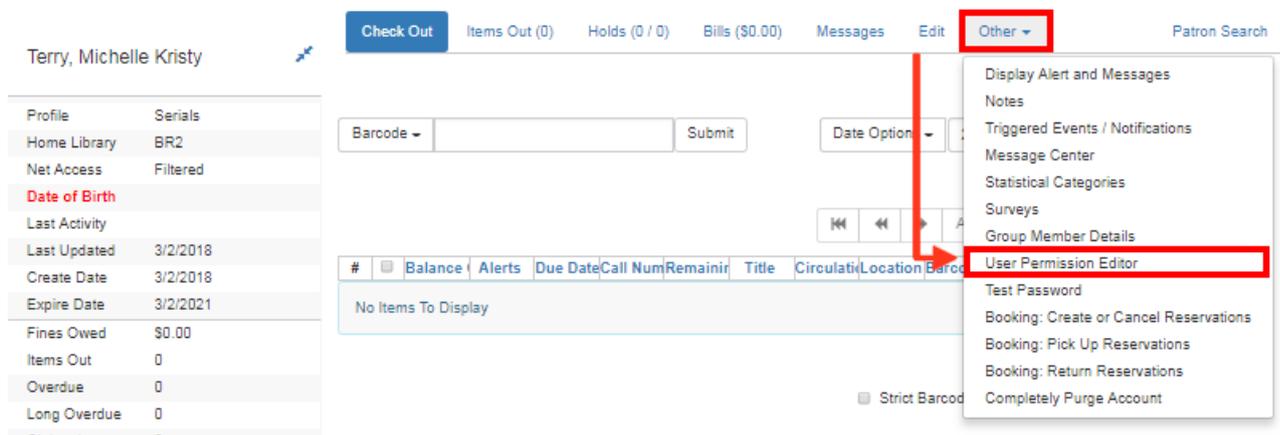
3. Place a check in the box next to the desired working location, then scroll to the bottom of the display and click *Save*.

> **NOTE**   In multi-branch libraries it is possible to assign more than one working location

64.1.1. Staff Account Permissions

To view a detailed list of permissions for a particular Evergreen account go to *Administration → User Permission Editor* in the staff client.

64.1.2. Granting Additional Permissions

A *Local System Administrator (LSA)* may selectively grant *LSA* permissions to other staff accounts. In the example below a *Circ +Full Cat* account is granted permission to process offline transactions, a function which otherwise requires an *LSA* login.

1. Log in as a Local System Administrator.

2. Select *Administration → User Permission Editor* and enter the staff account barcode when prompted

   OR

   Retrieve the staff account first, then select *Other → User Permission Editor*

3. The User Permission Editor will load (this may take a few seconds). Greyed-out permissions cannot be edited because they are either a) already granted to the account, or b) not available to any staff account, including LSAs.

1) List of permission names.

2) If checked the permission is granted to this account.

3) Depth limits application to the staff member's library and should be left at the default.

4) If checked this staff account will be able to grant the new privilege to other accounts (not recommended).

4. To allow processing of offline transactions check the Applied column next to *OFFLINE_EXECUTE*.

5. Scroll down and click Save to apply the changes.

group_application.user.vendor

money.collections_tracker.create

money.collections_tracker.delete

Library

Library

Library

Save

Chapter 65. Work Log

65.1. Expanding the Work Log

In versions of Evergreen prior to 2.3, the work log recorded check ins, checkouts, patron registration, patron editing, and renewals. In version 2.3, the work log also records holds that have been placed and payments that have been received.

In this example, a staff member has collected a fine from a patron. To view this action in the work log, click **Administration** → **Local Administration** → **Work Log**. By default, the work log will record the staff member's username, the amount that was received, the payment type, the patron's barcode, and the patron's last name.
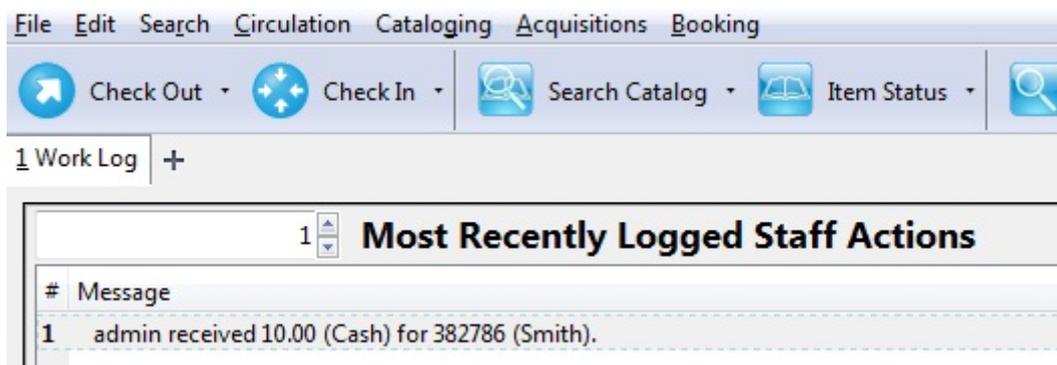
In this example, a staff member has placed a hold for a patron. To view this action in the work log, click **Administration** → **Local Administration** → **Work Log**. By default, the work log will record the staff member's username, the hold type, the patron's barcode, and the patron's last name.
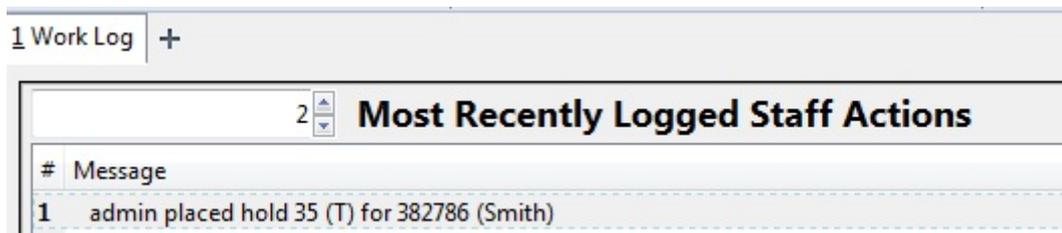
Chapter 66. Recent Staff Searches

This feature enables you to view your recent searches as you perform them in the staff client. The number of searches that you can view is configurable. This feature is only available through the staff client; it is not available to patrons in the OPAC.

66.1. Administrative Settings

By default, ten searches will be saved as you search the staff client. If you want to change the number of saved searches, then you can configure the number of searches that you wish to save through the **Library Settings Editor** in the **Admin** module.

To configure the number of recent staff searches:

1. Click **Administration** → **Local Administration** → **Library Settings Editor.**
2. Scroll to **OPAC: Number of staff client saved searches to display on left side of results and record details pages**
3. Click **Edit**.
4. Select a **Context** from the drop down menu.
5. Enter the number of searches that you wish to save in the **Value** field.
6. Click **Update Setting**

| NOTE | To retain this setting, the system administrator must restart the web server. |

If you do not want to save any searches, then you can turn off this feature.

To deactivate this feature:

1. Follow steps 1-4 (one through four) as listed in the previous section.
2. In the **value** field, enter 0 (zero).
3. Click **Update Setting.** This will prevent you from viewing any saved searches.

66.2. Recent Staff Searches

Evergreen will save staff searches that are entered through either the basic or advanced search fields. To view recent staff searches:

1. Enter a search term in either the basic or advanced search fields.

2. Your search results for the current search will appear in the middle of the screen. The most recent searches will appear on the left side of the screen.

Other administration

Chapter 67. Introduction

This section describes other staff client administrator tasks.

Chapter 68. Notifications / Action Triggers

68.1. Introduction

Action Triggers give administrators the ability to set up actions for specific events. They are useful for notification events such as hold notifications.

To access the Action Triggers module, select **Administration** → **Local Administration** → **Notifications / Action triggers**.

NOTE	You must have Local Administrator permissions to access the Action Triggers module.

You will notice four tabs on this page: Event Definitions, Hooks, Reactors and Validators.

68.2. Event Definitions

Event Definitions is the main tab and contains the key fields when working with action triggers. These fields include:

68.2.1. Table 1: Action Trigger Event Definitions

Field	Description
Owning Library	The shortname of the library for which the action / trigger / hook is defined.
Name	The name of the trigger event, that links to a trigger event environment containing a set of fields that will be returned to the Validators and/or Reactors for processing.
Hook	The name of the trigger for the trigger event. The underlying action_trigger.hook table defines the Fieldmapper class in the core_type column off of which the rest of the field definitions "hang".
Enabled	Sets the given trigger as enabled or disabled. This must be set to enabled for the Action trigger to run.
Processing Delay	Defines how long after a given trigger / hook event has occurred before the associated action ("Reactor") will be taken.

Processing Delay Context Field	Defines the field associated with the event on which the processing delay is calculated. For example, the processing delay context field on the hold.capture hook (which has a core_type of ahr) is *capture_time*.
Processing Group Context Field	Used to batch actions based on its associated group.
Reactor	Links the action trigger to the Reactor.
Validator	The subroutines receive the trigger environment as an argument (see the linked Name for the environment definition) and returns either *1* if the validator is *true* or *0* if the validator returns *false*.
Event Repeatability Delay	Allows events to be repeated after this delay interval.
Failure Cleanup	After an event is reacted to and if there is a failure a cleanup module can be run to clean up after the event.
Granularity	Used to group events by how often they should be run. Options are Hourly, Daily, Weekly, Monthly, Yearly, but you may also create new values.
Max Event Validity Delay	Allows events to have a range of time that they are valid. This value works with the **Processing Delay** to define a time range.
Message Library Path	Defines the org_unit object for a Patron Message Center message.
Message Template	A Template Toolkit template that can be used to generate output for a Patron Message Center message. The output may or may not be used by the reactor or another external process.
Message Title	The title that will display on a Patron Message Center message.
Message User Path	Defines the user object for a Patron Message Center message.
Opt-In Settings Type	Choose which User Setting Type will decide if this event will be valid for a certain user. Use this to allow users to Opt-In or Opt-Out of certain events.
Opt-In User Field	Set to the name of the field in the selected hook's core type that will link the core type to the actor.usr table.

Success Cleanup	After an event is reacted to successfully a cleanup module can be run to clean up after the event.
Template	A Template Toolkit template that can be used to generate output. The output may or may not be used by the reactor or another external process.

68.3. Creating Action Triggers

1. From the top menu, select **Administration → Local Administration → Notifications / Action triggers**.

2. Click on the *New* button.

3. Select an *Owning Library*.

4. Create a unique *Name* for your new action trigger.

5. Select the *Hook*.

6. Check the *Enabled* check box.

7. Set the *Processing Delay* in the appropriate format. E.g. *7 days* to run 7 days from the trigger event or *00:01:00* to run 1 hour after the *Processing Delay Context Field*.

8. Set the *Processing Delay Context Field* and *Processing Group Context Field*.

9. Select the *Reactor* and *Validator*.

10. Set the *Event Repeatability Delay*.

11. Select the *Failure Cleanup* and *Granularity*.

12. Set the *Max Event Validity Delay*.

Trigger Event Definitions

Owning Library	CONS
Name	90 Day Overdue Mark Lost
Hook	checkout.due
Enabled	☐
Processing Delay	90 days
Processing Delay Context Field	due_date
Processing Group Context Field	
Reactor	MarkItemLost
Validator	CircIsOverdue
Event Repeatability Delay	
Definition ID	2
Failure Cleanup	
Granularity	
Max Event Validity Delay	
Message Library Path	

13. If you wish to send a User Message through the Message Center, set a *Message Library Path*. Enter text in the *Message Template*. Enter a title for this message in *Message Title*, and set a value in *Message User Path*.

14. Select the *Opt-In Setting Type*.

15. Set the *Opt-In User Field*.

16. Select the *Success Cleanup*.

Message Title	
Message User Path	
Opt-In Setting Type	
Opt-In User Field	
Retention Interval	
Success Cleanup	

17. Enter text in the *Template* text box if required. These are for email messages. Here is a sample template for sending 90 day overdue notices:

```
[%- USE date -%]
[%- user = target.0.usr -%]
To: [%- params.recipient_email || user.email %]
From: [%- helpers.get_org_setting(target.home_ou.id, 'org.bounced_emails') ||
lib.email || params.sender_email || default_sender %]
Subject: Overdue Items Marked Lost
Auto-Submitted: auto-generated
```

```
Dear [% user.family_name %], [% user.first_given_name %]
The following items are 90 days overdue and have been marked LOST.
[%- params.recipient_email || user.email %][%- params.sender_email ||
default_sender %]
[% FOR circ IN target %]
    Title: [% circ.target_copy.call_number.record.simple_record.title %]
    Barcode: [% circ.target_copy.barcode %]
    Due: [% date.format(helpers.format_date(circ.due_date), '%Y-%m-%d') %]
    Item Cost: [% helpers.get_copy_price(circ.target_copy) %]
    Total Owed For Transaction: [% circ.billable_transaction.summary.total_owed %]
    Library: [% circ.circ_lib.name %]
[% END %]
```

```
[% FOR circ IN target %]
    Title: [% circ.target_copy.call_number.record.simple_record.title %]
    Barcode: [% circ.target_copy.barcode %]
    Due: [% date.format(helpers.format_date(circ.due_date), '%Y-%m-%d') %]
    Item Cost: [% helpers.get_copy_price(circ.target_copy) %]
    Total Owed For Transaction: [% circ.billable_transaction.summary.total_owed %]
    Library: [% circ.circ_lib.name %]
[% END %]
```

18. Once you are satisfied with your new event trigger, click the *Save* button located at the bottom of the form.

> **TIP** A quick and easy way to create new action triggers is to clone an existing action trigger.

68.3.1. Cloning Existing Action Triggers

1. Check the check box next to the action trigger you wish to clone.

2. Click *Clone Selected* on the top left of the page.

3. An editing window will open. Notice that the fields will be populated with content from the cloned action trigger. Edit as necessary and give the new action trigger a unique Name.

4. Click *Save*.

68.3.2. Editing Action Triggers

1. Double-click on the action trigger you wish to edit.

2. The edit screen will appear. When you are finished editing, click *Save* at the bottom of the form. Or click *Cancel* to exit the screen without saving.

NOTE	Before deleting an action trigger, you should consider disabling it through the editing form. This way you can keep it for future use or cloning.

68.3.3. Deleting Action Triggers

1. Check the check box next to the action trigger you wish to delete

2. Click *Delete Selected* on the top-right of the page.

68.3.4. Testing Action Triggers

1. Go to the list of action triggers.

2. Click on the blue link text for the action trigger you'd like to test.

3. Go to the Test tab.

4. If there is a test available, fill in the required information.

5. View the output of the test.

| WARNING | If you are testing an email or SMS notification, use a test account and email as an example. Using the Test feature will actually result in the notification being sent if configured correctly. Similarly, use a test item or barcode when testing a circulation-based event like Mark Lost since the test will mark the item as lost. |

68.3.5. Hooks

Hooks define the Fieldmapper class in the core_type column off of which the rest of the field definitions "hang".

Table 2. Hooks

Field	Description
Hook Key	A unique name given to the hook.
Core Type	Used to link the action trigger to the IDL class in fm_IDL.xml
Description	Text to describe the purpose of the hook.

Passive	Indicates whether or not an event is created by direct user action or is circumstantial.

You may also create, edit and delete Hooks but the Core Type must refer to an IDL class in the fm_IDL.xml file.

68.3.6. Reactors

Reactors link the trigger definition to the action to be carried out.

Table 3. Action Trigger Reactors

Field	Description
Module Name	The name of the Module to run if the action trigger is validated. It must be defined as a subroutine in `/openils/lib/perl5/OpenILS/Application/Trigger/Reactor.pm` or as a module in `/openils/lib/perl5/OpenILS/Application/Trigger/Reactor/*.pm`.
Description	Description of the Action to be carried out.

You may also create, edit and delete Reactors. Just remember that there must be an associated subroutine or module in the Reactor Perl module.

68.3.7. Validators

Validators set the validation test to be preformed to determine whether the action trigger is executed.

Table 4. Action Trigger Validators

Field	Description
Module Name	The name of the subroutine in `/openils/lib/perl5/OpenILS/Application/Trigger/Reactor.pm` to validate the action trigger.
Description	Description of validation test to run.

You may also create, edit and delete Validators. Just remember that their must be an associated subroutine in the Reactor.pm Perl module.

Appendix A: Attributions

DIG Contributors

- Hilary Caws-Elwitt, Susquehanna County Library
- Karen Collier, Kent County Public Library
- George Duimovich, NRCan Library
- Lynn Floyd, Anderson County Library
- Sally Fortin, Equinox Software
- Wolf Halton, Lyrasis
- Jennifer Pringle, SITKA
- June Rayner, eiNetwork
- Steve Sheppard
- Ben Shum, Bibliomation
- Roni Shwaish, eiNetwork
- Robert Soulliere, Mohawk College
- Remington Steed, Calvin College
- Jeanette Lundgren, CW MARS
- Tim Spindler, CW MARS

- Jane Sandberg, Linn-Benton Community College
- Lindsay Stratton, Pioneer Library System
- Yamil Suarez, Berklee College of Music
- Jenny Turner, PALS

Appendix B: Admonitions

- Note

- warning

- caution

- tip

Appendix C: Licensing

This work is licensed under a Creative Commons Attribution-ShareAlike 3.0 Unported License.

Index

registering a workstation, 5

T

Text Messaging
 Library Settings Editor, 60

V

Vandelay
 Library Settings Editor, 65

W

web client
 print templates, 205
 receipt template editor, 205