# **Evergreen Documentation**

**Documentation Interest Group** 

# Evergreen Documentation Documentation Interest Group

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# **Part I. Introduction**

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# **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 <u>Attributions</u> 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 <u>docs@evergreen-ils.org</u>.

This guide to Evergreen is intended to meet the needs of front-line library staff, catalogers, library administrators, system administrators, and software developers. It is organized into Parts, Chapters, and Sections addressing key aspects of the software, beginning with the topics of broadest interest to the largest groups of users and progressing to some of the more specialized and technical topics of interest to smaller numbers of users.

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.

# Chapter 3. Release notes

# Upgrade notes

# Log Protect (redaction)

To prevent sensitive information such as passwords from being logged in general activity logs, add the following XML chunk to the bottom of opensrf\_core.xml, just inside the <config> section:

```
</routers>
 <shared> <!-- new block starts here -->
   <log_protect>
     <match_string>open-ils.auth.authenticate.verify</match_string>
      <match_string>open-ils.auth.authenticate.complete</match_string>
     <match_string>open-ils.auth_proxy.login</match_string>
     <match_string>open-ils.actor.user.password</match_string>
     <match_string>open-ils.actor.user.username</match_string>
     <match_string>open-ils.actor.user.email</match_string>
     <match_string>open-ils.actor.patron.update</match_string>
      <match_string>open-ils.cstore.direct.actor.user.create</match_string>
     <match_string>open-ils.cstore.direct.actor.user.update</match_string>
     <match_string>open-ils.cstore.direct.actor.user.delete</match_string>
   </log_protect>
 </shared> <!-- new block ends here -->
</config>
```

# **Z39.50 Server Definitions**

Z39.50 server target definitions have been removed from the sample opensrf.xml.example file. To migrate existing settings from your opensrf.xml configuration file to the database, peform the following steps:

- 1. First, set up your custom Z39.50 sources in the database. For each entry in z3950/services, map the following XML paths to the corresponding config.z3950\_source table column as follows:
  - z3950/services/<entry> = name
  - //<entry>/name = label
  - //<entry>/host = host
  - //<entry>/port = port
  - //<entry>/db = db
  - //<entry>/record\_format = record\_format
  - //<entry>/transmission\_format = transmission\_format
- 2. Then, for each attribute defined in the <attrs> element for a given service, map the following XML paths to the corresponding config.z3950\_attr table column as follows:
  - z3950/services/<entry> = source
  - //<entry>/attrs/<attr> = name

- //<entry>/attrs/<attr>/code = code
- //<entry>/attrs/<attr>/format = format
- 3. After adding the new Z39.50 sources and corresponding attributes, you will need to log out of the staff client and log back into the staff client to retrieve the new entry values. If a given Z39.50 server does not work for a given attribute, pay attention to the truncation column for the attribute.

# **New features**

# Administration

### **Custom Org Unit Trees**

Evergreen enables you to create an organizational tree that describes the systems, branches, or other units that comprise your organization. By default, the org unit tree that appears to patrons in the OPAC is identical to the one that appears to users of the staff client. Using this feature, you can condense or re-order the organizational tree into a simpler structure for patrons using the OPAC while maintaining the complex organizational tree that is available to users of the staff client.

As a further enhancement, you can hide a parental org unit yet still make its child org units visible in the OPAC. In previous versions of Evergreen, child org units inherited the visibility setting of their parents.

Documentation for this feature is available in the Book of Evergreen at http://docs.evergreen-ils.org/2.2/

### **Fine Accrual on Closed Dates**

By default, fines accrue only on dates that the library is open. This feature enables you to charge patrons fines on dates the library is closed. Fines accrue during scheduled closings as well as during normal weekly closed dates.

Documentation for this feature is available in the Book of Evergreen at http://docs.evergreen-ils.org/2.2/

#### **Target Copies for Holds at Closed Libraries**

By default, when a patron places a hold on a title, the hold targeter will search for copies to fill the hold only at circulating libraries that are open. Copies at closed libraries are not targeted to fill holds. When turned on, this feature enables Evergreen to target copies that have closed circulating libraries to fill holds. Two new org unit settings control this feature.

Documentation for this feature is available in the Book of Evergreen at http://docs.evergreen-ils.org/2.2/

# OPAC

# Template Toolkit OPAC (TPAC)

The basic catalog has been replaced by the Template Toolkit OPAC (*TPAC*). Compared to the traditional catalog (*JSPAC*), TPAC uses far fewer network calls for each page, resulting in faster loading pages. TPAC is built on the

<u>Template Toolkit</u> language to enable simple but powerful customization, and supports integrated gettext-based translation for strings—including placeholders and quantities—for better internationalization support.

The next feature release of Evergreen will make TPAC the primary catalog and deprecate the use of the JSPAC.

# Auto Suggest in Catalog Search

The <u>auto suggest feature</u> suggests the completion of search terms as the user enters his query. By default, the user will see ten suggestions although this number is configurable at the database level. Scroll through suggestions with your mouse, or use the arrow keys to scroll through the suggestions. Select a suggestion to view records that are linked to this suggestion.

This feature is not turned on by default. You must turn it on in the Admin module.

# **Copy Location Groups**

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

For advanced users, this change includes a new Query Parser filter called location\_groups().

### **My Lists**

The My Lists feature replaces the bookbag feature that was available in versions proior to 2.2. This feature enables you to create temporary and permanent lists; create and edit notes for items in lists; place holds on items in lists; and share lists via RSS feeds and CSV files.

Documentation for this feature is available in the Book of Evergreen at http://docs.evergreen-ils.org/2.2/

### **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 copy locations via text message.

Documentation for this feature is available in the Book of Evergreen at http://docs.evergreen-ils.org/2.2/

#### **New Patron Preferences**

Users will now have the ability to designate the following preferences in the Template Toolkit catalog (*TPAC*):

- A preferred search location. Unlike the default search library in JSPAC, this setting will also control which copies display first in search results and record detail screens.
- A preferred pickup location.
- The ability to keep a history of checked out items.

• The ability to keep a history of holds.

# **Credit Card Payment via Public Catalog**

Patrons can now use credit cards to pay fines and bills in My Account of the TPAC.

# **Record Detail Print and E-mail Actions**

Implements Print and Email actions as links below the Add to List link in the TPAC record detail page.

# Identify Previously-Checked-Out Items in Search Results

When a user is logged into the TPAC and performs a search, this feature indicates in the results set when any of the result items were ever checked out by the logged-in user. Items will only be tagged when the related org setting is enabled and the user has opted in to circ history tracking.

# **Patron Management**

# **Patron Statistical Category Enhancements**

The following enhancements have been added to patron statistical categories:

- categories can be marked as *required* (must be filled out when a patron is registered)
- categories can be marked to allow or disallow user-created entries
- an entry for a given category and org unit can be marked as the default entry. It will be automatically selected in the new patron registration screen.

### **User Settings Available from Patron Editor**

Staff can now access and update user settings, like notification preferences and default pickup library, in the patron editor.

# Mark Patron E-mail or Phone as Invalid

Staff can mark a patron's email address or phone number as invalid in the patron editor. The system will clear the email (or phone) field from actor.usr, and [both optionally, per OU setting]:

- 1. create a corresponding standing penalty against the user, for staff to notice next time they bring up said patron in the staff client;
- 2. create a patron note. Related penalties (but not notes) will be cleared whenever that patron's email address or phone number is updated again.

# **Address Alert in Patron Registration**

Support for comparing user addresses to alert addresses. When an address is found, the address in question is styled (the header row turns red) and the configured alert message is shown along the top-right, where other warnings appear.

# Circulation

#### **Telephony Improvements**

Enhancements to notifications by telephony, including:

- A feature that allows an Evergreen system to roll over failed notifcations into new ones with a different notification method.
- Holiday awareness. System administrators can, via cron, schedule the set\_pbx\_holidays script on an Evergreen system to periodically update the PBX's table of holidays, based on a given org unit's closed date ranges.
- Smart retry. In certain situations, if you put too many callfiles into Asterisk's spool at once, Asterisk will try to make too many calls at once, and all such calls just fail. That is what the allocator is meant to prevent. Smart retry is about moving calls that have been tried once, and will be retried again later due to resulting in a busy signal or other problem, out of the spool to make room for other calls that could be made in the meantime.

# **Circulation Limit Groups & Limit Sets**

The new **Circulation Limit Groups** interface found in the **Server administration** menu can be thought of as *tags* the system places on circulations so that it can find them later. The **Limit Sets** interface found in the **Local administration** menu defines rules for limiting the number of active circulations a patron may have based on Circulation Modifiers and Limit Groups. These new features support the following options:

- Setting circ limits for circulations that have no circ modifiers. This is useful for systems with circulation rules based on something other than circulation modifiers (for example, **MARC type**) or for grouping items that may have different circulation modifiers so that, for example, you can count every video, regardless of circulation modifiers.
- The ability to set limits for a single library's items, regardless of the checkout library.

### **New Checkin Modifiers**

The following modifiers have been added to the check-in interface:

- Clear Shelf-Expired Holds. When checking in something on the hold shelf, run a *Clear Shelf Process* for the specific copy ID at that library to auto-clear any Shelf-Expired holds.
- **Retarget Local Holds**. When checking in *in process* items that are owned by the library, attempt to find a local hold to retarget. This is intended to help with proper targeting of newly-cataloged items.
- **Retarget All Statuses**. Similar to *Retarget Local Holds*, this modifier will attempt to find a local hold to retarget, regardless of the status of the item being checked in. This modifier must be used in conjunction with the *Retarget Local Holds* modifier.
- **Capture Local Holds as Transits**. With this checkin modifier, any local holds will be given an *in transit* status instead of *holds shelf*. The intent is to stop the system from sending holds notifications before the item is ready to be placed on the holds shelf. Possible use cases include Automated Materials Handling(AMH) checkins, in which items may be sitting in a bin for a while before landing on the holds shelf, and checkins done on closed days.

# **Copy Location Alerts**

This enhancement adds a new *checkin\_alert* column to copy locations. If true (defaults to false), then a routing alert is generated at reshelving time for the location. 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.

# Age Hold Protection Based on a Copy's Active Date

- Adds a *Sets copy active* column to the *Copy Statuses* interface to identify statuses that indicate a copy is active and ready for checkout. The first time a copy is set to one of these statuses, the system adds an *active date* for the copy, which can be used for reporting.
- Provides a new library setting for age hold protection to be based on the copy's active date instead of its create date.

### **Option to Place Holds on Age Protected Items**

Allow choice of placing hold despite age protection. This alters the backend to watch when so much as one copy failed only due to age protection. In JSPAC, an alternate confirm message is shown. In TPAC, the failure message is changed and override is always allowed for the hold in question.

#### Force and Cataloging Recall Holds

Creates two new types of copy-level holds, **Force** and **Cataloging Recall**, that cut in front of all other holds and ignore hold rules. For cataloging recall holds, the copy's status changes to *cataloging* when it reaches its destination.

#### Archiving Statistical Categories and Circulation-Time Copy Locations

Circulation-time copy locations are now archived with circulations (aged or active).

Using the **Statistical Categories Editor**, staff can also designate statistical categories (patron and copy) to archive with circulations.

#### **Browse Holds Shelf Interface Displays Canceled Holds**

Holds that are canceled after they are placed on the holds shelf will continue to display in this interface and will also display in the *shelf-expired holds* view.

# Acquisitions

# Vandelay Integration into Acquisitions

The Acquisitions Load MARC Order Record interface enables you to add MARC records to selection lists and purchase orders and upload the records into the catalog. The Vandelay interface enables you to create specific match points between incoming MARC records and exisiting catalog records. Combining these two features enables you to track on order MARC records through the Acquisitions interface and to utilize the record matching mechanisms available in Vandelay when importing acquisitions records.

Documentation for this feature is available in the Book of Evergreen at http://docs.evergreen-ils.org/2.2/

### **Receive Items from an Invoice**

This feature enables users to receive items from an invoice. Staff can receive individual copies, or they can receive items in batch.

Documentation for this feature is available in the Book of Evergreen at http://docs.evergreen-ils.org/2.2/

### Lineitem and Copy Actions Accessible from More Interfaces

Users can now access lineitem actions (for example, receive, unreceive, update barcodes, new invoice) from the acquisitions lineitem search results and selection list interfaces. Also available on these interfaces is a link to copy details where users can take receive actions (receive, unreceive, cancel) on individual copies.

# Improved Displays for Provider and Fund Administration Pages

This enhancement provides improved support for viewing the provider and fund administation pages. It also allows staff to use filters to find providers and funds.

# Cataloging

# **Authority Control Sets**

The tags and subfields that display in authority records in Evergreen are defined by control sets. The Library of Congress control set is the default control set in all versions of Evergreen. However, in Evergreen release 2.2, you can create customized control sets for authority records, and you can define thesauri and authority fields for these control sets.

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

Documentation for this feature is available in the Book of Evergreen at http://docs.evergreen-ils.org/2.2/

# **Batch Importing MARC Records**

The MARC Batch Import interface features improved matching of records and managing of your import queue. In version 2.2, you can specify match points between incoming and existing records to better detect matching records and prevent record duplication. You can also create quality controls to ensure that incoming matching records are superior in quality to existing catalog records.

You also have new options for managing your queue. You can apply filters to your queue, and you can generate a list of import errors. You can also print your queue, email your queue, or export your queue as a CSV file.

Documentation for this feature is available in the Book of Evergreen at http://docs.evergreen-ils.org/2.2/

# **Hide Fields in Copy Editor**

You can customize the **Copy Editor** for staff by hiding fields in the **Copy Editor** that are not relevant for workflows at particular org units. Descendant org units inherit the settings of their parents.

Documentation for this feature is available in the Book of Evergreen at http://docs.evergreen-ils.org/2.2/

### **Prevent Bibliographic Records from Having Attached Copies**

To enable libraries to designate specific sets of records as only for use as electronic resources, it is possible to configure a bibliographic source such that physical copies or MFHD records may not be attached to records from that source. The config.bib\_source table now includes a new Boolean column, can\_have\_copies, that controls this behavior. If can\_have\_copies for a given bibliographic source is TRUE, then the staff client will prevent a cataloger from adding volumes or MFHD records to records belonging to that source.

Documentation for this feature is available in the Book of Evergreen at http://docs.evergreen-ils.org/2.2/

### **Overlay Existing Catalog Record via Z39.50 Import**

You can replace an existing catalog record with a record obtained through a Z39.50 search. No new permissions or administrative settings are needed to use this feature.

Documentation for this feature is available in the Book of Evergreen at http://docs.evergreen-ils.org/2.2/

### **Restrict Z39.50 Sources by Permission Group**

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.

Documentation for this feature is available in the Book of Evergreen at http://docs.evergreen-ils.org/2.2/

# Switch Copy Location Name and Library Short Name in Copy Editor

By default, the copy editor shows the library shortname (*BR1* or *CONS*) followed by the copy location name (*Stacks, Reference*). A new workstation setting, under **Admin # Workstation Administration # Copy Editor: Copy Location Name First**, enables staff to change the display so that the copy location name is displayed first, followed by the library shortname. This may be particularly useful for libraries that have defined one set of copy locations at the consortial level and want to enable quick keyboard navigation to copy locations by typing just the first letters of the copy location.

Documentation for this feature is available in the Book of Evergreen at http://docs.evergreen-ils.org/2.2/

# **User Activity Types**

The User Activity Types feature enables you to specify the user activity that you want to record in the database. You can use this feature for reporting purposes. This function will also display a last activity date in a user's account. Currently, this feature only tracks user authentication.

Documentation for this feature is available in the Book of Evergreen at http://docs.evergreen-ils.org/2.2/

# **Authentication Proxy**

To support integration of Evergreen with organizational authentication systems, and to reduce the proliferation of user names and passwords, Evergreen offers a new service called open-ils.auth\_proxy. If you

enable the service, open-ils.auth\_proxy supports different authentication mechanisms that implement the authenticate method. You can define a chain of these authentication mechanisms to be tried in order within the <authenticators> element of the opensrf.xml configuration file, with the option of falling back to the native mode that uses Evergreen's internal method of password authentication.

This service only provides authentication; there is no support for automatic provisioning of accounts. To authenticate against any authentication system, the user account must first be defined within the Evergreen system, and authentication will be based on the user name as it exists in Evergreen.

A sample authentication mechanism for LDAP is provided in Open-ILS::Application::AuthProxy::LDAP\_AUTH, and corresponding sample attributes can be found in opensrf.xml.example.

# **Auditor Tables**

This enhancement adds user and workstation IDs to the auditor tables. It also adds/changes auditor functions to allow for setting, getting, and clearing auditor information, as well as adding a couple of utility functions for updating auditors after changes to their origin columns.

# Reports

# **New Views for Reporting Sources**

To support the creation of collection development reports, the following reporting sources have been added:

- *Last Circulation or Creation Date* is a source that offers the copy ID, the last circulation date or creation date, and the last circulation date
- *Hold/Copy Ratio per Bib and Pickup Library* is a source that calculates the number of holds per copy per bibliographic record, with granularity by pickup library.

# **Staff Client Navigation**

# **Customizable Toolbar**

By default, two toolbars are available in the staff client: circulation and cataloging. This feature enables you to customize toolbars in the staff client. You can add buttons that will enable quick access to a variety of features. You can create toolbars for specific org unit(s), workstation(s), or login(s).

Documentation for this feature is available in the Book of Evergreen at http://docs.evergreen-ils.org/2.2/

# **Double Clicking in the Staff Client**

You can search for a patron's record, and double click on a result to access that record. You can double click on an item in the **Holdings Maintenance** screen to access copy information. The item is linked to the **Volume/Copy Creator**, if you turned it on in the staff client's org unit settings. If you did not turn on the **Volume/Copy Creator**, then the item links to the **Item Attributes**.

Documentation for this feature is available in the Book of Evergreen at http://docs.evergreen-ils.org/2.2/

### **Recent Staff Searches**

You can view your recent searches as you perform them in the staff client. By default, staff can view their recent searches, although the number is configurable. This feature is only available through the staff client; it is not available to patrons in the OPAC.

Documentation for this feature is available in the Book of Evergreen at http://docs.evergreen-ils.org/2.2/

# **Return to Search Results from MARC Record**

This feature enables you to return to your title search results directly from any view of the MARC record, including the **OPAC View**, **MARC Record**, **MARC Edit**, and **Holdings Maintenance** views. You can use this feature to page through records in the **MARC Record View** or **Edit** interfaces. You do not have to return to the **OPAC View** to access title results.

Documentation for this feature is available in the Book of Evergreen at http://docs.evergreen-ils.org/2.2/

### **Sorting Columns**

This feature enables you to sort by multiple display columns so that you can find easily the information that you need on a screen. You can sort display columns on any screen that is built on a grid, such as the **Check In** screen or the **On Shelf Pull List**.

You can also sort the columns on the following Administration screens:

- Circulation Policies
- Hold Policies
- Circulation Limit Sets
- Barcode Completion
- Acquisitions User Request List
- Vandelay Import Errors

You can sort items in an ascending or descending order, and you can prioritize the order in which columns will sort.

Documentation for this feature is available in the Book of Evergreen at http://docs.evergreen-ils.org/2.2/

#### **Tab Button**

This feature enables you to add a new tab to the Evergreen staff client by clicking the + sign adjacent to the tab that you currently have opened. As in previous versions, you can also add new tabs by clicking **File # New Tab**, or use the hotkey, **Ctrl+T**.

Documentation for this feature is available in the Book of Evergreen at http://docs.evergreen-ils.org/2.2/

# **Close All Tabs Shortcut**

You can use **CTRL+Click** on the close tab (**X**) button to close all tabs.

### Independent Column Configurations and Receipt Templates for Different Hold List Interfaces

Previously, all hold list interfaces shared the same column picker settings and receipt templates. This enhancement creates independent settings for the following interfaces:

- Actions for this Record # View Holds
- Patron Display # Holds
- Circulation # Browse Hold Shelf
- Circulation # Pull List for Hold Requests

### Line Number Columns

List displays in the staff client now have a non-sortable line number column which displays the ordinal position of each row in the list. The first row in such a list will always have a value of 1 in the ordinal column, no matter how the list is sorted. There is no special handling for paged interfaces; the first row on any given page still gets an ordinal value of 1.

#### Auto-Login

Supports auto-login in the staff client by adding three new command line parameters:

- -ILSuser: user name to log in with
- -ILSpassword: password to use
- -ILShost: hostname to use

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# Part II. Software Installation

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# **Chapter 4. Introduction**

This part will guide you through the installation steps installation or upgrading your Evergreen system. It is intended for system administrators.

# Chapter 5. System Requirements Server Minimum Requirements

The following are the base requirements setting Evergreen up on a test server:

- An available desktop, server or virtual image
- 1GB RAM, or more if your server also runs a graphical desktop
- Linux Operating System
- Ports 80 and 443 should be opened in your firewall for TCP connections to allow OPAC and staff client connections to the Evergreen server.

# **Staff Client Requirements**

Staff terminals connect to the central database using the Evergreen staff client, available for download from The Evergreen download page. The staff client must be installed on each staff workstation and requires at minimum:

- Windows (XP, Vista, or 7), Mac OS X, or Linux operating system
- a reliable high speed Internet connection
- 512Mb of RAM
- The staff client uses the TCP protocal on ports 80 and 443 to communicate with the Evergreen server.

#### **Barcode Scanners**

Evergreen will work with virtually any barcode scanner – if it worked with your legacy system it should work on Evergreen.

#### Printers

Evergreen can use any printer configured for your terminal to print receipts, check-out slips, holds lists, etc. The single exception is spine label printing, which is still under development. Evergreen currently formats spine labels for output to a label roll printer. If you do not have a roll printer manual formatting may be required.

# Chapter 6. Installing the Evergreen server Preamble: referenced user accounts

In subsequent sections, we will refer to a number of different accounts, as follows:

- Linux user accounts:
  - The user Linux account is the account that you use to log onto the Linux system as a regular user.
  - The **root** Linux account is an account that has system administrator privileges. On Debian and Fedora you can switch to this account from your **user** account by issuing the su command and entering the password for the **root** account when prompted. On Ubuntu you can switch to this account from your **user** account using the sudo su command and entering the password for your **user** account when prompted.
  - The **opensrf** Linux account is an account that you create when installing OpenSRF. You can switch to this account from the **root** account by issuing the su opensrf command.
  - The **postgres** Linux account is created automatically when you install the PostgreSQL database server. You can switch to this account from the **root** account by issuing the su postgres command.
- PostgreSQL user accounts:
  - The evergreen PostgreSQL account is a superuser account that you will create to connect to the PostgreSQL database server.
- Evergreen administrator account:
  - The **egadmin** Evergreen account is an administrator account for Evergreen that you will use to test connectivity and configure your Evergreen instance.

# **Preamble: developer instructions**



Skip this section if you are using an official release tarball downloaded from http://evergreen-ils.org/downloads

Developers working directly with the source code from the Git repository, rather than an official release tarball, must install some extra packages and perform one step before they can proceed with the ./configure step.

As the **root** Linux account, install the following packages:

- autoconf
- automake
- libtool

As the **user** Linux account, issue the following command in the Evergreen source directory to generate the configure script and Makefiles:

After running make install, developers also need to install the Dojo Toolkit set of JavaScript libraries. The appropriate version of Dojo is included in Evergreen release tarballs. Developers should install the Dojo 1.3.3 version of Dojo by issuing the following commands as the **opensrf** Linux account:

```
wget http://download.dojotoolkit.org/release-1.3.3/dojo-release-1.3.3.tar.gz
tar -C /openils/var/web/js -xzf dojo-release-1.3.3.tar.gz
cp -r /openils/var/web/js/dojo-release-1.3.3/* /openils/var/web/js/dojo/.
```

# **Installing prerequisites**

Evergreen has a number of prerequisite packages that must be installed before you can successfully configure, compile, and install Evergreen.

- 1. Begin by installing the most recent version of OpenSRF (2.1 or later). You can download OpenSRF releases from <a href="http://evergreen-ils.org/opensrf.php">http://evergreen-ils.org/opensrf.php</a>
- 2. On many distributions, it is necessary to install PostgreSQL 9 from external repositories.
  - On Debian Squeeze, open /etc/apt/sources.list in a text editor as the **root** Linux account and add the following line:

deb http://backports.debian.org/debian-backports squeeze-backports main contrib

• On Ubuntu Lucid, you can use a PPA (personal package archive), which are package sources hosted on Launchpad. The one most commonly used by Evergreen Community members is maintained by Martin Pitt, who also maintains the official PostgreSQL packages for Ubuntu. As the **root** Linux account, issue the following commands to add the PPA source:

```
apt-get install python-software-properties
add-apt-repository ppa:pitti/postgresql
```

- Ubuntu Precise comes with PostgreSQL 9, so no additional steps are required.
- Fedora comes with PostgreSQL 9, so no additional steps are required.
- 3. On Debian and Ubuntu, run aptitude update as the **root** Linux account to retrieve the new packages from the backports repository.
- 4. Issue the following commands as the **root** Linux account to install prerequisites using the Makefile.install prerequisite installer, substituting debian-squeeze, fedora, ubuntu-lucid, or ubuntu-precise for <osname> below:

```
make -f Open-ILS/src/extras/Makefile.install <osname>
```

5. Add the libdbi-libdbd libraries to the system dynamic library path by issuing the following commands as the **root** Linux account:



You should skip this step if installing on Ubuntu Precise. The ubuntu-precise target uses libdbd-pgsql from packages.

#### Debian / Ubuntu Lucid.

```
echo "/usr/local/lib/dbd" > /etc/ld.so.conf.d/eg.conf
ldconfig
```

```
Fedora.
```

```
echo "/usr/lib64/dbd" > /etc/ld.so.conf.d/eg.conf
ldconfig
```

# **Configuration and compilation instructions**

For the time being, we are still installing everything in the /openils/ directory. From the Evergreen source directory, issue the following commands as the **user** Linux account to configure and build Evergreen:

```
./configure --prefix=/openils --sysconfdir=/openils/conf make
```

# Installation instructions

1. Once you have configured and compiled Evergreen, issue the following command as the **root** Linux account to install Evergreen, build the server portion of the staff client, and copy example configuration files to /openils/ conf. Change the value of the STAFF\_CLIENT\_STAMP\_ID variable to match the version of the staff client that you will use to connect to the Evergreen server.

```
make STAFF_CLIENT_STAMP_ID=rel_name install
```

2. The server portion of the staff client expects http://hostname/xul/server to resolve. Issue the following commands as the **root** Linux account to create a symbolic link pointing to the server subdirectory of the server portion of the staff client that we just built using the staff client ID *rel\_name*:

cd /openils/var/web/xul ln -sf rel\_name/server server

# Change ownership of the Evergreen files

All files in the /openils/ directory and subdirectories must be owned by the opensrf user. Issue the following command as the **root** Linux account to change the ownership on the files:

```
chown -R opensrf:opensrf /openils
```

# **Configure the Apache Web server**

1. Use the example configuration files in Open-ILS/examples/apache/ to configure your Web server for the Evergreen catalog, staff client, Web services, and administration interfaces. Issue the following commands as the **root** Linux account:

#### Debian and Ubuntu.

```
cp Open-ILS/examples/apache/eg.conf /etc/apache2/sites-available/
cp Open-ILS/examples/apache/eg_vhost.conf /etc/apache2/
cp Open-ILS/examples/apache/startup.pl /etc/apache2/
# Now set up SSL
mkdir /etc/apache2/ssl
cd /etc/apache2/ssl
```

#### Fedora.

```
cp Open-ILS/examples/apache/eg.conf /etc/httpd/conf.d/
cp Open-ILS/examples/apache/eg_vhost.conf /etc/httpd/
cp Open-ILS/examples/apache/startup.pl /etc/httpd/
# Now set up SSL
mkdir /etc/httpd/ssl
cd /etc/httpd/ssl
```

2. The openssl command cuts a new SSL key for your Apache server. For a production server, you should purchase a signed SSL certificate, but you can just use a self-signed certificate and accept the warnings in the staff client and browser during testing and development. Create an SSL key for the Apache server by issuing the following command as the **root** Linux account:

openssl req -new -x509 -days 365 -nodes -out server.crt -keyout server.key

- 3. As the **root** Linux account, edit the eg.conf file that you copied into place.
  - a. Replace Allow from 10.0.0/8 with Allow from all (to enable access to the offline upload / execute interface from any workstation on any network note that you must secure this for a production instance)
  - b. (Fedora): Change references from the non-existent /etc/apache2/ directory to /etc/httpd/.
- 4. Change the user for the Apache server.
  - (Debian and Ubuntu): As the **root** Linux account, edit /etc/apache2/envvars. Change export APACHE\_RUN\_USER=www-data to export APACHE\_RUN\_USER=opensrf.
  - (Fedora): As the **root** Linux account, edit /etc/httpd/conf/httpd.conf. Change User apache to User opensrf.
- 5. Configure Apache with performance settings appropriate for Evergreen:
  - (Debian and Ubuntu): As the **root** Linux account, edit /etc/apache2/apache2.conf:
  - (Fedora): As the **root** Linux account, edit /etc/httpd/conf/httpd.conf:
    - a. Change KeepAliveTimeout to 1. Higher values reduce the chance of a request timing out unexpectedly, but increase the risk of using up all available Apache child processes.
    - b. Optional: Change MaxKeepAliveRequests to 100
    - c. Update the prefork configuration section to suit your environment. The following settings apply to a busy system:

```
<IfModule mpm_prefork_module>
StartServers 20
MinSpareServers 5
MaxSpareServers 15
MaxClients 150
MaxRequestsPerChild 10000
</IfModule>
```

- 6. (Fedora): As the **root** Linux account, edit the /etc/httpd/eg\_vhost.conf file to change references from the non-existent /etc/apache2/ directory to /etc/httpd/.
- 7. (Debian and Ubuntu): As the **root** Linux account, enable the Evergreen site:

```
a2dissite default # OPTIONAL: disable the default site (the "It Works" page) a2ensite eg.conf
```

# Configure OpenSRF for the Evergreen application

There are a number of example OpenSRF configuration files in /openils/conf/ that you can use as a template for your Evergreen installation. Issue the following commands as the **opensrf** Linux account:

cp -b /openils/conf/opensrf\_core.xml.example /openils/conf/opensrf\_core.xml
cp -b /openils/conf/opensrf.xml.example /openils/conf/opensrf.xml

When you installed OpenSRF, you created four Jabber users on two separate domains and edited the opensrf\_core.xml file accordingly. Please refer back to the OpenSRF README and, as the **opensrf** Linux account, edit the Evergreen version of the opensrf\_core.xml file using the same Jabber users and domains as you used while installing and testing OpenSRF.



The -b flag tells the cp command to create a backup version of the destination file. The backup version of the destination file has a tilde (~) appended to the file name, so if you have forgotten the Jabber users and domains, you can retrieve the settings from the backup version of the files.

eg\_db\_config.pl, described in the following section, sets the database connection information in opensrf.xml for you.

# **Creating the Evergreen database**

By default, the Makefile.install prerequisite installer does not install the PostgreSQL 9 database server required by every Evergreen system; for production use, most libraries install the PostgreSQL database server on a dedicated machine. You can install the packages required by Debian or Ubuntu Lucid on the machine of your choice using the following commands as the **root** Linux account:

#### (Debian and Ubuntu Lucid) Installing PostgreSQL 9.1 server packages.

make -f Open-ILS/src/extras/Makefile.install install\_pgsql\_server\_backport\_debs\_91

#### (Ubuntu Precise) Installing PostgreSQL 9.1 server packages.

make -f Open-ILS/src/extras/Makefile.install install\_pgsql\_server\_debs\_91

You can install the packages required by Fedora on the machine of your choice using the following commands as the **root** Linux account:

#### (Fedora) Installing PostgreSQL server packages.

make -f Open-ILS/src/extras/Makefile.install install\_fedora\_pgsql\_server
postgresql-setup initdb

For a standalone PostgreSQL server, install the following Perl modules as the root Linux account:

#### (Debian / Ubuntu) Installing additional Perl modules on a standalone PostgreSQL 9 server.

```
aptitude install gcc libxml-libxml-perl libxml-libxslt-perl
cpan Business::ISBN
cpan JSON::XS
cpan Library::CallNumber::LC
cpan MARC::Record
cpan MARC::File::XML
cpan UUID::Tiny
```

#### (Fedora) Installing additional Perl modules on a standalone PostgreSQL 9 server.

```
yum install gcc perl-XML-LibXML perl-XML-LibXSLT perl-Business-ISBN
cpan Library::CallNumber::LC
cpan MARC::Record
cpan MARC::File::XML
cpan UUID::Tiny
```

You need to create a PostgreSQL superuser to create and access the database. Issue the following command as the **postgres** Linux account to create a new PostgreSQL superuser named evergreen. When prompted, enter the new user's password:

```
createuser -s -P evergreen
```

Once you have created the **evergreen** PostgreSQL account, you also need to create the database and schema, and configure your configuration files to point at the database server. Issue the following command as the **root** Linux account from inside the Evergreen source directory, replacing <user>, <password>, <hostname>, <port>, and <dbname> with the appropriate values for your PostgreSQL database (where <user> and <password> are for the **evergreen** PostgreSQL account you just created), and replace <admin-user> and <admin-pass> with the values you want for the **egadmin** Evergreen administrator account:</a>

```
perl Open-ILS/src/support-scripts/eg_db_config.pl --update-config \
    --service all --create-database --create-schema --create-offline \
    --user <user> --password <password> --hostname <hostname> --port <port> \
    --database <dbname> --admin-user <admin-user> --admin-pass <admin-pass>
```

This creates the database and schema and configures all of the services in your /openils/conf/opensrf.xml configuration file to point to that database. It also creates the configuration files required by the Evergreen cgibin administration scripts, and sets the user name and password for the **egadmin** Evergreen administrator account to your requested values.

# Creating the database on a remote server

In a production instance of Evergreen, your PostgreSQL server should be installed on a dedicated server.

#### PostgreSQL 9.1 and later

To create the database instance on a remote database server running PostgreSQL 9.1 or later, simply use the -- create-database flag on eg\_db\_config.pl.

### For PostgreSQL 9.0

To create the database instance on a remote database server running PostgreSQL 9.0, you can either:

- Install the PostgreSQL contrib modules on the machine on which you are installing the Evergreen code, and use the --create-database option from that machine, or
- Copy the Open-ILS/src/sql/Pg/create\_database.sql script to your PostgreSQL server and invoke it as the **postgres** Linux account:

psql -vdb\_name=<dbname> -vcontrib\_dir=`pg\_config --sharedir`/contrib -f create\_database.sql

Then you can issue the eg\_db\_config.pl command as above *without* the --create-database argument to create your schema and configure your configuration files.

# **Starting Evergreen**

1. As the root Linux account, start the memcached and ejabberd services (if they aren't already running):

```
/etc/init.d/ejabberd start
/etc/init.d/memcached start
```

2. As the **opensrf** Linux account, start Evergreen. The -l flag in the following command is only necessary if you want to force Evergreen to treat the hostname as localhost; if you configured opensrf.xml using the real hostname of your machine as returned by perl -ENet::Domain 'print Net::Domain::hostfqdn() . "\n";', you should not use the -l flag.

osrf\_ctl.sh -l -a start\_all

• If you receive the error message bash: osrf\_ctl.sh: command not found, then your environment variable PATH does not include the /openils/bin directory; this should have been set in the **opensrf** Linux account's .bashrc configuration file. To manually set the PATH variable, edit the configuration file ~/.bashrc as the **opensrf** Linux account and add the following line:

export PATH=\$PATH:/openils/bin

3. As the **opensrf** Linux account, generate the Web files needed by the staff client and catalogue and update the organization unit proximity (you need to do this the first time you start Evergreen, and after that each time you change the library hierarchy in config.cgi):

autogen.sh -u

4. As the root Linux account, restart the Apache Web server:

/etc/init.d/apache2 restart

If the Apache Web server was running when you started the OpenSRF services, you might not be able to successfully log in to the OPAC or staff client until the Apache Web server is restarted.

# **Testing connections to Evergreen**

Once you have installed and started Evergreen, test your connection to Evergreen via srfsh. As the **opensrf** Linux account, issue the following commands to start srfsh and try to log onto the Evergreen server using the **egadmin** Evergreen administrator user name and password that you set using the eg\_db\_config.pl command:

```
/openils/bin/srfsh
srfsh% login <admin-user> <admin-pass>
```

You should see a result like:

```
Received Data: "250bf1518c7527a03249858687714376"
Request Completed Successfully
Request Time in seconds: 0.045286
Received Data: {
    "ilsevent":0,
    "textcode":"SUCCESS",
    "desc":" ",
    "pid":21616,
    "stacktrace":"oils_auth.c:304",
    "payload":{
        "authtoken":"e5f9827cc0f93b503alcc66bee6bddla",
        "authtime":420
    }
```
Request Completed Successfully Request Time in seconds: 1.336568

}

If this does not work, it's time to do some troubleshooting.

- As the **opensrf** Linux acccount, run the settings-tester.pl script to see if it finds any system configuration problems. The script is found at Open-ILS/src/support-scripts/settings-tester.pl in the Evergreen source tree.
- Follow the steps in the troubleshooting guide.
- If you have faithfully followed the entire set of installation steps listed here, you are probably extremely close to a working system. Gather your configuration files and log files and contact the Evergreen development mailing list for assistance before making any drastic changes to your system configuration.

## **Getting help**

Need help installing or using Evergreen? Join the mailing lists at <u>http://evergreen-ils.org/listserv.php</u> or contact us on the Freenode IRC network on the #evergreen channel.

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# Chapter 7. Installing the Staff Client Installing on Windows

Official Evergreen releases have corresponding Windows based staff clients ready to use.

1. Download the staff client from http://www.open-ils.org/downloads.php.



The version of your staff client will need to match the version of your Evergreen server. If you are unsure about the version of your Evergreen server, contact your system administrator.

- 2. Click on the downloaded Evergreen setup file.
- 3. Click Next to begin installation:



4. Click *Next* to accept desitnation folder.

	<b>Choose Install Location</b> Choose the folder in which to install Evergreen Staff Client 2.3 2.3, 1.
Setup will install Eve different folder, dic	green Staff Client 2.3 2.3.1 in the following folder. To install in a Browse and select another folder. Click Next to continue.
- Destination Falde	
C:\Program File	s (x86)\Evergreen Staff Client 2.3 Browse
Space required: 39. Space available: 12	)ИВ 7GB
Nullsoft Install System	2,46-7
	< Back Next > Cancel

#### 5. Click Install.

	Choose Start M Choose a Start I 2.3.1 shortcuts	<b>fenu Folder</b> Menu folder for th	e Evergreen Sta	ff Client 2.3
Select the Start Menu can also enter a name	folder in which you wou to create a new folder.	uld like to create th	ne program's shor	rtcuts. You
Evergreen Staff Clier	t 2.3			
Accessories Administrative Tools Adobe Adobe Design Premiun Android SDK Tools Application Verifier Application Verifier (x Blender Foundation Corel Applications CutePDF Debugging Tools for V Dell Webcam	n CS4 54) Vindows (x64)			-
Nullsoft Install System v2	,46-7			
		< Back	Install	Cancel

6. A pop-up should appear indicating that Evergreen has been installed. Click *Finish* to complete the installation.

Completing the Evergreen Staff Client 2.3 2.3.1 Setup Wizard Evergreen Staff Client 2.3 2.3.1 has been installed on your computer. Click Finish to close this wizard. ✓ Run Evergreen Staff Client 2.3 2.3.1
< Back Finish Cancel

When you login to Evergreen from the workstation for the first time, you will also need to register your workstation.

## **Installing on Linux**

Installation instructions for Linux.

#### **Using Wine and the Windows client**

One of the asiest ways to run a staff client on a Linux machine is to use the Windows client with Wine.

- 1. Install Wine on your Linux machine.
- 2. Download the staff client from http://www.open-ils.org/downloads.php.
- 3. Right click on the downloaded file and open with Wine Windows Program Loader.
- 4. Follow the same instructions as you would for installing the staff client on windows.

# Building and Deploying an Evergreen Staff Client on Linux

- 1. From the Evergreen server, Navigate to the staff\_client directory:
  - cd /home/opensrf/Evergreen-ILS-2.2.5/Open-ILS/xul/staff\_client
- 2. Make a linux staff client

```
make linux-client
```

This will generate a staff client tarball called evergreen\_staff\_client.tar.bz2

- 3. FTP or SCP the tarball to your staff client machine.
- 4. From your staff client machine, create a folder with the name of your staff client and version.
- 5. Extract the tar files into that folder
- 6. Within the folder, click on the *evergreen* file to start the program.

Or, you can run the program from a terminal (command line). For example, if the evergreen files were extracted to a directory called evergreen\_client\_2.2.5 in your home directory, you can run it with:

~/evergreen\_client\_2.2.5/evergreen

## **Registering a Workstation**

Before you can connect to Evergreen from your staff client, you will need to register your workstation when you try to login.



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, a red box will appear around your workstation information on the right side of the screen.

Vorkstation			
WS Name	workstation_name		
Organization	FENNELL	÷	
<u>R</u> egister	<u>H</u> elp		

- 2. Create a unique workstation name or use the default computer name provided.
- 3. Click Register
- 4. You will now be able to log into the system.

## **Removing Staff Client Preferences**

#### Windows

When you uninstall the Evergreen staff client code from your system, the staff client preferences and cached data are not removed from your system. This can be a problem if, for example, you have registered your workstation with the wrong library; or if you have chosen a display language (locale) that is broken and will not let you start up the client again

On Windows, you can uninstall the Evergreen staff client code using the Add/Remove Programs menu.

To remove the staff client preferences and cached data entirely on Windows, there are two directories that you must delete completely (where *<profile>* represents your user profile name):

- C:\Documents and Settings\<profile>\Application Data\OpenILS
- C:\Documents and Settings\<profile>\Local Settings\Application Data\OpenILS

You might need to change the preferences in Windows Explorer to display hidden files (Tools # Folder Options... # View).

#### Linux

To remove the staff client preferences and cached data from your user account on Linux, there is one directory that you must delete completely:

rm -fr ~/.openils

# Chapter 8. Upgrading the Evergreen Server

Before upgrading, it is important to carefully plan an upgrade strategy to minimize system downtime and service interruptions. All of the steps in this chapter are to be completed from the command line.

## **Software Prerequisites:**

- PostgreSQL: Version 9.1 is recommended. The minimum supported version is 9.0.
- Linux: Evergreen 2.0 has been tested on Debian Squeeze (6.0), Ubuntu Lucid Lynx (10.04) and Ubuntu Precise Pangolin (12.04). If you are running an older version of these distributions, you may want to upgrade before upgrading Evergreen. For instructions on upgrading these distributions, visit the Debian or Ubuntu websites.
- OpenSRF: The minimum supported version of OpenSRF is 2.1.0.

In the following instructions, you are asked to perform certain steps as either the root or opensrf user.

- Debian: To become the root user, issue the su command and enter the password of the root user.
- Ubuntu: To become the root user, issue the sudo su command and enter the password of your current user.

To switch from the root user to a different user, issue the su - [user] command; for example, su - opensrf. Once you have become a non-root user, to become the root user again simply issue the exit command.

## Upgrade the Evergreen code

The following steps guide you through a simplistic upgrade of a production server. You must adjust these steps to accommodate your customizations such as catalogue skins.

- 1. Stop Evergreen and back up your data:
  - a. As root, stop the Apache web server.
  - b. As the opensrf user, stop all Evergreen and OpenSRF services:

osrf\_ctl.sh -l -a stop\_all

- c. Back up the /openils directory.
- 2. Upgrade OpenSRF. Download and install the latest version of OpenSRF from the OpenSRF download page.
- 3. As the opensrf user, download and extract Evergreen 2.2:

```
wget http://evergreen-ils.org/downloads/Evergreen-ILS-2.2.5.tar.gz
tar xzf Evergreen-ILS-2.2.5.tar.gz
```



For the latest edition of Evergreen, check the <u>Evergreen download page</u> and adjust upgrading instructions accordingly.

4. As the root user, install the prerequisites:

cd /home/opensrf/Evergreen-ILS-2.2.5

On the next command, replace [distribution] with one of these values for your distribution of Debian or Ubuntu:

- debian-squeeze for Debian Squeeze (6.0)
- ubuntu-lucid for Ubuntu Lucid Lynx (10.04)
- ubuntu-precise for Ubuntu Precise Pangolin (12.04)

```
make -f Open-ILS/src/extras/Makefile.install [distribution]
```

5. As the opensrf user, configure and compile Evergreen:

```
cd /home/opensrf/Evergreen-ILS-2.2.5
./configure --prefix=/openils --sysconfdir=/openils/conf
make
```

#### 6. As the root user, install Evergreen:

```
cd /home/opensrf/Evergreen-ILS-2.2.5
make STAFF_CLIENT_STAMP_ID=rel_2_2_5 install
```

7. As the root user, change all files to be owned by the opensrf user and group:

chown -R opensrf:opensrf /openils

#### 8. As the opensrf user, update the configuration files:

cd /home/opensrf/Evergreen-ILS-2.2.5

```
perl Open-ILS/src/support-scripts/eg_db_config.pl \
--create-offline --user evergreen --password evergreen \
--hostname localhost --port 5432 --database evergreen
```

9. As the opensrf user, update the server symlink in /openils/var/web/xul/:

```
cd /openils/var/web/xul/
rm server
ln -s rel_2_2_5/server
```

10.As the opensrf user, update opensrf\_core.xml and opensrf.xml by copying the new example files (/openils/conf/ opensrf\_core.xml.example and /openils/conf/opensrf.xml).

```
cp /openils/conf/opensrf_core.xml.example /openils/conf/opensrf_core.xml
cp /openils/conf/opensrf.xml.example /openils/conf/opensrf.xml
```



Copying these configuration files will remove any customizations you have made to them. Remember to redo your customizations after copying them.

#### 11.Update Apache files:



Copying these Apache configuration files will remove any customizations you have made to them. Remember to redo your customizations after copying them. For example, if you purchased an SSL certificate, you will need to edit eg.conf to point to the appropriate SSL certificate files.

- a. Update /etc/apache2/startup.pl by copying the example from Open-ILS/examples/apache/startup.pl.
- b. Update /etc/apache2/eg\_vhost.conf by copying the example from Open-ILS/examples/apache/eg\_vhost.conf.
- c. Update /etc/apache2/sites-available/eg.conf by copying the example from Open-ILS/ examples/apache/ eg.conf.

12.Update opensrf.xml with the database connection info:

As the opensrf user, if you are happy with the default settings in opensrf.xml.example, then:

```
cp -b /openils/conf/opensrf.xml.example /openils/conf/opensrf.xml
cd /home/opensrf/Evergreen-ILS-2.2.5
perl Open-ILS/src/support-scripts/eg_db_config.pl --update-config --service all \
--database evergreen --host localhost --user evergreen --password evergreen
```

Otherwise, compare /openils/conf/opensrf.xml with /openils/conf/opensrf.xml.example and manually copy the new pieces into place in your existing opensrf.xml file

## Upgrade the Evergreen database schema

The upgrade of the Evergreen database schema is the lengthiest part of the upgrade process for sites with a significant amount of production data.

Before running the upgrade script against your production Evergreen database, back up your database, restore it to a test server, and run the upgrade script against the test server. This enables you to determine how long the upgrade will take and whether any local customizations present problems for the stock upgrade script that require further tailoring of the upgrade script. The backup also enables you to cleanly restore your production data if anything goes wrong during the upgrade.



Pay attention to error output as you run the upgrade scripts. If you encounter errors that you cannot resolve yourself through additional troubleshooting, please report the errors to the Evergreen Technical Discussion List.

Run the following script as a user with the ability to connect to the database server. Adjust the arguments to the psql command to reflect your database server connection information:

```
cd /home/opensrf/Evergreen-ILS-2.2.5/Open-ILS/src/sql/Pg
psql -U evergreen -h localhost -f version-upgrade/2.1-2.2-upgrade-db.sql evergreen
psql -U evergreen -h localhost -f version-upgrade/2.2.0-2.2.1-upgrade-db.sql evergreen
psql -U evergreen -h localhost -f version-upgrade/2.2.1-2.2.2-upgrade-db.sql evergreen
psql -U evergreen -h localhost -f version-upgrade/2.2.2-2.2.3-upgrade-db.sql evergreen
psql -U evergreen -h localhost -f version-upgrade/2.2.3-2.2.4-upgrade-db.sql evergreen
psql -U evergreen -h localhost -f version-upgrade/2.2.3-2.2.4-upgrade-db.sql evergreen
psql -U evergreen -h localhost -f version-upgrade/2.2.4-2.2.5-upgrade-db.sql evergreen
```

#### **Restart Evergreen and Test**

1. As the opensrf user, start all Evergreen and OpenSRF services:

```
osrf_ctl.sh -l -a start_all
```

2. As the opensrf user, run autogen to refresh the static organizational data files:

```
cd /openils/bin
./autogen.sh
```

3. Start srfsh and try logging in using your Evergreen username and password:

```
/openils/bin/srfsh
srfsh% login username password
```

You should see a result like:

```
Received Data: "250bf1518c7527a03249858687714376"
   _____
   Request Completed Successfully
   Request Time in seconds: 0.045286
   _____
   Received Data: {
     "ilsevent":0,
     "textcode":"SUCCESS",
     "desc":" ",
     "pid":21616,
     "stacktrace":"oils_auth.c:304",
     "payload":{
       "authtoken":"e5f9827cc0f93b503a1cc66bee6bdd1a",
       "authtime":420
     }
   }
   -----
   Request Completed Successfully
   Request Time in seconds: 1.336568
         _____
```

If this does not work, it's time to do some troubleshooting.

4. As the root user, start the Apache web server.

If you encounter errors, refer to the troubleshooting section of this documentation for tips on finding solutions and seeking further assistance from the Evergreen community.

# Chapter 9. Setting Up EDI Acquisitions Introduction

Electronic Data Interchange (EDI) is used to exchange information between participating vendors and Evergreen. This chapter contains technical information for installation and configuration of the components necessary to run EDI Acquisitions for Evergreen.

## Installation

#### **Install EDI Translator**

The EDI Translator is used to convert data into EDI format. It runs on localhost and listens on port 9191 by default. This is controlled via the edi\_webrick.cnf file located in the edi\_translator directory. It should not be necessary to edit this configuration if you install EDI Translator on the same server used for running Action/Triggers events.



If you are running Evergreen with a multi-server configuration, make sure to install EDI Translator on the same server used for Action/Trigger event generation.

#### **Steps for Installing**

1. As the **opensrf** user, copy the EDI Translator code found in Open-ILS/src/edi\_translator to somewhere accessible (for example, /openils/var/edi):

```
cp -r Open-ILS/src/edi_translator /openils/var/edi
```

2. Navigate to where you have saved the code to begin next step:

```
cd /openils/var/edi
```

3. Next, as the **root** user (or a user with sudo rights), install the dependencies, via "install.sh". This will perform some apt-get routines to install the code needed for the EDI translator to function. (Note: subversion must be installed first)

./install.sh

4. Now, we're ready to start "edi\_webrick.bash" which is the script that calls the "Ruby" code to translate EDI. This script needs to be started in order for EDI to function so please take appropriate measures to ensure this starts following reboots/upgrades/etc. As the **opensrf** user:

./edi\_webrick.bash

- 5. You can check to see if EDI translator is running.
  - Using the command "ps aux | grep edi" should show you something similar if the script is running properly:

root 30349 0.8 0.1 52620 10824 pts/0 S 13:04 0:00 ruby ./edi\_webrick.rb

• To shutdown EDI Translator you can use something like pkill (assuming no other ruby processes are running on that server):

kill -INT \$(pgrep ruby)

#### **Install EDI Scripts**

The EDI scripts are "edi\_pusher.pl" and "edi\_fetcher.pl" and are used to "push" and "fetch" EDI messages for configured EDI accounts.

1. As the **opensrf** user, copy edi\_pusher.pl and edi\_fetcher.pl from Open-ILS/src/support-scripts into /openils/bin:

```
cp Open-ILS/src/support-scripts/edi_pusher.pl /openils/bin
cp Open-ILS/src/support-scripts/edi_fetcher.pl /openils/bin
```

- 2. Setup the edi\_pusher.pl and edi\_fetcher.pl scripts to run as cron jobs in order to regularly push and receive EDI messages.
  - Add to the opensrf user's crontab the following entries:

```
10 * * * * cd /openils/bin && /usr/bin/perl ./edi_pusher.pl > /dev/null
0 1 * * * cd /openils/bin && /usr/bin/perl ./edi_fetcher.pl > /dev/null
```

- The example for edi\_pusher.pl sets the script to run at 10 minutes past the hour, every hour.
- The example for edi\_fetcher.pl sets the script to run at 1 AM every night.



You may choose to run the EDI scripts more or less frequently based on the necessary response times from your vendors.

## Configuration

#### **Configuring Providers**

Look in Admin > Server Administration > Acquisitions > Providers

Column	Description/Notes
Provider Name	A unique name to identify the provider
Code	A unique code to identify the provider
Owner	The org unit who will "own" the provider.
Currency	The currency format the provider accepts
Active	Whether or not the Provider is "active" for use
Default Claim Policy	??
EDI Default	The default "EDI Account" to use (see EDI Accounts Configuration)
Email	The email address for the provider
Fax Phone	A fax number for the provider
Holdings Tag	The holdings tag to be utilized (usually 852, for Evergreen)
Phone	A phone number for the provider
Prepayment Required	Whether or not prepayment is required
SAN	The vendor provided, org unit specific SAN code
URL	The vendor website

#### **Configuring EDI Accounts**

Look in Admin > Server Administration > Acquisitions > EDI Accounts

Column	Description/Notes
Label	A unique name to identify the provider
Host	FTP/SFTP/SSH hostname - vendor assigned
Username	FTP/SFTP/SSH username - vendor assigned
Password	FTP/SFTP/SSH password - vendor assigned
Account	Vendor assigned account number associated with your organization
Owner	The organizational unit who owns the EDI account
Last Activity	The date of last activity for the account
Provider	This is a link to one of the "codes" in the "Providers" interface
Path	The path on the vendor's server where Evergreen will send it's outgoing .epo files
Incoming Directory	The path on the vendor's server where "incoming" .epo files are stored
Vendor Account Number	Vendor assigned account number.
Vendor Assigned Code	Usually a sub-account designation. Can be used with or without the Vendor Account Number.

#### **Configuring Organizational Unit SAN code**

Look in Admin > Server Settings > Organizational Units

This interface allows a library to configure their SAN, alongside their address, phone, etc.

## Troubleshooting

#### **PO JEDI Template Issues**

Some libraries may run into issues with the action/trigger (PO JEDI). The template has to be modified to handle different vendor codes that may be used. For instance, if you use "ingra" instead of INGRAM this may cause a problem because they are hardcoded in the template. The following is an example of one modification that seems to work.

#### Original template has:

#### Modified template has the following where it matches on provider SAN instead of code:

```
"buyer":[
    [% IF target.provider.edi_default.vendcode && (target.provider.san == '1556150') -%]
    {"id-qualifier": 91, "id":"[% target.ordering_agency.mailing_address.san _ ' ' _ target.provider.edi_default
    {"id-qualifier": 91, "id":"[% target.ordering_agency.mailing_address.san _ ' ' _ target.provider.edi_default
    [% ELSIF target.provider.edi_default.vendcode && (target.provider.san == '1697978') -%]
    {"id":"[% target.ordering_agency.mailing_address.san %]"},
    {"id-qualifier": 91, "id":"[% target.provider.edi_default.vendcode %]"}
    [% ELSE -%]
    {"id":"[% target.ordering_agency.mailing_address.san %]"}
    [% ELSE -%]
    {"id":"[% target.ordering_agency.mailing_address.san %]"}
],
```

# Part III. System Configuration and Customization

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# **Chapter 10. Introduction**

The Evergreen system allows a free range of customizations to every aspect of the system. Use this part of the documentation to become familiar with the tools for configuring the system as well as customizing the OPAC and staff client.

# Chapter 11. TPac Configuration and Customization

#### **Template toolkit documentation**

For more general information about template toolkit see: official documentation.

The purpose of this chapter is to focus on the Evergreen-specific uses of Template Toolkit (TT) in the OPAC.

# **TPAC URL**

The URL for the TPAC on a default Evergreen system is <u>http://localhost/eg/opac/home</u> (adjust localhost to match your hostname or IP address, naturally!)

## Perl modules used directly by TPAC

- Open-ILS/src/perlmods/lib/OpenILS/WWW/EGCatLoader.pm
- Open-ILS/src/perlmods/lib/OpenILS/WWW/EGCatLoader/Account.pm
- Open-ILS/src/perlmods/lib/OpenILS/WWW/EGCatLoader/Container.pm
- Open-ILS/src/perlmods/lib/OpenILS/WWW/EGCatLoader/Record.pm
- Open-ILS/src/perlmods/lib/OpenILS/WWW/EGCatLoader/Search.pm
- Open-ILS/src/perlmods/lib/OpenILS/WWW/EGCatLoader/Util.pm

## **Default templates**

The source template files are found in Open-ILS/src/templates/opac.

These template files are installed in /openils/var/templates/opac.

**NOTE.** You should generally avoid touching the installed default template files, unless you are contributing changes that you want Evergreen to adopt as a new default. Even then, while you are developing your changes, consider using template overrides rather than touching the installed templates until you are ready to commit the changes to a branch. See below for information on template overrides.

## **Apache configuration files**

The base Evergreen configuration file on Debian-based systems can be found in /etc/apache2/sitesenabled/eg.conf. This file defines the basic virtual host configuration for Evergreen (hostnames and ports), then single-sources the bulk of the configuration for each virtual host by including /etc/apache2/eg\_vhost.conf.

# **TPAC CSS and media files**

The CSS files used by the default TPAC templates are stored in the repo in Open-ILS/web/css/skin/default/opac/ and installed in /openils/var/web/css/skin/default/opac/.

The media files—mostly PNG images—used by the default TPAC templates are stored in the repo in Open-ILS/ web/images/ and installed in /openils/var/web/images/.

## Mapping templates to URLs

The mapping for templates to URLs is straightforward. Following are a few examples, where <templates> is a placeholder for one or more directories that will be searched for a match:

- http://localhost/eg/opac/home # /openils/var/<templates>/opac/home.tt2
- http://localhost/eg/opac/advanced # /openils/var/<templates>/opac/ advanced.tt2
- http://localhost/eg/opac/results#/openils/var/<templates>/opac/results.tt2

The template files themselves can process, be wrapped by, or include other template files. For example, the home.tt2 template currently involves a number of other template files to generate a single HTML file:

#### Example Template Toolkit file: opac/home.tt2.

```
[% PROCESS "opac/parts/header.tt2";
WRAPPER "opac/parts/base.tt2";
INCLUDE "opac/parts/topnav.tt2";
ctx.page_title = l("Home") %]
<div id="search-wrapper">
    [% INCLUDE "opac/parts/searchbar.tt2" %]
</div>
<div id="content-wrapper">
        <div class="common-full-pad"></div>
        <div class="common-full-pad"></div>
        </div>
        </div>
        </div>
[% END %]
```

We will dissect this example in some more detail later, but the important thing to note is that the file references are relative to the top of the template directory.

## How to override templates

Overrides for templates go in a directory that parallels the structure of the default templates directory. The overrides then get pulled in via the Apache configuration.

In the following example, we demonstrate how to create a file that overrides the default "Advanced search page" (advanced.tt2) by adding a new templates directory and editing the new file in that directory.

#### Adding an override for the Advanced search page (example).

We now need to teach Apache about the new templates directory. Open eg.conf and add the following <Location /eg> element to each of the <VirtualHost> elements in which you want to include the overrides. The default Evergreen configuration includes a VirtualHost directive for port 80 (HTTP) and another one for port 443 (HTTPS); you probably want to edit both, unless you want the HTTP user experience to be different from the HTTPS user experience.

#### Configuring the custom templates directory in Apache's eg.conf.

```
<VirtualHost *:80>

# <snip>

# - absorb the shared virtual host settings

Include eg_vhost.conf

<Location /eg>

PerlAddVar OILSWebTemplatePath "/openils/var/templates_algoma"

</Location>

# <snip>

</VirtualHost>
```

Finally, reload the Apache configuration to pick up the changes:

#### Reloading the Apache configuration.

```
bash# /etc/init.d/apache2 reload
```

You should now be able to see your change at http://localhost/eg/opac/advanced

#### **Defining multiple layers of overrides**

You can define multiple layers of overrides, so if you want every library in your consortium to have the same basic customizations, and then apply library-specific customizations, you can define two template directories for each library.

In the following example, we define the template\_CONS directory as the set of customizations to apply to all libraries, and template\_BR# as the set of customizations to apply to library BR1 and BR2.

As the consortial customizations apply to all libraries, we can add the extra template directory directly to eg\_vhost.conf:

#### Apache configuration for all libraries (eg\_vhost.conf).

```
# Templates will be loaded from the following paths in reverse order.
PerlAddVar OILSWebTemplatePath "/openils/var/templates"
PerlAddVar OILSWebTemplatePath "/openils/var/templates_CONS"
```

Then we define a virtual host for each library to add the second layer of customized templates on a per-library basis. Note that for the sake of brevity we only show the configuration for port 80.

#### Apache configuration for each virtual host (eg.conf).

```
<VirtualHost *:80>
   ServerName brl.concat.ca
   DocumentRoot /openils/var/web/
   DirectoryIndex index.xml index.html index.xhtml
   Include eq vhost.conf
    <Location /eg>
        PerlAddVar OILSWebTemplatePath "/openils/var/templates_BR1"
    </Location>
</VirtualHost>
<VirtualHost *:80>
   ServerName br2.concat.ca
   DocumentRoot /openils/var/web/
   DirectoryIndex index.xml index.html index.xhtml
   Include eg_vhost.conf
   <Location /eg>
        PerlAddVar OILSWebTemplatePath "/openils/var/templates_BR2"
    </Location>
</VirtualHost>
```

#### Changing some text in the TPAC

Out of the box, the TPAC includes a number of placeholder text and links. For example, there is a set of links cleverly named *Link 1*, *Link 2*, and so on in the header and footer of every page in the TPAC. Let's customize that for our templates\_BR1 skin.

To begin with, we need to find the page(s) that contain the text in question. The simplest way to do that is with the handly utility ack, which is much like grep but with built-in recursion and other tricks. On Debian-based systems, the command is ack-grep as ack conflicts with an existing utility. In the following example, we search for files that contain the text "Link 1":

#### Searching for text matching "Link 1".

Next, we copy the file into our overrides directory and edit it with vim:

#### Copying the links file into the overrides directory.

Finally, we edit the link text in opac/parts/header.tt2.

#### Content of the opac/parts/header.tt2 file.

For the most part, the page looks like regular HTML, but note the  $[\$_("")\$]$  that surrounds the text of each link. The  $[\$_{\ldots} \$]$  signifies a TT block, which can contain one or more TT processing instructions. 1(" ...

") ; is a function that marks text for localization (translation); a separate process can subsequently extract localized text as GNU gettext-formatted PO files.

**NOTE.** As Evergreen supports multiple languages, any customizations to Evergreen's default text must use the localization function. Also, note that the localization function supports placeholders such as  $[\_1]$ ,  $[\_2]$  in the text; these are replaced by the contents of variables passed as extra arguments to the l() function.

Once we have edited the link and link text to our satisfaction, we can load the page in our Web browser and see the live changes immediately (assuming we are looking at the BR1 overrides, of course).

## Troubleshooting

If there is a problem such as a TT syntax error, it generally shows up as a an ugly server failure page. If you check the Apache error logs, you will probably find some solid clues about the reason for the failure. For example, in the following example the error message identifies the file in which the problem occurred as well as the relevant line numbers:

#### Example error message in Apache error logs.

```
bash# grep "template error" /var/log/apache2/error_log
[Tue Dec 06 02:12:09 2011] [warn] [client 127.0.0.1] egweb: template error:
  file error - parse error - opac/parts/record/summary.tt2 line 112-121:
    unexpected token (!=)\n [% last_cn = 0;\n FOR copy_info IN
    ctx.copies;\n callnum = copy_info.call_number_label;\n
```

# Chapter 12. Auto Suggest in Catalog Search

The auto suggest feature suggestions for completing search terms as the user enters his search query. Ten suggestions are the default, but the number of suggestions is configurable at the database level. Scroll through suggestions with your mouse, or use the arrow keys to scroll through the suggestions. Select a suggestion to view records that are linked to this suggestion. This feature is not turned on by default. You must turn it on in the Admin module.

## **Enabling this Feature**

- 1. To enable this feature, click Admin # Server Administration # Global Flags.
- 2. Scroll down to item 10, OPAC.
- 3. Double click anywhere in the row to edit the fields.
- 4. Check the box adjacent to **Enabled** to turn on the feature.
- 5. The **Value** field is optional. If you checked **Enabled** in step 4, and you leave this field empty, then Evergreen will only suggest searches for which there are any corresponding MARC records.

note: If you checked **Enabled** in step 4, and you enter the string, **opac\_visible**, into this field, then Evergreen will suggest searches for which there are matching MARC records with copies within your search scope. For example, it will suggest MARC records with copies at your branch.

6. Click Save.

#### Global Flags

Bac	<u>k</u> <u>Next</u>		
#	Label	Enabled	Value
5	Cat: Use Internal ID for TCN Value	True	
6	Historical Circulation Retention Age	True	
7	Historical Circulations per Copy	True	
8	Cat: Maintain 001/003/035 according to the MARC21 specification	True	
9	Circ: Use original circulation library on opac renewal instead of user home library	False	
10	OPAC: Show auto-completing suggestions dialog under basic search box (put 'opac_visible' into the value field to limit suggestions to OPAC-visible items, or blank the field for a possible performance improvement)	True	opac_visible
11	Org Units Do Not Inherit Visibility	False	

## **Using this Feature**

- 1. Enter search terms into the basic search field. Evergreen will automatically suggest search terms.
- 2. Select a suggestion to view records that are linked to this suggestion.

E V E RÌ∭G R E E N°			
Link 1 Link 2 Link 3 Link 4 L	ink 5		
Search the Catalog Advanced Search			
Search All Formats	piano	Keyword	💌 i
	Concertos (Piano)		
	Topic Subject (Subject)		
	Concertos, piano		
	Uniform Title (Title)		
	Dances (Piano)		
	Topic Subject (Subject)		
	Piano music		Г
	Uniform Title (Title)		1
	Piano music		
	Topic Subject (Subject)		
	Sonatas (Piano)		
	Topic Subject (Subject)		
	Variations (Piano)		

# Chapter 13. Customizing the Staff Client Customizable Toolbar

By default, two toolbars are available in the staff client: circulation and cataloging. This feature enables you to customize toolbars in the staff client. You can create toolbars for specific org unit(s), workstation(s), or login(s).

#### **Configure Toolbar**

- 1. Click Admin # Workstation Administration # Toolbars # Configure Toolbars.
- 2. Click New Toolbar.
- 3. Enter label for toolbar.

Toolbars +			
# Owning User	Owning Org Unit Owning Workstation	Label	Layout
1	SILVA	circ	["circ_checkout","circ_checkin","tool
2	SILVA	cat	["circ_checkin","toolbarseparator.1","
List Actions •			The page at http://eg-master-db.evergreencatalog.co
Available			
# Button ID		Label	Cancel
1 toolbarseparat	tor	Toolbar Separator	

- 4. Click **Ok**. .Select one of the buttons in the **Available** panel. The **Button ID** describes that action that the button will take, and the **Label** will display in the toolbar.
- 5. Click the **-#** A button to add the selected function to the **Selected** panel on the bottom right side of the screen. To remove a button, click the **#-R** button.

ile Edit	Search Circulation Cataloging <u>A</u> c ate Purchase Order	quisitions <u>B</u> ooking			
. Toolbars	+				
# Own	ing User Owning Org Unit Owning Wo	orkstation Label		Layout	
1 admi	n	Acquisitions		[]	
2	SILVA	circ		["circ_che	eckout", "circ_checkin", "toolbarseparator.1", "sea
3	SILVA	cat		[ circ_cne	eckin , tooibarseparator.1 , search_opac , cop
List Act	ions •		1		
Available	2				Selected
# Butto	on ID	Label	E\$		# Button ID
1 toolb	arseparator	Toolbar Separator	<u>^</u>		1 acq_create_po
2 toolb	arspacer	Toolbar Spacer		< ( <u>R</u> )	
3 brows	se_holds_shelf	Browse Holds Shelf	_ [	> (A)	
4 book	ing_capture	Capture Resources			

- 6. Continue adding buttons if desired. The buttons will display in the order that you add them. If you want to reorder the buttons, click the **Up** or **Down** buttons.
- 7. To separate buttons onto left and right sides of the screen on the same toolbar, select **toolbarspacer**, and click -# **A**.

Create Purcha	ase Order 🛐	Create Invoice	Create MARC Record 🝷			
# Owning User	Owning Org Unit	Owning Workstation	Label		Layout	
1 admin			Acquisitions		[]	
2 9	SILVA		circ		["circ_chec	kout", "circ_checkin", "toolbarseparator.1", "sea
List Actions •						
Available						Selected
# Button ID			Label	EŞ.		# Button ID
1 toolbarseparate	or		Toolbar Separator			1 acq_create_po
2 toolbarspacer			Toolbar Spacer		< ( <u>R</u> )	2 acg create invoice
3 browse_holds_s	shelf		Browse Holds Shelf			3 toolbarseparator.1333911481317
4 booking_captu	re		Capture Resources		> (A)	4 create marc

8. To add a dividing line between buttons that appear on the same side of the screen, select **toolbarseparator**, and click **-#A**.

itions <u>B</u> ooking Create MARC Record •	
tation Label	Delete Toolbar
Acquisitions	0
circ cat	"" ["circ_checkout","circ_checkin","toolbarseparator.1","search_opac","copy_status","toolbarseparator.2","patron_ ["circ_checkin","toolbarseparator.1","search_opac","copy_status","toolbarseparator.2","create_marc","authority_



- 9. At the bottom of the screen, choose the owner of this toolbar. If you click **Owning Org Unit**, then the owning org unit that you specify will display this toolbar. Select the owning org unit from the drop down menu. The rule of parental inheritance applies, so all child units will inherit the toolbars of their parental units. If you click **Owning Workstation**, then the workstation to which you are logged in when you created the toolbar will display this toolbar. If you select **Owning User**, then your login has access to that toolbar.
- 10.When you are finished creating the toolbar, click **Save Toolbar**. Any toolbar to which you have access displays under **Admin # Workstation Administration # Toolbars # Current**.

#### Permissions

ADMIN\_TOOLBAR - Allow a user to create, edit, and delete custom toolbars

# Part IV. Using the Staff Client

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# **Chapter 14. Introduction**

This part of the documentation deals with general Staff Client usage including logging in, navigation and shortcuts.

# Chapter 15. Logging in to Evergreen

- 1. Select the Locale to match your language preference.
- 2. Enter the Hostname of the Evergreen server you are connecting.
- 3. Click *Test Server* to ensure that you are able to reach the server. You should see "200 : OK" indicated in green for *Status* and *Version*.



If *Status* indicates "There was an error testing this server", check for a typo in the *Hostname* field or ask your administrator for the correct *Hostname* to use.

IF *version* indicates "404 Not Found", the server does not support the version of your staff client. You will need to download the correct version or contact your system administrator.

If your server has a self-signed SSL certificate, you may need to click Add SSL Exception in order to login.

- 4. Enter your Username and Password and click Login.
- 5. If this is the first time you login from the workstation, you will need to register your workstation.

#### **Standalone Interface**

If your connection to Evergreen is lost, click *Standalone Interface* tio circulate items or register patrons while connection is down.

## **Logging Out**

There are several ways to end your Evergreen staff client session:

- Click the **Exit Evergreen** button on the bottom of the login page.
- Click the **x** at the top left of the **login** window.
- Choose File # Quit Program from the menu of the application window.



Clicking the  $\mathbf{x}$  on the application window (not the login window) will not exit Evergreen, but only close the window.

A new application window can be opened by cicking Open New Window from the login window.

# **Chapter 16. Tab Buttons**

This feature enables you to add a new tab to the Evergreen staff client by clicking the + sign adjacent to the tab that you currently have opened. As in previous versions, you can also add new tabs by clicking **File # New Tab**, or use the hotkey, Ctrl+T.



# Chapter 17. New Options for Double Clicking

## **Double Click to Retrieve a Patron's Record**

- 1. Click Search # Search for Patrons to access a patron's record
- 2. Enter search terms.
- 3. Retrieve a list of possible matches. Double click on the record that you want to open.

Eile       Edit       Search       Circulation       O         Check Out       •       •       •       •       •         Patron Search       +       •       •       •       •	Cataloging <u>A</u> cquisitions <u>B</u> o k In +	oking g 🔹 🦲 Item Status 🔹 💽 Patron S	earch • 🔝 Pa			
Smith, Cathy Cheryl Patron Info Smith, Cathy Cheryl Date of Birth: 2/17/89 Library Card: 99999389406 Holds Alias: OPAC Login: br1csmith Email:		Addresses 784 Striking Theatre Fords Lazear CO 81420 Mailing Billing Phone Numbers Day Phone: Evening Phone: Other Phone:				
# Barred	Date of Birth	Last Name	First N			
1 f	2/17/89 12:00 AM	Smith	Cathy			
2 f	12/28/65 12:00 AM	Smith	Kevin			
3 f	6/21/62 12:00 AM	Smith	Martha			
4 f	6/24/87 12:00 AM	Smith	Robert			
5 f 1/13/90 12:00 AM		Smith				

## **Double Click to Retrieve Item Attributes**

- 1. Enter search terms to retrieve a bibliographic record.
- 2. Click Actions for this Record # Holdings Maintenance.
- 3. Double click on an item.

F	ecord Summary ( Add Volume	s) ( <u>Viev</u>	w MARC	)	
Т	tle: Harry Potter and the priso	ner of Azka	aban		
A	uthor: Rowling, J. K.				
B	b Call #: PR6068.094H27 2001				
Red	ord 3 of 7 Start Prev	ious	Next	End	Searc <u>h</u> Results
Н	oldings Maintenance				
5	ILVA Silva Consortium				Limit: Th
			<b>F</b>	Lile Defearb	
	Show volumes V Show Items	- Hid	e Empty	LIDS	
#	Location/Barcode	Volumes	Copies	Call Number	Circulatio
1	▲ SILVA : Silva Consortium				
2	ARDEN : Arden University				
3	AMAIN : Main Campus	1	<1>		
4	▲LAW : John Ring Law Li	0	<0>		
5	<b>4</b> 823.92		1	823.92	
6	65487431			823.92	MAIN

4. The copy information will appear in a new tab.

# **Chapter 18. Sorting Columns**

This feature enables you to sort display columns so that you can find easily the information that you need on a screen that contains multiple columns. You can sort display columns on any screen that is built on a grid, such as the Check In screen or the On Shelf Pull List.

You can also sort the columns on the following Administration screens: Circulation Policies, Hold Policies, Circulation Limit Sets, Barcode Completion, Acquisitions User Request List, and Vandelay Import Errors.

You can sort items in an ascending or descending order, and you can prioritize the order in which columns will sort. The following use cases illustrate how to sort items within the Circulation and Administration interfaces.

## Sorting the On Shelf Pull List

You want to capture items that are on the shelf to fill current holds. To simplify this process, you will sort the items on the On Shelf Pull List by Copy Location and Call Number.

- 1. Click Circulation # Pull List for Hold Requests.
- 2. The first column that you want to sort is the column, Current Copy Location. Right click the column header, Current Copy Location.
- 3. Click Sort First (Descending).

1 On Shelf Pull List +					
Reload Holds Fetch More Holds Tota	al Holds: 8				
# Request Date	Title	Current Copy Location	Call Number	Current Copy	Status
1 2012-04-12 6:13 PM	Arthur meets the President	Children's	Sort First (Ascending)	7599397711	Waiting for
2 2012-04-12 6:21 PM	The icebound land	YA	Sort First (Descending)	4722013685	Waiting for
3 2012-04-12 6:16 PM	Arthur's baby	YA	Sort Next (Ascending)	0929824944	Waiting for
4 2012-04-12 6:05 PM	Mouse count	Stacks	Soft Next (Ascending)	9256812135	Waiting for
5 2012-04-12 6:03 PM	Clap your hands	Stacks	Sort Next (Descending)	2430082355	Waiting for
6 2011-04-01 3:19 PM	Wag a tail	Stacks	EHLERT	489607280482	Waiting for
7 2011-03-07 9:20 AM	Odd hours	Stacks	KOONTZ	605415736469	Waiting for
8 2011-02-24 9:50 AM	Love smart : find the one you want, fix the one you got	Stacks	MCGRAW	679619640104	Waiting for

4. The next column that you want to sort is the column, Call Number. Right click the column header, Call Number.

5. Click Sort Next (Ascending).

1 On Shelf Pull List +

Reload Holds Fetch More Holds Total	Holds: 8				
# Request Date	Title	Current Copy Location	Call Number	Current Copy	Status
1 2012-04-12 6:21 PM	The icebound land	YA	FLANAGAN	Sort First (Ascending)	Waiting for
2 2012-04-12 6:16 PM	Arthur's baby	YA	BROWN	Sort First (Descending)	Waiting for
3 2012-04-12 6:05 PM	Mouse count	Stacks	WALSH	Cast Next (Assauding)	Waiting for
4 2012-04-12 6:03 PM	Clap your hands	Stacks	CAULEY	Soft Next (Ascending)	Waiting for
5 2011-04-01 3:19 PM	Wag a tail	Stacks	EHLERT	Sort Next (Descending)	Waiting for
6 2011-03-07 9:20 AM	Odd hours	Stacks	KOONTZ	605415736469	Waiting for
7 2011-02-24 9:50 AM	Love smart : find the one you want, fix the one you got	Stacks	MCGRAW	679619640104	Waiting for
8 2012-04-12 6:13 PM	Arthur meets the President	Children's	BROWN	907599397711	Waiting for

6. The pull list has now been sorted by copy location and call number.

1 On Shelf Pull List +

	I	Reload							
r	Holds								
	Fe	etch More Holds Total	Holds: 8						
	#	Request Date	Title	Current Copy Location	Call Number	Current Copy	Status		
	1	2012-04-12 6:16 PM	Arthur's baby	YA	BROWN	310929824944	Waiting for capt		
	2	2012-04-12 6:21 PM	The icebound land	YA	FLANAGAN	234722013685	Waiting for capt		
	3	2012-04-12 6:03 PM	Clap your hands	Stacks	CAULEY	492430082355	Waiting for capt		
	4	2011-04-01 3:19 PM	Wag a tail	Stacks	EHLERT	489607280482	Waiting for capt		
	5	2011-03-07 9:20 AM	Odd hours	Stacks	KOONTZ	605415736469	Waiting for capt		
	6	2011-02-24 9:50 AM	Love smart : find the one you want, fix the one you got	Stacks	MCGRAW	679619640104	Waiting for capt		
	7	2012-04-12 6:05 PM	Mouse count	Stacks	WALSH	339256812135	Waiting for capt		
	8	2012-04-12 6:13 PM	Arthur meets the President	Children's	BROWN	907599397711	Waiting for capt		



If you wanted to sort more columns, you could continue the process by clicking **Sort Next** for any subsequent columns.

## **Sorting Circulation Policies**

You want to sort the display of circulation policies in your staff client.

- 1. Click Administration # Local Administration # Circulation Policies.
- 2. Right click on any column header.
- 3. A pop-up box appears.
| Cir       | cula | ation P | olicy   | Config | uratio      | n             |             |        |          | [ | Column Picker                                    |                                       |                                 |               | 8  |
|-----------|------|---------|---------|--------|-------------|---------------|-------------|--------|----------|---|--|---------------------------------------|---------------------------------|---------------|----|
| Back Next |      |         |         |        |             |               |             |        |          |   | Column   | Display                               | Auto Width                      | Sort Priority | *  |
|           |      |         | Dormic  | Ora    | Сору        | Сору          | User        |        |          | 0 | $\checkmark$                                     | 1                                     |                                 |               |    |
| ~         | #    | Active? | Group   | Unit   | Circ<br>Lib | Owning<br>Lib | Home<br>Lib | Renewa | Juvenile | M | #  |                                       |                                 |               |    |
|           | 1    | True    | Lleare  | CONS   |             |               |             | Uncot  | Uncot    |   | Active?  |                                       |                                 | 0             | =  |
|           | 2    | True    | Users   | CONS   | CONS        | CONS          |             | True   | Unset    | M | Permission Group                                 |                                       |                                 | 0             |    |
|           | 3    | True    | Patrons | APEX   | oono        | oono          |             | Unset  | Unset    |   | Org Unit   | <b>v</b>                              |                                 | 0             |    |
|           |      |         |         |        |             |               |             |        |          |   | Copy Circ Lib                                    | <b>v</b>                              | <b>V</b>                        | 0             |    |
|           |      |         |         |        |             |               |             |        |          |   | Copy Owning Lib                                  | <b>V</b>                              | $\checkmark$                    | 0             |    |
|           |      |         |         |        |             |               |             |        |          |   | User Home Lib                                    |                                       | $\checkmark$                    | 0             |    |
|           |      |         |         |        |             |               |             |        |          |   | Renewal?   |                                       |                                 | 0             |    |
|           |      |         |         |        |             |               |             |        |          |   | Juvenile?  |                                       |                                 | 0             |    |
|           |      |         |         |        |             |               |             |        |          |   | Circulation Modifier                             |                                       |                                 | 0             |    |
|           |      |         |         |        |             |               |             |        |          |   | MARC Type  | 1                                     |                                 | 0 ≑           |    |
|           |      |         |         |        |             |               |             |        |          |   | MARC Form  | 1                                     |                                 | 0 ≑           |    |
|           |      |         |         |        |             |               |             |        |          |   | MADO DE Laure                                    | [TT#]                                 | (ma)                            | n 🔺           | *  |
|           |      |         |         |        |             |               |             |        |          |   | A Sort Priority of '0' r<br>Apply a negative Sor | neans no sortin<br>t Priority for dea | g is applied.<br>scending sort. |               |    |
|           |      |         |         |        |             |               |             |        |          |   |  |                                       |                                 | Cancel Sa     | ve |

- 4. Check the **Display** box if you want to display a column in the staff client.
- 5. Check the Auto Width box if you want the width of the columns to adjust to fit the staff client.
- 6. Select a sort priority.
  - a. A sort priority of "0" indicates that no sorting has been applied. Columns will display in their default order.
  - b. A sort priority of "1" indicates that ascending sorting should be applied to this column first. Subsequent sorts will be applied as you continue to enter increasing numbers.
  - c. A sort priority of "-1" indicates that descending sorting should be applied to this column.
- 7. Click **Save**. The circulation policies will now sort according to your selections each time that you log into the staff client.

# **Chapter 19. 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.

# **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 Admin # 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

OPAC: Number of staff client	t saved searches to display on left	side of results and record details pages
If unset, the OPAC ( your ten most recent you actually don't v	only when wrapped in the staff clie searches on the left side of the res vant to see this feature at all, set t your organizational tree.	ent!) will default to showing you sults and record details pages. If this value to zero at the top of
Context	CONS	•
Value	6	



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.

# **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.



# Chapter 20. Return to Search Results from MARC Record

This feature enables you to return to your title search results directly from any view of the MARC record, including the OPAC View, MARC Record, MARC Edit, and Holdings Maintenance. You can use this feature to page through records in the MARC Record View or Edit interfaces. You do not have to return to the OPAC View to access title results.

lib Reco	rd: 2	23 2 Bib Record	23 +							
Recor Title: Autho Bib Ca	r:	ummary ( <u>Ad</u> Complete trans Brahms, Johann M22.B82M34	d Volumes ) ( ) criptions, cadenz les	View MAR( as, and exer	) cises,	for solo p	ano			
Record 1	l of	44 <u>S</u> tart	<u>P</u> revious	<u>N</u> e	d	] <u>E</u> r	id 🚺	Searc <u>h</u> Resu	ults	
Call Nu	ck <u>s</u> imb	ubfields 🔲 Fl er	at-Text Editor	✓ Fast Iten Item <u>B</u> arcoc	n <u>A</u> dd le	<u>V</u> alio	late (	Save Recorg		<u>-</u> elp
MARC BLvl	Rec	ord Form				MRec		Ctry	00	
Desc	a			DtSt	s	Date1	1971	Date2	nyu	
TrAr		Part	LTxt	FMus		AccM		Comp		
LDR		01864ncm a22	00457 a 4500	5						
001		23								
003		CONS								
005		19991211180904.0								
800		970701s1971 nyu 00 eng								
010		‡a 72-116826								
020		‡a 0486226522								
The second second										
050 0	0	‡a M22.B82	‡b M34							

# **Chapter 21. Workstation Administration**

# **Copy Editor: Copy Location Name First**

By default, when editing item records, library code is displayed in front of shelving location in *Shelving Location* field. You may reverse the order by going to Admin # Workstation Administration # Copy Editor: Copy Location Name First. Simply click it to make copy location name displayed first. The setting is saved on the workstation.

# **Font and Sound Settings**

You may change the size of displayed text or turn staff client sounds on and off. These settings are specific to each workstation and stored on local hard disk. They do not affect OPAC font sizes.

- 1. Select Admin # Workstation Administration # Global Font and Sound Settings.
- 2. To turn off the system sounds, like the noise that happens when a patron with a block is retrieved, check the *disable sound* box and click *Save to Disk*.

Adjust Sound	
Disable sound?	Save to Disk

3. To change the size of the font, pick the desired option and click Save to Disk.



# **Select Hotkeys**

All or partial hotkeys can be turned on or off. It can be done for a particular workstation:

- 1. Navigate to Admin # Workstation Administration # Hotkeys # Current.
- 2. Select Default, Minimal, and None.



- **Default**: inlcuding all hotkeys
- Minimal: including those hotkeys using CTRL key
- None: excluding all hotkeys

- 3. Go back to the above menu.
- 4. Click Set Workstation Default to Current.

To clear the existing default click Clear Workstation Default.

You can use the **Toggle Hotkeys** button, included in some toolbars, on top right corner, to switch your selected Hotkeys *on* or *off* for the current login session. It has the same effect as when you click **Disable Hotkeys** on the *Hotkeys* menu.

# **Configure Printers**

Use the Printer Settings Editor to configure printer output for each workstation. If left unconfigured Evergreen will use the default printer set in the workstation's operating system (Windows, OSX, Ubuntu, etc).

Evergreen printing works best if you are using recent, hardware-specific printer drivers.

#### 1. Select Admin # Workstation Administration # Printer Settings Editor.

2. Select the *Printer Context*. At a minimum set the *Default* context on each Evergreen workstation. Repeat the procedure for other contexts if they differ from the default (e.g. if spine labels should output to a different printer.

QDefault ○Receipt ○Label ○Mail ○Offline

- Default: Default settings for staff client print functions (set for each workstation).
- **Receipt**: Settings for printing receipts.
- Label: Printer settings for spine and pocket labels.
- Mail: Settings for printing mailed notices (not yet active).
- **Offline**: Applies to all printing from the Offline Interface.
- 3. After choosing *Printer Context* click **Set Default Printer** and **Print Test Page** and follow the prompts. If successful, test output will print to your chosen printer.

Test Print	
1234567890	=
12345678901234567890	
123456789012345678901234567890	
<	]
Set Default Printer and Print Test Page	age Settings
h	

Chapter 21. Workstation Administration Report errors in this documentation using Launchpad.

4. (optional) To further format or customize printed output click **Page Settings** and adjust settings. When finished click **OK** and print another test page to view changes.

Format & Options Margins & Header/Footer
Orientation:
Print Background (colors & images)

### **Advanced Settings**

If you followed the steps above and still cannot print there are two alternate print strategies:

- DOS LPTI Print (sends unformatted text directly to the parallel port)
- Custom/External Print (configuration required)



Evergreen cannot print using the Windows Generic/Text Only driver. If this driver is the only one available try one of the alternate print strategies instead.

# **Receipt Template Editor**

There are many default receipt templates included with the Evergreen staff client. These templates are saved on invidual workstations. Customization can be done workstation by workstation or by exporting the templates to import to other workstations.

#### 1. Select Admin # Workstation Administration # Receipt Template Editor.

2. Select the *checkout* template from the dropdown menu.

Templa	Templates							
- ID		Actions						
<u>N</u> ame	item_status 💌	Preview Default Be sure to 'Save Locally' before export						
Туре	item_status	Macros Save Locally Export						
	transit_list							
	items_out							
Previe	renew	ler						
The fo	checkout	following items have been examined: <hr/> <ql></ql>						
	offline_chockout							
	checkin							
1.	bill_payment							
	bills_historical							
۷.	bills_current	Item						
	bills_main_view	%title% barcode%						
2	offline_checkin							
э.	offline_renew							
1	offline_inhouse_use							
4.	in_house_use	er > <hr/> % <u>SHORTNAME</u> % %TODAY_TRIM%< <u>br</u> />						
5	holds							
J.	hold_slip							
	transit_slip							
	hold_transit_slip							

3. This is what the default checkout template looks like. The template preview is on the left hand side. You can edit the *Header*, *Line Item* or *Footer* on the right hand side.

emplates						
ID       Name       checkout       Type       items	Actions       Preview     Default       Macros     Save Locally       Export     Import					
Preview Welcome to Prince Rupert Library! You checked out the following items:  1. Peace comes to Castle Oak Barcode: 3635300990263 Due: 2006-08-23	Header Welcome to %LIBRARY%! br/> You checked out the following items: <hr/> < 					
<ol> <li>The robber barons : the great American capitalists, 1861-1901 Barcode: 33207002163014 Due: 2006-09-06</li> <li>Katy no-pocket Barcode: 33034001434539 Due: 2006-09-06</li> <li>King's Castle Barcode: 31039000791757 Due: 2006-09-06</li> </ol>	Line Item <li>%title%  br/&gt; Barcode: %barcode% Due: %due_date%</li>					
5. Katy no-pocket Barcode: 33034001434539 Due: 2006-09-06 BPR 2009-12-02 10:54 You were helped by Jeremy	Footer You were helped by %STAFF_FIRSTNAME%    					

4. In the upper right hand corner you can see the available macros by clicking on the **Macros** button. A macro prints a real value from the database. In this example, the macro *%LIBRARY%* prints "Prince Rupert Library". The macros that are available vary slightly between types of receipt templates (i.e. bills, holds, items).

Receipt templates are marked up with HTML tags. You may use most HTML tags. See <u>http://www.w3schools.com/html/</u> for more information on HTML tags.
You may insert a link to an image, e.g. your library's logo, that exists on the web. For example, to inlcude the white Evergreen logo from this document, enter tag <img src="http://docs.evergreen-ils.org/2.3/media/small_logo_white.jpg"/> . in the receipt template.
There are several macros that can carry pre-built contents specific to individual libraries. The contents can be set up in local administration. For details see <u>Library Settings</u> . Though text can be hard-coded in receipt templates, the pre-built contents will be automatically applied to receipts printed from all workstations without editing each template.
• %INCLUDE(notice_text)%
• %INCLUDE(alert_text)%
• %INCLUDE(event_text)%
• %INCLUDE(footer_text)%%
• %INCLUDE(header_text)%

#### 5. Below are some example edits:

Barcode: 33207002163014 Due: 2006-09-06 3. Katy no-pocket Barcode: 33034001434539 Due: 2006-09-06 4. King's Castle Barcode: 31039000791757 Due: 2006-09-06 5. Katy no-pocket Barcode: 33034001434539 Due: 2006-09-06	Line Item <li><li>%title%  Barcode: %barcode% Due: %due_date%</li></li>
--	--

The above is the default *Line Item* in Checkout template. The macro *%barcode%* prints the item barcodes of the books that were checked out. The macro *%due\_date%* prints the due date for each item that was checked out. You may add a line break between them: Barcode: *%barcode%* </br>

The receipt preview will look like this:

- Peace comes to Castle Oak Barcode: 3635300990263 Due: 2006-08-23
   The robber barons : the great American capitalists, 1861-1901 Barcode: 33207002163014 Due: 2006-09-06
   Katy no-pocket
- Katy no-pocket Barcode: 33034001434539 Due: 2006-09-06
- King's Castle Barcode: 31039000791757 Due: 2006-09-06
- Katy no-pocket Barcode: 33034001434539 Due: 2006-09-06



The due date can only be printed in the YYYY-MM-DD format.

6. Once you have the checkout template how you want it, click Save Locally to save the template to your computer.

Templates							
[ ID	Actions						
Name checkout	Preview Default Be sure to 'Save Locally' before export						
Type items	Macros Save Locally Export						
	Import						

# **Print Holds Slip with Landscape Layout**

This feature enables you to use Mozilla-specific CSS to print holds with a landscape layout. To use the landscape layout:

- 1. Click Admin # Workstation Administration # Receipt Template Editor.
- 2. Select hold transit slip from the Template Name drop down menu.
- 3. Enter <div> before and after the block of text that you wish to rotate.
- 4. Enter the stylesheet text in the <div> bracket that appears before the block of text that you wish to rotate:

<div style="moz-transform: rotate(90deg);">

5. When you click out of this box, notice that the text in the **Preview** box on the left side of the screen has rotated 90 degrees.

6. You can further customize the look of the text by adjusting its height and width. The height and width that you specify will be unique to your printer. For example, you could add the following height and width to your rotated text:

```
<div style="moz-transform: rotate(90deg);height: 300px; width: 200px;">
```

7. The holds slip will print with the configured text in a landscape layout:

### **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 (e.g. more than one computers on the circulation desk, or another computer in the workroom that you use to checkin items or capture holds with).

#### 1. Click on Export.

Actions		
Preview	Default	Be sure to "Save Locally" before export
Macros	Save Locally	Export
		Import
		)

- 2. Select the location to save the template to, name the template, and click Save.
- 3. Click **OK** to confirm.

#### **Importing Templates**

- 1. Send the exported templates file to the workstation to which you want to import the templates. You may do it using memory stick or email, etc.
- 2. On Receipt Template Editor, Click Import.

Actions		)
Preview	Default	Be sure to "Save Locally" before export
Macros	Save Locally	Export
	<u> </u>	Import
L		

3 Navigate to and select the template file that you want to import. Click **Open**. Chapter 21. Workstation Administration Report errors in this documentation using Launchpad.



- 4. Click **OK** to confirm on the prompt.
- 5. Click Save Locally.

Actions		)
Preview	Default	Be sure to "Save Locally" before export
Macros	Save Locally	Export
	2010 1000	Import
L		/



By default all libraries use shared and hard-coded templates for Hold Slip and Transit Slip. Libraries can switch to using their own templates by setting up a library setting: Use legacy hardcoded receipts/slips. Details see Library Settings.

# **Button Bar/Toolbar**

There is an optional toolbar with buttons providing quick access to commonly used staff client functions. When activated the toolbar appears below the menu bar.

**Circulation Buttons** 

<u>File Edit Search Circulation Cataloguing Acquisitions Booking</u>	
🔕 Check Out 🔹 😯 Check In 🔹 🔤 Search Catalogue 🔹 🔤 Item Status 🔹 💽 Patron Search 🔹 🚺	Patron Registration 🔹
Cataloguing Buttons	
<u>File Edit Search Circulation Cataloguing Acquisitions Booking</u>	
Obset     Image: Statute     Image: Statute	

The look of the buttons can be customized. Use *Mode*, *Label Position* and *Icon Size* on the *Toolbar* menu shown on the screen below to select your preference.

A group of buttons can be selected or activated by default for all workstations at a particular library (see <u>Library</u> <u>Settings</u> for details). A different default group can be set up on individual workstations by the following steps.

#### 1. Go to Admin # Workstation Adminitration # Toolbars # Current.

					 Admin (-)
Patron Search • Patron Registra	Hior	<ul> <li>✓</li> </ul>	Copy Edito E <u>x</u> ternal Te Global For Hotkeys Printer Set <u>R</u> eceipt Te	or: Copy Location Name First ext Editor Command it and Sound Settings tings Editor mplate Editor	Operator Change: New         Download Offline Patron List         Offline Transaction Management         Local Administration         Server Administration         Workstation Administration         Toggle Activity Meters         User Permission Editor         For developers (-)
Current	۲		cat	•	
Icon Size			circ		
Label Position			lsa		
Mode		•	None		
Configure Toolbars		Γ			
Clear Workstation Default Set Workstation Default to Current					

- 2. Choose a group from the list.
- 3. Go back to the above menu. Select **Set Workstation Default to Current**. The above selected toolbar group is set as default for this workstation.

To clear an existing setting click Clear Workstation Default.

Circulation and Cataloguing are the default toolbar groups. Local system administrators can create new groups for individual accounts, workstations or all in a particular library.

- 1. Go to \*Admin # Workstation Adminitration # Toolbars # Configure Toolbars.
- 2. Click New Toolbar

	• ) = (   =   )	
	• 🛐 •	
1 Toolbars +		
· ·		
# Owning User Owning Org Unit	Owning Workstation Label	Layout
1 SITKA	circ	["circ_checko
2 SITKA	cat	["circ_checkir
List Actions -		
		1
Available		Sel
Available # Button ID	Label	Et #
Available # Button ID 1 toolbarseparator	Label Toolbar Separator	Et Sel
Available # Button ID 1 toolbarseparator 2 toolbarspacer	Label Toolbar Separator Toolbar Spacer	E₽ (R) Sel # 1 2
Available # Button ID 1 toolbarseparator 2 toolbarspacer 3 browse_holds_shelf	Label Toolbar Separator Toolbar Spacer Browse Holds Shelf	E
Available # Button ID 1 toolbarseparator 2 toolbarspacer 3 browse_holds_shelf 4 booking_capture	Label Toolbar Separator Toolbar Spacer Browse Holds Shelf Capture Resources	E
Available # Button ID 1 toolbarseparator 2 toolbarspacer 3 browse_holds_shelf 4 booking_capture 5 acq_claim_eligible	Label Toolbar Separator Toolbar Spacer Browse Holds Shelf Capture Resources Claim-Ready Items	E
Available # Button ID 1 toolbarseparator 2 toolbarspacer 3 browse_holds_shelf 4 booking_capture 5 acq_claim_eligible 6 edit_copy_buckets	Label Toolbar Separator Toolbar Spacer Browse Holds Shelf Capture Resources Claim-Ready Items Copy Buckets	E ← (R) Sel # 1 2 3 4 5 6
Available # Button ID 1 toolbarseparator 2 toolbarspacer 3 browse_holds_shelf 4 booking_capture 5 acq_claim_eligible 6 edit_copy_buckets 7 acq_create_invoice	Label Toolbar Separator Toolbar Spacer Browse Holds Shelf Capture Resources Claim-Ready Items Copy Buckets Create Invoice	E
Available # Button ID 1 toolbarseparator 2 toolbarseparator 3 browse_holds_shelf 4 booking_capture 5 acq_claim_eligible 6 edit_copy_buckets 7 acq_create_invoice 8 create_marc	Label Toolbar Separator Toolbar Spacer Browse Holds Shelf Capture Resources Claim-Ready Items Copy Buckets Create Invoice Create MARC Record	E ← (R) Sel # 1 2 3 4 5 6 7 <u>U</u> p 8
Available # Button ID 1 toolbarseparator 2 toolbarspacer 3 browse_holds_shelf 4 booking_capture 5 acq_claim_eligible 6 edit_copy_buckets 7 acq_create_invoice 8 create_marc 9 acq_create_po	Label Toolbar Separator Toolbar Spacer Browse Holds Shelf Capture Resources Claim-Ready Items Copy Buckets Create Invoice Create MARC Record Create Purchase Order	E
Available  # Button ID  1 toolbarseparator  2 toolbarspacer  3 browse_holds_shelf  4 booking_capture  5 acq_claim_eligible  6 edit_copy_buckets  7 acq_create_invoice  8 create_marc  9 acq_create_po booking_reservation	Label         Toolbar Separator         Toolbar Spacer         Browse Holds Shelf         Capture Resources         Claim-Ready Items         Copy Buckets         Create Invoice         Create MARC Record         Create Reservations	E E C C C C C C C C C C C C C
Available # Button ID 1 toolbarseparator 2 toolbarspacer 3 browse_holds_shelf 4 booking_capture 5 acq_claim_eligible 6 edit_copy_buckets 7 acq_create_invoice 8 create_marc 9 acq_create_po booking_reservation acq_unified_search	Label         Toolbar Separator         Toolbar Spacer         Browse Holds Shelf         Capture Resources         Claim-Ready Items         Copy Buckets         Create Invoice         Create MARC Record         Create Reservations         General Search	E E C C C C C C C C C C
Available         # Button ID         1 toolbarseparator         2 toolbarspacer         3 browse_holds_shelf         4 booking_capture         5 acq_claim_eligible         6 edit_copy_buckets         7 acq_create_invoice         8 create_marc         9 acq_create_po         booking_reservation         acq_unified_search         portal	Label           Toolbar Separator           Toolbar Spacer           Browse Holds Shelf           Capture Resources           Claim-Ready Items           Copy Buckets           Create Invoice           Create Purchase Order           Create Reservations           General Search           Home	E
Available  # Button ID  1 toolbarseparator  2 toolbarspacer  3 browse_holds_shelf  4 booking_capture  5 acq_claim_eligible  6 edit_copy_buckets  7 acq_create_invoice  8 create_marc  9 acq_create_po  booking_reservation  acq_unified_search  portal	Label         Toolbar Separator         Toolbar Spacer         Browse Holds Shelf         Capture Resources         Claim-Ready Items         Copy Buckets         Create Invoice         Create MARC Record         Create Reservations         General Search         Home	E       < (ℝ)

- 3. In the prompt window type in a name for the new group, and then click **OK**.
- Choose the function buttons you want to add to the new group. Click -->(A) to add. You may select one in the Selected pane, and then click <--(R) to remove it.</li>
- 5. Check one of the radio buttons: **Owning Org Unit**, **Owning Workstation**, or **Owning User** to specify the new group should be available to everyone/workstation in your library, or this workstation or yourself only.

6. If you chose *Owning Workstation* in the above step, click the down-pointed arrow at the end of the *Permission Context* box to select your library in the orgnization unit tree.

#### 7. Click Save Toolbar.

8. The new toolbar group will be displayed together with Circulation and Cataloguing groups when you choose a toolbar group next time.

# Part V. System Administration From the Staff Client

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# **Chapter 22. Introduction**

This part deals with the options in the Server Administration menu found in the staff client.

# Chapter 23. Acquisitions Administration Acquisitions Permissions in the Admin module

Several setting in the Library Settings area of the Admin module pertain to functions in the Acquisitions module. You can access these settings by clicking *Admin # 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.
- 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.
- 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

# **Cancel/Suspend 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 suspend or 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.

#### Create a cancel/suspend reason

- 1. To add a new cancel reason, click Administration # Server Administration # Acquisitions # 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 Admin # 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 be comprised of 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.

# 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.

# 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 Admin # Server Administration # Acquisitions # 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 Admin # Server Administration # Organizational Units).



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.

#### 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 Admin # Server Administration # Acquisitions # 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 Admin # Server Administration # Organizational Units).



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.

# 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 Admin # Server Administration # Acquisitions #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 Admin # Server Administration # Organizational Units).



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.



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

6. Click Save.

#### 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 Admin # Server Administration # Acquisitions #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.



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

# **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.

### Create a currency type

- 1. To create a new currency type, click Admin # Server Administration # Acquisitions # 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.

#### 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<sub>click. The pop</sub>up box will appear, and you can edit the fields.
- 3. After making changes, click Save.



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

# **Distribution Formulas**

Distribution formulas allow you to specify the number of copies that should be distributed to specific branches. You can create and reuse formulas as needed.

#### Create a distribution formula

- 1. Click Admin # Server Administration # Acquisitions #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 Admin # Server Administration # Organizational Units).



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 *Admin # Server Administration # Organizational Units*).
- 9. Select a Shelving Location from the drop down menu.
- 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 Admin # Server Administration # Acquisitions # Distribution Formulas. The item\_count will reflect the entries to your distribution formula.



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.

# Edit a distribution formula

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

# EDI

Many libraries use Electronic Data Interchange (EDI) accounts to order new acquisitions. Users can set up EDI accounts and manage EDI messages in the admin module. EDI messages and notes can be viewed in the acquisitions module. See also the EDI Installation Instructions because this is required for use of EDI.

The following fields are required to create an EDI account:



host, username, password, path, and incoming directory.

#### **EDI Accounts**

Create EDI Accounts to communicate electronically with providers.

- 1. Create a label. The label allows you to differentiate between accounts for the same provider. No limits exist on the number of characters that can be entered in this field.
- 2. Enter a host. Your provider will provide you with the requisite FTP or SCP information.
- 3. Enter the username that has been supplied by your provider.
- 4. Enter the password that has been supplied by your provider.
- 5. Enter account information. 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.

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



The rule of parental inheritance applies to this list.

- 7. The Last Activity updates automatically with any inbound or outbound communication.
- 8. Select a provider from the drop down menu to whom this account belongs.
- 9. Enter a path. The path indicates the remote location on the server from which files are pulled in to the ILS.
- 10.Enter the incoming directory. This directory indicates the location on your local network to which the files download.
- 11.Enter the vendor account number supplied by your provider.
- 12.Enter the vendor account code supplied by your provider.

13.Click Save.

#### **EDI Messages**

The EDI messages screen displays all incoming and outgoing messages between the library and the vendor.

# **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.

#### Create an exchange rate

- 1. To create a new exchange rate, click Admin # Server Administration # Acquisitions # 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.

#### **Edit an Exchange Rate**

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

# **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 Congres     ‡biblios.net	) 55
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 <u>Line Item Feratures</u> for more information.
- 4. Click the Notes link to add notes or line item alerts to the line item. See Line Item Feratures 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*.



# **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 Admin # Server Administration # Acquisitions # 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 Admin # Server Administration # Organizational Units).



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.

# **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.

#### Create a funding source

- 1. To create a new funding source, click Admin # Server Administration # Acquisitions # 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 Admin # Server Administration # Organizational Units).



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.

# **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.

# 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.

#### **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.

# 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.

### Create a fund

- 1. To create a new fund, click Admin # Server Administration # Acquisitions # 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 Admin # Server Administration # Organizational Units).



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.

12.Click Save.

# **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 Admin # Server Administration # Acquisitions # 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.

#### **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 Admin # Server Administration # Acquisitions # 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.

#### **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.

# **Core Source Added for Fund Reporting**

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

#### Edit a Fund

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

# **Perform Year End Closeout Operation**

The Year End Closeout 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 Admin # Server Administration # Acquisitions # Funds.
- 2. Click Fund Propagation and Rollover.
- 3. Check the box adjacent to Perform Fiscal Year Close~Out Operation.
- 4. Notice that the context org unit reflects the context org unit that you selected at the top of the Funds screen.
- 5. 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.
- 6. 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.
- 7. Click Process.
- 8. Evergreen will begin the propagation process. Evergreen will make a clone of each fund, but it will increment the year by .

# **Enhancements to Fiscal Rollover**

An enhancement to the fiscal rollover process 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.

To enable this enhancement, you must configure a new org unit setting:

- 1. Click Administration # Local Administration # Library Settings Editor.
- 2. Search for the setting, Allow funds to be rolled over without bringing the money along.
- 3. Click Edit.
- 4. Set the value to **True**.
- 5. Click Update Setting.

Enabling this setting will display a new check box in the **Fund Propagation & Rollover** drop down menu. To use this feature during the fiscal rollover process, click the check box adjacent to **Limit Fiscal Year Close-out Operation to Encumbrances**.

# **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.

#### 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 Admin # Server Administration # Acquisitions # 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.

#### 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 *Admin # Server Administration # Acquisitions # 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.

# 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.

# Create a line item alert

- 1. To create a line item alert, click Administration # Server Administration # Acquisitions # 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 Admin # Server Administration # Organizational Units).
- 6. Click Save.

# **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.

# Chapter 24. Authorities 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. In Evergreen release 2.2, 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.

### **Control Sets**

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 Admin # Server Administration # Authorities # Control Sets.

To add a control set:

- 1. Click Admin # Server Administration # Authorities # 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.

**Control Sets** 

Back	( Next	
V	Name	Description
	LoC	Library of Congress standard authority record control semantics

a a star there	
Name	Song Title Index
Description	Authority Record Control Semant

# Thesauri

A thesaurus describes the semantic rules that govern the meaning of words in a MARC record. The thesaurus code, which indicates the specific thesarus 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 Admin # Server Administration # Authorities # Control Sets, and choose the hyperlinked thesaurus that you want to access, or click Admin # Server Administration # Authorities # Thesauri.

To add a Thesaurus:

- 1. Click Admin # Server Administration # Authorities # Control Sets, and choose the hyperlinked thesaurus that you want to access, or click Admin # Server Administration # Authorities # 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.

howing only thesauri linked to control se ack Next	et: (102) Song Title Index / Authority Re	cord Control Semantics for Song Titles	
✓ Thesaurus Code	Contr	ol Set	
		0	
	Thesaurus Code	A	
	Control Set	102	
	Name	Song Title Headings	
	Description	Unique headings for song titles	
	Cancal		

# **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.

#### To create an Authority Field:

- 1. Click Admin # Server Administration # Authorities # 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. Click Save.

Name	Description	Main Entry	Control Set	Tag
] Song Title	Song Title		Song Title Inde	ex 660
			Name Description	Song Title Song Title
			Main Entry	
			Control Set	102
			Tag	660
			Subfield List	abcdef

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

#### 11.Click New Control Set Bib Field.

12.Add the corresponding tag in the bibiographic record.

13.Click Save.

#### **Control Set Bib Fields**

V	Tag		
			8
		Tag	640
		Tag Controlling Authority Field	<b>640</b>

## **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.

Create a new Browse Axis:

- 1. Click Admin # Server Administration # Authorities # 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.

DI	owse Axes				New Browse Axis	Delete Select
Bac	k Next					
1	Code	Name		Description	Sorter Attribute	
	author	Author		Author axis	Title	
	songtitle	Song Title		Song title search	Title	
	subject	Subject		Subject axis	Title	
	title	Title		Title axis	Title	
	topic	Topic		Topic Subject axis	Title	
			Code	songtitle		
			Name	Song Title		
			Description	Song title search		
			Sorter Attribute	Title		

- 7. Assign the axis to an authority so that users can find the authority record when browsing authorities. Click Admin # Server Administration # Authorities # 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-autho <u>Back_Next</u>	ority field maps	linked to authority field:	Song Title (660 tabcdef) Song Title
V Axis			
			0
- /	Axis	litle	
	Authority Field	1001	
	Cancel	Save	

## **OPAC Searching of Authorities**

Patrons and librarians can browse authorities through the OPAC.

To search for Authorities:

- 1. Click Advanced Search in the OPAC.
- 2. Find the Authority Browse column in the left side of the screen.
- 3. Select a browse axis, and enter a keyword. The terms in the middle of the results list should yield the best match.

Advanced Se	arch	
My Account		
Log in		
	Quick Search	
ISBN -		
	Submit	
	Authority Browse	
Author ▼ ]	clarke <u>Submit</u>	
	MARC Expert Search	
Tag: Value:	Subfield:	
	Add Row Submit	

#### 4. Click Submit.

5. A list of results will appear. The authorities with bibliographic records attached will be listed in bold with the number of attached bibliographic records in parentheses.

Arnoldson, K.P.	Heading Personal Name
Arnoldussen, Arnold	Heading Personal Name
Arnoldussen, Paul	Heading Personal Name
Arnon, Arie (2)	Heading Personal Name
Berg, Em. de	Heading Personal Name
Castan, A.L.	Heading Personal Name
Clarke, Stephen (1)	Heading Personal Name

6. Click on the bolded text to view bibliographic records.

#### 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 25. 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.

## **Configure call number prefixes**

Call number prefixes are codes that precede a call number.

To configure call number prefixes:

- 1. Select Admin # 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.

Con	text Org Unit APE	ΞX	
Bac	<u>k Next</u> 🖗		
V	Label		Owning Librar
	Copy 1		APEX
			0
	Label	Copy 2	0
	Label Owning Library	Copy 2	

## **Configure call number suffixes**

Call number suffixes are codes that succeed a call number.

To configure call number suffixes:

1. Select Admin # 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.

Cal	l Numb	er Prefixes		
Con	text Org l	Jnit APEX		
Bac	<u>k Next</u>			
V	Label			Owning Library
	YA			CONS
	E			 CONS
				0
		Label	DEE	 0
		Label	REF	 8
		Label Owning Library	REF APEX	 8

# **Apply Call Number Prefixes and Suffixes**

You can apply call number prefixes and suffixes to items from a pre-configured list in the **Unified Volume/Copy Creator**. See the document, Unified Volume/Copy Creator, for an example.

# Chapter 26. Restrict Z39.50 Sources by Permission Group

In Evergreen versions preceeding 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.

## **Administrative Settings**

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



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 Admin # 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.

	Z39.50 Source	Label	Host
	biblios	‡biblios.net	z3950.biblios.net
1	loc	Library of Congress	z3950.loc.gov
	ocic	OCLC	zcat.oclc.org
		Z39.50 Source	oclc
			e
		Z39.50 Source	oclc
		Label	OCLC
		Host	zcat.oclc.org
		Port	210
		DB	OLUCWorldCat
		Record Format	FI
		Transmission Format	usmarc
		Auth	
		Use Permission	DESTRICT 739.50
		Use r ennission	RESTRICT_233.50

4) Click Add.

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

## **Restrict Z39.50 Sources by Permission Group**

#### 1) Click Admin # 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.

Go <u>B</u> ack	Reload	Go Forwar <u>d</u>		
New Permissio	n: RESTRICT	_Z39.50	Add	
Carda			D	escription
Code			Di Ti	escription ranslation
Code			Di Ti Al	escription ranslation Ilow a user to at

#### 4) Click Save.

note

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

Group Permissions			
	Depth	Grantable	New Mapping 👻 Save Changes
IELD_DEF	Consortium	V	* <u></u>
IPORT_IMPORT_FIELD_DEF	Consortium		Permission: DESTRICT 739.50
IPORT_IMPORT_FIELD_DEF	Consortium		Denth: Consectium
MPORT_FIELD_DEF	Consortium		Grantable:
_ATTR_DEF	Consortium		
H_FIELD	Consortium		Add Mapping

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

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.

# Chapter 27. Booking Module Administration

# 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.

## **Create New Resource Type**

1) Select Admin -# Server Administration -# Booking -# Resource Types.

	Admin (-) Help
	Operator Change: New         Offline <u>T</u> ransaction Management         Download Offline Patron List         Local Administration
Organization Types Organizational Units Permission Groups Permissions Copy Statuses MARC Codes Billing Types Z39.50 Servers Circulation Modifiers Global Flags Organization Unit Setting Types User Setting Types Hard Due Date Changes Circulation Duration Rules Circulation Duration Rules Circulation Recurring Fine Rules Circulation Max Fine Rules Age Hold Protect Rules	Server Administration
Acquisitions ► Booking ►	Resources Resource <u>Types</u> Resource <u>Attributes</u> Resource Attribute <u>V</u> alues Resource Attribute <u>M</u> aps

2) A list of current resource types will appear. Use Back and Next buttons to browse the whole list.

L Server Settings											
G	Go <u>B</u> ack Go Forwar <u>d</u>										
Resource Types											
<u>Bac</u> √	<u>k Next</u> 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			



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, .

Admin (-)	<u>H</u> elp
	×
Debug Print Pa	ge
New Resource Type Delete Selected	Â
	ш

4) A box will appear in which you create your new type of resource.

	0
Resource Type Name	Laptop
Fine Interval	2 hours
Fine Amount	0.50
Owning Library	BPR
Catalog Item	
Transferable	
Inter-booking and Inter-circulation Interval	15 minutes
Max Fine Amount	20.00
Cancel	Save

- Resource Type Name Give your resource a name.
- Fine Interval How often will fines be charged? This period can be input in several ways:



• 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.

15	Server Settings										
Γ	Go Back Reload Go Forward										
ľ											
	Resource Types										
	Back Next										
	1	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		

### **Create New Resource Attribute**

1) Select Server Administration -# Booking -# 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.

	0
Resource Attribute Name	Computing Platform
Owning Library	BPR 🔻
Resource Type	Laptop
Is Required	
Cancel	Save

- 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.



One resource type may have multiple attributes. You may repeat the above procedure to add more.

#### **Create New Resource Attribute Value**

1) One resource attribute may have multiple values. To add new attribute value, select Server Administration # Booking # 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.

		0
Owning Library	BPR	-
Resource Attribute	Computing Platform	•
Valid Value	PC	
Cancel	Save	

- 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.

### **Create New Resource**

- 1) Add items to a resource type. Click Admin # Server Administration # Booking # Resources.
- 2) Click New Resource in the top right corner.
- 3) A box will appear. Add information for the resource.

	8
Owning Library	BPR 🔹
Resource Type	Laptop
Barcode	98723000112255
Overbook	
Is Deposit Required	
Deposit Amount	
User Fee	
Cancel	Save

- 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.



One resource type may have multiple resources attached.

## **Map Resource Attributes and Values to Resources**

1) Use Resource Attribute Maps to bring together the resources and their attributes and values. Select Admin # Server Administration # Booking # 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.

		۲
Resource	98723000112255	
Resource Attribute	Computing Platform	-
Attribute Value	PC	•
Cancel	Save	

- 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.



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.



# **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.

## **Editing Resource Types**

1) Bring up your list of resource types. Select Admin -# Server Administration -# Booking -# 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 Admin -# Server Administration -# Booking menu.

# **Deleting Non-bibliographic Resources**

1) To delete a booking resource, go to Admin # Server Administration # Booking # 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 Attribut Map/Resources -# Resource Attribute Values -# Resource Attributes -# Resource Types.

# **Chapter 28. 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.

## **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*.



In multi-branch libraries it is possible to assign more than one working location

## **Staff Account Permissions**

To view a detailed list of permissions for a particular Evergreen account go to Admin (-) # User permission editor in the staff client.

## **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 Admin (-) # 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.

User Name: First Name:	sitkacirccat circcat	Barcode: Middle Name:	sitkacirccat	Last Na	ame: sitka		
<b>V</b>	Powell River Public Li	ibrary (BPRDP)	Working Location				
0	Pen	mission	Арр	blied	Depth		Grantable
ABORT_F	EMOTE_TRANSIT		0	0	Library	~	0
ABORT_1	TRANSIT		V	] [	Library	~	
ADMIN_A	ACQ_FUND			] [	Library	~	
ADMIN_(	CIRC_MATRIX_MATC	THPOINT		] [	Library	~	
ADMIN_(	CIRC_MOD			] [	Library	~	
ADMIN_(	CURRENCY_TYPE			] [	Library	~	
ADMIN_F	JUND			] [	Library	~	
ADMIN_F	UNDING_SOURCE			] [	Library	~	
ADMIN_(	GROUP_PENALTY_TH	RESHOLD		] [	Library	~	
ADMIN_H	HOLD_MATRIX_MAT	CHPOINT		] [	Library	~	
ADMIN_N	MARC_CODE			] [	Library	~	
ADMIN_F	ROVIDER			] [	Library	~	
ADMIN_S	TANDING_PENALTY	-		] [	Library	~	
ADMIN_S	SURVEY			]	Library	~	
ADMIN_7	TRIGGER_CLEANUP			] [	Library	~	
ADMIN_1	TRIGGER_EVENT_DEF	3		] [	Library	~	
	RIGGER HOOK			] [	Library	~	

- 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.

MARK_HEM_ON_HOLDS_SHELF		Library		
MARK_ITEM_ON_ORDER		Library	~	
MARK_ITEM_RESHELVING		Library	~	
MAX_RENEWALS_REACHED.override	$\checkmark$	Consortium	1	
MERGE_BIB_RECORDS	$\checkmark$	Consortium	~	$\checkmark$
MERGE_USERS		Library	~	
MR_HOLDS	$\checkmark$	Consortium	~	$\checkmark$
OFFLINE_EXECUTE	$\mathbf{Q}$	Library	~	
OFFLINE_UPLOAD	43	Library	~	$\checkmark$
OFFLINE_VIEW	<b>V</b>	Library	~	
		0		

5. Scroll down and click Save to apply the changes.

group_application.user.vendor	Library	× 🗆
money.collections_tracker.create	Library	✓
money.collections_tracker.delete	Library	✓
Save		

# **Chapter 29. 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 copy locations via text message.

## **Administrative Setup**

You cannot receive text messages from Evergreen by default. You must enable this feature to receive hold notices and copy information from Evergreen via text message.

## **Enable Text Messages**

- 1. Click Admin # Local Admin # Library Settings Editor.
- 2. Select the setting, Enable features that send SMS text messages.
- 3. Set the value to True, and click Update Setting.

Organization Unit Settings       Context Location BR1       SMS       Filter       Clear Filter         Export       Import       Tradicates the setting is not inherited from the parent org unit at run time       Context       Val         Edit       History       Group       Setting       Disable auth requirement for texting call numbers.       Context       Val         Edit       History       SMS Text Messages       Disable auth requirement for texting call numbers.       Context       Val         Edit       History       SMS Text Messages       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.         Context       CONS       Value	tion Unit Settings   Context Location BR1	Clear Filt	
Export Import         * Indicates the setting is not inherited from the parent org unit at run time         Edit       History       Group       Setting       Context       Val         Edit       History       SMS Text Messages       Disable auth requirement for texting call numbers.       Image: Context       Val         Edit       History       SMS Text Messages       Enable features that send SMS text messages.       Image: Context       Val         Edit       History       SMS Text Messages       Enable features that send SMS text messages.       Image: Context Context       Image: Context Million of the OPAC. If this setting is not enabled, the SMS options will not be offered to the user.       Image: Context Context       Image: Context Context Context Context       Image: Context Context Context Context Context       Image: Context Co	port he setting is not inherited from the parent org unit at run time History Group Satting		er
* Indicates the setting is not inherited from the parent org unit at run time Edit History Group Setting Disable auth requirement for texting call numbers. Edit History SMS Text Messages Enable features that send SMS text messages. Edit History Enable features that send SMS text messages. Edit Setting Enable features that send SMS text messages. Edit Setting Enable 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. Context CONS Value True Value True Value V	he setting is not inherited from the parent org unit at run time		
Edit       History       Group       Setting       Context       Val         Edit       History       SMS Text Messages       Disable auth requirement for texting call numbers.       Image: Context Contex	History Croup Satting		
Edit       History       SMS Text Messages       Disable auth requirement for texting call numbers.         Edit       History       SMS Text Messages       Enable features that send SMS text messages.         Fold Setting       Enable features that send SMS text messages.         Current features that use SMS include hold-ready-for-pictup notifications and a "Send Text" action for call numbers in the OPAC. If this is not enabled, the SMS options will not be offered to the user.         Context       CONS         Value       True         Delete Setting       Update Setting	Thistory Group Setting	ntext	Value
Edit       SMS Text Messages       Enable features that send SMS text messages.         Edit Setting       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.         Context       CONS         Value       True         Delete Setting       Update Setting	History SMS Text Messages Disable auth requirement for texting call numbers.		
Edit Setting       C         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.         Context       CONS         Value       Tue         Delete Setting       Update Setting	History SMS Text Messages Enable features that send SMS text messages.		
Edit Setting       Image: Comparison of the			
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.         Context       CONS         Value       True         Delete Setting       Update Setting	Edit Setting	8	
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.         Context       CONS         Value       True         Delete Setting       Update Setting	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. Context Value True Delete Setting Update Setting			
Context CONS  Value True Update Setting	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.		
Value True Delete Setting Update Setting	Context CONS -		
Delete Setting	Value True -		
	Delete Setting		

## **Authenticate Patrons**

By default, you must be logged into your OPAC account to send a text message from Evergreen. However, if you disable this setting, you can text message copy information without having to login to your OPAC account.

To disable the patron login requirmement:

- 1. Click Admin # 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.

Library Settings	Editor								
Go <u>B</u> ack	Reload	Go Forwar <u>d</u>						Deb	ug Print Page
Organiza	tion Unit S	Settings	Context Locatior	n BR1	-	SMS	F	ilter Clear F	Filter
Export Im	port								
" Indicates t Edit	History	Group	from the parent	: org unit a	at run time			Context	Valua
<u>Edit</u>	History	SMS Text Messages	Disable auth requ	uirement for	texting call numbers.			Context	Value
<u>Edit</u>	- <u>History</u>	SMS Text Messages	Enable features t	that send SI	MS text messages.			CONS	True
		Edit Setti	ng				0		
			Disat	ble auth re	quirement for texting	call numbers.			
		Disable	authentication r	equiremen	t for sending call num OPAC.	ber information via :	SMS from the		
		Context			CONS	•			
		Value			True	•			
		Delete	Setting		Update Setting				
								1.	
4									Þ

### **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 Admin # 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.

1.12

Back	<u>c Next</u> %			
~	Region	Name	Email Gateway	Active
	USA	AT&T Enterprise Paging	\$number@page.att.net	True
	USA	AT&T Global Smart Messaging Suite	\$number@sms.smartmessagingsuite.com	True
	USA	AT&T Mobility/Wireless	\$number@txt.att.net	True
	USA	Alaska Communications	\$number@msg.acsalaska.com	True
	Canada	Aliant	\$number@sms.wirefree.informe.ca	True
	USA	Alltel (Allied Wireless)	\$number@sms.alltelwireless.com	True
	USA	Ameritech	\$number@paging.acswireless.com	True
	Canada	Bell Mobility & Solo Mobile	\$number@txt.bell.ca	True
	Canada	Bell Mobility & Solo Mobile (Alternate)	\$number@txt.bellmobility.ca	True
	USA	BellSouth	\$number@bellsouth.com	True

- 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.

SM	S Carriers					
Bac	k Next					
$\checkmark$	Region	Name	Email	Gateway	Active	
	USA	AT&T Enterprise Paging	\$num	ber@page.att.net	True	
	USA	AT&T Global Smart Messaging Suite	AT&T Global Smart Messaging Suite \$number@sms.smartmessagingsuite.com			
	USA	AT&T Mobility/Wireless			a rue	
	USA	Alaska Communications			rue	
	Canada	Aliant	ID	25	irue	
	USA	Alltel (Allied Wireless)		35	irue	
	USA	Ameritech	Region	USĄ	irue	
	Canada	Bell Mobility & Solo Mobile	Name	Alltel (Allied Wireless)	rue	
	Canada	Bell Mobility & Solo Mobile (Alternate	Email Gatew	way \$number@sms.alltelwireless.con	irue	
	USA	BellSouth	Active	$\checkmark$	irue	
	USA	Bluegrass Cellular	Cancel	Save	rue	
	USA	Boost Mobile	Gancer	Care	rue	

### **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 Admin # 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.

ırı	gger⊨vent	Definitions						New Clon	e Selected	Delete Selec
V	Owning Library	Name	Hook	Enabled	Processing Delay	Processing Delay Context Field	Processing Group Context Field	Reactor	√alidator	Granularity
	CONS	Items from Queued Bib Records	vandelay.impo	Irue	00:05:00		record.queue	e. (Processiem)	INUOP_True	on-demand.
	CONS	CSV Output for Queued Authority Records	vandelay.queu	True	00:05:00		queue.cwnei	r ProcessTem		print- on-demand
	CONS	CSV Output for Queued Bib Records	vandelay.que.	True	00:05:00		queue.owner	r ProcessTem	NDOP_True	print- on-demand
	CONS	Email Notice	aur. created	False	00:05:00			SendEmail	NOOP_True	
	CONS	Email Notice	aur. rejected	False	00:05:00			SendEmail	NOOP_True	
	CONS	Email Notice	aur.cancelled	False	00:05:00			SendEmail	Acq::UserRe	q
	CONS	Email Notice	aur. ordered	False	00:05:00			SendEmail	Acq::UserRe	q
	CONS	Email Notice	aur. received	False	00:05:00			SendEmail	Acq::UserRe	q
	CONS	Email Output for Import Items from Queued Bib Records	vandelay.impc	True	00:05:00		record.queue	e. i SendEmail	NOOP_True	
	CONS	Email Output for Queued Authority Records	vandelay.queu	True	00:05:00		queue.cwnei	r SendEmail	NOOP_True	
	CONS	Email Output for Queued Bib Records	vandelay.que.	True	00:05:00		queue.cwnei	r SendEmail	NOOP_True	
	CONS	<u>Hold Cancelled (No</u> Target) Email Notification	hald_request.	False	00:30:00	cancel_time	usr	SendEmail	HoldIsCance	lle
	CONS	Hold Expires from Shelf Soon	hald_request.	False	-1 days	shelf_expire	_tiusr	SendEmail	HoldisAvailab	bli
	CONS	Hold Ready for Pickup Email Notification	hold.available	False	00:30:00	shelf_time	usr	SendEmail	HoldIsAvailabl	
	CONS	Hold Ready for Pickup SMS Notification	hold, available	True	00:30:00	shelf_time	sms_notify	SendSMS	HoldisAvailat	olu .

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 view and/or edit the hold notice.

rigger Event Definition	15 New   Clone Selec
Failure Cleanup	×
Granularity	-
Max Event ∀alidity Delay	
Opt-In Setting Type	•
Opt-In User Field	
Success Cleanup	•
	<pre>[%- USE date -%] [%- user = target.0.usg%] From: [%- paramg.sender_email    default_sender %] To: [%- paramg.recipient_email    helpers.get ang_gateway_email(target.0.ang_carrier,target.0.ang_notify) %] Subject: Hold Available Notification Dear [% user.family_name %], [% user.first_given_name %] The item(s  you requested are available for pickup from the Library.</pre>
	<pre>[% FOR hold IN target %] Title: [% hold.current_copy.call_number.record.simple_record.title %] Author: [% hold.current_copy.call_number.record.simple_record.author %] Call Number: [% hold supreme such sumber label %]</pre>
	Call number: [* noid.current_copy.call number.label *]       Barcode: [* hold.current_copy.barcode *]       Library: [* hold.pickup_lib.name *]       [* END *]
Template	

# **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.

Log in to Your Account Please enter the following information:	
Library Card Number or Username Please include leading zeros and no spaces. Example: 0026626051	admin
PIN Number or Password If this is your first time logging in, please enter	••••••
the last 4 digits of your phone number. Example: 0926	Stay logged in?
	Log in Forgot your password?

- 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.

#### Place Hold

Complete transcriptions, cadenzas, and exercises, for solo piano / Johannes Brahms ; edited by Eusebius Mandyczewski.

Pickup location:	Branch 1 💌			
Notify when hold is r	eady for pickup?			
Yes, by Email				
Yes, by Phone				
Phone Number:				
Ves, by Text Me	ssaging			
Mobile carrier:	T-Mobile (USA)	•	Note: carrier charges may apply	
Mobile number:	5554443333	Hint: use the full 10 digits of your	phone #, no spaces, no dashes	

## Sending Copy Locations 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 location 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.

Log in to Your Account	
Please enter the following information:	
Library Card Number or Username	admin
Please include leading zeros and no spaces. Example: 0026626051	aumin
PIN Number or Password	-
If this is your first time logging in, please enter	•••••
Example: 0926	Stay logged in?
	Log in Forgot your password?

- 2. Search the catalog, and retrieve a title with copies.
- 3. Click the **Text** link adjacent to the call number.

PANO CONCERIOS NANO CONCERIOS	Piano concertos nos. 11 Mozart, Wolfgang Amadeus, 1756-	Piano concertos nos. 11-16. Mozart, Wolfgang Amadeus, 1756-1791 (Author). Mozart, Wolfgang Amadeus, 1756-1791 (Credited).					
n an	Available copies	Current holds					
	• 3 copies at Consortium.	0 current holds with 3 total copies.					
LOCATION	CALL NUMBER	BARCODE					
Branch 1	CONCERTO 33 (Text)	CONC4000068					
Branch 2	CONCERTO 33 (Text)	CONC50000168					
Branch 4	CONCERTO 33 (Text)	CONC70000268					

4. The text of the SMS Text Message appears.

#### Text call number Return to record

```
From: evergreen@dev198.esilibrary.com
To:
Subject: Call Number
Call Number: CONCERTO 33
Location: Stacks
Library: Branch 4
Title: Piano concertos nos. 11-16.
Author: Mozart, Wolfgang Amadeus,
```

- 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.

Text call numb	her			
Return to record	i-wireless (Sprint PCS) (L	JSA)	~	
From: everg To: Subject: Ca Call Number Location: S Library: Br Title: Piar Author: Moz	Iridium (International) Kajeet (USA) Koodo Mobile (Canada) MetroPCS (USA) MTS Mobility (Canada) Nextel (USA) Panacea Mobile (Interna PC Telecom (Canada) Pioneer Cellular (USA) Qwest Wireless (USA) Rogers Wireless (Canada) Simple Mobile (USA) South Central Communic Sprint (PCS) (USA) Straight Talk / PagePlus	tional) ate) (Canada & USA) da & USA) ations (USA) Cellular (USA)	- M	
	Syringa Wireless (USA)			
	T-Mobile (USA)		-	
Mobile carrier:	T-Mobile (USA)		-	
Mobile number	5554443333	Hint: use the full 10 digits o	f your pho	ne #, no spaces, no dashes
Submit Note: carrier ch	arges may apply			

#### 7. Click Submit.

8. The number and carrier are converted to an email address, and the text message is sent to your mobile phone.

#### Your message has been sent! Return to record From: evergreen@dev198.esilibrary.com To: 5554443333@tmomail.net Subject: Call Number Call Number: CONCERTO 33 Location: Stacks Library: Branch 4 Title: Piano concertos nos. 11-16. Author: Mozart, Wolfgang Amadeus,

#### Permissions to use this Feature

ADMIN\_SMS\_CARRIER - Enables users to add/create/delete SMS Carrier entries.

# Chapter 30. User Activity Types

The User Activity Types feature enables you to specify the user activity that you want to record in the database. You can use this feature for reporting purposes. This function will also display a last activity date in a user's account.

## **Enabling this Feature**

Click Admin # Server Administration # User Activity Types to access the default set of user activity types and to add new ones. The default set of user activity types records user logins to the Evergreen ILS and to third party products that communicate with Evergreen.

The Label is a free text field that enables you to describe the activity that you are tracking.

The **Event Caller** describes the third party software or Evergreen interface that interacts with the Evergreen database and is responsible for managing the communication between the parties.

The **Event Type** describes the type of activity that Evergreen is tracking. Currently, this feature only tracks user authentication.

The **Event Mechanism** describes the framework for communication between the third party software or OPAC and the database. Enter an event mechanism if you want to track the means by which the software communicates with the database. If you do not want to track how the softwares communicate, then leave this field empty.

The **Enabled** field allows you to specify which types of user activity that you would like to track.

The **Transient** column enables you to decide how many actions you want to track. If you want to track only the last activity, then enter **True.** If you want to trace all activity by the user, enter **False**.

Us	User Activity Type									
Bac	Back Next									
~	Label	Event Caller	Event Type	Event Mechanism	Activity Group	Enabled	Transient			
	Apache Auth Proxy Login	authproxy	login	apache	authen	True	False			
	EZProxy Verification	ezproxy	verify	remoteauth	authz	True	False			
	LibraryElf Login	libraryelf	login	xmlrpc	authz	True	False			
	Login via Apache module		login	apache	authen	True	False			
	Login via gateway-v1		login	gateway-v1	authen	True	False			
	Login via opensrf		login	opensif	authen	True	False			
	Login via remoteauth		login	remoteauth	authen	True	False			
	Login via srfsh		login	srfsh	authen	True	False			
	Login via translator-v1		login	translator-v1	authen	True	False			
	Login via xmlrpc		login	xmlrpc	authen	True	False			
	OPAC Login (jspac)	opac	login	gateway-v1	authen	True	False			
	OPAC Login (tpac)	opac	login	apache	authen	True	False			
	SIP2 Proxy Login		login	sip2	authen	True	False			
	SIP2 User Verification		verify	sip2	authz	True	False			
	Self-Check Proxy Login	selfcheck	login	translator-v1	authen	True	False			

# **Using this Feature**

The last activty date for user logins appears in the patron's summary.

Johnson, Jeanne		R	efresh	<u>C</u> heck Ou	ut <u>I</u> te 0
tron Info	Addresses 9634 Tough Division Junction		Account	Info Iden	tificatio
ate of Birth: 12/14/74 brary Card: 99999342446 olds Alias:	Phoenix AZ 85036 Mailing  Billing	(Copy/Print)		Patrons SL1 Internet Filtered	
PAC Login: 99999342446 nail:	Phone Numbers Day Phone: Evening Phone: Other Phone:		Accou Expire Last A	ccount created on xpires on 3/12/15 ast Activity 3/12/1.	

# **Part VI. Local Administration**

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# **Chapter 31. Introduction**

This part covers the options in the Local Administration menu found in the staff client.

# **Chapter 32. Hold-driven recalls**

#### Added in Evergreen 2.1

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

## **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 Admin # 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 copies 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 copies 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.

# 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 **Admin # Local Administration # Notifications / Action Triggers**.

# **Chapter 33. 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.

#### **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 Admin # 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

es to display on left	side of results and record details pages
pped in the staff clie ne left side of the res s feature at all, set t r organizational tree.	ent!) will default to showing you sults and record details pages. If this value to zero at the top of
ONS	•
Ipdate Setting	
	pped in the starr the ne left side of the rei s feature at all, set if r organizational tree.



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.

#### **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.


# Chapter 34. Library Settings Editor Fine Accrual on Closed Dates

By default, fines accrue only on dates that the library is open. This feature enables you to charge patrons fines on dates the library is closed. Fines accrue during scheduled closings as well as during normal weekly closed dates.

To enable this feature:

- 1. Click Admin # Local Administration # Library Settings # Charge fines on overdue circulations when closed
- 2. Click Edit.
- 3. Set the value to **True**.
- 4. Click Update Setting.

## **Target Copies for Holds at Closed Libraries**

By default, when a patron places a hold on a title, the hold targeter will search for copies to fill the hold only at circulating libraries that are open. Copies at closed libraries are not targeted to fill holds. When turned on, this feature enables Evergreen to target copies that have closed circulating libraries to fill holds. Two new org unit settings control this feature.

Use the following setting to target copies for holds at closed circulating libraries:

- 1. Click Admin # Local Administration # Library Settings Editor # Target copies for a hold even if copy's circ lib is closed
- 2. Set the value to **True** if you want to target copies for holds at closed circulating libraries. Set the value to **False**, or leave it unset, if you do not want to enable this feature.
- 3. Click Update Setting.

Organizat	tion U	Init Sett	tings	Context Location BR1 Target
* Indicates t	he sett	ing is not	inherited	from the parent org unit at run time
Edit	Hist	tory	Group	Setting
Edit	Hist	tory C	Circulation	Checkout Fills Related Hold
Edit	Hist	tory C	Circulation	Target copies for a hold even if copy's circ lib is closed
<u>Edit</u>	Hist	tory C	Circulation	Target copies for a hold even if copy's circ lib is closed IF the circ lib is the hold's pickup
Edit	Hist	tory	Holds	Maximum library target attempts
Edit	Hist	torv	Holds	Oro Unit Taroet Weight
Edit	Hi	Edit Sett	ing	0
Edit	Hi	Target	copies for	a hold even if copy's circ lib is closed IF the circ lib is the hold's pickup lib
EUIL		If thi t; actor Context Value	s setting arget cop org_unit.	is true at a given org unit or one of its ancestors, the hold targeter will ies from this org unit even if the org unit is closed (according to the closed_date table) IF AND ONLY IF the copy's circ lib is the same as the hold's pickup lib. BR1

Use the following setting to target copies for holds IF AND ONLY IF the circulating library is the hold's pickup library.

- 1. Click Admin # Local Administration # Library Settings Editor # Target copies for a hold even if copy's circ lib is closed IF the circ lib is the hold's pickup lib
- 2. Set the value to **True** if you want to target copies for holds at closed circulating libraries when the circulating library of the item and the pickup library of the hold are the same. Set the value to **False**, or leave it unset, if you do not want to enable this feature.

#### 3. Click Update Setting.

Organiza	tion I	Unit S	ettings	Context Location BR1 Target
* Indicates t	the set	ting is	not inherited	d from the parent org unit at run time
Edit	His	story	Group	Setting
Edit	His	story	Circulation	Checkout Fills Related Hold
Edit	His	story	Circulation	Target copies for a hold even if copy's circ lib is closed
<u>Edit</u>	] <u>Hi</u> s	story	Circulation	Target copies for a hold even if copy's circ lib is closed IF the circ lib is the hold's picku
<u>Edit</u>	His	story	Holds	Maximum library target attempts
Edit	Hi	storv	Holds	Oro Unit Taroet Weight
Edit	Hi	Edit S	Setting	8
Edit	Hi	Tard	et conies for	r a hold even if conv's circ lib is closed IF the circ lib is the hold's nickun lib
Edit	Hi	Targ	er copies ioi	
		ac	target cop tor.org_unit.	bies from this org unit even if the org unit is closed (according to the closed_date table) IF AND ONLY IF the copy's circ lib is the same as the hold's pickup lib.
		Cont	ext	BR1 🗸
		Valu	e	
		De	lete Setting	Update Setting

# **Chapter 35. 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 Admin # 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 *Copy Editor*, also known as the *Edit Item Attributes* screen. 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:

	Create a new	statistical category	
Enter the name:		Owning Library:	CONS
OPAC Visibility:	$\verb"On" \bigcirc \verb"Off" ®$	Туре:	Сору
Required:	$on \circ off $	Archive with Circs	On⊖Off®
SIP Field:	No SIP Export	SIP Format:	

- 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:



\* To edit or view information about an entry, click on the entry in the drop-down menu \*\* Some sip fields may only be valid on one stat cat. Entries using them may not save.

Statistical Categor Name	y Owning Library	OPAC Visibility	Required	SIP Field	SIP Format	Circ Archive	Entries	Add Entry	Edit
Gift Item	Example Consortium	Off	Off	No SIP		Off	No	<u>Add</u>	<u>Edit</u>
Kids Books	Example Consortium	Off	Off	No SIP		Off	(none) 🔻	<u>Add</u>	<u>Edit</u>
Vendor	Example Consortium	Off	Off	No SIP		Off	Amazon 🛛	<u>Add</u>	<u>Edit</u>

To add an entry, select Add. To edit an entry, select the entry you wish to edit from the drop-down list for the category.

This is how the copy stat cats appear in the Copy Editor:



#### **Patron Statistical Categories**

Patron stat cats can be used to keep track of information such as the high school a patron attends, or the home library for a consortium patron, e.g. Interlink, or patron preferences. They appear in the fifth section of the *Patron Registration* or *Edit Patron* screen.

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

	Create a nev	w statistical category	
Enter the name:		Owning Library:	CONS
OPAC Visibility:	on⊖off®	Туре:	Patron 💌
Required:	on⊖off®	Archive with Circs	On⊖Off®
Allow Free Text:	$\texttt{On}  \textcircled{\bullet}  \texttt{Off}  \bigcirc$	Show in Summary:	on⊖off®
SIP Field:	No SIP Export	SIP Format:	

- 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

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:

Focus Location: BR1





\* To edit or view information about an entry, click on the entry in the drop-down menu \*\* Some sip fields may only be valid on one stat cat. Entries using them may not save.

Statistical Category Name	Owning Library	OPAC Visibility	Required	Show in Summary	Allow Free Text	SIP Field	SIP Format	Circ Archive	Entries		Add Entry	Edit
High School	Example System 1	Off	Off	Off	Off	No SIP		Off	West High School*	Ŧ	<u>Add</u>	<u>Edit</u>
Preferred Library	Example System 1	Off	Off	Off	Off	No SIP		Off	Main Library	Ŧ	<u>Add</u>	<u>Edit</u>
Preferred Transportation	Example Consortium	Off	Off	Off	On	No SIP		Off	(none)	•	<u>Add</u>	<u>Edit</u>
Proof of residence document	Example Branch 1	Off	On	Off	On	No SIP		Off	(none)	Ŧ	<u>Add</u>	<u>Edit</u>
Provide due date slip	Example Consortium	Off	On	Off	Off	No SIP		Off	No*	Ŧ	<u>Add</u>	<u>Edit</u>

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

Statistical Category Name	Owning Library	OPAC Visibility	Required	Show in Summary	Allow Free Text	SIP Field	SIP Format	Circ Archive	Entries	Add Entry	Edit
High School	Example System 1	Off	Off	Off	Off	No SIP		Off	West High School* │▼	Add	<u>Edit</u>
Enter the value of the new entry: SYS1 V Default entry for SYS1 V Create new entry Cancel											

To edit an entry, select the entry you wish to edit from the drop-down list for the category:

Statistical Category Name	Owning Library	OPAC Visibility	Required	Show in Summary	Allow Free Text	SIP Field	SIP Format	Circ Archive	Entries	Add Entry	Edit
High School	Example System 1	Off	Off	Off	Off	No SIP		Off	Central High School 🕞	<u>Add</u>	<u>Edit</u>
Owned By Example Branch 1 Central High School Default entry for BR1 V Update Entry Value Delete Entry Cancel											

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:

Statistical Categories	
High School	West High School 🗾
Preferred Library	
Preferred Transportation	<b>•</b>
Proof of residence document	▲
Provide due date slip	No

# Part VII. Acquisitions

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# **Chapter 36. Acquisitions**

This section is intended for those who are responsible for managing and processing acquisitions.

Before beginning to use Acquisitions, the following must be configured by an administrator:

- Cancel/Suspend Reasons (optional)
- Claiming (optional)
- Currency Types (defaults exist)
- Distribution Formulas (optional)
- EDI Accounts (optional) (see Setting Up EDI Acquisitions under Software Installation)
- Exchange Rates (defaults exist)
- Funds and Fund Sources
- Invoice Types (defaults exist) and Invoice Payment Methods
- Line Item Features (optional)
- Merge Overlay Profiles and Record Match Sets (see <u>Batch Importing MARC Records</u> in Cataloging)
- Providers

## **Acquisitons Workflow**

The following diagram shows how the workflow functions in Evergreen. One of the differences in this process you should notice is that when creating a selection list on the vendor site, libraries will be downloading and importing the vendor bibs and item records.



# Chapter 37. Selection Lists and Purchase Orders

# **Selection Lists**

Selection lists allow you to create, manage, and save lists of items that you may want to purchase. To view your selection list, click Acquisitions # My Selection Lists. Use the general search to view selection lists created by other users.

### **Create a selection list**

Selection lists can be created in four areas within the module. Selection lists can be created when you <u>Add Brief</u> <u>Records</u>, Upload MARC Order Records, or find records through the <u>MARC Federated Search</u>. In each of these interfaces, you will find the Add to Selection List field. Enter the name of the selection list that you want to create in that field.

Selection lists can also be created through the My Selection Lists interface:

- 1. Click Acquisitions # My Selection Lists.
- 2. Click the New Selection List drop down arrow.
- 3. Enter the name of the selection list in the box that appears.
- 4. Click Create.

Re	efresh Grid	New Selection List 🔻	Clone Selected •
Bacl	<u>k Next</u>	A	
v	Name	Name: Adult Fiction	
	new	Create	
	Unnamod		

### Add items to a selection list

You can add items to a selection list in one of three ways: <u>add a brief record</u>; upload MARC order records; add records through a <u>federated search</u>; or use the <u>View/Place Orders</u> menu item in the catalog.

### **Clone selection lists**

Cloning selection lists enables you to copy one selection list into a new selection list. You can maintain both copies of the list, or you can delete the previous list.

- 1. Click Acquisitions # My Selection Lists.
- 2. Check the box adjacent to the list that you want to clone.

- 3. Click Clone Selected.
- 4. Enter a name into the box that appears, and click Clone.

Refresh Grid New Selection List 🔻	Clone Selected   Merge Selected	Delete Selected
Back Next		_
✓ Name	New Name: Business Reference	Creation Time
Adult Reference	Clone	1/31/11 3:00 F
Adult Fiction	admin	1/31/11 2:56 F
Shae's List	admin	10/26/10 4:54

### **Merge selection lists**

You can merge two or more selection lists into one selection list.

- 1. Click Acquisitions # My Selection Lists.
- 2. Check the boxes adjacent to the selection lists that you want to merge, and click Merge Selected.
- 3. Choose the Lead Selection List from the drop down menu. This is the list to which the items on the other list(s) will be transferred.
- 4. Click Merge.

Re	efresh Grid New Selection List 🔻 Clor	e Selected 🔻	Merge Selected	Delete Se	lected	
Bacl	<u>k Next</u>		· · · · · · · · · · · · · · · · · · ·		1	_
v	Name	Owner	Choose the Lead Sel	ection List:		•
	Adult Reference	admin		Me	Adult Reference	
		1.1			Adult Fiction	

### **Delete selection lists**

You can delete selection lists that you do not want to save. You will not be able to retrieve these items through the General Search after you have deleted the list. You must delete all line items from a selection list before you can delete the list.

- 1. Click Acquisitions # My Selection Lists.
- 2. Check the box adjacent to the selection list(s) that you want to delete.
- 3. Click Delete Selected.

### Mark Ready for Selector

After an item has been added to a selection list or purchase order, you can mark it ready for selector. This step is optional but may be useful to individual workflows.

1. If you want to mark part of a selection list ready for selector, then you can check the box(es) of the line item(s) that you wish to mark ready for selector. If you want to mark the entire list ready for selector, then skip to step 2.

- 2. Click Actions # Mark Ready for Selector.
- 3. A pop up box will appear. Choose to mark the selected line items or all line items.
- 4. Click Go.
- 5. The screen will refresh. The marked line item(s) will be highlighted pink, and the status changes to selector~ready.

Actions	Status
Actions	✓ selector-ready

### **Convert selection list to purchase order**

Use the Actions menu to convert a selection list to a purchase order.

- 1. From a selection list, click Actions ~> Create Purchase Order.
- 2. A pop up box will appear.
- 3. Select the ordering agency from the drop down menu.
- 4. Enter the provider.
- 5. Check the box adjacent to prepayment required if prepayment is required.
- 6. Choose if you will add All Lineitems or Selected Lineitems to your purchase order.
- 7. Check the box if you want to Import Bibs and Create Copies in the catalog.
- 8. Click Submit.

## **Brief Records**

Brief records are short bibliographic records with minimal information that are often used as placeholder records until items are received. Brief records can be added to selection lists or purchase orders and can be imported into the catalog. You can add brief records to new or existing selection lists. You can add brief records to new, pending or on~order purchase orders.

### Add brief records to a selection list

- 1. Click Acquisitions # New Brief Record. You can also add brief records to an existing selection list by clicking the Actions menu on the selection list and choosing Add Brief Record.
- 2. Choose a selection list from the drop down menu, or enter the name of a new selection list.
- 3. Enter bibliographic information in the desired fields.
- 4. Click Save Record.

#### New Brief Record

Add To Selection List	Business Reference 🔻
Title of work	ısiness Grammar, Style & Usage
Author of work	Abell, Alicia
Language of work	
Pagination	
ISBN	9781587620263
ISSN	
Price	
Identifier	
Publisher	
Publication Date	2003
Edition	
UPC	
Save Record	

### Add brief records to purchase orders

You can add brief records to new or existing purchase orders.

- 1. Open or create a purchase order. See the section on <u>purchase orders</u> for more information.
- 2. Click Add Brief Record.
- 3. Enter bibliographic information in the desired fields. Notice that the record is added to the purchase order that you just created.
- 4. Click Save Record.

#### New Brief Record

Adding to Purchse Order	49
Title of work	Small Business for Dummies
Author of work	Tyson, Eric
Language of work	
Pagination	
ISBN	978-0470177471
ISSN	
Price	
Identifier	
Publisher	
Publication Date	2008
Edition	
UPC	
Save Record	

### **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.

```
image::media/acq_marc_search.png[search form]
```

- 3. A list of results will appear. Click the "Copies" link to add copy information to the line item. See the <u>section</u> <u>on Line Items</u> for more information.
- 4. Click the Notes link to add notes or line item alerts to the line item. See the <u>section on Line Items</u> 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.



# Chapter 38. Receive Items From an Invoice

This feature enables users to receive items from an invoice. Staff can receive individual copies, or they can receive items in batch.

## **Receive Items in Batch (List Mode)**

In this example, we have created a purchase order, added line items and copies, and activated the purchase order. We will create an invoice from the purchase order, receive items, and invoice them. We will receive the items in batch from the invoice.

1) Retrieve a purchase order.

#### 2) Click Create Invoice.

Purchase Order	(on-order) Activated	d 11/2/11 6:01 AM					
	ID 10	Prepayment Required?	No				
Nan	ne <u>10</u>	Activatable?	No				
Provid	er Books R Us (BRU	) Notes	(0)				
Total Lineiter	ns 3	EDI Messages	(0)				
Total Estimate	ed \$30.00	History	<u>View</u>				
Total Encumber	ed \$30.00	Invoicing	View Invoices (0)	Create Invoice	Link Invoice 🔻		
Total Spe	nt \$0.00	Cancel	Cancel order 👻				
✓ Line Items						 Items	Note
Started	Early, Took My Dog						
Atkinso	n, Kate 978038560802	2 2010				Copies(2	2) <u>Notes</u>
# 34   _		et   requests					
When V	Nill There Be Good N	News?					
Atkinso	n, Kate 978055277245	7 2009				Copies(2	2) <u>Notes</u>
# 35   _		et   requests					
One Go	ood Turn						
Atkinso	n, Kate 978055277244	0 2007				Copies(2	2) <u>Notes</u>
# 36   _	catalog   <u> </u>	et requests					

3) The blank invoice appears. In the top half of the invoice, enter descriptive information about the invoice. In the bottom half of the invoice, enter the number of items for which you were invoiced, the amount that you were billed, and the amount that you paid.

#### Invoice

Vendor Invoice ID	ABCD1234		Invoice Date	11/2/2011						
Receive Method	Paper	•	Invoice Type							
Provider	BRU		Shipper	BRU						
Note			Payment Auth							
Payment Method	Purchase Order	-	Receiver	BR1		•	•			
Bibliographic Iten	ns									
Title Details				1	# Invoice	d / # Paid		Billed	Paid	Detach
One Good Turn, b 2 Ordered, 0 Rec Estimated \$10.00	<b>by Atkinson, Kate (978055277</b> eived, 0 Invoiced, 0 Claimed, 0 9, Encumbered \$10.00, Paid \$0	2440) Cance	elled	-						
# 36 <u>≈ 10 11/2/11</u>				2		/ 2	1	0	10	<u>Detach</u>
When Will There           2 Ordered, 0 Rec           Estimated \$10.00           # 35 <u>≈ 10 11/2/11</u>	Be Good News?, by Atkinson eived, 0 Invoiced, 0 Claimed, 0 , Encumbered \$10.00, Paid \$0	n, Kat Cance .00	e (97805527724 elled	2		/ 2	1	0	10	Detach
Started Early, Too           2 Ordered, 0 Rec           Estimated \$10.00           # 34 ≥ 10 11/2/11	o <mark>k My Dog, by Atkinson, Kate</mark> eived, 0 Invoiced, 0 Claimed, 0 , Encumbered \$10.00, Paid \$0	e <b>(978)</b> Cance 0.00	0385608022) elled	2		/ 2	1	0	10	Detach

4) Click Save. You must choose a save option before you can receive items.

5) The screen refreshes. In the top right corner of the screen, click **Receive Items**.

6) The **Acquisitions Invoice Receiving** screen opens. By default, this screen enables users to receive items in batch, or **Numeric Mode**. You can select the number of copies that you want to receive; you are not receiving specific copies in this mode.

7) Select the number of copies that you want to receive. By default, the number that you invoiced will appear. In this example, we will receive one copy of each title.



You cannot receive fewer items than 0 (zero) or more items than the number that you ordered.

8) Click Receive Selected Copies.

#### Acquisitions Invoice Receiving

#### Invoice #ABCD1234

[ Use List Mode ]

Receive Selected Copies	
One Good Turn, by Atkinson, Kate (9780552772440)           2 Ordered, 0 Received, 2 Invoiced, 0 Claimed, 0 Cancelled           Estimated \$10.00, Encumbered \$0.00, Paid \$10.00           # 36 <u>⊯ 10 11/2/11</u>	
Number of copies to receive: 1	<b>÷</b>
When Will There Be Good News?, by Atkinson, Kate (97           2 Ordered, 0 Received, 2 Invoiced, 0 Claimed, 0 Cancelled           Estimated \$10.00, Encumbered \$0.00, Paid \$10.00           # 35 <u>≈ 10 11/2/11</u>	80552772457
Number of copies to receive: 1	* *
<u>Started Early, Took My Dog</u> , by Atkinson, Kate (97803856 2 Ordered, 0 Received, 2 Invoiced, 0 Claimed, 0 Cancelled Estimated \$10.00, Encumbered \$0.00, Paid \$10.00 # 34 <u>≈ 10 11/2/11</u>	508022)
Number of copies to receive: 1	<b>•</b>
Receive Selected Copies	

9) When you are finished receiving items, close the screen. You can repeat this process as you receive more copies.

### **Receive Specific Copies (Numeric Mode)**

In this example, we have created a purchase order, added line items and copies, and activated the purchase order. We will create an invoice from the purchase order, receive items, and invoice them. We will receive specific copies from the invoice. This function may be useful to libraries who purchase items that have been barcoded by their vendor.

1) Complete steps 1-5 in the previous section.

2) The Acquisitions Invoice Receiving screen by default enables user to receive items in batch, or Numeric Mode. Click Use List Mode to receive specific copies.

3) Select the check boxes adjacent to the copies that you want to receive. Leave unchecked the copies that you do not want to receive.

4) Click Receive Selected Copies.

#### Acquisitions Invoice Receiving

#### Invoice #ABCD1234

[Use Numeric Mode]

Receive Selected Copies

Select All	Owning Branch	Shelving Location	Collection Code	Fund	Circ Modifier
<u>One Good Turn</u> , by A	tkinson, Kate (9780552772440)				
2 Ordered, 1 Received	d, 2 Invoiced, 0 Claimed, 0 Cancelled				
# 36 9 10 11/2/11	icumbered \$0.00, Paid \$10.00				
	BR1	Stacks		Book	PF
When Will There Be	Good News?, by Atkinson, Kate (97	(80552772457)		Dook	
2 Ordered, 1 Receive	d, 2 Invoiced, 0 Claimed, 0 Cancelled				
Estimated \$10.00, Er	cumbered \$0.00, Paid \$10.00				
# 35 <u># 10 11/2/11</u>					
	BR1	Stacks		Book	PF
Started Early, Took N	ly Dog, by Atkinson, Kate (97803856	508022)			
2 Ordered, 1 Receive	d, 2 Invoiced, 0 Claimed, 0 Cancelled				
Estimated \$10.00, Er	cumbered \$0.00, Paid \$10.00				
# 34 <u># 10 11/2/11</u>					
	BR1	Stacks		Book	PF

The screen will refresh. Copies that have not yet been received remain on the screen so that you can receive them when they arrive.

- 5) When all copies on an invoice have been received, a message confirms that no copies remain to be received.
- 6) The purchase order records that all items have been received.

Items	Notes	Actions		Status
<u>Copies(2)</u>	<u>Notes(0)</u>	Actions	•	received
<u>Copies(2)</u>	<u>Notes(0)</u>	Actions	•	received
Copies(2)	<u>Notes(0)</u>	Actions	•	received

# Chapter 39. Vandelay Integration into Acquisitions

The Acquisitions Load MARC Order Record interface enables you to add MARC records to selection lists and purchase orders and upload the records into the catalog. The Vandelay interface enables you to create specific match points between incoming MARC records and exisiting catalog records. Combining these two features enables you to track on order MARC records through the Acquisitions interface and to utilize the record matching mechanisms available in Vandelay.

The purpose of this documentation is to describe the interaction between Vandelay and the Acquisitions MARC Batch Upload interface. For detailed instructions on using the Acquisitions MARC Batch Upload interface, see the Evergreen Documentation Interest Group's Book of Evergreen, 2.1 documentation, Chapter 5, Load MARC Order Records. For detailed instructions on using the Vandelay functions for record matching and importing, see the Evergreen Documentation Interest Group's Book of Evergreen, 2.2 documentation, Chapter 7, Batch Importing MARC Records.

#### Use Cases for Vandelay Integration into Acquisitions

You can add items to a selection list or purchase order and ignore the Vandelay options, or you can use both acquisitions and cataloging functions. In these examples, you will use both functions.

Example 1: Using the Acquisitions MARC Batch Load interface, upload MARC records to a selection list and a Vandelay queue, and match queued records with existing catalog records.

In this example, an acquisitions librarian has received a batch of MARC records from a vendor. She will add the records to a selection list and a Vandelay record queue. A cataloger will later view the queue, edit the records, and import them into the catalog.

#### 1. Click Acquisitions # Load MARC Order Records

- 2. Add MARC order records to a **Selection list** and/or a **Purchase Order.** Check the box to create a purchase order if desired.
- 3. Select a **Provider** from the drop down menu, or begin typing the code for the provider, and the field will auto-fill.
- 4. Select a **Context Org Unit** from the drop down menu, or begin typing the code for the context org unit, and the field will auto-fill.
- 5. Select a **Selection List** from the drop down menu, or begin typing the name of the selection list. You can create a new list, or the field will auto-fill.
- 6. Create a new record queue in Vandelay, or upload the records to an existing queue.
- 7. Select a Record Match Set.
- 8. Browse your computer to find the MARC file, and click **Upload**.

#### Upload

Create Purchase Order			
Activate Purchase Order			
Provider	BAB		
Context Org Unit	BR1	•	
Add to Selection List	Popular Fiction - 2012	•	
Upload to Queue		•	Or create a new queue Popular Fiction - 2012
Record Match Set	Title and ISBN	•	
Merge Profile		-	
Import Non-Matching Records			Record Source
Merge On Exact Match (901c)			
Merge On Single Match			
Merge On Best Match			
Best/Single Match Minimum Quality Ratio	0.0 New Record Qua	ity / Qua	lity of Best Match
Insufficient Quality Fall-Through Profile		•	

9. The processed items appear at the bottom of the screen.

Lineitems Processed	7
Vandelay Records Processed	7
Bib Records Merged/Imported	0
ACQ Copies Processed	0
Debits Encumbered	0
Real Copies Processed Upload Complete!	0
View Selection List	
View Import Queue	

10.You can click the link(s) to access the selection list or the import queue. Click the link to View Selection List.

11.Look at the first line item. The line item has not yet been linked to the catalog, but it is linked to a Vandelay record queue. Click the link to the **queue** to examine the MARC record.

Actions	
⊻ Line Ite	ems
ELEVEN	Eleven on top / Janet Evanovich.
EBMONICH	Evanovich, Janet. 0312985347 St. Martin's Paperbacks ed. 2006. St. Martin's Paperbacks, BAB
TOP	#1   <u>⇒ link to catalog</u>   <u>é worksheet</u>   <u>requests</u>   <u>⇔ queue</u>

12. The Vandelay interface opens in a new tab. The bibliographic records appear in the queue. Records that have matches are identified in the queue. You can edit these records and/or import them into the catalog, completing the process.

#### Queue Popular Fiction - 2012

(	Queue Action	<u>s</u>	Queue Sun	nmary		Queue F	ilters			
I	mport Selecte	d Records	Records in Queue: 7		7	Limit to F				
I	mport All Reco	ords	Records Imp	oorted:	0	Limit to N	Ion-Imported F	Records		
١	/iew Import Ite	ms	Record Impo	ort Failures	0	Limit to F	Records with I	mport Errors		
[	Delete Queue		Items in Que	eue	0					
(	Copy To Bucke	et	Items Import	ed	0					
			Item Import	Failures	0					Export
	View MARC	Matches	Import Failures	Import Tin	ne T	itle of work	Author of work	Language of work	Pagination	ISBN
	View MARC	Matches (1)			E t E	Eleven on op / Janet Evanovich.	Evanovich, Janet.		349 p. ;	0312985347
	View MARC				E J E	Explosive eighteen / lanet Evanovich.	Evanovich, Janet.		305 p. ;	97803455277 <sup>.</sup>

Example 2: Using the Acquisitions MARC Batch Load interface, upload MARC records to a selection list, and use the Vandelay options to import the records directly into the catalog. The Vandelay options will enable you to match incoming records with existing catalog records.

In this example, a librarian will add MARC records to a selection list, create criteria for matching incoming and existing records, and import the matching and non-matching records into the catalog.

#### 1. Click Acquisitions # Load MARC Order Records

- 2. Add MARC order records to a **Selection list** and/or a **Purchase Order.** Check the box to create a purchase order if desired.
- 3. Select a **Provider** from the drop down menu, or begin typing the code for the provider, and the field will auto-fill.
- 4. Select a **Context Org Unit** from the drop down menu, or begin typing the code for the context org unit, and the field will auto-fill.
- 5. Select a **Selection List** from the drop down menu, or begin typing the name of the selection list. You can create a new list, or the field will auto-fill.
- 6. Create a new record queue in Vandelay, or upload the records to an existing queue.

- 7. Select a Record Match Set.
- 8. Select Merge Profile # Match-Only Merge.
- 9. Check the box adjacent to Merge on Best Match.

10.Browse your computer to find the MARC file, and click Upload.

Upload				
Create Purchase Order				
Activate Purchase Order				
Provider	BAB			
Context Org Unit	BR1	-		
Add to Selection List	Popular Mysteries	•		
Upload to Queue		•	Or create a new	queue Popular Mysteries
Record Match Set	Title and ISBN	•		
Merge Profile	Match-Only Merge	•		
Import Non-Matching Records			Record Source	
Merge On Exact Match (901c)				
Merge On Single Match				
Merge On Best Match	$\checkmark$			
Best/Single Match Minimum Quality Ratio	0.0 New Record Quality	/Quali	ity of Best Match	
Insufficient Quality Fall-Through Profile		•		

11.Click the link to **View Selection List** Line items that do not match existing catalog records on title and ISBN contain the link, **link to catalog**. This link indicates that you could link the line item to a catalog record, but currently, no match exists between the line item and catalog records. Line items that do have matching records in the catalog contain the link, **catalog**.

v	⊻ Line Items						
		Apple turnover murder / Joanne Fluke. Fluke, Joanne, 1943- 9780758247452 c2010. Kensington Books, BAB					
		# 21   <u>⇒ link to catalog</u>   <u>é worksheet</u>   <u>requests</u>   <u>⇒ queue</u>					
	ALUERARY ALUERTIN ALUERTIN	Blueberry muffin murder : a Hannah Swensen mystery / Joanne Fluke. Fluke, Joanne, 1943- 157566707X c2002. Kensington Books, BAB # 22   → catalog   ǿ worksheet   requests   ⇔ queue					
		<u>Candy cane murder.</u> 9780758221988 2007. Kensington Books, BAB # 20   <u>→ catalog</u>   <u>&amp; worksheet</u>   <u>requests</u>   <u>⇔ queue</u>					
		Carrot cake murder : a Hannah Swensen mystery with recipes / Joanne Fluke. Fluke, Joanne, 1943- 9780758210203 2008. Kensington Books, BAB # 23   ⇒ link to catalog   <u> </u>					

12.Click the **catalog** link to view the line item in the catalog.

#### Permissions to use this Feature

IMPORT\_MARC - Using Vandelay to create new bib records now requres the IMPORT\_MARC permission (same as open-ils.cat.biblio.record.xml.import). If the permission fails, the queued record will fail import and be stamped with a new "import.record.perm\_failure" vandelay import error

IMPORT\_ACQ\_LINEITEM\_BIB\_RECORD\_UPLOAD - This allows interfaces leveraging Vandelay, such as Acquisitions, to create a higher barrier to entry. This permission prevents users from creating new bib records directly from the ACQ vendor MARC file upload interface.

# Part VIII. Cataloging

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# **Chapter 40. Introduction**

Cataloguers should use this part for understanding the cataloguing procedures used in Evergreen.

# Chapter 41. Batch Importing MARC Records

The cataloging module in version 2.2 includes an enhanced MARC Batch Import interface. This interface features improved matching of records and managing of your import queue. In 2.2, you will be able to specify match points between incoming and existing records. You will also be able to apply filters to your queue that enable you to generate any errors that may have occurred during import. You will also be able to print your queue, email your queue, or export your queue as a CSV file.

# Permissions

To use match sets to import records, you will need the following permission:

#### ADMIN\_IMPORT\_MATCH\_SET

## **Record Display Attributes**

This feature enables you to specify the tags and subfields that will display in records that appear in the import queue.

#### **Record Match Sets**

This feature enables you to create custom match points that you can use to accurately match incoming records with existing catalog records.

In this example, to demonstrate matching on record attributes and MARC tags and subfields, we will create a record match set that defines a match based on the title of the record, in either the 240 or 245, and the fixed field, Lang. You can add multiple record attributes and MARC tags to customize a record match set.

#### 1) Click Cataloging # MARC Batch Import/Export.

2) Create a new record match set. Click Record Match Sets # New Match Set.

3) Enter a name for the record match set.

4) Select an **Owning Library** from the drop down menu. Staff with permissions at this location will be able to use this record match set.

5) Select a **Match Set Type** from the drop down menu. You can create a match set for authority records or bibliographic records.

6) Click Save.

Export Records 🖺 Impo	ort Records 📲 🛙	nspect Queue	Record Displa	Attributes	Herge / Overlay Profiles	Record Match Sets
Vandelay Match Sets						
Show sets owned at or below	w: Example Bran	ich 1	-			
Back Next						
✓ Name	Ow	ming Library		Match Se	t Type	
	News	Tala and the	A A A A A A A A A A A A A A A A A A A			
	Name	Title and La	nguage Match			
	Owning Library	BR1		•		
	Match Set Type	biblio		•		
	Cancel	Save				

7) The screen will refresh to list the record match set that you created. Click the link to the record match set.

8) 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** or **MARC Tag and Subfield**. You can use the Boolean operators AND and OR to combine these elements to create a match set.

9) Select a Record Attribute from the drop-down menu.

10) 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.

11) Check the **Negate?** box if you want to negate the match point. Checking this box would be the equivalent of applying a Boolean operator of NOT to the match point.

🖺 Export Records 📲 Im	port Records 📲 Inspect Queue	🔋 Record Display Attributes	Herge / Overlay Profiles	Record Match Sets	🔋 Import Item Attributes
Vandelay Match S	et Editor				
Match set name: Title a Owning Library: Examp Type: biblio	nd Language Match e Branch 1				
Your Expression: ()					
Add new Record Attrib	MARC Tag and Subfie	eld Boolean Operator			
Working Match Point				You	r Expression
Record Attribute: Lang	•				AND AND
Match Score 1 Negate?	1			[	Delete Selected Node
[	Ok				
Define this match p	pint using the above fields, then	drag me to the tree on the righ	t.		
				Save Changes To	Expression

12) Click Ok.

13) Drag the completed match point under the folder with the appropriately-named Boolean folder under the Expression tree.

Vandelay Ma	atch Set Ed	itor			
Match set name: Owning Library: Type:	Title and Lan Example Brand biblio	guage Match ch 1			
Your Expression:	0				
Add new Reco	ord Attribute	MARC Tag and Subfield	Boolean Operator		
Working Match	Point			Your Expressio	n
Record Attribute:	Lang	*		🛅 AND	
Match Score	1			Delete Selecte	d Node
Negate?				Delete Selecte	unoue
	Ok				
• item_lang /	Lang   Match so	core 1			
		<ul> <li>item_lang / Lang   Match score 1</li> </ul>		Save Changes To Expression	

The match point will nest underneath the folder in the Expression tree.

Vandelay Match Set Editor	
Match set name: <b>Title and Language Match</b> Owning Library: Example Branch 1 Type: biblio	
Your Expression: (item_lang)         Add new       Record Attribute         MARC Tag and Subfield       Boolean Operator	
Working Match Point Choose from among the three buttons above to add a new match point.	Your Expression
	Save Changes To Expression

14) Enter another **Boolean Operator** to further refine your match set.

- 15) Click Boolean Operator.
- 16) Select the **OR** operator from the drop down menu.
- 17) Click Ok.
- 18) Drag the operator to the expression tree.

Your Expression
AND
In the model of the mode

#### 19) Click MARC Tag and Subfield.

20) Enter a MARC tag on which you want the records to match.

21) Enter a **subfield** on which you want the records to match.

22) 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.

23) Check the **Negate?** box if you want to negate the match point. Checking this box would be the equivalent of applying a Boolean operator of NOT to the match point.

24) Click Ok.

#### Vandelay Match Set Editor

Your Expression: (item_lang AND ())	
Add new Record Attribute MARC Tag and Subfield Boolean Operator	
Working Match Point	Your Expression
Tag: 245	E AND
Subfield: ‡ a	Item_lang / Lang   Matc
Match Score 1	L OK
Negate?	Delete Selected Node
Ok	

25) Drag the completed match point under the folder with the appropriately-named Boolean folder under the Expression tree. The Expression will build across the top of the screen.

26) Add additional MARC tags or record attributes to build the expression tree.

#### 27) Click Save Changes to Expression.

Save Changes To Expression

#### Vandelay Match Set Editor

Match set name: Title and Language Match Owning Library: Example Branch 1 Type: biblio	
Your Expression: (item_lang AND (240 ‡a OR 245 ‡a)) Add new Record Attribute MARC Tag and Subfield Boolean Operator	
Working Match Point Choose from among the three buttons above to add a new match point.	Your Expression AND item_lang / Lang   Ma CR 240 ‡a   Match scr 245 ‡a   Match scr
~	Delete Selected Node Save Changes To Expression

#### **Replace Mode**

Replace Mode enables you to replace an existing part of the expression tree with a new record attribute, MARC tag, or Boolean operator. For example, if the top of the tree is AND, in replace mode, you could change that to an OR.

- 1) Create a working match point.
- 2) Click Enter replace mode.
- 3) Highlight the piece of the tree that you want to replace.
- 4) Drag the replacement piece over the highlighted piece.

#### 5) Click Exit Replace Mode.

#### **Quality Metrics**

1) Set the **Quality Metrics for this Match Set**. Quality metrics are used to determine the overall quality of a record. Each metric is given a weight and the total quality value for a record is equal to the sum of all metrics that apply to that record. For example, a record that has been cataloged thoroughly and contains accurate data would be more valuable than one of poor quality. You may want to ensure that the incoming record is of the same or better quality than the record that currently exists in your catalog; otherwise, you may want the match to fail. The quality metric is optional.

2) You can create quality metrics based on the record attribute or the MARC Tag and Subfield.

#### 3) Click Record Attribute.

- 4) Select an attribute from the drop down menu.
- 5) Enter a value for the attribute.

6.) Enter a match score. You can enter any integer into this field. The number that you enter is only important as it relates to other quality values for the current configuration. Higher scores would indicate increasing quality of

incoming records. You can, as in the expression match score, increase the quality points by increasing subsequent records by a power of 2 (two).

7) Click Ok.

Record Attribute:	ELvI	
Value:	К	
Match Score	1	

#### **Import Records**

The **Import Records** interface incorporates record match sets, quality metrics, more merging options, and improved ways to manage your queue. In this example, we will import a batch of records. One of the records in the queue will contain a matching record in the catalog that is of lower quality than the incoming record. We will import the record according to the guidelines set by our record match set, quality metrics, and merge/overlay choices that we will select.

1) Select a **Record Type** from the drop down menu.

2) Create a queue to which you can upload your records, or add you records to an existing queue. Queues are linked to match sets and a holdings import profile. You cannot change a holdings import or record match set for a queue.

3) Select a **Record Match Set** from the drop down menu.

4) Select a Holdings Import Profile if you want to import holdings that are attached to your records.

5) Select a **Record Source** from the drop down menu.

6) Select a **Merge Profile**. Merge profiles enable you to specify which tags should be removed or preserved in incoming records.

7) Choose one of the following import options if you want to auto-import records:

- a. Merge on Single Match Using the Record Match Set, Evergreen will only attempt to perform the merge/ overlay action if only one match was found in the catalog.
- b. **Merge on Best Match** If more than one match is found in the catalog for a given record, Evergreen will attempt to perform the merge/overlay action with the best match as defined by the match score and quality metric.



Quality ratio affects only the Merge on Single Match and Merge on Best Match options.

8) Enter a **Best/Single Match Minimum Quality Ratio.** Divide the incoming record quality score by the record quality score of the best match that might exist in the catalog. By default, Evergreen will assign any record a quality score of 1 (one). If you want to ensure that the inbound record is only imported when it has a higher quality than

the best match, then you must enter a ratio that is higher than 1. For example, if you want the incoming record to have twice the quality of an existing record, then you should enter a 2 (two) in this field. If you want to bypass all quality restraints, enter a 0 (zero) in this field.

9) Select an **Insufficient Quality Fall-Through Profile** if desired. This field enables you to indicate that if the inbound record doees not meet the configured quality standards, then you may still import the record using an alternate merge profile. This field is typically used for selecting a merge profile that allows the user to import holdings attached to a lower quality record without replacing the existing (target) record with the incoming record. This field is optional.

10) Browse to find the appropriate file, and click Upload. The files will be uploaded to a queue.

Export Records 🛛 🖥 Import Records	🖥 Inspect Queue 🛛 🖥 Reco	ord Displa	ay Attributes 🛛 🖥 Mu
Evergreen MARC File Upload			
Record Type	Bibliographic Records	•	
Create a New Upload Queue	New Records		or Add to an Exist
Record Match Set	Title and Language Match	•	
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	1.0 New Record Qual	ity / Quali	ty of Best Match
Insufficient Quality Fall-Through Profile		-	
File to Upload: C:\Users\Sally\Harry Pot	ter and the Prisoner of Azka	Brow	se_ Upload

11) The screen will display records that have been uploaded to your queue.

	Queue Action	<u>s</u>	Queue Sum	imary		Queue F	ilters		
Import Selected Records		Records in Queue: 4		4	Limit to R	Limit to Records with Matches			
Import All Records		Records Imported: 0		0	Limit to N	Limit to Non-Imported Records			
	View Import Ite	<u>ms</u>	Record Impo	rt Failures	0	Limit to R	lecords with Ir	mport Errors	
	Delete Queue		Items in Que	ue	0				
			Items Import	ed	0				
			Item Import F	ailures	0				
	View MARC	Matches	Import Failures	Import Tim	e	Title of work	Author of work	Language o work	f
	View MARC					Gregor and the Code of Claw / Suzanne Collins.	Collins, Suzanne.		
	View MARC					Gregor and the curse of the warmbloods / Suzanne Collins.	Collins, Suzanne.		
	View MARC					Gregor and the marks of secret / Suzanne Collins.	Collins, Suzanne.		
	View MARC	<u>Matches (2)</u>				Gregor and the Prophecy of Bane /	Collins,		

12) If Evergreen indicates that matching records exist, then click the **Matches** link to view the matching records. Check the box adjacent to the existing record that you want to merge with the incoming record.

#### Import Matches

∧ Back To In	nport Queue										
Merge Target	ID	View MARC	Match Score	Queued Record Quality	Matched Record Quality	Creator	Create Date	Last Edit Date	Source	TCN Source	TCN Valu
	1387	View MARC	2	0	1	admin	11/7/11	11/7/11	2		1387
	1386	View MARC	2	0	1	admin	11/4/11	11/4/11	2		1386

#### 13) Click Back to Import Queue.

14) Check the boxes of the records that you want to import, and click **Import Selected Records**, or click **Import All Records**.

15) A pop up window will offer you the same import choices that were present on the **Import Records** screen. You can choose one of the import options, or click **Import**.

Record Type	Bibliographic Records	-	
Create a New Upload Queue	New Records	or Ad	d to an Exist
Record Match Set	Title and Language Match	•	
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	1.0 New Record Quality	/ Quality of Be	st Match
Insufficient Quality Fall-Through Profile		-	

16) The screen will refresh. The Queue Summary indicates that the record was imported. The Import Time column records the date that the record was imported.
| 1 | Queue Action       | <u>s</u>    | Queue Sum           | imary                  | Queue F  | ilters                        |                     |  |
|---|--------------------|-------------|---------------------|------------------------|--|-------------------------------|---------------------|--|
|   | mport Selecter     | d Records   | Records in Queue: 4 |                        | Limit to R   | Limit to Records with Matches |                     |  |
|   | Import All Records |             | Records Imported: 1 |                        | Limit to N   | Ion-Imported                  | Records             |  |
|   | View Import Ite    | <u>ms</u>   | Record Impo         | rt Failures 0          | Limit to R   | Records with I                | mport Errors        |  |
| 1 | Delete Queue       |             | Items in Que        | ue 0                   |  |                               |                     |  |
|   |                    |             | Items Import        | ed 0                   |  |                               |                     |  |
|   |                    |             | Item Import F       | <sup>=</sup> ailures 0 |  |                               |                     |  |
|   | View MARC          | Matches     | Import<br>Failures  | Import Time            | Title of work  | Author of<br>work             | Language of<br>work |  |
|   | View MARC          |             |                     |                        | Gregor and<br>the Code of<br>Claw /<br>Suzanne<br>Collins.               | Collins,<br>Suzanne.          |                     |  |
|   | View MARC          |             |                     |                        | Gregor and<br>the curse of<br>the<br>warmbloods<br>/ Suzanne<br>Collins. | Collins,<br>Suzanne.          |                     |  |
|   | View MARC          |             |                     |                        | Gregor and<br>the marks of<br>secret /<br>Suzanne<br>Collins.            | Collins,<br>Suzanne.          |                     |  |
|   | View MARC          | Matches (2) |                     | 11/7/11                | Gregor and<br>the<br>Prophecy of<br>Bane /                               | Collins,<br>Suzanne           |                     |  |

17) Search the catalog to confirm that the record was imported.



# Gregor and the Prophecy of Bane /Suzanne Collins.

Collins, Suzanne. (Author). Collins, Suzanne. (Credited).

#### Record details

- ISBN: 0439650755 (hardcover : alk. paper)
- Physical Description: 312 p. ;21 cm.
- Edition: 1st ed.
- Publisher: Scholastic Press, 2004.

#### Search for related items by subject

Subject: Friendship — Fiction. Brothers and sisters — Fiction.

# Chapter 42. Overlay Existing Catalog Record via Z39.50 Import

This feature enables you to replace a catalog record with a record obtained through a Z39.50 search. No new permissions or administrative settings are needed to use this feature.

#### To Overlay an Existing Record via Z39.50 Import:

#### 1) Click Cataloging # Import Record from Z39.50

2) Select at least one **Service** in addition to the **Local Catalog** in the **Service and Credentials** window in the top right panel.

3) Enter search terms in the Query window in the top left panel.

#### 4) Click Search.



- 5) The results will appear in the lower window.
- 6) Select the record in the local catalog that you wish to overlay.

#### 7) Click Mark Local Result as Overlay Target

R	esults					
Sł	howing 9 of 43					
F	Fetch <u>M</u> ore Results	List Actions • Mark Lo	ocal Result as Overlay Target	ow in Catalog		MARC View MARC
	Author	Edition	ISBN	Publication Date	Publisher	Service
4	Elgin, Kathy.		9781607542216 (hard)	c2009	Skyview Books	loc
	Donoghue, Emma	1st U.S. ed.	9780151015498	c2008	Harcourt	loc
	Heins, Marjorie.	1st ed.	0374175454 (alk. paper)	2001	Hill and Wang	biblios
	Horowitz, Michael E.		1402404328	c2004	Practising Law Institute	biblios
	Donoghue, Emma	1st U.S. ed.	9780151015498	c2008	Harcourt	biblios
	Muggleton, Lodowick			1663	[s.n.]	biblios
-	Donoghue, Emma.		9781554680368	2008	Harper Collins	native-evergreen-catalog

8) A confirmation message appears. Click OK.

9) Select the record that you want to replace the existing catalog record.

#### 10) Click Overlay.

erlay Target Sho	ow in Catalog		MARC View	MARC Editor Overlay
	Publication Date	Publisher	Service	TCN
7542216 (hard)	c2009	Skyview Books	loc	15861600
1015498	c2008	Harcourt	loc	15239539
5454 (alk. paper)	2001	Hill and Wang	biblios	8725398

11) The record that you selected will open in the MARC Editor. Make any desired changes to the record, and click **Overlay Record**.

Stack subfields       Flat-Text Editor       Fast Item Add       Validate       Ove         MARC Record       Fixed Fields Record type:       BKS       Type       a       ELvi       Srce       d       Audn       Ctrl       Lar         BLvi       m       Form       Conf       0       Biog       MRec       Ctrl         Image: Cont       GPub       LitF       1       Indx       0       0         Desc       a       Ills       Fest       0       DtSt       s       Date1       2008       Date1         LDR       01685cam a2200385 a 4500       000 1 eng       9008       20111021160900.0       0000 1 eng       906       4a 7 ±b cbc ±c orignew ±d1 ±e ecip ±f 20 ±g y-ger       925 0       ±a acquire ±b 2 shelf copies ±x policy default       925 0       ±a 2008014677       920       ±a 2008014677       020       ±a 9780151015498       020       ±a 0151015498       020       ±a 015101549X       035       ±a (OCoLC) 213451577												ions	Opt
MARC Record         Fixed Fields Record type: BKS         Type       a       ELvl       Srce       d       Audn       Ctrl       La         BLvl       m       Form       Conf       0       Biog       MRec       Ctrl         Desc       a       Ills       Fest       0       DtSt       s       Date1       2008       Da         LDR       01685cam a2200385 a 4500       000 1 eng       9005       20111021160900.0       000 1 eng       906       #a 7 #b cbc #c orignew #d 1 #e ecip #f 20 #g y-gen       906       #a acquire #b 2 shelf copies #x policy default       908-03-29 #e 1h03 2008-03-29       #a 1h03 2008-03-29 #i 1h03 2008-03-29 #e 1h03 2008-03-010       #a 2008014677         020       #a 0151015498       9780151015498       4a (OCoLC) 213451577       #a 4 (OCoLC) 213451577	verlay Recor <u>d</u>	Ove	date	<u>V</u> alio	n <u>A</u> dd	ast Iten	F	xt Editor	Flat-Te	ields [	k <u>s</u> ubf	Stac	
Fixed Fields Record type: BKS         Type       a       ELvl       Srce       d       Audn       Ctrl       La         BLvl       m       Form       Conf       0       Biog       MRec       Ctrl       La         BLvl       m       Form       Conf       0       Biog       MRec       Ctrl       La         Desc       a       Ills       Fest       0       DtSt       s       Date1       2008       Date1         DR       01685cam a2200385 a 4500       Fest       0       DtSt       s       Date1       2008       Date1         DR       01685cam a2200385 a 4500       000 1 eng       000 1 eng       906       4 a 7 ±b cbc ±c orignew ±d 1 ±e ecip ±f 20 ±g y-ger       907 eng y-ger         906       ±a acquire ±b 2 shelf copies ±x policy default       908 eng y-ger         905       ±a 1h03 2008-03-29 ±i 1h03 2008-03-29 ±i 1h03 2008-03-29 ±i 1h03 2008-03-29 ±e 1h03 2008-03-29 ±e 1h03 2008-03-29       100 ±h 103 2008-03-29 ±e 1h03 2008-03-29 ±e 1h03 2008-03-29         907       ±a 0151015498       ±a 0151015498       ±a 0151015498       ±a 0151015498       ±a 0151015498 <tr< th=""><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th>ecord</th><th>RC F</th><th>MAI</th></tr<>											ecord	RC F	MAI
Type         a         ELvl         Srce         d         Audn         Ctrl         La           BLvl         m         Form         Conf         0         Biog         MRec         Ctrl         Ctrl         Ctrl         La           BLvl         m         Form         Conf         0         Biog         MRec         Ctrl         Ctrl<								BKS	rd type:	Reco	Fields	ced	Fi
BLvt         m         Form         Conf         0         Biog         MRec         Ct           Cont         GPub         LitF         1         Indx         0         Date           Desc         a         Ills         Fest         0         Dtft         s         Date1         2008         Date           LDR         01685cam a2200355 a 4500         000 Itff         s         Date1         2008         Date1           001         15239539         0000 1         000 1 eng         900 1	ang eng	La		Ctrl		Audn	d	Srce		ELvI	a	pe	Ту
Image: Cont of the	Ctry flu	Ct		MRec		Biog	0	Conf		Form	m	vI.	BL
Desc         a         Ills         Fest         0         DtSt         s         Date1         2008         Date1           LDR         01685cam a2200385 a 4500         001         15239539         005         20111021160900.0         0001         eng           008         08032932008         flu         0001         eng         906         #a 7         #b cbc         #c orignew         #d 1         #e ecip         #f 20         #g y-ger           925         0         #a acquire         #b 2         shelf         copies         #x policy         default           955         #a 1h03         2008-03-29         #i         lh03         2008-03-29         #e         lh03         2008-03-29           010         #a         2008014677         000         #a         2008         04677           020         #a         9780151015498         020         #a         015101549X         035         #a         (OCoLC) 213451577			0	Indx	1	LitF		GPub		Cont			
LDR         01685cam a2200385 a 4500           001         15239539           005         20111021160900.0           008         080329s2008 flu         000 1 eng           906         ‡a 7 ‡b cbc ‡c orignew ‡d 1 ‡e ecip ‡f 20 ‡g y-ger           925         0         ‡a acquire ‡b 2 shelf copies ‡x policy default           955         ‡a 1h03 2008-03-29 ‡i 1h03 2008-03-29 ‡e 1h03 2008-03-           010         ‡a 2008014677           020         ‡a 9780151015498           020         ‡a 015101549X           035         ‡a (OCoLC) 213451577	Date2	3 Da	2008	Date1	s	DtSt	0	Fest		Ills	а	esc	De
001         15239539           005         20111021160900.0           008         08032932008         flu         000 1 eng           906         ‡a 7 ‡b cbc ‡c orignew ‡d 1 ‡e ecip ‡f 20 ‡g y-ger           925         0         ‡a acquire ‡b 2 shelf copies ‡x policy default           955         ‡a 1h03 2008-03-29 ‡i 1h03 2008-03-29 ‡e 1h03 2008-03-           010         ‡a 2008014677           020         ‡a 0151015498           020         ‡a (OCoLC) 213451577							0	5 a 45	a220038	685cam	01		LDR
005       20111021160900.0         008       08032932008 flu       000 1 eng         906       ‡a 7 ‡b cbc ‡c orignew ‡d 1 ‡e ecip ‡f 20 ‡g y-ger         925       4a acquire ‡b 2 shelf copies ‡x policy default         955       ‡a 1h03 2008-03-29 ‡i 1h03 2008-03-29 ‡e 1h03 2008-03-         010       ‡a 2008014677         020       ‡a 0151015498         020       ‡a 015101549X         035       ‡a (OCoLC) 213451577										239539	15		001
008         08032932008         flu         000 1         eng           906         #a 7         #b cbc         #c orignew         #d 1         #e ecip         #f 20         #g y-ger           925         0         #a acquire         #b 2         shelf copies         #x policy default           955         #a 1h03         2008-03-29         #i 1h03         2008-03-29         #e 1h03         2008-03-           010         #a         2008014677           #a         9780151015498           020         #a         0151015498           #a          #a           035         #a         (OCoLC)         213451577          #a           #a           #a           #a            #a            #a            #a           #a            #a           #a          #a         #a         #a         #a         #a         #a         #a         #a         #a         #a         #a         #a <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>160900.0</td> <td>111021:</td> <td>20:</td> <td></td> <td>005</td>									160900.0	111021:	20:		005
906       #a 7 #b cbc #c orignew #d 1 #e ecip #f 20 #g y-ger         925       0       #a acquire #b 2 shelf copies #x policy default         955       #a lh03 2008-03-29 #i lh03 2008-03-29 #e lh03 2008-03-         010       #a 2008014677         020       #a 0151015498         020       #a 015101549X         035       #a (OCoLC) 213451577					1 eng	000		lu	008 f	032982	08		008
925       0       #a acquire #b 2 shelf copies #x policy default         955       #a 1h03 2008-03-29 #i 1h03 2008-03-29 #e 1h03 2008-03-         010       #a 2008014677         020       #a 9780151015498         020       #a 015101549X         035       #a (OCoLC) 213451577	encatlg	g y-ger	0 ‡	p ‡f 2	e eci	1 ‡	n ‡(	origne	cbc ‡c	7 ‡b	‡a		906
955       \$a lh03 2008-03-29       \$i lh03 2008-03-29       \$e lh03 2008-03-         010       \$a 2008014677         020       \$a 9780151015498         020       \$a 0151015498         035       \$a (OCoLC) 213451577			ult	cy defa	poli	з ‡х	copie	shelf	re ‡b 2	acqui	‡a	0	925
010	3-29 to CI	008-03-	03 2	‡e lh	03-29	2008-	Lh03	29 ‡i	2008-03-	1h03 2	‡a		955
020									8014677	2008	‡a		010
020									51015498	97801	‡a		020
035 ‡a (OCoLC) 213451577									L549X	015101	‡a		020
								577	:) 213451	(OCoLO	‡a		035
035 ‡a (OCoLC) ocn213451577					_			451577	C) ocn213	(OCoLO	‡a		035
040 ‡a DLC ‡c DLC ‡d BTCTA ‡d BAKER ‡d YDXCP ‡d OCLCG	≠d C#P :	OCLCG	‡d (	YDXCP	R ‡0	BAKE	A ‡(	‡d BTCI	te DLC	DLC	‡a		040
										e-uk	‡a	-	043
050 0 0 ta PR6054.0547 tb 543 2008							2008	7D 543	1.0547	PR6054	0 = a	0	050
052 U U Fa 523/.914 F2 22			_				0.00	- + -	14 <b>∓</b> 2	823/ .S	U Fa	0	1002
100 1 +a Donognue, Emma, 70 1969-	a Donoghue, Emma, ‡d 1969-							7 a	1	245			

12) The catalog record that you want to overlay will appear in a new window. Review the MARC record to verify that you are overlaying the correct catalog record.

13) If the correct record appears, click **Overlay**.

Overlay this re	cord?	
<u>O</u> verlay	<u>C</u> ancel	
Record Sur Title: Author: Bib Call #:	nmary ( <u>View MARC</u> ) Edition: Pub Date: 2008	TCI Dat Rec
MARC View		
Print Pag		
LDR 006	20cam a2200205Ka 4500	
005 201	.11021154702.0	
008 070	0101s eng d	
020	‡a 9781554680368	
020	‡a 1554680360	
100	‡a Donoghue, Emma.	
24514	ta The sealed letter	
260	‡a Toronto ‡b Harper Collins ‡c 2008	
	+_ 1202 +1_ +_ 1202	

14) A confirmation message will appear to confirm that you have overlaid the record. Click Ok.

15) The screen will refresh in the OPAC View to show that the record has been overlaid.

The sealed letter /Emma Donoghue. Donoghue, Emma, 1969- (Author). Donoghue, Emma, 1969- (Credited).

#### **Record details**

- ISBN: 9780151015498
- ISBN: 015101549X
- Physical Description: 396 p. ;24 cm.
- Edition: 1st U.S. ed.
  Publisher: Harcourt, c2008.
- Publisher: Harcourt, c2008.

#### Search for related items by subject

```
Subject: Codrington, Henry John, Sir, 1808-1877 — Fiction.
Codrington, Helen, d. 1876 — Fiction.
Faithfull, Emily, 1836?-1895 — Fiction.
Triangles (Interpersonal relations) — Fiction.
Divorce — Great Britain — Fiction.
```

Genre: Domestic fiction.

# **Chapter 43. Monograph Parts**

**Monograph Parts** enables you to differentiate between parts of monographs or other multi-part items. This feature enables catalogers to describe items more precisely by labeling the parts of an item. For example, catalogers might identify the parts of a monograph or the discs of a DVD set. This feature also allows patrons more flexibility when placing holds on multi-part items. A patron could place a hold on a specific disc of a DVD set if they want to access a specific season or episode rather than an entire series.

Four new permissions are used by this functionality: CREATE\_MONOGRAPH\_PART, UPDATE\_MONOGRAPH\_PART, DELETE\_MONOGRAPH\_PART and MAP\_MONOGRAPH\_PART. Thes e permissions should be assigned at the consorial level to those groups or users that will make use of the features described below.

### Add a monograph part to an existing record

To add a monograph part to an existing record in the catalog:

1) Retrieve a record.

#### 2) Click Actions for this Record # Manage Parts



#### 3) Click New Monograph Part

4) Enter the **label** that you want to appear to the user in the catalog, and click **Save**. This will create a list of monograph parts from which you can choose when you create a volume and copy.

Record Summary ( <u>Add Volumes</u> ) ( <u>View MARC</u> )			
Author: Convicts Collection (Like Pub Date: 2002.00.02)	ICN: Record ID:	15526052	Created By: admin
Bib Call #:	Record Owner	:	Last Edited On: 2011-09-02 3:28 PM
Record 1 of 1 Start Previous Next En	d		
Reload			
Nonograph Parts			
Back Next			
√ label			
			8
		label	Episodes 1-6
		record	695033

5) Add a volume and copy. To add a volume and copy to your workstation library, click the **Add Volumes** link in the **Record Summary** at the top of the bibliographic record, or click **Actions for this Record # Add Volumes**.

Cancel

Save

To add a volume and copy to your workstation library or other libraries, click **Actions for this Record # Holdings Maintenance # Add Volumes**.



6) The **Unified Volume/Copy Creator** opens. Enter the number of volumes that you want to add to the catalog and the volume description.

7) Enter the number of copies and barcode(s) of each item.

8) Select the **part designation** from the drop down menu adjacent to the barcode field.

9) Apply a template to the copies, or edit fields in the **Copy Editor**.

Call Number	Suffix	# of Copies	Barcode / Part Design	nation
ALIAS 1:1-6		• 1	093837377223	Episodes 1-6 🔻
	•			
	Circulation (2)		Miscellaneous (3)	

#### 10) Click Create Volumes/Items.

11) The **Holdings Maintenance** screen will refresh to demonstrate the addition of the volume, copy, and part. These fields also appear in the OPAC View.

Casey Library System

Apex Branch	ALIAS 1-6	Stacks	Copy Details Browse Call Place Hold	Numbers	0	
				print the	ese details	
	Barcode		Status	Location	Part	
09876767	7888 place h	old book now	In process	Stacks	Episodes 1-6	

# **Chapter 44. Conjoined Items**

Prior to Evergreen version 2.1, items could be attached to only one bibliographic record. The Conjoined Items feature in Evergreen 2.1 enables catalogers to link items to multiple bibliographic records. This feature will enable more precise cataloging. For example, catalogers will be able to indicate items that are printed back to back, are bilingual, are part of a bound volume, are part of a set, or are available as an e-reader pre-load. This feature will also help the user retrieve more relevant search results. For example, a librarian catalogs a multi-volume festschrift. She can create a bibliographic record for the festschrift and a record for each volume. She can link the items on each volume to the festschrift record so that a patron could search for a volume or the festschrift and retrieve information about both works.

In the example below, a librarian has created a bibliographic record for two bestselling items. These books are available as physical copies in the library, and they are available as e-reader downloads. The librarian will link the copy of the Kindle to the bibliographic records that are available on the e-reader.

# **Using the Conjoined Items Feature**

The Conjoined Items feature was designed so that you can link items between bibliographic records when you have the item in hand, or when the item is not physically present. Both processes are described here. The steps are fewer if you have the item in hand, but both processes accomplish the same task. This documentalso demonstrates the process to edit or delete links between items and bibliographic records. Finally, the permission a cataloger needs to use this feature is listed.

**Scenario 1: I want to link an item to another bibliographic record, but I do not have the item in hand.** 1) Retrieve the bibliographic record to which you would like to link an item.

			Text Size: Regu
	Go!		Keyword 🔻
dvanced			
ample Branch 1			
ecord Summary			
	Title	The troubled man	
	Author	Henning, Mankell	
Flooting	ISBN	9780307593498	
Merkel	Edition		
(ber (the))?	Publication Date		
ALL YES	Publisher		
Google	Physical Description	print	
Preview	Format	🐼 text	
	Abstract		
	Subjects		

2) Click Actions for this Record # Mark as Target for Conjoined Items.

3) A confirmation message will appear. Click **OK.** 

4) In a new tab, retrieve the bibliographic record with the item that you want to link to the other record.

5) Click Actions for this Record # Holdings Maintenance.

6) Select the copy that you want to link to the other bibliographic record. Right-click, or click Actions for Selected Rows # Link as Conjoined Items to Previously Marked Bib Record.

Maintenance							
Example Branch 1			-	Limit:	This Specialized Library / Your B	ookmobile	•
Volumes 🔲 Show Items	Refres	h S	Show <u>L</u> ibraries With Ite	ems			
/Barcode	Volumes	Copies	Call Number		Circulation Library	Due Date	Location
Example Consortium : Example System 1 L : Example Branch 1	1	<1>					
L1 : Example Sub-library 1 INDLE	0	<0> 1	KINDLE				
00001111			KINDLE		BR1	akaten akaten akaten akaten akaten akaten akaten ak	Stacks

7) The **Manage Conjoined Items** interface opens in a new tab. This interface enables you to confirm the success of the link, and to change the peer type if desired. The **Result** column indicates that you created a successful link between the item and the bib record.

Manage Co	njoined Items				
Peer <u>T</u> ype:	Back-to-back 🔹	<u>B</u> arcode:		Link to Bib (Submit)	
Result	Barcode		Is Holdable	OPAC Visible	title
Success	00001111		t	t	KINDLE
estimateli fante i fa					Show in Catalog
					Change Peer Type
					Remove from Bib

The default peer type, **Back-to-back**, was set as the peer type for our item. To change a peer type after the link has been created, right-click or click **Actions for Selected Items # Change Peer Type**. A drop down menu will appear. Select the desired peer type, and click **OK**.

🗾 Change Pee	• • •	e64.esilibra
Back-to-back	+	<u>3</u> Manac
Back-to-b	ack	1
Bilingual		<u> </u>
Bound Vol	ume	
e-Reader	Preload	
Set Manage Co	njoinea items	]
Peer <u>T</u> ype:	Back-to-back	•
Result		Barcode
Success		00001111

8) The Result column will indicate that the Peer Type [has been] Updated.

Manage Co	njoined Items					
Peer <u>T</u> ype:	Back-to-back	•	<u>Barcode</u> :		Link to Bib (Submit)	
Result		Barcode		Is Holdable	OPAC Visible	e title
Peer Type u	updated	00001111		t	t	KINDLE

9) To confirm the link between the item and the desired bib record, reload the tab containing the bib record to which you linked the item. Click the link for **Linked Titles.** 

	Title	The troubled man	
	Author	Henning, Mankell	
Heating	ISBN	978030759 <mark>3498</mark>	
Mankel	Edition		
No. CONTRACT	Publication Date		
11 - 2 × 4	Publisher		
Google	Physical Description	print	
Preview	Format	🗭 text	
	Abstract		
	Subjects		

10) To view the copy details, including the peer type, click Copy Details.

Copy Summary	Shelf Browser	Preview	MARC Record	Linked Titles
	Title			
	KINDLE			
	Barco	ode		Status
00001111 :: e-R	eader Preload pla	ace hold bool	k now linked titles	In process

Items can be linked to multiple bibliographic records simultaneously. If you click the linked titles button in the copy details, then you will retrieve a list of bibliographic records to which this item is linked.



**Scenario 2: I want to link an item to another bibliographic record, and I do have the item in hand.** 1) Retrieve the bibliographic record to which you would like to add the item.

#### 2) Click Actions for this Record # Manage Conjoined Items.

End			
			Text Size: Regu
	G	ol	Keyword 💌
dvanced			
ample Brand	ch 1		
ecord Summ	nary		
	Title	Firewall	
	Author	Mankell, Henning.	
	ISBN	9781400031535	
3.33	Edition		
ALCONTRACTOR -	Publication Date		
0 224	Publisher		
	Physical Description	print	
	Format	🗭 text	
	Abstract		
	Subjects		

3) A note in the bottom left corner of the screen will confirm that the record was targeted for linkage with conjoined items, and the **Manage Conjoined Items** screen will appear.

4) Select the peer type from the drop down menu, and scan in the barcode of the item that you want to link to this record.

#### 5) Click Link to Bib (Submit).

Manage Co	njoined Items				
Peer <u>T</u> ype:	Back-to-back	•	<u>Barcode</u> :	00001111	Link to Bib (Submit)
Result		Barcode		Is Holdable	OPAC Vi

6) The linked item will appear in the screen. The **Result** column indicates Success.

7) To confirm the linkage, click **Actions for this Record # OPAC View.** 

8) When the bibliographic record appears, click **Reload. Linked Titles** will show the linked title and item.

**Scenario 3: I want to edit or break the link between a copy and a bibliographic record.** 1) Retrieve the bibliographic record that has a copy linked to it.

#### 2) Click Actions for this Record # Manage Conjoined Items.

3) Select the copy that you want to edit, and right-click or click Actions for Selected Items.

4) Make any changes, and click OK.

UPDATE\_COPY - Link items to bibliographic records

# Part IX. Serials

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# Chapter 45. Serials

This documentation is intended for users who will be ordering subscriptions, distributing issues, and receiving issues in Evergreen.

# Serial Control View vs. Alternate Serial Control View

Serial Control View and Alternate Serial Control View offer you two views of Serials. Both views enable you to create subscriptions, add distributions, define captions, predict future issues, and receive items. Serial Control View was designed for users who work with a smaller number of issues and was designed to accommodate workflows in academic and special libraries. Alternate Serial Control View was designed for users who receive a larger number of issues and was designed for users who receive a larger number of issues and was designed for users in public libraries.

The views are interoperable, but because the views were designed for different purposes, some differences emerge. For example, Serial Control View enables you to create and edit serials in a single tabbed interface while Alternate Serial Control View leads you through a series of steps on multiple screens. In addition, receiving functions vary between views. Both receiving interfaces enable you to batch receive issues. However, the Serials Batch Receive interface, which is associated with Alternate Serial Control View, allows for more customization of each receiving unit while the Items tab in Serial Control View allows for greater flexibility in creating multi-issue units, such as in binding serials.

Function	Serials Control View	Alternate Serials Control View
Menu Style	Menu driven	Wizard oriented
Setting Up subscription	No calendar drop downs	Includes calendar drop down
Setting up distributions	No copy template selection	Requires the selection of a copy template
Creating streams	No setup required	Requires streams
Creating captions and patterns	Wizard available	Wizard available
Adding Starting Issue	No holdings code wizard	Includes holdings code wizard
Generate Predictions	Make predictions	Generate predictions
Add items for special issue	No functionality	New items on issuances tab

#### Table 45.1. Serials Control View and Alternate Serials Control View Comparison

# **MFHD Records**

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

# **Chapter 46. Copy Template for Serials**

A copy template enables you to specify item attributes that should be applied by default to copies of serials. You can create one copy template and apply it to multiple serials. You can also create multiple copy templates. Templates will be used in the Alternate Serial Control View or the Serial Control View.

### Create a copy template

To create a copy template, click Admin # Local Administration # Copy Template Editor.

- 1. Enter a Name for the template.
- 2. Select an owning library from the Owning lib drop down menu. This organization owns the copy template. A staff member with permissions at that organization can modify the copy template. The menu is populated from the organizations that you created in Admin . Server Administration . Organizational Units.
- 3. Click the box adjacent to Circulate. If you want the item to circulate.
- 4. Check the box adjacent to Holdable. if patrons can place holds on the item.
- 5. Check the box adjacent to OPAC Visible. if you want patrons to be able to see the item in the OPAC after you receive it.
- 6. Select a loan duration rule from the drop down menu.
- 7. Select a fine level for the item from the drop down menu.
- 8. Select a copy Location from the drop down menu. The menu is populated from the copy locations that you created in Admin . Local Administration . Copy Locations.
- 9. Select a circ modifier from the drop down box. The menu is populated from the modifiers that you created in Admin . Server Administration . Circulation Modifiers.
- 10.Check the box adjacent to Floating. if the item is part of a floating collection.
- 11.Check the box adjacent to Deposit. if patrons must place a deposit on the copy before they can use it.
- 12.Check the box adjacent to Reference. if the item is a reference item.
- 13.If the item is in mint condition, then check the box adjacent to Mint Condition.
- 14.Enter age protection rules in the Age Protect field. Age protection allows you to control the extent to which an item can circulate after it has been received. For example, you may want to protect new copies of a serial so that only patrons who check out the item at your branch can use it.
- 15.Enter a message in the Alert Message field. This message will appear every time the item is checked out to a patron.
- 16.Enter a code from the MARC fixed fields if you want to control the circulation based on the item type in the Circ as Type field.
- 17.Enter a deposit amount if patrons must place a deposit on the copy before they can use it.

18.Enter the price of the item.

19.Enter the ID of the copy status in the Status field. A list of copy statuses and their IDs can be found in Admin . Server Administration . Copy Status.

20.Click Save.

21. Fine level and loan duration are required fields in the Copy Template Editor.

### Edit a copy template

You can make changes to an existing copy template. Changes that you make to a copy template will apply to any items that you receive after you edited the template.

- 1. To edit a copy template, click your cursor in the row that you want to edit. The row will turn blue.
- 2. Double-click. The copy template will appear, and you can edit the fields.
- 3. After making changes, click Save.



From the copy template interface, you can delete copy templates that have never been used.

# **Chapter 47. Serials Control View**

Serial Control View is separate from the Alternate Serial Control interface. Serial Control View enables you to manage serials in a single tabbed interface. This view also enables you to bind units. Serial Control View consists of five tabs: Items, Units, Distributions, Subscriptions, and Claims. Units and Claims are not functional in 2.0.

### **Create a subscription**

A subscription is designed to hold all information related to a single serial title. Therefore, each library is likely to have only one subscription per serial title.

Elle Edit Search Girculation Cataloging Acquisitions 239.50 2 Bib Record: 18148413 +	Booking				Admin 🕑 🗄
Record Sammary ( Add Volumes ) 1 View MARC Title The Journal of American history Asthon Cryanization of American Historium Bb Call #, Microfilm (c) 85/2009 [2tert] Divious [Set] [2tert]	) nd Search Ferrutz		Edition Pub Date: 1954	TON: 18145432 Database ID: 18145433 Record Owner:	Created By: admin Last Edited By: admin Last Edited On: 4/3/12953 AM Actions for this Record
Serial Control Items Units Distributions Subscriptions Claims					
Show Sabe. Show Groups Reliesh	Actions for Selected Row	D Construction	- Star 1 subscription	n Date	1 subscription
# Location 1 #CONS : Dample Consortium 2 #SYS1 : Dample System 1	Add Subscription Add Distribution Add Insurance	ing Likrary	1 subscription	Date	1 subscription
3 + BFU : Example Branch 1 4 - BFU : Example Branch 2	Add Caption/Pattern Make Predictions		- 6op «Uy	ected Date Offset	1 subscription
	Delete Subscription Delete Distribution		-		
	Delete Caption/Patte				
			-		
					(

- 1. Click the Subscriptions link.
- 2. Select the branch that will own the subscription.
- 3. Right-click or click Actions for Selected Row, and click Add Subscription.
- 4. Enter the date that the subscription begins in the start date, and click Apply. You must enter the date in YYYY-MM-DD format.
- 5. Enter the date that the subscription ends in the end date. This field is optional.
- 6. Enter the difference between the nominal publishing date of an issue and the date that you expect to receive your copy in the Expected Date Offset. For example, if an issue is published the first day of each month, but you receive the copy two days prior to the publication date, then enter -2 days into this field.
- 7. When finished, click Create Subscription(s) in the bottom right corner of the screen.
- 8. A confirmation message appears. Click OK.



You can add notes to the subscription by clicking Subscription Notes. These notes are currently viewable only in the staff client by clicking on the Subscription Notes button.

# **Create a distribution**

Distributions indicate the branches that should receive copies of a serial. Distributions work together with streams to indicate the number of copies that should be sent to each branch.

rend Summary ( Add Volumes ) ( View MARC ) ks : Die Journal of American bistory lisus : Organization of American Listorians : Call P: Internetion (s) (Ny2009			6d Pu	ition: 6 Date: 1961	TCN: 107/0019 Database ID: 107/0019 Record Owner:	Greated By: Astron Lost Edited By: Astron Lost Edited One 4/1/12 Sey LAM
nd Lof 1 Start Previous Next	Ind Search	ierofis _				Actions for this
10 Example Banch 1	•	Distribution		Holding Lib		
Show Subs. E Show Groups Retreth Arth	tonstor Selected Row	· 10		BR2		1 distribut
Location	Subscriptions 🛤	<unact <="" td=""><td>1 distribution</td><td>Library Specific Option</td><td>e</td><td></td></unact>	1 distribution	Library Specific Option	e	
a CONS: Example Consortium a/W/I : Example System 1		- Lahel Default	1 distribution	Legacy Record Entry-	terring task with enset all of these values	1 detmour
20061 : Isample Banch 1 all 82 : Isample Banch 2 a Subscription + 1	1	- Summary Method - Viscle	1 distribution	Receive Call Number		
> Destributions		- Unit Label Prefix		- SUBSES		1 signation
2 Captions/Patterns		<unact <="" td=""><td>1 distribution</td><td>Sing Call Number</td><td></td><td>1 sistminut</td></unact>	1 distribution	Sing Call Number		1 sistminut
		- Unit Label Suttix <ursets< td=""><td>1 distribution</td><td>Receive Unit Templat</td><td>le</td><td>1.00000</td></ursets<>	1 distribution	Receive Unit Templat	le	1.00000
			1	- starters		1 spinor
				- Bind Unit Template		1 distribut

- 1. Click the distributions link beneath the subscription. Right click or click Actions for Selected Rows, and click Add distribution.
- 2. Apply a new label to the distribution. It may be useful to identify the branch to which you are distributing these issues in this field. This field is not publicly visible and only appears when an item is received. There are no limits on the number of characters that can be entered in this field.
- 3. Apply a prefix to the spine label if desired. This information will display in Serial Control View when the items are received, but it does not print on the spine label in . 0.
- 4. Apply a suffix to the spine label if desired. This information will display in Serial Control View when the items are received, but it does not print on the spine label in . 0.
- 5. The holding library is filled in by default and is the library to which you attached the subscription.
- 6. The Legacy Record Entry contains the MFHD records that are attached to the bib record if the owning library is identical to the distribution's holding library. A distribution can thus be an extension of an MFHD record. Select the MFHD record from the drop down menu.
- 7. The Receive Call Number field is empty until you receive the first item. When you receive the first item, you are prompted to enter a call number. That call number will populate this drop down menu.
- 8. The Bind Call Number field is empty until you bind the first item. When you receive the first item, you are prompted to enter a call number. That call number will populate this drop down menu.
- 9. Receive Unit Template The template that should be applied to copies when they are received. Select a template from the drop down menu.

- 10.Bind Unit Template The template that should be applied to copies when they are bound. Select a template from the drop down menu.
- 11.When finished, click Create Distribution(s) in the bottom right corner of the screen.
- 12.A confirmation message appears. Click OK.



You can add notes to the distribution by clicking Distribution Notes. These notes are currently viewable only in the staff client by clicking on the Distribution Notes button.

### **Create Captions and Patterns**

- 1. Click the captions and patterns link beneath the subscription. Right click or click Actions for Selected Rows, and click Add Caption/Pattern.
- 2. Apply the type which can be for basic subscription, supplements, or indices
- 3. Apply active. Only one active caption and pattern is allowed per type
- 4. In the Pattern Code dbox, you can enter a JSON representation of the 85X tag by hand, or you can click the Pattern CodeWizard to enter the information in a user-friendly format.

### **Use the Pattern Code Wizard**

The Pattern Code Wizard enables you to create the caption of the item and add its publication information. The Wizard is composed of five pages of questions. You can use the Next and Previous navigation buttons in the top corners to flip between pages.

To add a pattern code, click Wizard.

#### **Page 1: Enumerations**

Pattern Code Wizard	×
Pattern Code Wizard	
Previous	Next
Use enumerations?	
"v." and "no." are common first and second level enumeration captions.	
Enumeration Caption Units Per Higher Level Numbering Continuity First level: v.	
Second level:   Number 4  Restarts at unit completion   Remove  Varies	
Ondetermined      Add Enumeration <u>Add Enumeration</u> <u>Add Alternate Enumeration</u>	

- 1. To add an enumeration, check the box adjacent to Use enumerations.. The enumerations conform to \$a-\$h of the 853,854, and 855 MARC tags.
- 2. A field for the First level will appear. Enter the enumeration for the first level. A common first level enumeration is volume, or "v."
- 3. Click Add Enumeration.
- 4. A field for the Second level will appear. Enter the enumeration for the second level. A common first level enumeration is number, or "no."
- 5. Enter the number of bibliographic units per next higher level. This conforms to \$u in the 853, 854, and 855 MARC tags.
- 6. Choose the enumeration scheme from the drop down menu. This conforms to \$v in the 853, 854, and 855 MARC tags.



You can add up to six levels of enumeration.

- 7. Add Alternate Enumeration if desired.
- 8. When you have completed the enumerations, click Next.

#### Page 2: Calendar

Pattern Code Wizard	X
Pattern Code Wizard	
Previous	Next
☑ Use calendar changes?	
Identify any points during the year at which the highest level enumeration caption changes.	
Type Point	
At start of a month 👻 June 👻	Remove
Add <u>C</u> alendar Change	

- 1. To use months, seasons, or dates in your caption, check the box adjacent to Use calendar changes.
- 2. Identify the point in the year at which the highest level enumeration caption changes.
- 3. In the Type drop down menu, select the points during the year at which you want the calendar to restart.
- 4. In the Point drop down menu, select the specific time at which you would like to change the calendar
- 5. To add another calendar change, click Add Calendar Change. There are no limits on the number of calendar changes that you can add.
- 6. When you have finished the calendar changes, click Next.

### Page 3: Chronology

Pattern Code \	Wizard		X
		Pattern Code Wizard	
Previous	]		Next
Use chror	ology captions?		
Each caption	must be a sma	ller unit of time than the preceding caption.	
	Caption	Include this actual word in the caption?	
First level:	Year 👻		Remove
Second level:	Season 👻		Remove
		Add Chronology Caption	

- 1. To add chronological units to the captions, check the box adjacent to Use chronology captions.
- 2. Choose a chronology for the first level. If you want to display the terms such as "year" and "month" next to the chronology caption in the catlaog, then check the box beneath Display in holding field.
- 3. To include additional levels of chronology, click Add Chronology Caption. Each level that you add must be smaller than the previous level.
- 4. After you have completed the chronology caption, click Next.

#### **Page 4: Compress and Expand Captions**

Pattern Code Wizard	×	J
	Pattern Code Wizard	Π
Previous	Next	]
Compressibility and Expandability:	Can compress or expand 🗸	
Caption Evaluation:	Captions verified; all levels present	
<ul> <li>Select <u>f</u>requency:</li> <li>Use number of <u>i</u>ssues per year:</li> </ul>	Quarterly	

- 1. Select the appropriate option for compressing or expanding your captions in the catalog from the compressibility and expandability drop down menu. The entries in the drop down menu correspond to the indicator codes and the subfield \$w in the 853 tag. Compressibility and expandability correspond to the first indicator in the 853 tag.
- 2. Choose the appropriate caption evaluation from the drop down menu.
- 3. Choose the frequency of your publication from the drop down menu. For irregular frequencies, you may wish to select use number of issues per year, and enter the total number of issues that you receive each year. However, in the . 0 release, recommended practice is that you use only regular frequencies. Planned development will create an additional step to aid in the creation of irregular frequencies.
- 4. Click Next.

### **Page 5: Regularity Information**

Pattern Code Wizard	×
Pattern Code Wizard	
Previous	Next
Use specific regularity information (published, omitted, and/or combined issues)?	
Omitted   Season    Spring	
Remove whole row	-
Add More Regularity Information	

- 1. If needed, check box for Use specific regularity information
- 2. Choose the appropriate information for combined, omitted or published issues
- 3. Choose the appropriate frequency and issue
- 4. Add additional rows as required

#### Page 5: Finish Captions and Patterns

- 1. To complete the wizard, click Create Pattern Code.
- 2. Return to Subscription Details.
- 3. Confirm that the box adjacent to Active is checked. Click Save Changes. The row is now highlighted gray instead of orange.

### **Creating an Issuance**

The Issuances function enables you to manually create an issue. Evergreen will use the initial issue that you manually create to predict future issues.

tle: The journal of American history Juthor: Organization of American Historians b Call #:			Editi Pub
Error 1 of 2     Start     Previous     Mext     End       rial Control     Image: Subscriptions     Claims			
SPFLD-MAIN Springfield Main Library	•	Issuance	
Show Subs. 🔲 Show Groups Refresh	Actions for Selected Row	Create Date	
	Subscriptions	<unset></unset>	1 issuance
CWMARS COW MARS Inc	Subscriptions -	Creator	
#WESTERN : Western Region		???	1 issuance
A SPRINGEIELD MA : Springfield	1		
SPELD-MAIN : Springfield Main Library	0	- Edit Date	
SPFLD-BW : Springfield Brightwood Branch	0	<unset></unset>	1 issuance
SPFLD-EFP : Springfield East Forest Park Branch	0	F. 194	
> SPFLD-ES : Springfield East Springfield Branch	0	Editor	
SPFLD-FP : Springfield Forest Park Branch	0		1 Issuance
SPFLD-IO : Springfield Indian Orchard Branch	0		
SPFLD-LI: Springfield Liberty Branch	0		
SPFLD-MS : Springfield Mason Square Branch	0		
> SPFLD-PP : Springfield Pine Point Branch	0		
SPFLD-SA : Springfield Sixteen Acres Branch	0		-
Subscription : #9			
Distributions			
Issuances			
Captions/Patterns			

- 1. Click the Issuances link beneath the subscription. Right click or click Actions for Selected Rows, and click Issuance.
- 2. Click the holdings code and click apply. Currently there is no wizard to create this code. The wizard is only available in the Alternate Serials Control View.
- 3. Click the Caption/Pattern selecting the appropriate patternand click apply
- 4. Click the date published and enter date information (format YYYY-MM-DD) and click apply
- 5. Click label, enter label and click apply
- 6. When finished, click Create Issuance(s) in the bottom right corner of the screen.
- 7. A confirmation message appears. Click OK.

### **Generate Prediction**

1. Open the Subscriptions tab.

- 2. Right-click or click Actions for Selected Row # Make predictions.
- 3. A pop up box will aks you how many items you want to predict. Enter the number, and click OK.
- 4. A confirmation message will appear. Click OK.
- 5. Click the Issuances link to view the predicted issues.

# **Chapter 48. Alternate Serial Control View**

Using the Alternate Serial Control View, you can create a subscription, a distribution, a stream, and a caption and pattern, and you can generate predictions and receive issues. To access Alternate Serial Control View, open a serials record, and click Actions for this Record >> Alternate Serial Control. This opens the Subscriptions interface

- 1. Create a subscription
- 2. Create a distribution
- 3. Create a a stream (within the distribution)
- 4. Create a caption and pattern (or import from bibliographic or legacy serial records)
- 5. Create at least the first issuance and generate predictions

### **Creating a Subscription**

A subscription is designed to hold all information related to a single serial title. Therefore, each library is likely to have only one subscription per serial title.

<u>File Edit Search Circulation Cataloging Acquisiti</u>	ons <u>B</u> ooking			Admin (-) He
💫 Check Out 🔹 🎲 Check In 🔹 🔤 Search	n Catalog 🔹 🔤 Item Status 🤹	Patron Search 🔹 📊	Patron Registration 🔹	Toggle Hotke
1 Bib Record: 219635 2 Subscriptions				
Go Back Reload Go Forward				Debug
Subscriptions         Show subscriptions related to The journal of Ame         Back Next         ✓       ID         Owning       Start Date	rican history. owned at or above End Date Expected Date Offset	E BOYLSTON	▼ New Subscription	Delete Selected
	Owning Library Start Date End Date Bibliographic Record Entry Expected Date Offset Cancel	BOYLSTON 3/1/2012 219635 5 Save		E

- 1. Add new subscriptions to a serials record that exists in the catalog.
- 2. Create a subscription

- 3. Click New Subscription.
- 4. Select an owning library. The owning library indicates the organizational unit(s) whose staff can use this subscription. This menu is populated with the shortnames that you created for your libraries in the organizational units tree in Admin . Server Administration . Organizational Units. The rule of parental inheritance applies to this list. For example, if a system is made the owner of a subscription, then users, with appropriate permissions, at the branches within the system could also use this subscription.
- 5. Enter the date that the subscription begins in the start date. Recommended practice is that you select the date from the drop down calendar although you can manually enter a date. Owning library and start date are required fields in the new subscription pop up box.
- 6. Enter the date that the subscription ends in the end date. Recommended practice is to select a date from the drop down calendar, but you can manually enter a date, also.
- 7. Enter the difference between the nominal publishing date of an issue and the date that you expect to receive your copy in the Expected Date Offset. For example, if an issue is published the first day of each month, but you receive the copy two days prior to the publication date, then enter -2 days into this field.
- 8. Click Save.

After you save the subscription, it will appear in a list with a hyperlinked ID number. Use the drop down menu at the top of the screen to view subscriptions at other organizations.

# **Creating a Distribution**

Distributions indicate the branches that should receive copies of a serial. Distributions work together with streams to indicate the number of copies that should be sent to each branch.

secrețian Dealis	in lives Select Collowed						
name no se parte a se	bscription Details					Clone Subscription	Batch from Repeive
Sended 30 / Nex List Suite:         Centre Continuente Summary Mitched         Centre Continuente Summary Mitche         Centre Continuente Summary Mitche         Centre Continuente Summary Mitche         Centre Continuente         Centr	annary Disclutions Capture and Patterns Issuances						
r Later Grid New Userbalan Ceneral Same	stributions						
r     Laber     ording Life     Display Grouping     Receive Unit Template     Summary Mathed     Unit Label Surfax       Subarrightm     #       Laber     Man       Laber     Man       Italiang Life     Receive       Display Grouping     Provide       Gummary Mathed     Provide       Unit Laber Surfax     Provide       Gummary Mathed     Provide       Gancel     Sare	ale bloom				sieth	esh Grid   New Distribut	ion   Delete Gelected
Subscription     #       Lobit     Main       Lobit     Main       Holding Lib     Lift       Dayley Granulagy     .       Receive Lint Limplete     Serial Science       Summary Mitched	f Labe	lodno Lb	Display Grouping	Receive Unit Template 3	Summary Method	Unt Label Proto	Unit Label Suffx
Subscription     I       Lobel     Man       Hidring Lib     LRT       Dopley Comping     Chemistry       Hockne Unit Hompidae     Series       Summary Kitch     L       Unit Later Porfsc     U       Unit Later Suffsc     Same				0			
Rubeription     I       Lobot     Man       Lobot     Man       Richard     Rith       Dapley Comping     Committing       Recense unit Lemate     I       Summary Richard     I       Unit Later Parks     I       Unit Later Suffix     I       Cancel     Same							
Lobol Van Hotorg Lub JRI ■ Dragby Crouping Chemility ■ Hotore unit lemptite Tentar period ■ Summary Mathed ■ Hot Later Perfa ■ Unit Later Softie ■ Cancel Some		Subscription	4				
Hidding Lib     LR1     •       Dapky Champing     Chamblage     •       Rocate Unit Template     Serial spence     •       Summary Mathed     •     •       High Table Onfor     •     •       Unit Labe Sume     •     •       Cancel     Sare     •		Label	Van				
Dagley Oscipity     Chronology       Recore unit temptate     Serial generic       Summary Mathed     Image: Serial generic       High Tabler Profix     Image: Serial generic       Unit Laber Suffix     Image: Serial generic       Cancel     Sare		Holding Lib	URT				
Mocore Unit Temple     Serial generic       Summary Mithed		Display Grouping	Chronology	1.			
Summary Mathed Link Lake Parfor Unit Lake Suffic Cancel Same		Receive Unit Template	senal generic				
Unit table Profe. Unit table Suffer Cancel Same		Summary Method	L				
Cancel Same		Unit Latel Prefs	[				
Cancel Save		Und Label Suffix		_			
		Cancel	Save				

- 1. Click the Distributions tab.
- 2. Click New Distribution.

- 3. Enter a name for the distribution in the Label field. It may be useful to identify the branch to which you are distributing these issues in this field. This field is not publicly visible and only appears when an item is received. There are no limits on the number of characters that can be entered in this field.
- 4. Select a holding library from the drop down menu. The holding library is the branch that will receive the copies.
- 5. Select a copy template from the Receive Unit Template drop down menu. This menu is populated with the copy templates that you created in Copy Template Editor.



Label, Holding Library, and Receive Unit Template are required fields in the new distribution pop up box.

- 6. Ignore the fields, Unit Label Prefix and Unit Label Suffix. These fields are not functional in Alternate Serial Control View.
- 7. Click Save. The distribution will appear in a list in the Distributions tab in the Subscription Details.

# **Creating a Stream**

Distributions work together with streams to indicate the number of copies that should be sent to each branch. Distributions identify the branches that should receive copies of a serial. Streams identify how many copies should be sent to each branch. Streams are intended for copies that are received on a recurring, even if irregular, basis.

- 1. Click the hyperlinked title of the distribution. The number of streams that have already been created for this distribution displays adjacent to the title. You can choose one of two ways to create a stream: New Stream or Create Many Streams. The New Stream button allows you to create one new stream and assign it a routing label.
- 2. Click New Stream
- 3. Enter a routing label so that the copy could be read by specific users or departments before the copy is shelved. The routing label appears during receiving and could be added to routing lists; it is not viewable by the public. Routing lists do not print from in 2.0. This field is optional.
- 4. Click Save.



The "Create Many Streams button" allows you to create multiple streams at once, but it does not allow you to add a routing label when you create the stream.

- 5. Click Create Many Streams.
- 6. Enter the number of streams that you want to create in the How many. Field.
- 7. Click Create.

### **Creating a Caption and Pattern**

The Captions and Patterns wizard allows you to enter caption and pattern data as it is described by the 853, 854, and 855 MARC tags. These tags allow you to define how issues will be captioned, and how often the library receives issues of the serial.

- 1. Open the Subscription Details.
- 2. Click the Captions and Patterns tab.
- 3. Click Add Caption and Pattern.
- 4. In the Type drop down box, select the MARC tag to which you would like to add data.
- 5. In the Pattern Code drop down box, you can enter a JSON representation of the 85X tag by hand, or you can click the Wizard to enter the information in a user-friendly format.
- 6. The Caption and Pattern that you create is Active by default, but you can deactivate a caption and pattern at a later time by unchecking the box.



A subscription may have multiple captions and patterns listed in the subscription details, but only one Caption and Pattern can be active at any time. If you want to add multiple patterns, e.g. for Basic and Supplement, Click Add Caption and Pattern.

### **Use the Pattern Code Wizard**

The Pattern Code Wizard enables you to create the caption of the item and add its publication information. The Wizard is composed of five pages of questions. You can use the Next and Previous navigation buttons in the top corners to flip between pages.

To add a pattern code, click Wizard.

### Page 1: Enumerations

Pattern Code Wizard	×
Pattern Code Wizard	
Previous	Next
Use enumerations?	
"v." and "no." are common first and second level enumeration captions.	
Enumeration Caption Units Per Higher Level Numbering Continuity First level:  V.  Remove	
Second level:   Number 4  Restarts at unit completion   Remove  Kemove	
Image: Constraint of the second se	

- 1. To add an enumeration, check the box adjacent to Use enumerations.. The enumerations conform to \$a-\$h of the 853,854, and 855 MARC tags.
- 2. A field for the First level will appear. Enter the enumeration for the first level. A common first level enumeration is volume, or "v."
- 3. Click Add Enumeration.
- 4. A field for the Second level will appear. Enter the enumeration for the second level. A common first level enumeration is number, or "no."
- 5. Enter the number of bibliographic units per next higher level. This conforms to \$u in the 853, 854, and 855 MARC tags.
- 6. Choose the enumeration scheme from the drop down menu. This conforms to \$v in the 853, 854, and 855 MARC tags.



You can add up to six levels of enumeration.

- 7. Add Alternate Enumeration if desired.
- 8. When you have completed the enumerations, click Next.

### Page 2: Calendar

Pattern Code Wizard	X
Pattern Code Wizard	
Previous	Next
✓ Use calendar changes?	
Identify any points during the year at which the highest level enumeration caption changes.	
Type Point	
At start of a month 👻 June	Remove
Add <u>C</u> alendar Change	

1. To use months, seasons, or dates in your caption, check the box adjacent to Use calendar changes.

- 2. Identify the point in the year at which the highest level enumeration caption changes.
- 3. In the Type drop down menu, select the points during the year at which you want the calendar to restart.
- 4. In the Point drop down menu, select the specific time at which you would like to change the calendar
- 5. To add another calendar change, click Add Calendar Change. There are no limits on the number of calendar changes that you can add.
- 6. When you have finished the calendar changes, click Next.

### Page 3: Chronology

Pattern Code V	Vizard	140 E	x
		Pattern Code Wizard	
Previous	]		Next
Use chron	ology captions?		
Each caption	must be a sma	ller unit of time than the preceding caption.	
	Caption	Include this actual word in the caption?	
First level:	Year 👻		Remove
Second level:	Season 👻		Remove
		Add Chronology Caption	

- 1. To add chronological units to the captions, check the box adjacent to Use chronology captions.
- 2. Choose a chronology for the first level. If you want to display the terms, "year" and "month" next to the chronology caption in the catlaog, then check the box beneath Display in holding field.
- 3. To include additional levels of chronology, click Add Chronology Caption. Each level that you add must be smaller than the previous level.
- 4. After you have completed the chronology caption, click Next.

#### **Page 4: Compress and Expand Captions**

Pattern Code Wizard	×	J
	Pattern Code Wizard	Π
Previous	Next	]
Compressibility and Expandability:	Can compress or expand 🗸	
Caption Evaluation:	Captions verified; all levels present	
<ul> <li>Select <u>f</u>requency:</li> <li>Use number of <u>i</u>ssues per year:</li> </ul>	Quarterly	

- 1. Select the appropriate option for compressing or expanding your captions in the catalog from the compressibility and expandability drop down menu. The entries in the drop down menu correspond to the indicator codes and the subfield \$w in the 853 tag. Compressibility and expandability correspond to the first indicator in the 853 tag.
- 2. Choose the appropriate caption evaluation from the drop down menu.
- 3. Choose the frequency of your publication from the drop down menu. For irregular frequencies, you may wish to select use number of issues per year, and enter the total number of issues that you receive each year. However, in the . 0 release, recommended practice is that you use only regular frequencies. Planned development will create an additional step to aid in the creation of irregular frequencies.
- 4. Click Next.

### **Page 5: Regularity Information**

Pattern Code Wizard	×
Pattern Code Wizard	
Previous	Next
Use specific regularity information (published, omitted, and/or combined issues)?	
Omitted   Season   Add sub-row  Add sub-row	
Remove whole row	
Add More Regularity Information	

- 1. If needed, check box for Use specific regularity information
- 2. Choose the appropriate information for combined, omitted or published issues
- 3. Choose the appropriate frequency and issue
- 4. Add additional rows as required

#### Page 5: Finish Captions and Patterns

- 1. To complete the wizard, click Create Pattern Code.
- 2. Return to Subscription Details.
- 3. Confirm that the box adjacent to Active is checked. Click Save Changes. The row is now highlighted gray instead of orange.

# **Creating an Issuance**

The Issuances tab enables you to manually create an issue. Evergreen will use the initial issue that you manually create to predict future issues.

#### Subscription Details

Summary Dist	ributions	Captions and Patterns	Issuances
Issuances			
Back Next			
Subscription	8		
Creator	880		
Editor	880		
Label	Starting	Issue	
Date Published	12/1/201	1	
Caption/Pattern	11	•	
Holding Type	basic		
		145	
		VVizard	
	V.	98	
	i.	3	
Holding Code	Year	2011	
	Season	Winter	-
		Compile	
	п		
Cancel	Save		

- 1. Click the Issuances tab in the Subscription Details.
- 2. Click New Issuance.
- 3. The Subscription, Creator, and Editor fields contain subscription and user IDs, respectively. These fields are disabled because Evergreen automatically fills in these fields.
- 4. Enter a name for this issuance in the Label field. There are no limits on the number of characters that can be entered in this field. You may want to enter the month and year of the publication in hand.
- 5. Enter the Date Published of the issuance that you are editing. Recommended practice is that you select the date from the drop down calendar although you can manually enter a date. If you are creating one manual issue before automatically predicting more issues, then this date should be the date of the most current issue before the prediction starts.
- 6. Select a Caption/Pattern from the drop down menu. The numbers in the drop down menu correspond to the IDs of the caption/patterns that you created.
- 7. The Holding Type appears by default and corresponds to the Type that you selected when you created the Caption/ Pattern.
- 8. In the holding code area of the New Issuance dialog, click Wizard. The Wizard enables you to add holdings information.

- 9. Enter the volume of the item in hand in the v. field.
- 10.Enter the number of the item in hand in the no. field.
- 11.Enter the year of publication in the Year field.
- 12.Enter the month of publication in the Month field if applicable. You must enter the calendar number of the month rather than the name of the month. For example, enter 12 if the item in hand was published in December.
- 13.Enter the day of publication in the day field if applicable.
- 14.Click Compile to generate the holdings code.

### **Generate Item Predictions**

After you manually create the first issue, Evergreen will predict future issuances. Use the Generate Predictions functionality to predict future issues.

- 1. Click Subscription Details # Issuances # Generate Predictions.
- 2. Choose the length of time for which you want to predict issues. If you select the radio button to predict until end of subscription, then Evergreen will predict issues until the end date that you created when you created the subscription. See simplesect . 1 for more information. If you do not have an end date, select the radio button to predict a certain number of issuances, and enter a number in the field.
- 3. Click Generate.
- 4. Evergreen will predict a run of issuances and copies. The prediction will appear in a list.
- 5. You can delete the first, manual issuance by clicking the check box adjacent to the issuance and clicking Delete Selected.
## **Chapter 49. Edit Subscriptions**

Subscriptions can be edite to change the caption and pattern and other information.

#### Serials Control View

```
. To access Serial Control View, open a serials record, and click Actions for this Record >> Serial Control. This op . Click the subscriptions tab
```

. Click on the appropriate link to edit

Alternate Serials Control View

- 1. To access Alternate Serial Control View, open a serials record, and click Actions for this Record >> Alternate Serial Control. This opens the Subscriptions interface
- 2. Click the hyperlinked ID number to edit the subscription.
- 3. Click on the appropriate tab to edit the information

## **Chapter 50. Receiving**

You can receive either through the Serials Control View or in Batch Receive with the simple or advanced interface

## **Serials Control View Receiving**

On the Protocers	ars-tistesting evergreen I	binus			A name of	and a state of	Accession of the		and the local division of the local division			· • • •
Edik Search <u>C</u> i	rculation Cataloging A	cquisitions gooking	1								A	dmin 🕣 🕴
Record: 18148420	2 Subscriptions 2 Bib R	ecord:18148419 +										
Record Summary	( Add Volumes ) ( )	ew MARC )										
itles The Jour	mal of American history						Edition		TCN: 18	148419	Created By: admin	
withon Organiz	ation of American Historia	na					Pub Date: 1964		Database ID: 18	148419	Last Edited Byt admin	
Sib Call #1 Microfile	m (a) 85/2009								Record Owners		Last Edited On: 4/3/129:53 A	м
cord1of1	Part Dominum	Net	Fred Search 8	len tr							Lations I.	athis Pass
arial Control	ine [ Demon		The second								Bennin II	e tres range
ms Units Distribu	utions Subscriptions Clai	ms										
Subscriber: BR2	Example Branch	2		• Mode: 👁 R	leceive 💿 Adv. Receive	🔿 Bind 👿 Show All	Refresh				Actions for Sele	cted Rows
# hern ID	Insuance Label	Distribution	Holder	Stream ID	Date Published	Date Expected	Date Received	Notes	Call Number	Unit 10 / Contents	Date Last Edited	10
1 122	v.9913(2012)Jun.)	Default	BR2	3	2012-06-01	2012-06-01		0			2012-04-03	
2 123	v.991.2(2012)Sep.)	Default	BR2	3	2012-09-01	2012-09-01		0			2012-04-03	
3 124	v.991/3(2012/Dec.)	Default	BR2	3	2012-12-01	2012-12-01		0			2012-04-03	
4 125	v.991/4(2013(Mar.)	Default	BR2	3	2013-03-01	2013-03-01		0			2012-04-03	
5 126	v.100ii.1(2013.lun.)	Default	BR2	3	2013-06-01	2013-06-01		0			2012-04-03	
6 127	v.100/i.2(2013/Sep.)	Default	BR2	3	2013-09-01	2013-09-01		0			2012-04-03	
7 128	v.100%3(2013/Dec.)	Default	BR2	3	2013-12-01	2013-12-01		0			2012-04-03	
8 129	v.1005.4(2014:Mar.)	Default	BRZ	3	2014-03-01	2014-03-01		0			2012-04-03	
Showing: Recen	tty Received										Receive/Mave S	elected 4
Current Working	Unit: "Auto per kem"	Distribution .	Uniday	Owner III	Data Data Laborat	Reto Constant	Data Death and		Coll Manches	Unit D. / Contrato	Set of an and a set of	anon one
		L L L L L L L L L L L L L L L L L L L	HOM/NOT	Stream ID	DatePupested	Date Expected	Late secenced	IN000ES	Call raumber	UNDER LUCE ONDERES	Date Last Edited	re l

- 1. To receive items, click the Receive radio button. In the top half of the screen, the items that have yet to be received are displayed. In the bottom half of the screen, recently received items are displayed.
- 2. Select the branch that will receive the items from the drop down box.
- 3. Select the issue that you want to receive.
- 4. Select the current working unit. Click Set Current Unit, located in the lower right corner of the screen. A drop down menu will appear.
  - If you want to barcode each item individually, select Auto per item. This setting is recommended for most receiving processes.
  - If you want each item within a unit to share the same barcode, then select New Unit. This setting is advised for most binding processes.
  - If you want the item to be received or bound into an existing item, select Recent and select the desired issue. To making a change in bound items, receive or bind the items into an already existing unit.
- 5. Click Receive/Move Selected.
- 6. Enter a barcode and call number if prompted to do so.
- 7. A message confirming receipt of the item appears. Click OK.

8. The screen refreshes. In the top half of the screen, the item displays a received date. In the bottom half of the screen, the item that you have just received is now at the top of the list of the received items.

After receiving items, you can view the updated holdings in the OPAC. In this example, the legacy MFHD record and the items recently received in the serial control view display together in the MFHD statement.

## **Batch Receiving**

You can batch receive items through a simple or an advanced interface. The simple interface does not allow you to add barcodes or use the copy template. These items are also not visible in the OPAC. The advanced interface enables you to use the copy templates that you created, add barcodes, and make items OPAC visible and holdable.

You can access both Batch Receive interfaces from two locations in the ILS. From the Subscription Details screen, you can click Batch Item Receive. You can also access these interfaces by opening the catalog record for the serial, and clicking Actions for this Record. Serials Batch Receive.

#### **Simple Batch Receiving**

Follow these steps to receive items in batch in a simple interface.

Title: The journal of American history Author: Organization of American Historians Fulfilling Subscription: 8: (BOYLSTON) 3/1/12 - Issuance: v.99:i.3(2012:Autumn)							
Org Unit	Note	Routing List	Receive?	Apply			
BOYLSTON							
Receive Selected	Items						

- 1. The Batch Receive interface displays issues that have not yet been received. The earliest expected issue appears at the top of the list.
- 2. In the right lower corner, you see a check box to Create Units for Received Items. If you do not check this box, then you will receive items in simple mode.
- 3. Click Next.
- 4. In simple mode, the distributions that you created are displayed. They are marked received by default. If you hover over the branch name, you can view the name of the distribution and its stream.
- 5. You can receive and add a note to each item individually, or you can perform these actions on all of the distributions and streams at once. To do so, look above the line, and enter the note that you want to apply to all copies and confirm that the box to Receive. is checked.
- 6. Click Apply. The note should appear in the note field in each distribution.
- 7. Then click Receive Selected Items.
- 8. The received items are cleared from the screen.

#### **Advanced Batch Receiving**

Follow these steps to receive items in batch in a simple interface.

Title: The journal of American history Author: Organization of American Historians Fulfilling Subscription: 8: (BOYLSTON) 3/1/12 - Issuance: v.99:i.3(2012:Autumn)						
Org Unit	Note	Routing List	Receive?	Apply		
BOYLSTON		V				
Receive Selected	Items					

- 1. The Batch Receive interface displays issues that have not yet been received. The earliest expected issue appears at the top of the list.
- 2. If you want to barcode each copy, display it in the catalog, and make it holdable, then check the box adjacent to Create Units for Received Items in the lower right side of the screen.
- 3. This will allow you to utilize the copy templates and input additional information about the copy:
- 4. Barcode You can scan printed barcodes into the barcode field for each copy, or you can allow the system to auto-generate barcodes. To auto-generate barcodes, check the box adjacent to Auto-generate., and enter the first barcode into the barcode field in the first row of the table. Then press the Tab key. The remaining barcode fields will automatically populate with the next barcodes in sequence, including check digits.
- 5. Circ Modifiers The circ modifiers drop down menu is populated with the circulation modifiers that you created in Admin . Server Administration . Circulation Modifiers. If you entered a circ modifier in the copy template that you created for this subscription, then it will appear by default in the distributions.
- 6. Call Number Enter a call number. Any item with a barcode must also have a call number.
- 7. Note Add a note. There are no limits on the number of characters that can be entered in this field. The note only displays in this screen.
- 8. Copy Location The copy location drop down menu is populated with the copy locations that you created in Admin . Local Administration . Copy Location Editor. If you entered a copy location in the copy template that you created for this subscription, then it will appear by default in the distributions.
- 9. Price If you entered a price in the copy template that you created for this subscription, then it will appear by default in the distributions. You can also manually enter a price if you did not include one in the copy template.
- 10.Receive The boxes in the Receive Column are checked by default. Uncheck the box if you do not want to receive the item. Evergreen will retain the unreceived copies and will allow you to receive them at a later time.
- 11. When you are ready to receive the items, click Receive Selected Items.
- 12. The items that have been received are cleared from the Batch Receive interface. The remaining disabled item is an unreceived item.

13.If the items that you received have a barcode, a copy template that was set to OPAC Visible, and are assigned a shelving location that is OPAC Visible, then you can view the received items in the catalog. Notice that the Holdings Summary has been updated to reflect the most recent addition to the holdings.

## **Chapter 51. Special Issues**

Currently, Setting up the special issue can only be done through the Alternate Serials Control view.

- 1. Create an issuance in the Serials Control View or the Alternate Serials Control View
- 2. In the Alternate Serials Control View, click on the name of your special issue in the list of issuances.
- 3. Click the New Items button
- 4. Enter the appropriate information
- 5. The item is now ready to receive. If you complete the Date Received field and change the status to received then it will receive the issue but it won't create the associated copy record whereas if you leave it blank and receive the item through the Serials Control View or Batch Receive function you can create the Copy Record at that time.

## **Chapter 52. Holdings**

## **System Generated Holdings Statement**

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

## **MARC Format for Holdings Display (MFHD)**

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

#### **Create an MFHD record**

- 1. Open a serial record, and in the bottom right corner above the copy information, click Add MFHD Record. You can also add the MFHD statement by clicking Actions for this Record .MFHD Holdings .Add MFHD Record.
- 2. A message will confirm that you have created the MFHD Record. Click OK.
- 3. Click Reload in the top left corner of the record.
- 4. The Holdings Summary will appear. Click Edit Holdings in the right corner.
- 5. Click Edit Record.
- 6. The MFHD window will pop up. Enter holdings information. Click Save MFHD.
- 7. Close the MFHD window.
- 8. Click Reload in the top left corner of the record. The Holdings Summary will reflect the changes to the MFHD statement.

#### Edit a MFHD record

- 1. Open a serial record, and in the Actions for this Record, click MFHD Record>>Edit MFHD Record and select the appropriate MFHD.
- 2. Edit the MFHD
- 3. Click Save MFHD

#### **Delete a MFHD Record**

- 1. Open a serial record, and in the Actions for this Record, click MFHD Record>>Delete MFHD Record and select the appropriate MFHD.
- 2. Click to confirm the deletion of the MFHD

# Chapter 53. Group Serials Issues in the Template Toolkit OPAC

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



This feature is only available in the Template Toolkit OPAC.

## Administration

Enable the following organizational unit settings to use this feature:

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

## **Displaying Issues in the OPAC**

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

- 1. Retrieve the bibliographic record for the serial, and click **Actions for this Record # Alternate Serial Control**.
- 2. Create a New Subscription or click on the hyperlinked ID of an existing subscription.
- 3. Click New Distribution.

- 4. Create a label to identify the distribution.
- 5. Select the holding library from the drop down menu that will own physical copies of the issues.
- 6. Select a display grouping. Select chronology from the drop down menu.
- 7. Select a template from the drop down menu to receive copies.
- 8. Click Save.

Summary	Distributions	Captions and Patt	erns	Issuances
Distributio	ns			
Back <u>Next</u>				
√ #	Label	Ibscription	9	
	La	bel	Issue	es to Forest Falls Branch
	Ho	olding Lib	FOR	EST FALLS
	Di	splay Grouping	Chro	nology
	Re	eceive Unit Template	New	Periodicals 🔹
	Su	ummary Method		
	Ur	nit Label Prefix		
	Ur	nit Label Suffix		
		Cancel	Sav	/e

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

10.Complete the creation of your subscription.

- 11.Retrieve the record from the catalog.
- 12.Scroll down to and click the Issues Held link. The issues label for each branch appears.
- 13.Click the hyperlinked issues label.

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

Record Summany ( Add Volumes ) ( )	iew MARC )						
Title: Martha Stewart living Author: Stewart, Martha. Bib Call #: 640/.5	<u>IEW MIAILE</u> /			Edition: Pub Date	: 1990	TCN: Database II Record Ow	268 D: 268 ner:
Record 2 of 2 Start Previous	Next End	Searc <u>h</u> Resu	lts				
Go Back Reload Go Forward							
	ARDS, REVIEWS, & SUGGESTED	READS					
	JES HELD						
Silva Co Sier	onsortium ra Public Library System IcKinley Grove Public Library • <u>v.50:no.2(2012;Feb.) - v.</u>	51:no.3(2013:Ma	<u>ar.)</u>				
F	▼ v 50:no 2(2012:Feb.) - v.5	51:no.3(2013:Ma	<u>ar.)</u>				
F	▼ v 50:no 2(2012:Feb.) - v.5 ▼ 2013 ISSUE LABEL	CALL NUMBER	BARCODE	SHELVING LOCATION	AGE HOLD PROTECTION	CREATE DATE	HOLDAE
F	▼ v 50:no 2(2012;Feb.) - v.9 ▼ 2013 ISSUE LABEL v.51:no.1(2013;Jan.)	CALL NUMBER	BARCODE 300023983289	SHELVING LOCATION	AGE HOLD PROTECTION	CREATE DATE 05/11/2012	HOLDAE Place o
F	▼ v.50:no.2(2013:Jeb.) - v. ▼ v.50:no.2(2012:Feb.) - v. ISSUE LABEL v.51:no.1(2013:Jan.) v.51:no.2(2013:Feb.)	CALL NUMBER PER PER	BARCODE <u>300023983289</u> <u>30030439498</u>	SHELVING LOCATION Periodicals Periodicals	AGE HOLD PROTECTION None None	CREATE DATE 05/11/2012 05/11/2012	HOLDAE Place o Place o

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

1 Bib Record: 2688 +						
Record Summary       ( Add Volumes ) ( View MARC )         Title:       Martha Stewart living         Author:       Stewart, Martha.         Bib Call #: 640/.5			Edition: Pub Date:	1990	TCN: Database ID Record Own	268 : 268 ner:
Record 2 of 2     Start     Previous     Next     End       Go Back     Reload     Go Forward       Subject: Home economics     > Periodic	Searc <u>h</u> Resu	ults				
AWARDS, REVIEWS, & SUGGES	TED READS					
▼ <u>v.50:no.2(2012:Feb.)</u> ▼ <u>v.51</u>	-v.51:no.3(2013:M	ar.)				1101.01
v 51 no 1/2013: la	CALL NUMBER	300023983290	Periodicals	None	05/11/2012	Place
v.51:no.2(2013:Fe	b.) PER	30030439499	Periodicals	None	05/11/2012	Place
v.51:no.3(2013:Ma	ar.) PER	30002383983905	Periodicals	None	05/11/2012	Place
► <u>v. 50</u> Forestrans rubic Library ► <u>v.50:no.2(2012:Feb.)</u>	- v.51:no.3(2013:M	ar.)				

## **Part X. Circulation**

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## **Chapter 54. Introduction**

Use this section for understanding the circulation procedures in the Evergreen system.

# Chapter 55. Circulating Items Check Out (F1)

#### **Regular Items**

1) To check out an item press **F1**, click **Check Out** on the Circulation toolbar, or select **Circulation # Check Out Items**.

<u>C</u> irculation	Catalo <u>q</u> ing		
Check <u>O</u> ut Items		F1	
Check I atems		F2	

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

1	1 Check Out						
ſ	Retrieve	Patron					
	<u>B</u> arcode:	2373800000001	<u>S</u> ubmit				

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

Check Out		
Barcode:	31549000087592	<u>S</u> ubmit

4) Due date is now displayed.

Check Out		
Barcode:	Submit	
Barcode	Due Date	Title
31549000087592	6/6/11 11:59 PM	Pride and prejudice

5) When all items are scanned, hit the **F1** key or click the **Check Out** button on the Circulation toolbar to generate slip receipt or to exit patron record if not printing slip receipts.

#### **Pre-cataloged Items**

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

- 2) Scan the item barcode.
- 3) At prompt, click **Pre-Cataloged**.

Sert Sert	- 0 💌
Alert	
Mis-scan or non-cataloged item. Checkout as a pre-cataloged item?	
Options	
Cancel Pre-cataloged	Copy Message

4) Enter required information and click Check Out.

Pre-Catalog Fi	eld Entry
<u>T</u> itle	Ghosts of Massachusetts
Author	Standish, Myles
ISBN	123456789123
Circ <u>M</u> odifier	<unset></unset>
	Check Out



On check-in, Evergreen will prompt staff to re-route the item to cataloging.

#### **Due Dates**

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

Before you scan the item, select the **Specific Due Date** checkbox. Use the calendar widget to select a date. Or click in day, month or year, then use the up or down arrows to make the change or simply delete the data, then enter again. Time is used for hourly loan only. This date applies to all items until you change the date, de-select the **Specific Due Date** checkbox, or quit the patron record.

Check Out						
Barcode: 🔹	Submit		Specific D <u>u</u> e Date	05/16	/ 2011	÷ -
Barcode	Due Date	Title		•	May	2011
				SM	TW	TF
				8 9	3 4 10 11	5 0 12 13
				15 16	17 18	19 20
				22 23	24 25	26 27
				29 30	31 h	ç
a						

Check Out				
Barcode: 🗸	Sub	omit 🔍	Specific D <u>u</u> e Date	06/16/2011 🛓 🗸

## Check In (F2)

#### **Regular check in**

1) To check in an item, select Circulation # Check In Items, click Check In on the Circulation toolbar, or press F2.

<u>Circulation</u>	Catalo <u>g</u> ing	
Check Out	F1	
Check In I	tems	F2
kegister P	atron	Shift+F1
Retrieve <u>L</u> a	ast Patron	F8

2) Scan item barcode or enter manually and click Submit.

<u>1</u> ŀ	tem Check In 2	Bib Record: 307881								
	Check In or Process Item									
	Auto-Print Hold and Transit Slips									
	Check In Enter B <u>a</u> rcode:	32114000771270		Submit	]	Effec	tive <u>D</u> ate:	05/ 19/	2011 🔺 🗸	
	Alert Message	Balance Owed	Barcode	Bill #	Checkin Date	Family Name	Finish	Location	Route To	

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

Transaction for 333001 billable \$2.10 Fine Tally: \$2.10							
Alert Message	Balance Owed	Barcode	Bill #	Checkin Date	Family Name		
	2.10	333001	8	5/19/11 4:28 PM	Lussier		

#### **Backdated check in**

This is useful for clearing a book drop.

1) To change effective check-in date, select **Circulation # Check In Items**, or press **F2**. Use the calendar widget to choose the effective date.

Enter B <u>a</u> rcode:			Submit	]	Effe	tive <u>D</u> ate:	05/	19/	20	11	* •	A	ctions
Alert Message	Balance Owed	Barcode	Bill #	Checkin Date	Family Name	Finish	• S 1 8 15 22 29	M 2 9 16 23 30	Ma T 3 10 17 24 31	y 4 11 18 25	20 T 5 12 19 26	11 F 6 13 20 27	• 5 7 14 21 28

2) The top green bar changes to red. The new effective date is now displayed in the header.

		Backd	ated	2011-05	-16 Che	ck In		
Check In Enter B <u>a</u> rcode:			Submit		Effe	ctive <u>D</u> ate:	05/ 16/	2011 🔺 🗸
Alert Message	Balance Owed	Barcode	Bill #	Checkin Date	Family Name	Finish	Location	Route To

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

#### **Backdate Post-Checkin**

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

1) Select the item on the Check In screen, click Actions for Selected Items # Backdate Post-Checkin.

Check In										
Enter B <u>a</u> rcode:		Submit	]				Effective <u>D</u> ate:	05/ 19/	2011 🏺 🗸	Actions for <u>S</u> ele
32114001901769 was	already checked in.									Copy to C
Alert Message	Balance Owed	Barcode	Bill #	Checkin Date	Family Name	Finish	Location	Route To	Start	Add to Ite
		32114001901					Stacks	Stacks		<u>S</u> how in C
b1 was either mis-s		b1								Show Item
										Show <u>L</u> ast
										<u>R</u> etrieve La
										Edit Item
										<u>B</u> ackdate

2) Use the calendar widget to select an effective check-in date. Click Apply. Overdue fines, if any, will be adjusted according to the new effective check-in date.

Cancel Hold			
Backdate		Backdate Alı	ready-Checked-In Circulation
Number of circu	ulations sele	ected: 1	
Effective <u>D</u> ate:	05/ 19/	2011 🔺 🗸	<u>Cancel</u> <u>Apply</u>

1	Checkin Modifiers				
---	-------------------	--	--	--	--

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

- Ignore Pre-cat Items: no prompt when checking in a pre-cat item. Item will be routed to Cataloging with Cataloging status.
- Suppress Holds and Transit: item will not be used to fill holds or sent in transit. Item has Reshelving status.
- Amnesty Mode/Forgive Fines: overdue fines will be voided if already created or not be inserted if not yet created (e.g. hourly loans).
- Auto-Print Hold and Transit Slips: slips will be automatically printed without prompt for confirmation.

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



## **Renewal and Editing the Item's Due Date**

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

#### **Renewing via a Patron's Account**

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

			Refresh <u>Check Ou</u>	t <u>Items Out</u> 3	Holds
Items Out					
Barcode	Checkout or Renew Library	Circulation Library	Due Date	Fines Stopped	Remaining Ren
33934002432954	MBI	MBI	5/16/11 11:59 PM		2
33934003043396	MBI	MBI	6/16/11 11:59 PM		2
31549000087592	MBI	MLA	6/6/11 11:59 PM		2

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

Items Out							Act
Barcode	Checkout or Renew Library	Circulation Library	Due Date	Fines Stopped	Remaining Renewals	Title	<u>C</u> opy to
33934002432954	MBI	MBI	5/16/11 11:59 PM	2	2	E.T. the E	Add to I
33934003043396	MBI	MBI	6/16/11 11:59 PM	2	2	The new	Show in
31549000087592	MBI	MLA	6/6/11 11:59 PM	2	2	Pride and	Show Ite Show La Show Tr
							Edit Iten
							Mark Lo Mark Cla
Show Non-Catalo	and Circulations in List Above				Auto-Print Hold and	Transit S	Renew
Loct Chimod Potu	uned Long Overdue Has Uppaid Pi	lling	1 1		Auto- <u>r</u> init Hold and		Renew v

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

Select Date or Timestamp:							
Renew with Due Date	Renew with Due Date						
Enter a new due date for these items to be renewed: 33934002432954							
Date: 05/16/ 2011 → 11: 25: 06 AM →	ancel <u>A</u> pply						



Renewal can also be done on the Item Status screen. See the section called <u>Item Status (F5)</u> for more information.

## **Renewing by Item Barcode**

1) To renew items by barcode, select Circulation # Renew Items or press CTRL-F2.

2) Scan or manually entire the item barcode.

		Renew Item
Renew		
Enter B <u>a</u> rcode:	31589026548963 Submit	Specific D <u>u</u> e Date     05/ 20/ 2011

3) If you want to specify the due date, click **Specific Due Date** and select a new due date from the calendar.

Renew	/ Item									
	✓ Specific Due	Date	06/	20/	20	)11	<u>*</u> •		8: 5	3: 29 AM 🌲
Due Date	Family Name	Finis	4		Jur	ie	20	11	۰	Renewals S
6/20/11 11:5	Dickinson	5/20,	S	М	Т	W	Т	F	S	5/
						1	2	3	4	
			5	6	7	8	9	10	11	
			12	13	14	15	16	17	18	
			19	20	21	22	23	24	25	
			26	27	28	29	30			

#### **Editing Due Date**

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

2) Select the item you want to renew. Click on Actions for Selected Items # Edit Due Date.

Items Out						
Barcode	Checkout or Renew Library	Circulation Library	Due Date	Fines Stopped	Remaining Renewals	Title
33934002432954	MBI	MBI	6/6/11 11:59 PM		1	E.T. the I
33934003043396	MBI	MBI	6/16/11 11:59 PM		2	The new
31549000087592	MBI	MLA	6/6/11 11:59 PM		2	Pride and

3) Select a new due date in the pop-up window, then click Apply.



You can select multiple items by pressing down the CTRL key on your keyboard and clicking each items you want to edit.



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

## **Marking Items Lost and Claimed Returned**

#### Lost Items

- 1) To mark items Lost, retrieve patron record and click Items Out.
- 2) Select the item. Click on Actions for Selected Items # Mark Lost (by Patron).

Items Out							Acti
Barcode	Checkout or Renew Library	Circulation Library	Due Date	Fines Stopped	Remaining Renewals	Title	Copy to (
33934002432954	MBI	MBI	6/6/11 11:59 PM		1	E.T. the E	Add to Ite
33934003043396	MBI	MBI	6/16/11 11:59 PM		2	The new	Show in (
31549000087592	MBI	MLA	6/6/11 11:59 PM		2	Pride and	Show <u>I</u> ter Show <u>L</u> as Show <u>T</u> rig <u>E</u> dit Item
							Edit Due Mark Los Mark Clai

3) The lost item now displays in the Lost/Claimed Returned/Long Overdue, Has Unpaid Billings section of the patron record.

Lost, Claimed Returned	, Long Overdue, Has Unpaid	Billings			
					Actions f
Barcode	Checkin Date	Checkout or Renew Library	Circulation Library	Fines Stopped	Title
33934003043396		MBI	MBI	LOST	The new solar system : ice worlds, mo
31549000087592		MBI	MLA	CLAIMSRET	Pride and prejudice

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





Lost Item Billing

- Marking an item Lost will automatically bill the patron the replacement cost of the item as recorded in the price field in the item record, and a processing fee as determined by your local policy. If the lost item has overdue charges, the overdue charges may be voided or retained based on local policy.
- A lost-then-returned item will disappear from the Items Out screen only when all bills linked to this particular circulation have been resolved. Bills may include replacement charges, processing fees, and manual charges added to the existing bills.
- The replacement fee and processing fee for lost-then-returned items may be voided if set by local policy. Overdue fines may be reinstated on lost-then-returned items if set by local policy.

### **Refunds for Lost Items**

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

If you need to balance a bill with a negative amount and close the linked lost circulation record without making a refund (removing the item from the **Lost, Claimed Returned, Long Overdue, Has Unpaid Bills** panel on the **Items Out** screen), you need to add two dummy bills to the existing bills. The first one can be of any amount (e.g. \$0.01), while the second should be of the absolute value of the negative amount. Then you need to void the first dummy bill. The reason for using a dummy bill is that Evergreen will check and close the circulation record only when payment is applied or bills are voided.

#### **Claimed Returned Items**

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

2) Select the item, then select Actions for Selected Items # Mark Claimed Returned from the dropdown menu.

items out							Action
Barcode	Checkout or Renew Library	Circulation Library	Due Date	Fines Stopped	Remaining Renewals	Title	<u>C</u> opy to Cli
33934002432954	MBI	MBI	6/6/11 11:59 PM		1	E.T. the E	Add to Item
31549000087592	MBI	MLA	6/6/11 11:59 PM		2	Pride and	Show in Cat
							Show Item I
							- Show Last F
							Show Trigg
							E dia tauna Ad
							Edit Item At
							Edit Due Da
							Mark Lost (I
							Mark Claim
Show Non-Catalog	ed Circulations in List Above				Auto-Print Hold and	Transit S	Renew

#### 3) Select a date and click **Apply**.

Itoms Out

Select Date or Timestamp:						
Claimed Returned	Date Claimed					
Enter a claimed returned date for these items: 31549000087592						
Date: 05/16/ 2011 ▲ 1:00:37 PM ★ Cance	l <u>A</u> pply					

4) The Claimed Returned item now displays in the Lost/Claimed Returned/Long Overdue, Has Unpaid Billings section of the patron record.

Lost Claimed Returned	Long Overdue, Has Unnaid B	Rillings				
Lost, clained netaniea,	cong overdue, mas onpaid i	sinnys				
						Actions f
Barcode	Checkin Date	Checkout or Renew Library	Circulation Library	Fines Stopped	Title	
33934003043396		MBI	MBI	LOST	The new solar system : ice v	vorlds, mo
31549000087592		MBI	MLA	CLAIMSRET	Pride and prejudice	

5) The Claimed Returned item adds to the count of Check Outs that are Claimed Returned in the patron summary on the left (or top) of the screen. It also adds to the total **Claims-returned Count** (including those that are current Check Outs and those that have since been returned) that is displayed when editing the patron's record.





More on Claimed Returned Items

- The date entered for a Claimed Returned item establishes the fine. If the date given has passed, bills will be adjusted accordingly.
- When a Claimed Returned item is returned, if there is an outstanding bill associated with it, the item will not disappear from the **Items Out** screen. It will disappear when the outstanding bills are resolved.
- When an item is marked Claimed Returned, the value in **Claims-returned Count** field in the patron record is automatically increased. Staff can manually adjust this count by editing the patron record.

## In-house Use (F6)

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

Circulation Cataloging Acquisit	ions <u>B</u> ookin
Check Out Items	F1
Check In Items	F2
Re <u>n</u> ew Items	Ctrl+F2
Register Patron	Shift+F1
Pending Patrons	
Retrieve Last Patron	F8
Capture <u>H</u> olds	Shift+F2
Pull List for Hold Requests	
Browse Holds Shelf	
Place <u>H</u> old	F3
Show Item Status by <u>B</u> arcode	F5
Retrieve Patron by Barcode	F1
Verify Credentials	
Replace Barcode	
Record In-House Use	F6
Scan Item as Missing Pieces	
Re-Print <u>L</u> ast	F9

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

			Record In-House Use
In-House Use			
# of <u>u</u> ses: 1	Barcode: 🔹	33934000576075	



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

## Item Status (F5)

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

#### **Checking item status**

1) To check the status of an item, select **Search # Search for copies by Barcode** or **Circulation # Show Item Status by Barcode**; click the **Item Status button** on the circulation or cataloging toolbar; or press **F5**.

Circ	ulation Cataloging <u>A</u> o	quisitions	<u>B</u> ooki
	Check Out Items	F1	
	Check In Items	F2	
	Re <u>n</u> ew Items	Ctrl	+F2
	Register Patron	Shif	t+F1
	Pending Patrons		
	Retrieve Last Patron	F8	
	Capture <u>H</u> olds	Shif	t+F2
	Pull List for Hold Reque	ests	
	Browse Holds Shelf		
	Place <u>H</u> old	F3	
	Show Item Status by Ba	rcode F5	
	Retrieve Patron by Bar	Sde F1	

2) Scan the barcode or type it and click **Submit**. The current status of the item is displayed with selected other fields. You can use the column picker to select more fields to view.

m Status

3) Click the Alternate View button, and the item summary and circulation history will be displayed.

						Item St 33934002432	atus 2954	
can Item arcode: Alternate View Fitle: E.T. the B	Subr	ni <u>t</u> Upload Fro	om File	TCN:	932961	Created By: admin		
Author: Graham, Bib Call #: 523.2 Quick Summary Ci	Ian Pub Dat Item Ca rculation <u>H</u> istory Holds/Tr	e: 2002 II # J 523.2/GRA ansit Cataloging <u>I</u> n	ıfo	Record ID: Record Owner:	932961	Last Edited By: admin Last Edited On: 5/14/11 6:	10 PM	
Barcode	33934002432954	Circ Library	MBI		Item Call #	J 523.2/GRA	Status	Reshel
Price	6.00	Owning Library	MBI		Renewal Type	Desk	Due Date	6/6/11
ISBN	0753455153	Copy Location	Stacks		Total Circs	28	Checkout Date	5/16/1
Date Created	11/12/04 12:00 AM	Loan Duration	Normal		Total Circs - Current Vear		Checkout Workstation	MPLC
	11/11/01 11:00 / 11/1		raonnai		rotar enes carrent rear	2		IVIDI-C
Status Changed	5/16/11 1:20 PM	Fine Level	Normal		Total Circs - Prev Year	0	Duration Rule	IVIDI-C
Status Changed Copy ID	5/16/11 1:20 PM 8070492	Fine Level Reference	Normal		Total Circs - Prev Year Renewal Workstation	0 MBI-Coordinator	Duration Rule Recurring Fine Rule	IVIDI-C
Status Changed Copy ID TCN	5/16/11 1:20 PM 8070492 932961	Fine Level Reference OPAC Visible	Normal No Yes		Total Circs - Prev Year Renewal Workstation Remaining Renewals	0 MBI-Coordinator	Duration Rule Recurring Fine Rule Max Fine Rule	
Status Changed Copy ID TCN Floating	5/16/11 1:20 PM 8070492 932961 No	Fine Level Reference OPAC Visible Holdable	Normal No Yes Yes		Total Circs - Prev Year Renewal Workstation Remaining Renewals	2 0 MBI-Coordinator 1	Duration Rule Recurring Fine Rule Max Fine Rule Checkin Time	5/16/1
Status Changed Copy ID TCN Floating	5/16/11 1:20 PM 8070492 932961 No	Fine Level Reference OPAC Visible Holdable Circulate	Normal No Yes Yes Yes		Total Circs - Prev Year Renewal Workstation Remaining Renewals	2 0 MBI-Coordinator 1	Duration Rule Recurring Fine Rule Max Fine Rule Checkin Time Checkin Scan Time	5/16/1: 5/16/1:

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

			Item S 339340024	Status <sup>432954</sup>
Scan Item Barcode:	Submi <u>t</u> Upload From	n File		
Alert Message	Barcode	Call Number	Due Date	Location
	33934002432954	J 523.2/GRA	6/6/11 11:59 PM	Stacks



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



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

#### **Viewing past circulations**

- 1) To view past circulations, retrieve the item on the Item Status screen as described above.
- 2) Select Actions for Selected Items # Show Last Few Circulations.

Item S	Status 432954			
			Alternate <u>V</u> iew Actions <u>f</u> or	Catalogers Actions for Selected Items
	Location	Status	Title	<u>C</u> opy to Clipboard
9 PM	Stacks	Reshelving	E.T. the Extra-Terrestrial	dis <u>A</u> dd to Item Bucket
				Add to Record Bucket
				Show in Catalog
				Show <u>I</u> tem Details
				Show Last Few Circulations
				Show riggered Events

3) The item's recent circulation history is displayed.

Record Summary	( <u>View MARC</u> )					
The new solar system : ice       Edition:         Author:       Daniels, Patricia       Pub Date:       2009         Bib Call #:       523.2				TCN: Record ID: Record Owne	1193733 1193733 #r:	Created By: Last Edited By: Last Edited On:
Item Summary			1	I		
Alert Message	Barcode Cal 3393400304 523	Number 2/DANI	Circulation Library MBI	Location Stacks	Owning Library MBI	Total Circs 🛱 5
List Actions •	Show in Catalog	Alternat	e View			
Last Few Circulatio	ns		I	I		]
Dickinson, Emi	<b>ly : 1234</b> 5/16/11 1:43 PM	Due Date	6/6/11 11:59 PM St	op Fines Time	Circulati 5/16/11 1:43 PM Cha	eck In Time 5/
Bennett, Elizat	eth : 237380000	00001			Circulat	ion ID: 550736 ▲
Check Out Time	5/16/11 1:42 PM	Due Date	6/6/11 11:59 PM St	op Fines Time	5/16/11 1:42 PM Cha	eck In Time 5/ 👻
Dickinson, Emi	ly : 1234				Circulati	ion ID: 550735 🔺
Check Out Time	5/16/11 1:41 PM	Due Date	6/6/11 11:59 PM St	op Fines Time	5/16/11 1:41 PM Ch	eck In Time 5/
Bennett, Elizat	eth : 237380000	00001			Circi	ulation ID: 55065
Check Out Time	5/16/11 10:47 A	M Due Date	e 6/16/11 11:59 PM	Stop Fines Time	5/16/11 12:31 PM	Check In Time
Retrieve <u>L</u> ast Patron	Retrieve <u>A</u> ll Th	ese Patrons				Done

4) To retrieve the patron(s) of the last circulations, click the **Retrieve Last Patron** or the **Retrieve All These Patrons** button at the bottom of the above screen. Patron record(s) will be displayed in new tab(s).



note

The number of items that displays in the circulation history can be set in Local Administration # Library Settings Editor.

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

#### Marking items damaged or missing and other functions

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

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

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

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

#### **Item alerts**

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

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

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

Circulation (2)		Miscellaneous ( <u>3</u> )		Statistics ( <u>4</u> )	
Circulate?		Alert Message		Library Filter	+
Yes	1 copy	<unset></unset>	1 copy	MVLC : Collection	
Holdable?		Deposit?		167 - ADULT FICTION	1 сору
Yes	1 сору	No	1 сору	MVLC : Horizon Itype	
Age-based Hold Protection		Deposit Amount		B - Book	1 сору
<unset></unset>	1 copy	0.00	1 copy	MVLC : Purchase Source	
Floating?		Price		<unset></unset>	1 copy
No	1 copy	22.00	1 copy		

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

Miscellaneous ( <u>3</u> )
Alert Message
Damaged back cover.
Apply Cancel

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

## **Chapter 56. Booking Module**

## **Creating a Booking Reservation**

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

#### To create a reservation from a patron record

- 1) Retrieve the patron's record.
- 2) Select Other -# Booking -# Create or Cancel Reservations. This takes you to the Reservations Screen.

						Admin (-) <u>H</u> elp ×
Refresh Check Out	Items Out	<u>H</u> olds 1/3	<u>B</u> ills \$ 0.00		dit	Messages Other
Submit	Title	Specific Create or Ca Pick Up Rese	D <u>u</u> e Date ncel Reserva	16/06/ ations		Iriggered Events Statistical Categories Booking Surveys
		<u>R</u> eturn Reser	vations		]	<u>G</u> roup Member Details Test <u>P</u> assword <u>U</u> ser Permission Editor <u>T</u> oggle Summary
						Delete Patron Account Exit

3) For non-catalogued items, choose a Bookable Resource Type and click Next. For catalogued items, enter the barcode in Enter the barcode of a catalogued, bookable resource box, then click Next beside the box.

Patron: Pringle, Jennifer 2 Reservations
Go <u>B</u> ack Go Forward
Choose a Bookable Resource Type
Ereader Laptop Projector Room Video Connector
Next
- Or -
Enter the barcode of a cataloged, bookable resource: Next
To reserve an item that is not yet registered as a bookable resource, find it in the catalog or under Display Item, and select Make Item Bookable or Book Item Now there.
Existing reservations for Pringle, Jennifer:
This user has no existing reservations at this time.
Cancel selected

4) For non-catalogued resources, the Bookable Resource Type and the items associated with the type will appear.

1 Patron: Pringle, Jennifer 2 Reservations	
Go Back Go Forward Go Forward	
Laptop	I need this resource
98723000112235 98723000112234 98723000112233 98723000112244 98723000112246	Between 6/16/2011 16:19 and 6/16/2011 16:19
	With these attributes: Operating System ANY  Computing Platform ANY
Choose the pickup library for this reservation: BPR    Reserve Selected Reserve Any	
Existing reservations for Pringle, Jennifer: This user has no existing reservations at this time. Cancel selected	

For catalogued items, the title and the item will display in the box.

5) Select the date and time for the reservation in I need this resource... area. Click the date field. A calendar widget will be displayed for you to choose a date. Click the time field to choose time from the dropdown list.

Between		
6/16/2011		15:39
and		<b>^</b>
6/16/2011		15:15
With these attributes:		15:30
		15:45
Operating System	ANY	16:00
		16:15
Computing Platform	ANY -	16:30
		-



If incorrect date and time is selected, the date/time boxes will appear in red. For example, if the time for which the reservation is set has already passed, the boxes will appear in red. There must be at least 15 minutes between the creation of the reservation and the start time of the reservation.

6) For non-catalogued resources, patrons may specify special feature(s), if any, of the resource. With these attributes: allows you to do so. For example, if a patron is booking a laptop he/she can choose between PC and Mac and even choose a specific operating system if they need to. Click the drop down arrow to select your option from the list.



7) Select the pickup location from the dropdown list.

Choose the pickup library for this reservation:	BPR 🔻
	SITKA
Reserve Selected Reserve Any	BNCLF
	BPR
Existing reservations for Pringle, Jen	BTE
This user has no existing reservations at this	BNELF
	BFN
Cancel selected	BTR

8) If there are multiple copies of the resource and any item listed is acceptable, click Reserve Any. To choose a specific item, select it and then click Reserve Selected.

Go Back Reload Go Forward	
Laptop	
98723000112235 98723000112234 98723000112233 98723000112244 98723000112236	
Choose the pickup library for this reservation: BPR	'
Reserve Selected Reserve Any	

9) A message will confirm that the action succeeded. Click OK on the prompt.

10) The screen will refresh and the reservation will appear below the patron's name at the bottom of the screen.

Patron: Pringle, Jennifer 2 Reservations				
Go <u>B</u> ack Reload Go Forward				
Laptop		I need this resou	rce	
98723000112235 98723000112234 98723000112244 98723000112236	*	Between 6/16/2011 and 6/16/2011	17:30	
Choose the pickup library for this reservation: BPR  Reserve Selected Reserve Any	Ţ	With these attribut	Ites: ANY • ANY •	
Existing reservations for Pringle, Jennifer:				
Туре	Resource		Start time	
Laptop	98723000112233		2011-06-16 17:30	
Cancel selected				

#### To create a reservation from a booking resource

You need to know the barcode of the patron when you create a reservation for him/her from a booking resource.

1) From the Booking menu, select Create Reservations

Booking	
Create Reservations	
Pull <u>L</u> ist	
Capture Resources	
Pick Up Reservations	
<u>R</u> eturn Reservations	

2) Choose a Bookable Resource Type and click Next or enter the barcode of a catalogued resource and click Next.

1	Reservations		
[	Go <u>B</u> ack Go Forward		
	Choose a Bookable Resource Type		
	Ereader Laptop Projector Room Video Connector		
	Next		
	- Or -		
	Enter the barcode of a cataloged, bookable resource:		
	To reserve an item that is not yet registered as a bookable resource, find it in the catalog or under Display Item, and select Make Item Bookable or Book Item Now there.		

3) For non-catalogued resources, a screen showing the Bookable Resource Type and the items associated with the type will appear.

Reservations	
Go Back     Reload     Go Forward       Laptop	I need this resource
98723000112233 98723000112235 98723000112234 98723000112236 98723000112244	Between 6/15/2011 and 6/15/2011 14:37 With these attributes:
Ψ.	Operating System ANY   Computing Platform ANY
Reserve to patron barcode: Choose the pickup library for this reservation: BPR Reserve Selected Reserve Any	

For catalogued resources, the title and item will appear.
4) Enter the user's barcode in the Reserve to patron barcode box. The user's existing reservations, if any, will appear at the bottom of the screen.



5) Select the date and time for the reservation in I need this resource... area. Click the date field. A calendar widget will be displayed for you to choose a date. Click the time field to choose time from the dropdown list.

Settieen	
6/16/2011	15:39
and	<b>^</b>
6/16/2011	15:15
	15:30
With these attributes:	15:45
Operating System ANY	16:00
	16:15
Computing Platform ANY	16:20



If incorrect date and time is selected, the date/time boxes will appear in red. For example, if the time for which the reservation is set has already passed, the boxes will appear in red. The times must be set correctly for the reservation to be created. There must be at least 15 minutes between the creation of the reservation and the start time of the reservation.

6) For non-catalogued resources, patrons may specify special feature(s), if any, of the resource. The With these attributes: allows you to do so. For example, if a patron is booking a laptop they can choose between PC and Mac and even choose a specific operating system if they need to. Click the dropdown arrow to select your option from the list.



7) Select the pickup location from the dropdown list.

Choose the pickup library for this reservation:	BPR 💌	
Reserve Selected Reserve Any	SITKA	
	BNCLF	
	BPR	
Existing reservations for Pringle, Jen	BTE	
This user has no existing reservations at this t	BNELF	
	BFN	
Cancel selected	BTR	
		`

8) If there are multiple copies of the resource and any item listed is acceptable, click Reserve Any. To choose a specific item, select it and then click Reserve Selected.

Go Back Reload Go Forward				
Laptop				
98723000112235 98723000112234 98723000112233 98723000112244 98723000112236				
Choose the pickup library for this reservation: BPR				
Reserve Selected Reserve Any				

9) A message will confirm that the action succeeded. Click OK on the prompt.

10) The screen will refresh and the reservation will appear below the patron's name at the bottom of the screen.

Patron: Pringle, Jennifer 2 Reservations			
Go Back Reload Go Forward			
Laptop		I need this resource	e
98723000112235 98723000112234 98723000112244 98723000112246	~	Between 6/16/2011 and 6/16/2011	17:30 18:45
	Ŧ	With these attribute Operating System At Computing Platform	ANY -
Choose the pickup library for this reservation: BPR	-		
Reserve Selected Reserve Any			
Existing reservations for Pringle, Jennifer:			
Туре	Resource	S	tart time
Laptop	98723000112233	2	011-06-16 17:30
Cancel selected			

#### Search the catalogue to create a reservation

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

1) In the staff client, select Cataloguing -# Search the Catalogue or keyboard shortcut F3 to search for the item you wish to reserve. You may search by any bibliographic information.

2) Click the title to display the record summary. In the Copy Summary, select Copy Details in Actions column.

3) The Copy Details will appear in a new row. In the barcode column, click the book now link.

4) A screen showing the title and barcodes of available copies will appear.

5) Enter the user's barcode in the Reserve to patron barcode box. The user's existing reservations, if any, will appear at the bottom of the screen.

6) Select the date and time in I need this resource... section. If the date and time set is incorrect the boxes appear in red. For example, if the time for which the reservation is set has already passed, the boxes will appear in red.

7) Select pickup location. If there are multiple copies and any of the listed items is acceptable, click Reserve Any. To choose a specific item, select it and then click Reserve Selected.

8) A message will confirm that the action succeeded. Click OK on the prompt.

9) The screen will refresh, and the reservation will appear below the user's name.



Reservations on catalogued items can be created on Item Status (F5) screen. Select the item, then Actions for Selected Items # Book Item Now.

## **Reservation Pull List**

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

1) To create a pull list, select Booking -# Pull List.

Booking			
Create Reservations			
Pull <u>L</u> ist			
Capture Resources			
Pick Up Reservations			
<u>R</u> eturn Reservations			

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

3) Click Fetch to retrieve the pull list.

1	Booking Pull List
	Go <u>B</u> ack Rejoad Go Forwar <u>d</u>
	Booking Pull List
	See pull list for library: BPR
	Generate list for this many days hence: 1
	Fetch
Ц	

4) The pull list will appear. Click Print to print the pull list.

-			
Barcode	Call number	Copy location	Reservation details
98723000112233	-	-	2011-06-17 17:30 - 2011-06-17 18:45 at BPR for Pringle, Jennifer
98723000112236	-	-	2011-06-17 13:00 - 2011-06-17 14:00 at BPR for Marple, Jane
	▼ Barcode 98723000112233 98723000112236	Barcode         Call number           98723000112233         -           98723000112236         -	Barcode         Call number         Copy location           98723000112233         -         -           98723000112236         -         -

#### **Capturing Items for Reservations**

Reservations must be captured before they are ready to be picked up by the patron.



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

1) In the staff client, select Booking -# Capture Resources.



2) Scan the item barcode or type the barcode then click Capture.

_	
1	Booking Capture
	Go Back Go Forward
	Capture Reserved Resources
	Enter barcode: 98723000112233 Capture

3) The message Capture succeeded will appear to the right. Information about the item will appear below the message. Click Print button to print a slip for the reservation.

1 Booking	Capture
Go	ack Rejoad Go Forward
Cap	ture Reserved Resources
Enter t	barcode: 98723000112233 Capture Capture Succeeded
Capt	ure Information Print
This i Barco Title:	item need to be routed to <b>RESERVATION SHELF:</b> ode: 98723000112233 Laptop
Reso Barco	erved for patron Pringle, Jennifer ode: 998723000123456
Requ Rese	rved from: 2011-06-17 11:50 rved from: 2011-06-17 17:30 - 2011-06-17 18:45
Slip o Printe	date: Fri Jun 17 13:54:25 2011 ed by System Account, Administrator at BPR

## **Picking Up Reservations**



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

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

						Admin (-)	<u>H</u> elp
							×
Refresh Check Out	<u>I</u> tems Out	Holds	<u>B</u> ills \$ 0.00	<u>E</u>	dit	Messages Other	• ] s
Submit		Specific	D <u>u</u> e Date	17/ 06/	   	<u>N</u> otes Triggered E <u>v</u> ents <u>S</u> tatistical Categories	
	Title	Create or Car	ncel Reserva	ations		Booking	•
		Pick Up Rese	rvations			Surve <u>y</u> s	
		<u>R</u> eturn Reser	vations			Group Member Details	
	_					Test <u>P</u> assword	
					!	User Permission Editor	
						Toggle Summary	
					1	Delete Patron Account	
						Exit	

Booking				
	Create Reservations			
	Pull <u>L</u> ist			
	Capture Resources			
	Pick Up Reservations			
	Return Reservations			

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

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

			_
1 Patron: Pringle, Jennifer 2 Reservation Pickup			
Go Back Reload Go Forward			Ī
Reservations Pickup			
Pringle, Jennifer			
Patron has these reservations ready for nickun-			
Tal.	Devent	Otest Mars	
	Barcode	Start time	-
	30123000112233	2011-00-11 11:50	
Pickup			
Poten oursette has these consistions out:			-
Patron currently has these reservations out:			
Patron has no more reservations out at this time.			
			Ī
			ī

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

Patron: Pringle, Jennifer 2 Reservation Pickup			
Reservations Pickup			
Pringle, Jennifer			
Patron has these reservations ready for pic	sup:		
Patron has no reservations ready for pickup at a	his time.		
Patron currently has these reservations out			
Title	Barcode	Pickup time	1
Laptop	98723000112233	2011-06-17 14:06	

## **Returning Reservations**



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

1) To return reservations, select Booking -# Return Reservations



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

_	
1	Reservation Return
Г	
	Go Back Reload Go Forward
L	
	Reservations Return
	Return by barcode of Resource  98723000112233 Go Resource
	Patron
L	

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

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

1 Patron: Pringle, Jennifer 2 Reservation Return			
Go Back Reload Go Forward			
Reservations Return			
Pringle, Jennifer			
Patron currently has these reservations out:			
Title	Barcode	Pickup time	[
Laptop	98723000112233	2011-06-17 14:06	2
Return			
Patron has returned these resources today:			
Patron has not returned any resources today.			

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

Go Back Reload Go Forward			
Reservations Return			
Return by barcode of Resource - 9872300011223	3 Go		
Pringle Jennifer			
Fingle, Vennier			
Patron currently has these reservations out:			
Patron currently has these reservations out: Patron has no more reservations out at this time.			
Patron currently has these reservations out: Patron has no more reservations out at this time. Patron has returned these resources today:			
Patron currently has these reservations out: Patron has no more reservations out at this time. Patron has returned these resources today: Title	Barcode	Due time	F



Reservations can be returned from within patron records by selecting Other -# Booking -# Return Reservations

## **Cancelling a Reservation**

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

#### Cancel a reservation from the patron record

- 1) Retrieve the patron's record.
- 2) Select Other -# Booking -# Create or Cancel Reservations.

						Admin (-)	<u>H</u> elp
							×
Refresh Check Ou	It Items Out	Holds	Bills	<u>E</u> d	it	Messages Other	•
	1	1/3	\$ 0.00			Display <u>A</u> lert and Message	25
						<u>N</u> otes	
						Triggered E <u>v</u> ents	
Submit		Specific	D <u>u</u> e Date	16/ 06/		Statistical Categories	
	Title	Create or Ca	incel Reservati	ons		<u>B</u> ooking	•
		Pick Up Rese	ervations			Surve <u>y</u> s	
		Return Rese	rvations			Group Member Details	
						Test <u>P</u> assword	
						User Permission Editor	
						<u>T</u> oggle Summary	
						Delete Patron Account	
						E <u>x</u> it	

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

Go Back Reload Go Forward Choose a Bookable Resource Type Ereader Laptop Projector Room Video Connector			
Choose a Bookable Resource Type			
Ereader Laptop Projector Room Video Connector			
- Or -	Nevt		
To reserve an item that is not yet registered as a bookable resource, find it in the Existing reservations for Pringle, Jennifer:	catalog or under Display Item, and select Ma	ake Item Bookable or Book Item Now there.	
Туре	Resource	Start time	E
Laptop	98723000112233	2011-06-16 17:30	2
Ereader	98723000223356	2011-06-17 10:30	2

4) Highlight the reservation that you want to cancel. Click Cancel Selected.

ſ	Existing reservations for Pringle, Jennifer:						
I		Туре	Resource	Start time			
I		Laptop	98723000112233	2011-06-16 17:30			
I		Ereader	98723000223356	2011-06-17 10:30			
I	Са	ancel selected					

-	
- <b>P</b>	
-	
note	
6	
note	

Use Shift or Ctrl on keyboard and mouse click to select multiple reservations if needed.

- 5) A pop-up window will confirm the cancellation. Click OK on the prompt.
- 6) The screen will refresh, and the cancelled reservation(s) will disappear.

1 Patron: Pringle, Jennifer 2 Reservations			
Go Back Reload Go Forward			
Choose a Bookable Resource Type			
Ereader Laptop Projector Room Video Connector			
- Or -			
Enter the barcode of a cataloged, bookable resource:	Next		
To reserve an item that is not yet registered as a bookable resource, fin	d it in the catalog or under Display Item, and sel	ect Make Item Bookable or Book Item Now there.	
Existing reservations for Pringle, Jennifer:			
Туре	Resource	Start time	E
Laptop	98723000112233	2011-06-16 17:30	2
Cancel selected			

#### **Cancel a reservation on reservation creation screen**

1) Access the reservation creation screen by selecting Booking -# Create Reservations.

- 2) Select any Bookable Resource Type, then click Next.
- 3) Scan or type in the patron barcode in Reserve to Patron box then hit Enter.
- 4) Patron's existing reservations will display at the bottom of the screen.
- 5) Select those that you want to cancel, then click Cancel Selected.

# Chapter 57. Circulation - Patron Record Searching Patrons

To search for a patron, select the Patron Search option from the toolbar, *Search # Search for Patrons* from the menu bar, or **F4**.

The Patron Search screen will display. The orientation of the search pane may be vertical or horizontal, depending on your library's configuration. It will contain options to search on the following fields:

- Last Name
- First Name
- Middle Name
- Alias
- Address 1
- Address 2
- City
- Zip
- Phone
- Email
- State
- Barcode
- OPAC Login ID

Use the options above the search fields to include patrons marked "inactive" in your search results or to limit results to patrons in a specific library branch or in a specific permission group.

1	Patron Search 2	Register Patron <u>3</u> Patron	n: Turner, Margare	t Lynda +					
	No Patron Sel	ected				M	erge Patrons	Search <u>F</u> orm	Retrieve Patr
	Search for Patr	on							
	Include inactive	patrons? 📄 Limit resu	ults to patrons in	Example Consortium	Filter by Permission Profile:			•	
	Last Name:		A <u>d</u> dress 1:	<u>P</u> hone	e:	<u>B</u> arcode:	_		
	First Name:		Address 2:	Email	:	OPAC Login	:		Search
	Middle Name:		City:	State		ID:			
	Alias:		ZIP:						Clear Form



#### **Tips for searching**

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

Once you have located the desired patron, highlight the entry for this patron in the results screen. A summary for this patron will display in place of the search fields.



Use the Retrieve Patron button to retrieve the patron for circulation or editing.

11 Description   Blogmen 21 Description	
	Admin (-) <u>H</u> elp
🔢 Patron Registration 🝷	Toggle Hotkeys
<u>M</u> erge Patrons	Search Form Retrieve Patron
Account Info Identification Group: 0.00 Stat Cat	S

The Search Form button may be used to resume searching for patrons.

## **Registering New Patrons**

To register a new patron, select *Patron Registration* from the toolbar, *Circulation* # *Register Patron* from the menu bar, or **shift** + **F1**. The Patron Registration form will display.

1: ac	Imin@BR1-JTpals.testing.evergr dit Search Circulation Catalo	reen.lib.in.us oging Acquisitions Booking	Secondary Strength 11 Secondary 10	eques (d'Incomentation + [4]	Admin (-)
	heck Out 🔹 😚 Check In 🔹	Search Catalog + 📧 Ite	m Status + 💽 Patron Search + 🔝 Patron Registration +	N	Toggle Hot
					roggie noi
Patro	n Search   2 Register Patron   3 F	Patron: Turner, Margaret Lynda			
Re	eload			Debug	Print Page
	Barcode	A	Replace Barcode		-
	OPAC/Staff Client User Name	A			
	Password	1430	Reset Password	Save Save & Clone	
	Verify Password	1430		Show Suggested Fields	
	First Name	A			
	Middle Name				
	Prefix				
	Last Name	$\underline{\mathbb{A}}$			E
	Suffix/Title				
	OPAC/Staff Client Holds Alias				
	Date of Birth		Example: Jan 31, 1970		
	Juvenile				
	Primary Identification Type	<u>A</u> -			
	Primary Identification				
	Parent/Guardian				
	Email Address				
	Daytime Phone				
	Evening Phone				
	Other Phone				
	Home Library	Example Branch 1			
	Main (Profile) Permission Group	<u>A</u> -			
	Privilege Expiration Date	A	Example: Jan 31, 1970		
	Internet Access Level	Filtered •			
	Active	$\checkmark$			
	Barred				
	Is Group Lead Account				
	Claims-returned Count	0			-

#### Mandatory fields display in yellow.

Barcode	A
OPAC/Staff Client User Name	<u> </u>

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

C.a		Savo & Clono	
30	ve	Save & Clone	
Sho	w Only	<b>Required Fields</b>	
Sh	iow Su	ggested Fields	

When one of these options is selected, it is possible switch to the other limited view or to revert to the original view by selecting *Show All Fields*.



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

Hold Notification Format	Phone: 🗸 Email: 🗸	
Address	Mailing 🔍 Billing 🍳	X
This address is owned by another user	: <u>Jenny Pals</u>	
Туре	MAILING	
Postal Code	56001	
Street (1)	ML 3022	
Street (2)		
City	Mankato	
County		
State	MN	
Country	USA	

- Requested fields may be configured in the *Library Settings Editor* (*Admin # Local Admin # Library Settings Editor*).
  - Statistical categories may be created for information tracked by your library that is not in the default patron record.
  - These may be configured in the *Statistical Categories Editor* (*Admin # Local Admin # Statistical Categories Editor*).
  - Staff accounts may also function as patron accounts.

## **Updating Patron Information**

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

Select Edit from the options that display at the top of the patron record.

		0/0 \$ 0.00
(Invalid Date of Birth) Patron Info Pals, Test Date of Birth: <unset> Library Card: pals124 Used Align</unset>	Addresses ML 3022 Mankato MN 56001 Mailing O Billing (Copy/Print)	Account Info Identification Group: 0.00 Stat Cats Patrons BR1 Internet Filtered
OPAC Login: pals124 Email: School Departments Economics	Phone Numbers Day Phone: Evening Phone: Other Phone:	Account created on Jun 13, 2012 Expires on Jun 13, 2015 Last Activity <unset></unset>
Reload		Debug Print Pag
Barcode pals124 OPAC/Staff Client User Name pals124	Replace Barcode See All	
Password Verify Password First Name Test	Reset Password	Save & Clone Show Only Required Fields Show Suggested Fields

Edit information as required. When finished, select *Save*. If you attempt to close out of the patron account before the information is received, an alert will display.

[	[JavaScript Application]
	Phis tab may have unsaved data. Close it anyway?
	OK Cancel

Select *OK* to continue or *Cancel* to return to the editing form.

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



If collapsed, you will need to manually "un-collapse" this pane.

## **Renewing Library Cards**

Expired patron accounts display with a black box around the patron's name, a note that the patron is expired, and – when initially retrieved – an alert stating that the "Patron account is EXPIRED."



Open the patron record in edit mode as described in the section <u>Updating Patron Information</u>.

Navigate to the information field labeled *Privilege Expiration Date*. Enter a new date in this box. When you place your cursor in the *Patron Expiration Date box*, a calendar widget will display to help you easily navigate to the desired date.

Barcode	pals124						Replace Barcode	S	
OPAC/Staff Client User Name	pals	124							
Password								Reset Password	
Marifa Dagamad	۲			June	•		۲		
Verity Password	S	Μ	Т	W	Т	F	S		
First Name	29	30	31	1	2	3	4		
l ast Name	5	6	7	8	9	10	11		
Last Name	12	13	14	15	16	17	18		
Primary Identification Type	19	20	21	22	23	24	25		
Home Library	26	27	28	29	30	1	2		
Home Library	3	4	5	6	7	8	9		
Main (Profile) Permission Group		20	10	2011	20	12			
Privilege Expiration Date	Jun	13, 2	2011		_			Example: Jan 31, 1970	
Internet Access Level	Filte	red					-		

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

## **Lost Library Cards**

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

Open the patron record in edit mode as described in the section <u>Updating Patron Information</u>.

Next to the *Barcode* field, select the *Replace Barcode* button.

Barcode	123123	Replace Barcode See All

This will clear the barcode field. Enter a new barcode and *Save* the record. The screen will refresh and the new barcode will display in the patron summary pane.

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

Select the *See All* button next to the *Replace Barcode* button. This will display the current and past barcodes associated with this account.



Check the box(es) for all barcodes that should be "active" for the patron. An "active" barcode may be used for circulation transactions. A patron may have more than one "active" barcode. Only one barcode may be designated "primary." The "primary" barcode displays in the patron's summary information in the *Library Card* field.

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

#### **Resetting Patron's Password**

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

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

Select the Reset Password button next to the Password field.

Password	Reset Password
Verify Password	



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

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

## **Barring a Patron**

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

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

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

Internet Access Level	Filtered	-
Active	-	
Barred		
Is Group Lead Account		
Claims-returned Count	0	<b>•</b>

Save the user. The screen will refresh.

The patron account will now display an alert stating that the patron account is **BARRED**.

Additionally a red box and note will indicate the patron's barred status.





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

To unbar a patron, uncheck the Barred checkbox.

#### **Barred vs. Blocked**

**Barred**: Stops patrons from using their library cards; alerts the staff that the patron is banned/barred from the library. The "check-out" functionality is disabled for barred patrons (NO option to override – the checkout window

is unusable and the bar must be removed from the account before the patron is able to checkout items). These patrons may still log in to the OPAC to view their accounts.

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

Some examples:

- Patron exceeds fine threshold
- Patron exceeds max checked out item threshold

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

#### **Patron Alerts**

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



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

If you wish to view these alerts after they are cleared from view, they may be retrieved. Use the Other menu to select *Display Alert* and *Messages*.



There are two types of Patron Alerts:

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

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

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

Open the patron record in edit mode as described in the section <u>Updating Patron Information</u>.

Enter the alert text in the Alert Message field.

	Claims Never Checked Out Count	0	-			
	Alert Message	This is an alert message!				
User Settings						

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

Additionally, the patron name will be highlighted in yellow and a note will indicate that there is an alert on the account.

Pals, Test (Alert) (Invalid Date of Birth)

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

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

Delete the alert text in the Alert Message field.

Save the record.

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

#### **Patron Notes**

When a patron account contains a note, a *See Notes* message appears beneath the patron's name in the patron summary pane.



Notes are strictly communicative and may be made visible to the patron via their account on the OPAC. In the JSPAC, these notes display on the account summary screen in the OPAC.

Account Summary	Items Checked Out	Items on Hold
* Staff Notes * Patron Visible Note : This is	a natron visible note	
Name	Test Pals	
Day Phone	123-456-7890	

To insert or remove a note, retrieve the patron record as described in the section Searching Patrons.

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

Use the Other menu to navigate to Notes.



Select the Add New Note button. An Add Note window displays.

Enter note information.

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



Select Add Note to save the note to the patron account.

To delete a note, go to Other # Notes and use the Delete This Note button under each note.



An alert will display. Click Yes to delete the note or No to retain the note. A confirmation box will display; click OK.

## **Merging Patron Records**

When patron records are erroneously duplicated, they may be merged into one record. As described in the section <u>Searching Patrons</u>, search for the term(s) shared by the two records.

Select the two records to merge by pressing down the CTRL key and clicking each record.

Click the Merge Patrons button next to the Search Form and Retrieve Patron buttons on the top of the screen.

Pals, Jenny (Invalid Date of Birth) Patron Info Pals, Jenny Date of Birth: Library Card: Holds Alias: OPAC Login: Email: School Departments	s, Jenny id Date of Birth) on Info Jenny e of Birth: <unset> ary Card: pals123 is Alias: C Login: pals123 ii: bol Departments History Addresses ML 3022 Mankato MN 56001 Mailing Billing (Copy/Print) Phone Numbers Day Phone: Evening Phone: Other Phone:</unset>			Merge Patrons       Retrieve Patrons         Account Info       Identification       Group: 0.00       Stat Cats         Patrons       BR1       Internet Filtered         Account created on Jun 13, 2012       Expires on Jun 13, 2015         Last Activity <unset></unset>		
# Barred 1 f 2 f	Date of Birth	Last Name Pals Pals	First Name Jenny Test	Middle Name	Library Card: Barcode pals123 pals124	

A Record Merging window will display. Compare the two records.

Select the record you want to keep by checking the radio button Lead Record next to the appropriate record.

Record	Merging	firet	
Merge		115()	
Lead Record? 1008	Patron Info         Pals, Jenny         Date of Birth: <unset>         Library Card:       pals123         Holds Alias:          OPAC Login:       pals123         Email:          School Departments       History</unset>	Addresses ML 3022 Mankato MN 56001 Mailing Billing (Copy/Print) Phone Numbers Day Phone: Evening Phone: Other Difference:	Account Info Identification Group: 0.00 Stat Cats          Patrons         BR1         Internet Filtered         Account created on Jun 13, 2012         Expires on Jun 13, 2015         Last Activity <unset></unset>
© Lead Record? # 1009	Patron InfoPals, TestDate of Birth:Library Card:pals124Holds Alias:testOPAC Login:pals124Email:School DepartmentsEconomics	Addresses ML 3022 Mankato MN 56001 Mailing Billing (Copy/Print) Phone Numbers Day Phone: 123-456-7890 Evening Phone: 987-654-3210	Account Info       Identification       Group: 0.00       Stat Cats         Volunteers       BR1       Internet Filtered         Account created on Jun 13, 2012       Expires on Jun 13, 2013         Last Activity Jun 14, 2012       V

After making your selection, click the *Merge* button. The screen will refresh. Only one of the two patron names will display.



Patron records may also be merged from the *Patron Group* screen Retrieve one of the two patron records you want to merge.

Go to Other # Group Member Details.



The patron records are displayed as group members. If both patron records are not already displayed on this screen, click *Choose an Action # Move another patron to this patron group*.

Name	First Name	Middle Name	Balanc	Register a New Group Member by Cloning Selected Patrons					
	Test			<u>R</u> emove Selected Patrons from the Group					
	JMI			Move Selected Patrons to another patron's group.					
	Jenny			Move another patron to this patron group					
				Kenneve Selected Patrons					
				Merge Selected Patrons					

At the prompt, scan or type the patron's barcode.

Click OK.

Confirm the move by clicking the *Move* button on top of the screen.

Move Patron into a Usergroup		
Move patron 102206487007966 into p	atron pals127's usergroup	
Patron Info	Addresses	Account Info Identification Group: 0.00 Stat Cats
Pals, JMT	ML 3022	Patrons
Date of Birth: <unset></unset>	Mankato MN 56001	BR1
Library Card: pals127	Mailing      Billing <u>(Copy/Print)</u>	Internet Filtered
Holds Alias:	<b>-</b>	Account created on lun 14 2012
4		
Patron Info	Addresses	Account Info Identification Group: 0.00 Stat Cats
Palmer, James Douglas	6781 Inadequate Knowledge Avenue	Lisers =
Date of Birth: Dec 26, 1965	Gentryville IN 47537	BM1
Library Card: 102206487007966	Mailing Billing (Copy/Print)	Internet Filtered

Click OK on the confirmation pop-up window.

Both records are displayed as group members.

Select both records by pressing CTRL key and clicking each record.

Click Choose an Action # Merge Selected Patrons. The merging records window pops up.

Choose the lead record and continue to merge records as described in the above.



## **Bills and Payments**

When a patron account has bills attached to it, a note displays under the patron name in the patron summary panel.

ile [	dit Search Circulation Cataloging Acquisitions Boo
	Check Out 🔹 😯 Check In 🕘 🔤 Search Catalog 🐁
. Patr	on Search 2 Patron: Johnson, Sandra +
Jo	phnson, Sandra
Sta	
Ad	ult
FO	REST FALLS
Inte	ernet Filtered
Aco	count created on 3/26/12
Exp	bires on 4/25/15
Las	t Activity <unset></unset>
Las	t updated on 4/26/12

To view more information about the patron's bills, or to make payments on or edit the bills, click on the Bills button from the patron account screen.

rch 5	Patron: Turner	, Margaret Lyn					×		
	Refresh	<u>C</u> heck Out	<u>I</u> tems Out	<u>H</u> olds (	Bills	<u>E</u> dit	<u>M</u> essages	<u>O</u> ther	-
			1	0/3	\$ 9.74	·			

Circulation bills: system-generated (overdue fines, lost item cost, processing fees, etc.).

- Overdue fines are added daily once an item is overdue. When an item is marked
- as lost, bills may be automatically generated to cover the item's cost and a
- processing fee, according to library policy.

Grocery bills: staff-applied to patron accounts.

- One default grocery bill, Misc, exists in an unmodified Evergreen
- installation. Additional grocery bills may be configured through the Admin
- settings. Admin # Server Administration # Billing Types.

To view more information about a bill, highlight the bill and right-click or use the Actions for Selected Transactions menu to select *Full Details*.

Cu T( T(	rrent Bills otal Owed: 9. otal Checked: 9.	74 74	Ref	unds Available dit Available:	e: 0.00 0.00		Pay Bill Payment <u>Ty</u> Payment <u>R</u> e	pe Ca ceived: Payment	ash See <u>D</u> is	• stribution	Apply <u>P</u> aym	nent!
E	<u>B</u> ill Patron <u>H</u> istory					Re	d Items are st	ill Checked	Out Act	tions for Sele	cted Transa	action
#	Balance Owed	Bill #	Start	Total Billed	Total Paid	Туре	Title			Show in Ca	italog	ng 🖽
1	✓ 5.99	3	Apr 19, 2012	5.99	0.00	circulatior	My par	ida book [L	UCE-	Show Item	Details	
2	✓ 3.75	13	May 29, 2012	3.75	0.00	grocery				Void All Bi	llings	
										Refund	-	
										Add Billing		
Ŀ	st Actions • Chec <u>k</u> All	Uncheck All	Check All Refunds	Print Bills					$\langle$	Full <u>D</u> etails		ns •
Vo	oided this session: 0.00					Payment	Change		Owed	Billed	Paid	
С	hange Due Upon	Payment	: 0.00		Pending:	0.00	0.00	Total:	9.74	9.74	0.00	
	<u>C</u> onvert Change to Patron C	Credit						Checked:	9.74	9.74	0.00	

A window will display additional information about the bill, including a record of any payments that have been made on the bill.

4	of the lot	<b>L</b> ingen an	and the second second								X
Johnson, S	Sandra : 300	0092929292	992								
Summary											
MAIN : M	ain Campu	us									
Bill #	1	1	otal Billed	4.30	Title	Enc	yclopedia Br	own and th	ne Case of the	e Sleeping Do	
Type circulation		1	otal Paid	.30 Checked Out		4/8	/12 8:41 PM				
Start 4/8/12 8:41 PM		1 PM 6	Balance Owed	4.00	Due Date	4/2	3/12 6:59 PM				
Finish		F	Renewal?	No	Checked In	6/7,	/12 6:09 PM				
Item Summ	ary				I	1					
# Alert Mes	sage	Barcode	Call Number	C	irculation Library	Lo	cation	Owning	Library	Total Circs	₽
1		345987231	J SOB	F	OREST FALLS	Sta	cks	FOREST	FALLS	1	
Bills					1	1					
# Amount		Billing 1	Гуре	Note			Void	ed	\	When	₽,
<b>1</b> .10		Overdue	e materials	System	Generated Overdu	e Fine	No		(	5/6/12 6:59 PM	
<b>3</b> .10		Overdue	e materials	System	Generated Overdu	e Fine	No		6	5/4/12 6:59 PM	-
List Actions	•								Edit note	Void selected b	oillings
Payments					1	1					
# Amount		Note		Paymen	t Type	Staff		When	W	orkstation	E\$
1 .30				cash_pa	yment	System /	Account ( 4	4/26/12 11	:13 AM FO	REST FALLS-esi-4wl	h93q1
List Actions	•									Edit	note
										<u>C</u> lose V	Vindow

From the *Full Details* screen, portions of the bill may be voided (e.g. an erroneous daily overdue charge) by using the *Void selected billings* button. Notes may be added to payments or line items by using the *Edit note* button.

		1	1			
Bills						
# Amount	Billing Type	Note		Voided	When	₽
1 .10	Overdue materials	System Generated Ov	verdue Fine	No	6/6/12 6:59 PM	
<b>2</b> .10	Overdue materials	System Generated Ov	verdue Fine	No	6/5/12 6:59 PM	
<b>3</b> .10	Overdue materials	System Generated Ov	/erdue Fine	No	6/4/12 6·59 PM	-
List Actions •				E	dit note Void selected bi	llings
Payments						
# Amount	Note	Payment Type	Staff	When	Workstation	₽.
1 .30		cash_payment	System Ac	count ( 4/26/12 11:13	AM FOREST FALLS-esi-4wh	93q1
List Actions •					Edit r <u>C</u> lose W	indow

#### **Making Payments**

To collect payments, retrieve the patron record. Navigate to the Bills screen as described in Bills and Payments.

When bills are paid, the money applied starts at the top of the list of bills. To pay specific bills, uncheck the bills that you do not wish to pay at this time. The amount displayed in *Total Checked:* will change to reflect the appropriate amount.

Тс	ota	Owed:	13.50	Refunds Available: 0.00				
Тс	ota	Checked:	L3.50	Credit A	0.00			
_								
<u>B</u> i	ill Pa	tron <u>H</u> istory				R		
<u>B</u> i #	ill Pa	tron <u>H</u> istory Balance Owed	Bill #	Start	Total Billed	Total F		
<u>B</u> i # 1	ill Pa	Balance Owed	Bill # 48	Start 6/20/12	Total Billed	Total P 0.00		
<u>B</u> i # 1 2	ill Pat	Balance Owed 5.00 1.50	Bill # 48 2	Start 6/20/12 4/8/12 8:	Total Billed 5.00 1.80	Total F 0.00 .30		
<u>B</u> i # 1 2 3	ill Pai	tron <u>History</u> Balance Owed 5.00 1.50 1.50	Bill # 48 2 3	Start 6/20/12 4/8/12 8: 4/8/12 8:	Total Billed 5.00 1.80 1.80	Total F 0.00 .30 .30		
<u>B</u> i # 1 2 3 4	ill Par	History Balance Owed 5.00 1.50 1.50 1.50	Bill # 48 2 3 4	Start 6/20/12 4/8/12 8: 4/8/12 8: 4/8/12 8:	Total Billed 5.00 1.80 1.80 1.80	Total F 0.00 .30 .30 .30 .30		



the presence of the Uncheck All and Check All options below the list of bills.

	<u>B</u> ill Pa	tron	<u>H</u> istory				Rec	I Items a
#		Balar	nce Owed	Bill #	Start	Total Billed	Total Pai	d
1		5.00		48	6/20/12	5.00	0.00	
2	~	1.50		2	4/8/12 8:	1.80	.30	(
3	~	1.50		3	4/8/12 8:	1.80	.30	(
4	~	1.50		4	4/8/12 8:	1.80	.30	(
5	~	4.00		1	4/8/12 8:	4.30	.30	(
L	ist Act	ions •	Chec <u>k</u> All	Unchec	k All Chec	k All Re <u>f</u> unds	Print Bills	
Ve	oided	this se	ssion: 0.00				Payment	Change
C	han	ge [	Due Upor	n Pavm	ent: 0.0	00 Pending:	0.00	0.00

When you are ready to make a payment, select a payment type from the dropdown menu in the *Pay Bill* portion of the screen.

		D.11	<b>-</b>		
<u> </u>	lolds	Bills	Edit	Messages	Other
0/1		\$ 8.50			
	Pay Bi	11			
	Paymo	ent <u>T</u> ype	Cash	•	
	Paymo	ent <u>R</u> eceived:	Cash		
	🔲 A <u>n</u>	notate Paymer	Check	App	ly <u>P</u> ayment!
			Credit Card		
R	ed Items	are still Check	Patron Credit	Selected	Transaction
Туре		Title	Work	Payme	nt Pending 🖪
grocery	1		Forgive	0.00	
circulat	tion	Encyclopedia	Goods	. 0.00	
circulat	tion	Harry Potter a	nd the prisoner	of 0.00	
circulat	tion	Harry Potter a	nd the Order o	f th 0.00	
circulat	tion	Encyclopedia	Brown and the	Cas 0.00	

Enter the amount of payment in the Payment received field.

If you would like to add a note to the payment, check the box for Annotate Payment.

Click Apply Payment! to make the payment.

If you have selected Annotate Payment, a box will display for the annotation.

The screen will refresh to display the updated bill information for the patron. If change is due, the bottom portion of the screen, *Change Due Upon Payment:* will briefly reflect the amount due to the patron.



if you need more time to review the amount due, click outside the *Payment Received* box before selecting *Apply Payment!* This will cause the screen to refresh and display the amount due.

It is possible to convert change due to a patron credit by selecting the Convert Change to Patron Credit checkbox.

Voided this session: 0.00	Payment	Change		Owed	
Change Due Upon Payment: 1.00 Pending	1.00	1.00	Total:	1.00	
C Sphyert Change to Patron Credit			Checked:	1.00	



- Items marked with red are still checked out. It is possible for a patron to
- pay a bill while the item is still out and accruing fines. When Check is
- selected as the payment type, it is not necessary to select \_Annotate
- Payment\_, as a box for the check number and a note displays automatically.

#### Void vs. Forgive

Void clears all history of the bill, while forgive retains the history.

#### **Forgiving Bills**

Choose forgive as the payment type as described in the section Making Payments.

Enter the amount to be forgiven. Choose Annotate Payment as required by local policy.

Apply Payment. Annotate, if prompted.

The screen will refresh to display the payment.

#### **Voiding Bills**

Bills under one transaction are grouped in one bill line. Bills may be voided in part or in whole.

#### To void the full billing amount:

Select the bill(s) to be voided from the list in the patron account.

Right click or use the Actions for Selected Transactions menu to select Void All Billings.

E	Bill Patron History							Actions for Selected
#		Balance Owed	Bill #	Start	Total Billed	Total Paid	Type Tit	Show in Catalog
1	~	5.99	3164	5/18/06	5.99	0.00	grocery	Show Item Details
2	<ul> <li></li> </ul>	8.25	3785	5/18/06	8.25	0.00	grocery	Void All Billings
3	~	10.25	1590	6/12/06	12.25	2.00	grocery	Pofund
4	~	9.25	2448	5/18/06	12.25	3.00	grocery	Add <u>B</u> illing Full <u>D</u> etails

Confirm the action.

#### To void a partial amount:

Select a billing and choose Full Details for the transaction, as described in the section <circ\_vs\_grocery,Circulation vs. Grocery Bills>>

The bill details screen displays.

Select the specific bill to void.

Void Selected Billings and confirm the action.

Bills				
# Amount	Billing Type	Note	Voided	When 🛤
<b>1</b> .25	Overdue materials	System Generated Overdue Fine	No	6/1/12 11:59 PM 🔷
<b>2</b> .25	Overdue materials	System Generated Overdue Fine	No	6/2/12 11:59 PM
3.25	Overdue materials	System Generated Overdue Fine	No	6/4/12 11:59 PM
4 .25	Overdue materials	System Generated Overdue Fine	No	6/5/12 11:59 PM
List Actions -				Edit note Void selected billings
Payments				

#### Adding New "Grocery" Bills

A grocery bill can be added as a new bill or to an existing bill.

#### To add a as a new bill:

- 1. Retrieve the patron record.
- 2. Navigate to the Bills screen.
- 3. Click the\_Bill Patron\_ button above the list of current bills.

	Curr	ent	Bills								
•	Total Owed: 33.74			Refunds Available: 0.00			Pay	Bill			
	Tم	tal	Checked	33 74	Credit A	vailable	0.00	Payr	nent <u>T</u> ype	Forgive	-
			Checked.	55.74	creaters	vanabie.	0.00	Payr	nent <u>R</u> eceive	<b>d:</b> 0.00	
								A	A <u>n</u> notate Payn	nent See D	istribution Appl
	<u>B</u> il	I Pat	tron <u>H</u> istory	/						A	ctions for Selected
	#	-	Balance Owed	Bill #	Start	Total Billed	Total	Paid	Туре	Title	Paymen
	1	~	5.99	3164	5/18/06	5.99	0.00		grocery		0.00
	2	~	8.25	3785	5/18/06	8.25	0.00		grocery		0.00
	3	~	10.25	1590	6/12/06	12.25	2.00		grocery		0.00
	4	$\checkmark$	9.25	2448	5/18/06	12.25	3.00				0.00

**Choose appropriate** *Billing Type* **from the drop down menu.** (**"Grocery" is the.** only available transaction type.) . Enter the Amount and Note (as required). . *Submit this Bill* and confirm this action.

💛 Bill Patron Wizar	d	
Create Bill		
Location	East Grand Forks Campbell Library	
Transaction Type	Grocery	
Billing Type	Non-Print Lost Materials Processing Fee 🔹	
Amount	1.00	
Note	Test note	
	Cancel	Submit this Pill

#### To add bill to an existing bill line:

- 1. Retrieve the patron record.
- 2. Navigate to the Bills screen.

- 3. Highlight the desired bill.
- 4. Use the Actions for Selected Transactions to select Add Billing. Confirm this action.
- 5. Follow steps 4 through 6 above. There is no confirmation message after clicking Submit this Bill.
- 6. The Money Summary will adjust accordingly.

#### **Bill History**

#### To view a patron's bill history:

- 1. Retrieve the patron record.
- 2. From the *Bills* screen, click *History*.
- 3. A Bill History screen with two tabs will display. One for Transactions and one for Payments.

# A       Pay       Payment Dat       Payme       V         1       2       1        6/28/12       2:14        forgive       f         2       2       6/28/12       2:12        cash_pa       f         3       1       3       6/28/12       3:13        forgive       f         4       1       4       6/28/12       3:51       goods       f         5       1       5       6/28/12       3:51       work_p       f         6       1       6        6/28/12       3:52        credit_c	Transaction Type Last Billing Type 🖪
1       2 1       6/28/12 2:14 forgive f         2       2 2       6/28/12 3:12 cash_pa f         3       1 3       6/28/12 3:13 forgive f         4       1 4       6/28/12 3:51 goods f         5       1 5       6/28/12 3:51 work_p f         6       1 6       6/28/12 3:52 credit_c f	
2         2 2         6/28/12 3:12 cash_pa f           3         1 3         6/28/12 3:13 forgive f           4         1 4         6/28/12 3:51 goods f           5         1 5         6/28/12 3:51 work_pn f           6         1 6         6/28/12 3:52 credit_c f	grocery Misc
3 1 3       6/28/12 3:13 forgive f         4 1 4       6/28/12 3:51 goods f         5 1 5       6/28/12 3:51 work_p f         6 1 6       6/28/12 3:52 credit_c f	grocery Misc
4         1 4         6/28/12 3:51 goods f           5         1 5         6/28/12 3:51 work_p f           6         1 6         6/28/12 3:52 credit_c f	grocery Misc
5         1         5         6/28/12         3:51          work_p         f           6         1         6          6/28/12         3:52          credit_c         f	grocery Misc
<b>6</b> 1 6 6/28/12 3:52 credit_c f	grocery Misc
	grocery Misc

4. For more information about a specific billing, select the bill and click *Full Details*. A screen detailing item information, billings, and payments will display.

Johnsor	n, <mark>Sandra</mark> : 30	00092929292	992							
Summary	,									
MAIN:	Main Cam	ous								
Bill #	1	Т	otal Billed	4.30	Title	Encyclop	edia Brown ar	d the Case o	of the Sleeping Do	
Туре	circulation	. то	otal Paid	4.30	4.30 Checked Out 4/8/12 8:41 PM					
Start	4/8/12 8:4	1 PM B	alance Owed	0.00	Due Date	4/23/12	4/23/12 6:59 PM			
<b>Finish</b> 7/2/12 10:38 AM <b>Renewal?</b>		enewal?	No	Checked In	6/7/12 6:09 PM					
Item Sum	imary				1	1				
# Alert N	lessage	Barcode	Call Numbe	r C	irculation Library	Locatio	n Owr	ning Library	Total Circs	E,
1		345987231	J SOB	FC	OREST FALLS	Stacks	FOR	EST FALLS	1	
		```			1	1				
Bills										
# Amour	nt	Billing Ty	/pe	Note			Voided		When	E
<b>1</b> .10		Overdue	materials	Syster	n Generated Overd	lue Fine	No		6/6/12 6:59 PM	-
<b>2</b> .10		Overdue	materials	Syster	m Generated Overd	lue Fine	No		6/5/12 6:59 PM	-
List Actio	ons -							Edit note	e Void selected	billings
Payments	5				1	I				
# Amour	nt	Note		Payment	t Type	Staff	When		Workstation	E.
<b>1</b> 4.00				cash_pay	/ment	System Acco	unt 7/2/12 1	L0:38 AM	MAIN-MSU1382389	
<b>2</b> .30				cash_pay	/ment	System Acco	unt 4/26/12	11:13 AM	FOREST FALLS-esi-4	wh93q1

Items may be deleted from the catalog even if a charge for that item is still attached to the patron's record. The charge will remain on the patron's account after the deletion.

# Part XI. Reports

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# **Chapter 58. Introduction**

Learn how to create and use reports in Evergreen.

# Chapter 59. Starting and Stopping the Reporter Daemon

Before you can view reports, the Evergreen administrator must start the reporter daemon from the command line of the Evergreen server.

The reporter daemon periodically checks for requests for new reports or scheduled reports and gets them running.

#### **Starting the Reporter Daemon**

To start the reporter daemon, run the following command as the opensrf user:

clark-kent.pl --daemon

You can also specify other options:

- sleep=interval: number of seconds to sleep between checks for new reports to run; defaults to 10
- lockfile=filename: where to place the lockfile for the process; defaults to /tmp/reporter-LOCK
- concurrency=integer: number of reporter daemon processes to run; defaults to 1
- boostrap=filename: OpenSRF bootstrap configuration file; defaults to /openils/conf/opensrf\_core.xml



The open-ils.reporter process must be running and enabled on the gateway before the reporter daemon can be started.

Remember that if the server is restarted, the reporter daemon will need to be restarted before you can view reports unless you have configured your server to start the daemonautomatically at start up time.

## **Stopping the Reporter Daemon**

To stop the reporter daemon, you have to kill the process and remove the lockfile. Assuming you're running just a single process and that the lockfile is in the default location, perform the following commands as the opensrf user:

kill `ps wax | grep "Clark Kent" | grep -v grep | cut -b1-6`

rm /tmp/reporter-LOCK
## **Chapter 60. 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.

1 Reports							
Go Back Go Forward							
My Folders							
Templates							
Reports							
D Output							
Shared Folders							
⇒ <sup>©</sup> <u>Reports</u>							
Dutput							

### **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.



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.

### **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 61. 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.

### **Choosing Report Fields**

1. Click on the My Folder template folder where you want the template to be saved.

My Folders	
♣ 📁 <u>Templates</u>	
······ <u>Circulation (BNCLF)</u>	
🐟 📁 <u>Reports</u> 🔊 🖤	
🔿 📁 <u>Output</u>	
Shared Folders	
⇒ 📁 <u>Output</u>	

2. Click on Create a new Template for this folder.

Manage	Folder Contents		Manage Folder
	Circulation: created	d by jeremybuhler	
	Create a new report from select	ed template	Submit
Limit output to 10 💌			Create a new Template for this folder
No items to display			

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).

<u>1</u> Reports			
Go Back Go Forward			Deb
C Database Source Browser			
Sources	Source Specifier:		
Nullable Source Name	E Field Name	Data Type 🖽	Field Transform 🛛 Output Type 🗗
Enable nullability selection		···· •	- Add Selected Fields
Template Configuration			
Name:			Source Specifier:
Description:		Save	
Displayed Fields Base Filters Aggregate Filter	ers		
Display Name	Data Type Field	Transform 🛱	
Alter Display Header Change Transfor	rm • Move Up Move Down	Remove Selected Field	

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.

1 Reports				ĺ
Go Back Go Forward				Debug
Database Source Browser				
Sources	Source Specifier: Circulation			
Nullable Source Name 🖽	Field Name	Data Type 🖽	Field Transform	Output Type 🛛 🖽
Circulation	Base Transaction	link 🔼		
12	Billing Totals	money		
	Check In Date/Time	timestamp 🗏		
	Check In Library	org_unit		
	Check In Staff	link		
	Check Out Date/Time	timestamp		
	Circ Duration Rule	link		
	Circ ID	id		
	Circulating Item	link		
	Circulating Library	org_unit		
	Circulating Staff	link 🔛		
Enable nullability selection				Add Selected Fields

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.

1 Reports			×
Go Back Go Forward Database Source Browser		D	ebug
Sources	Source Specifier: Circulation		
Nullable Source Name	🛱 🛛 Field Name	Data Type 🖽 🛛 Field Transform 🛛 Output Type	₽₽
Circulation	Base Transaction	link 🙍 Count Aggregate	
	_ Billing Totals	money Count Distinct Aggregate	
	Check In Date/Time	timestamp 📕 Raw Data 💦 Non-Aggregate	
	Check In Library	org_unit 🛄 📗	
	Check In Staff	link	
	Check Out Date/Time	timestamp	
	Circ Duration Rule	link	
	Circ ID	id 🔰	
	Circulating Item	link	
	Circulating Library	org_unit	
	Circulating Staff		_
Enable nullability selection		Add Selected Field	s

*Field Transforms* have either an *Aggregate* or *Non-Aggregate* output type. See the section called <u>Field Transforms</u> 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.

L Reports				E
Go Back Go Forward				Debug
Sources	Source Specifier: Circulation			
Nullable       Source Name       E <ul> <li></li></ul>	Field Name Base Transaction Billing Totals Check In Date/Time Check In Library Check In Staff Check Out Date/Time Circ Duration Rule Circ ID Circulating Item Circulating Library Circulation Staff	Data Type IP link Co money timestamp link timestamp link org_unit link org_unit link org_unit link	eld Transform unt unt Distinct w Data	Output Type 🛱 Aggregate Aggregate Non-Aggregate
Template Configuration     Name:     Description:		Save	Source Specifier: Circulation	: 17
Displayed Fields Base Filters Aggregate Filters				
Display Name Circ ID	Data Type Field Transfor id Count Distinct	rm 🖰		
Alter Display Header Change Transform *	Move Up Move Down F	Remove Selected Field		

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*.

Template Configuration			
Name:			
Description:			Save
Displayed Fields Base Filters Aggregate Filters			
Display Name	Data Type	Field Transform	E.
Circ ID	id	Count Distinct	
Alter Display Header Change Transform *	Move Up Move Down	Remove S	elected Field

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*.

The pa	ge at http://hepburn.pines.bclipary 🔀
?	Change the column header to:
2	Circ count
	OK Cancel

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.

Sources		~
Nullable	Source Name	E.
	Circulation	<u>^</u>
Default	🗟 🕀 Base Transaction	
Default	🗉 Billing Totals	
Default	🗉 Check In Library	
Default	🗉 Check In Staff	=
Default	Circ Duration Rule	
Default	🗉 Circulating Item	
Default	🗉 Circulating Library	
Default	🗉 Circulating Staff	
Default	E Circulation Type	
Default	Max Fine Rule	~

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.

Database Source Browser								
Sources		~	Source Specifier: Circulation -> Item :: Shelving Location					
Nullable 9	Source Name	₽₽	Field Name		Data Type 🛱	Field Transform	Output Type	EŞ.
Default	Circulating Library		Can Circulate?		bool	Count	Aggregate	
Default	Circulation Modifier		Hold Capture Requ	uires Verification	bool -	Count Distinct	Aggregate	
Default	<ul> <li>Circulations</li> </ul>		Is Holdable?		bool	First 5 characters (fo	Non-Aggregate	
Default	🗉 Copy Notes		Is OPAC Visible?		bool	First contiguous non	Non-Aggregate	
Default	Copy Status		Location ID		id	First Value	Non-Aggregate	=
Default	🗉 Creating User	=	Name		text	Last Value	Non-Aggregate	
Default	🛨 Last Editing User		Owning <sup>1</sup> Örg Unit		org_unit	Lower case	Non-Aggregate	
Default	<ul> <li>Shelving Location</li> </ul>					Max	Aggregate	
Default	🗉 Stat-Cat entry maps		-			Min	Aggregate	
Default	Total Circulations					Raw Data	Non-Aggregate	
Default	Circulating Library	~				Substring	Non-Angregate	<u> </u>
🔲 Enable	Enable nullability selection Add Selected Fields							

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.

Database Source Browser							
Sources			Source Specifier: Circulation ->	Item :: Shelving Location			
Nullable S	Source Name	E.	Field Name	Data Type 🛱	Field Transform	Output Type	₽₽
Default	🗉 Circulating Library		Can Circulate?	bool	Count	Aggregate	
Default	Circulation Modifier	_	Hold Capture Requires Verification	n bool -	Count Distinct	Aggregate	
Default	<ul> <li>Circulations</li> </ul>	4	Is Holdable?	bool	First 5 characters (fo	Non-Aggregate	
Default	🗄 Copy Notes		Is OPAC Visible?	bool	First contiguous non	Non-Aggregate	
Default	Copy Status		Location ID	id	First Value	Non-Aggregate	≡
Default	📧 Creating User		Name	text	Last Value	Non-Aggregate	
Default	🗉 Last Editing User		Owning Org Unit	org_unit	Lower case	Non-Aggregate	
Default	Shelving Location				Max	Aggregate	
Default	🗉 Stat-Cat entry maps	- II-			Min	Aggregate	
Default	Total Circulations				Raw Data	Non-Aggregate	
Default	🗉 Circulating Library	✓			Substring	Non-Agenerate	
🔲 Enable	Enable nullability selection						

Name will appear in the bottom left pane. Select the Name row and click Alter Display Header.

<ul> <li>Template Configuration</li> </ul>			
Name:			
Description:			Save
Displayed Fields Base Filters Aggregate Filters			
Display Name	Data Type	Field Transform	E.
Circ count	id	Count Distinct	
Name	text	Raw Data	
Alter Display Header Change Transform •	Move Up Move Down	Remove Se	lected Field

11.Enter a new, more descriptive column header, for example, Shelving location. Click OK.

The pa	ge at http://hepburn.pines.bclibrary 🔀
?	Change the column header to:
-	Shelving location
	OK Cancel

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*.

Template Configu	uration ——				
Name:					
Description:					Save
Displayed Fields	Base Filters	Aggregate Filters			
Display Name			Data Type	Field Transform	E.
Circ count			id	Count Distinct	
Shelving location	on		text	Raw Data	
Alter Display I	Header	hange Transform 🔹		Move Down Remov	e Selected Field

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.

ources	×	Source Specifier: Circulation			
Jullable Source Name	E‡	Field Name	Data Type 🖽	Field Transform	Output Type
Circulation	<u>_</u>	Base Transaction	link 🔼	Age	Non-Aggregate
efault 🛛 🕀 Base Transaction		_ Billing Totals	money	- Count	Aggregate
efault 🛛 🕀 Billing Totals	=	Check In Date/Time	timestamp 🔳	Count Distinct	Aggregate
efault 🛛 🗄 Check In Library		Check In Library	org_unit	Date	Non-Aggregate
efault 🛛 🛨 Check In Staff		Check In Staff	link	Day Name	Non-Aggregate
efault Circ Duration Rule		Check Out Date/Time	timestamp	Day of Month	Non-Aggregate
efault 🗧 Circulating Item		Circ Duration Rule	link	Day of Week	Non-Aggregate
efault Age Hold Protection		Circ ID	id	Day of Year	Non-Aggregate
efault 💿 Call Number/Volume		Circulating Item	link	First Value	Non-Aggregate
efault 💿 Circulating Library		Circulating Library	org_unit	Hour	Non-Aggregate
efault Circulation Modifier	~	Circulating Staff	link 💌	Hour of day	Non-Addredate

14.Select Year + Month in the right hand Field Transform pane and click Add Selected Fields

Database Source Browser								
Sources	<b>~</b>	Source Specifier:	Circulation					
Nullable Source Name	₽₽	Field Name		Data Type	₽₽	Field Transform	Output Type	₽₽
Circulation		Base Transaction		link		Min	Aggregate	
Default 🗄 Base Transaction		Billing Totals		money	- [	Month Name	Non-Aggregate	
Default 🗄 Billing Totals		Check In Date/Tim	e	timestamp	Ξ	Month of Year	Non-Aggregate	
Default 🛛 🗄 Check In Library		Check In Library		org_unit		Months ago	Non-Aggregate	
Default 🛛 🗄 Check In Staff		Check In Staff		link		Quarter of Year	Non-Aggregate	
Default Circ Duration Rule		Check Out Date/T	ime	timestamp		Quarters ago	Non-Aggregate	
Default 🖃 Circulating Item		Circ Duration Rule		link		Raw Data	Non-Aggregate	
Default Age Hold Protection		Circ ID		id		Week of Year	Non-Aggregate	=
Default 🗉 Call Number/Volume		Circulating Item		link		Year	Non-Aggregate	
Default 🗉 Circulating Library		Circulating Library		org_unit		Year + Month	Non-Aggregate	
Default Circulation Modifier	~	Circulating Staff		link	<b>~</b>		$\sim$	
Enable nullability selection							Add Selecter Fi	elds

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.

Template Configuration			
Name:			
Description:			Save
Base Filters Aggregate Filters			
Display Name	Data Type	Field Transform	₽,
Shelving location	text	Raw Data	
Circ count	id	Count Distinct	
Check Out Date/Time	timestamp	Year + Month	
Alter Display Header Change Transform *	Move Up Move I	Down Remove Sele	ected Field

16.Select the *Check Out Date/Time* row. Click *Alter Display Header* and change the column header to *Check out month*.

The pa	ge at http://hepburn.pines.bclityary 🗙
3	Change the column header to:
	Check out month
	OK Cancel

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.

Template Configuration		
Name:		
Description:		Save
Displayed Fields Base Filters Aggregate Filters		
Display Name	Data Type	Field Transform 🛱
Check out month	timestamp	Year + Month
Shelving location	text	Raw Data
Circ count	id	Count Distinct
Alter Display Header Change Transform •	Move Up	Remove Selected Field



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.

Count         Count Distinct         Raw Data         Alter Display Header       Change Transform         K       Move Up       Move Down         Remove Selected Field	Circ count	id	Count Distinct	
	Count Count Distin Raw Data Alter Display Header Change Transfo	n Move Up	Move Down Remove Selected	Field

### **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.

### **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.

Database	Source Browser							
Sources		Sou	urce Specifier:	Circulation				
Nullable	Source Name	E Fie	eld Name		Data Type	EŞ F	Field Transform	Output Type
	Circulation	🔼 🛛 Bas	se Transaction		link	📥   L	ast Value	Non-Aggregate
Default	Base Transaction	Billi	ing Totals		money	M	1ax	Aggregate
Default	🛨 Billing Totals	Ch	eck In Date/Time	e	timestamp	M	1in	Aggregate
)efault	🗉 Check In Library	Ch	eck In Library		org_unit	E I	1onth Name	Non-Aggregate
efault	🗈 Check In Staff	Ch	eck In Staff		link	<u> </u>	1onth of Year	Non-Aggregate
efault	Circ Duration Rule	- Ch	eck Out Date/Tir	ne	timestamp	IV.	1onths ago	Non-Aggregate
efault	Circulating Item	Cin	c Duration Rule		link		)uarter of Year	Non-Aggregate
)efault	Age Hold Protection	Cin	c ID		id		)uarters ago	Non-Aggregate
efault	🗉 Call Number/Volume	🤞 Cin	culating Item		link	- R	law Data	Non-Aggregate
efault	Circulating Library	Ciri	culating Library		org_unit	V	Veek of Year	Non-Aggregate
)efault	Circulation Modifier	Cin	culating Staff		link	Y	ear	Non-Aggregate
efault	Circulations	💽 🛛 Ciri	culation Duration	r	interval	💽   Y	'ear + Month	Non-Aggregate
emplate ame:	Configuration						Source Spec	fior
ame.							Source Spec	ner:
escriptio)	n:					Save	Circulation ->	Item :: Shelving Location
isplayed	Fields Base Filters Aggregate Filte	rs						
Filter Fi	eld	Field Transform	n	Operator	Value	E,		
Check C	Dut Date/Time	Year + Month		Equals		- d =:- 1 d -		

3. Select *Check Out Date/Time*. Click on *Change Operator* and select *In list* from the dropdown menu.

Template Configuration				
Name:				
Description:				Save
Displayed Fields Base Filters Aggregate Filters				
Filter Field	Field Transform	Operator	Value	E.
Check Out Date/Time	Year + Month	In list		
	_			
Change Transform • Change Operator	Change value	Remove value	Remove Select	ed Fields

4. To filter on the location of the circulation select *Circulation -# Circulating library -# Raw Data* and click on *Add Selected Fields*.

Database Source Browser		
Sources	Source Specifier: Circulation	
Source Name	🕫 🛛 Field Name	Data Type 🖽 🛛 Field Transform
Circulation	<ul> <li>Check In Date/Time</li> </ul>	timesta 🔺 Raw Data
Base Transaction	Check In Library	org_unit
Billing Totals	E Check In Staff	link
Check In Library	Check Out Date/Time	timesta
Check In Staff	Circ Duration Rule	link
-Circ Duration Rule	Circ ID	id
<ul> <li>Circulating Item</li> </ul>	Circulating Item	link
-Age Hold Protection	Circulating Library	org_unit
Call Number/Volume	Circulation Staff	link T
Circulating Library		

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.

Template Configuration Name: Circulations by Description: Displayed Fields Base Filters Filter Field Check Out Date/Time Circulating Library	Equals Contains Matching substring Contains Matching substring (ignore case) Greater than Greater than or equal to Less than Less than or equal to In list Not in list Between Not between Is NULL Is not NULL Is not NULL Is not NULL or Blank Is not NULL or Blank	Operator In list Equals	Value 🛱	
Change Transform 🔹	Change Operator • Change value Remo	ove value	Remove Selected Fields	

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*.

me: Circulations by month	n for one library			
played Fields Base Filters Again	egate Filters		(	Save
Filter Field	Field Transform	Operator	Value	E
Check Out Date/Time	Year + Month	In list		
Circulating Library	Raw Data	Equals		

7. Click OK.

Γ



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

note	The bottom right hand pane is a that are visible to the sources yo fields. Use <b>Ctrl+Click</b> to select	lso a source specifier. By selecting one of these rows you will limit the fields ou have specified. This may be helpful when reviewing templates with many or deselect items.
	Source Specifier Circulation Circulation -> Item :: Shelving Location	

## Chapter 62. 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*.

Manage Folder Contents			Manage Folder				
	Circulation: created by jeremybuhler						
Limit output to	Create a new report from selected template						
Select All None	name		description	create_time	owner		
	Circulations by month for one library			2009-11-24 15:40	jeremybuhler		
	Monthly Circulation by Shelving Location (clone)	Number of circulation a library. Shelving	ns (including renewal) occured at locations not on the list had 0 circulation.	2009-11-24 15:35	<u>jeremybuhler</u>		

3. Complete the first part of report settings. Only *Report Name* and *Choose a folder...* are required fields.

Template Name:	Circulations by month for one library
Template Creator:	jeremybuhler
Template Description:	
Report Name: 🛛 🥹	October 2009 circ
Report Description: 0	Prince Rupert circulation stats by shelving location for October 2009
Report Columns: 0	Check out month Shelving location Circ count
Pivot Label Column:	- Select One (optional) -
Pivot Data Column:	Circ count
Choose a folder to store this report definition: 🚯	Selected Folder: Circulation          Paper Folders         Circulation

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.

Pi	vot Label Column:		- Sel	?	·	Oc	tobe	r, 20C	9		×	
Pi	vot Data Column:		Circ d	« 🖕	<		Too	Jay		> .	» _	
				wk	Sun	Mon	Tue	Wed	Thu	Fri	Sat	
			Select	39					1	2	3	
С	noose a folder to store this report definition:		ء 🕑 😓	40	4	5	6	- 7	8	9	10	
	·			41	11	12	13	14	15	16	17	
				42	18	19	20	21	22	23	- 24	
	Column	Tr	ansfor	43	25	26	213	28	29	30	- 31	Params
	containin		anoror				fue, (	oct 20				
							Re	eal De	ate	~		2009-10
							A	1 h	)el			
							$\geq$					
	Circulation -> Check Out Date/Time	Year +	+ Month	1	In lis	st	200	19-10				

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.

Output Options • Excel Output • CSV Output • HTML Output • Bar Charts • Line Charts	
Recurring Report: 🛛 🥑	
Recurrence Interval: 🚯	1 🔽 Day(s) 🔽
Run as soon as possible 2009-11-24 Midnight 💙	
Send completion notification to this Email address: ④	info@library.com
Choose a folder to store this report's output: 6	Selected Folder: Circulation Circulation Circulation
Save Report	

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 <u>Recurring Reports</u>. 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.

## **Chapter 63. 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 Admin (-) -# 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*.

View report output											
Limit output to 10 💽 Pending Items											
No items to disp	olay										
Limit output to 10 Completed Items											
Select <u>All None</u>	report	run_time	complete_time	runner	email	folder	erro	r_text	excel_format	html_format	csv_format
	October 2009 circs	2009-11-24 18:00	i	<u>ieremybu</u>	<u>hler</u>	2	296		t	t	f

- 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 looks like this in Excel:

1	<u> </u>	<u>I</u> nsert F <u>o</u> rmat <u>T</u> ools <u>D</u> ata	<u>W</u> indow <u>H</u> elp	D		
1	对 🖬 👌 🗃	•) •   Σ • A     @	Arial	•	10 <b>- B</b>	I
	A1 🔻	∱ Check out month				
	A	В	С	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	0000 10	Multilingual Juvanila Franch	22			

## **Chapter 64. 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 <u>Creating Folders</u>.

- 1. Access the reports interface from the Admin (-) menu under Local 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*.



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 <u>Creating Folders</u>.
- 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 <u>Creating Templates</u>. *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 65. Adding Data Sources to Reporter

You can further customize your Evergreen reporting environment by adding additional data sources.

The Evergreen reporter module does not build and execute SQL queries directly, but instead uses a data abstraction layer called **Fieldmapper** to mediate queries on the Evergreen database.Fieldmapper is also used by other core Evergreen DAO services, including cstore and permacrud. The configuration file *fm\_IDL.xml* contains the mapping between *Fieldmapper* class definitions and the database. The *fm\_IDL.xml* file is located in the */openils/conf* directory.

There are 3 basic steps to adding a new data source. Each step will be discussed in more detail in the

- 1. Create a PostgreSQL query, view, or table that will provide the data for your data source.
- 2. Add a new class to *fm\_IDL.xml* for your data source.
- 3. Restart the affected services to see the new data source in Reporter.

There are two possbile sources for new data sources:

- An SQL query built directly into the class definition in *fm\_IDL.xml*. You can use this method if you are only going to access this data source through the Evergreen reporter and/or cstore code that you write.
- A new table or view in the Evergreen PostgresSQL database on which a class definition in *fm\_IDL.xml*. You can use this method if you want to be able to access this data source through directly through SQL or using other reporting tool.

# Create a PostgreSQL query, view, or table for your data source

You need to decide whether you will create your data source as a query, a view, or a table.

- 1. Create a query if you are planning to access this data source only through the Evergreen reporter and/or cstore code that you write. You will use this query to create an IDL only view.
- 2. Create a view if you are planning to access this data source through other methods in addition to the Evergreen reporter, or if you may need to do performance tuning to optimize your query.

3. You may also need to use an additional table as part of your data source if you have additional data that's not included in the base Evergreen, or if you need to use a table to store the results of a query for performance reasons.

To develop and test queries, views, and tables, you will need

- Access to the Evergree PostgreSQL database at the command line. This is normally the psql application. You can access the Postgres documentation at the <u>Official Postgres documentation</u> for more information about PostgreSQL.
- Knowledge of the Evergreen database structure for the data that you want to access. You can find this information by looking at the Evergreen schema Evergreen schema

If the views that you are creating are purely local in usage and are not intended for contribution to the core Evergreen code, create the Views and Tables in the extend\_reporter schema. This schema is intended to be used for local customizations and will not be modified during upgrades to the Evergreen system.

You should make that you have an appropriate version control pocess for the SQL used to create you data sources.

Here's an example of a view created to incorporate some locally defined user statistical categories:

#### example view for reports.

```
create view extend_reporter.patronstats as
select u.id,
grp.name as "ptype",
rl.stat_cat_entry as "reg_lib",
gr.stat_cat_entry as "gender",
ag.stat_cat_entry as "age_group",
EXTRACT(YEAR FROM age(u.dob)) as "age",
hl.id as "home_lib",
u.create_date,
u.expire_date,
ms_balance_owed
from actor.usr u
join permission.grp_tree grp
       on (u.profile = grp.id and (grp.parent = 2 or grp.name = 'patron'))
join actor.org_unit hl on (u.home_ou = hl.id)
left join money.open_usr_summary ms
        on (ms.usr = u.id)
left join actor.stat_cat_entry_usr_map rl
        on (u.id = rl.target_usr and rl.stat_cat = 4)
left join actor.stat_cat_entry_usr_map bt
        on (u.id = bt.target_usr and bt.stat_cat = 3)
left join actor.stat_cat_entry_usr_map gr
        on (u.id = gr.target_usr and gr.stat_cat = 2)
left join actor.stat_cat_entry_usr_map gr
       on (u.id = gr.target_usr and gr.stat_cat = 2)
left join actor.stat_cat_entry_usr_map ag
        on (u.id = ag.target_usr and ag.stat_cat = 1)
where u.active = 't' and u.deleted <> 't';
```

# Chapter 66. Add a new class to fm\_IDL.xml for your data source

Once you have your data source, the next step is to add that data source as a new class in *fm\_IDL.xml*.

You will need to add the following attributes for the class definition

- id. You should follow a consistent naming convention for your class names that won't create conflicts in the future with any standard classes added in future upgrades. Evergreen normally names each class with the first letter of each word in the schema and table names. You may want to add a local prefix or suffix to your local class names.
- controller="open-ils.cstore"
- oils\_obj:fieldmapper="extend\_reporter::long\_name\_of\_view"
- oils\_persist.readonly="true"
- reporter:core="true" (if you want this to show up as a "core" reporting source)
- **reporter:label**. This is the name that will appear on the data source list in the Evergreen reporter.
- **oils\_persist:source\_definition**. If this is an IDL-only view, add the SQL query here. You don't need this attribute if your class is based on a PostgreSQL view or table.
- **oils\_persist:tablename=''schemaname.viewname or tablename''** If this class is based on a PostgreSQL view or table, add the table name here. You don't need this attribute is your class is an IDL-only view.

For each column in the view or query output, add field element and set the following attributes. The fields should be wrapped with *<field> </field>* 

- reporter:label. This is the name that appears in the Evergreen reporter.
- name. This should match the column name in the view or query output.
- reporter:datatype (which can be id, bool, money, org\_unit, int, number, interval, float, text, timestamp, or link)

For each linking field, add a link element with the following attributes. The elements should be wrapped with *</link>* \* **field** (should match field.name) \* **reltype** ("has\_a", "might\_have", or "has\_many") \* **map** ("") \* **key** (name of the linking field in the foreign table) \* **class** (ID of the IDL class of the table that is to be linked to)

The following example is a class definition for the example view that was created in the previous section.

#### example class definition for reports.

```
<class id="erpstats" controller="open-ils.reporter-store"
oils_obj:fieldmapper="extend_reporter::patronstats"
oils_persist:tablename="extend_reporter.patronstats" oils_persist:readonly="true"
reporter:label="Patron Statistics" reporter:core="true">
  <fields oils_persist:primary="id">
  <field reporter:label="Patron ID" name="id" reporter:datatype="link" />
  <field reporter:label="Patron Type" name="ptype" reporter:datatype="text" />
  <field reporter:label="Reg Lib" name="reg_lib" reporter:datatype="text" />
  <field reporter:label="Boro/Twp" name="boro_twp" reporter:datatype="text" />
  <field reporter:label="Gender" name="gender" reporter:datatype="text" />
  <field reporter:label="Age Group" name="age_group" reporter:datatype="text" />
  <field reporter:label="Age" name="age" reporter:datatype="int" />
  <field reporter:label="Home Lib ID" name="home_lib_id"
        reporter:datatype="link" />
  <field reporter:label="Home Lib Code" name="home_lib_code"
        reporter:datatype="text" />
  <field reporter:label="Home Lib" name="home_lib" reporter:datatype="text" />
  <field reporter:label="Create Date" name="create_date"
        reporter:datatype="timestamp" />
  <field reporter:label="Expire Date" name="expire_date"
       reporter:datatype="timestamp" />
  <field reporter:label="Balance Owed" name="balance_owed"
        reporter:datatype="money" />
</fields>
<links>
  k field="id" reltype="has_a" key="id" map="" class="au"/>
  <link field="home_lib_id" reltype="has_a" key="id" map="" class="aou"/>
</links>
</class>
```



 $fm\_IDL.xml$  is used by other core Evergreen DAO services, including cstore and permacrud. So changes to this file can affect the entire Evergreen application, not just reporter. After making changes fm\_IDL.xml, it is a good idea to ensure that it is valid XML by using a utility such as **xmllint** – a syntax error can render much of Evergreen nonfunctional. Set up a good change control system for any changes to fm\_IDL.xml. You will need to keep a separate copy of you local class definitions so that you can reapply the changes to  $fm\_IDL.xml$  after Evergreen upgrades.

# Chapter 67. Restart the affected services to see the new data source in the reporter

The following steps are needed to for Evergreen to recognize the changes to fm\_IDL.xml

1. Copy the updated fm\_IDL.xml Update /openils/conf/fm\_IDL.xml to /openils/var/web/reports/fm\_IDL.xml

cp \_/openils/conf/fm\_IDL.xml /openils/var/web/reports/fm\_IDL.xml

2. Run Autogen to to update the Javascript versions of the fieldmapper definitions.

/openils/bin/autogen.sh

3. Restart C services

osrf\_ctl.sh -l -a restart\_c

4. Restart the Evergreen reporter. You may need to modify this command depending on your system configuration and pid path

opensrf-perl.pl -l -action restart -service open-ils.reporter \
-config /openils/conf/opensrf\_core.xml -pid-dir /openils/var/run

5. Restart the Evergreen application or use Admin -# For Developers -# Clear Cache

## **Chapter 68. 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 <u>Viewing</u> <u>Report Output</u>.

To set up a monthly recurring report follow the procedure in <u>Generating Reports from Templates</u> 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.



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 69. Template Terminology Data Types

The central column of the Database Source Browser lists Field Name and Data Type for the selected database table.

+

+

Each data type has its own characteristics and uses:

Data Type	Description	Notes
id	Unique number assigned by the database to identify a record	A number that is a meaningful reference for the database but not of much use to a human user. Use in displayed fields when counting records or in filters.
text	Text field	Usually uses the Raw Data transform.
timestamp	Exact date and time	Select appropriate date/time transform. Raw Data includes second and timezone information, usually more than is required for a report.
bool	True or False	Commonly used to filter out deleted item or patron records.
org_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.
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.
int	Integer	money

### **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 70. 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.

### **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

### **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.

## Part XII. Using the Public Access Catalog

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# **Chapter 71. Introduction**

Use this part for information about searching the Evergreen public access catalog.
# Chapter 72. My Lists 2.2

The **My Lists** feature replaces the bookbag feature that was available in versions proior to 2.2. The **My Lists** feature is a part of the Template Toolkit OPAC that is available in version 2.2. This feature enables you to create temporary and permanent lists; create and edit notes for items in lists; place holds on items in lists; and share lists via RSS feeds and CSV files.

#### Create New Lists

- 1) Log in to your account in the OPAC.
- 2) Search for titles.
- 3) Choose a title to add to your list. Click Add to My List.

4.	Justice denied Tanenbaum, Robert. 2010, c1994.		Place Hold		
	0 of 0 copies available		Add to my list		
5.	Rage of angels Sheldon, Sidney, 2010.	0	✓ Place Hold		
0 of 0 copies available		Add to my list			
6.	Irresistible impulse Tanenbaum, Robert. 2010, c1997.	2	✓ Place Hold		
0 of 0 copies available	0 of 0 copies available		Add to my list		

4) Scroll up to the gray row on top of the Search Results. Click View My List

5) Items are added to a temporary list. Your temporary list appears at the bottom of the screen.

6) The Actions for these items menu on the right side of the screen demonstrates the actions that you can apply to this list. You can place holds on items in your temporary list; remove items from the list; or move selected items to a permanent list.

To place a hold or remove items from the list, check the box adjacent to the title of the item, and select the desired function.

To move selected items into an existing list, check the box adjacent to the title, and highlight the list in which you will store the item.

#### Temporary List

	AUTHOR(S)	Actions for these items 💌 🛛 Go
Rage of angels	Sheldon, Sidney,	Actions for these items Place hold Remove from list
Justice denied	Tanenbaum, Robert.	Move selected items to Book Club
Irresistible impulse	Tanenbaum, Robert.	

7) If you do not want to place the item into an existing list, you can create a new list to contain the item. Enter the name of the new list, and, if desired, enter a description.

#### Create new list

Enter the name of the new list:	Legal Thrillers	Share this list? No 👻 🕐	Submit Cancel
List description (optional):	Legal Thrillers th	at I have read	

#### 8) Click Submit.

9) The new list appears beneath the temporary list.

10) Select the title(s) of the items that you want to add to the list, and click **Actions for these items**. Select the permanent list that you created from the drop down menu.

#### **Temporary List**

	AUTHOR(S)	Actions for these items
Rage of angels	Sheldon, Sidney,	Actions for these items Place hold Demove from list
Justice denied	Tanenbaum, Robert.	Move selected items to Book Club
Irresistible impulse	Tanenbaum, Robert,	Legal Thrillers

#### 11) Click Go.

12) Your existing lists appear. Click on a list to view the items in the list. You can sort the items in the permanent list. You can also add, edit, and remove notes.

13) Click **Edit** to add or edit a note.

14). Enter desired notes, and click Save Notes.

Legal Thrillers Legal Thrillers that I have read		Share Del	
Sort list items by: Title: A to Z	✓ Sort		
	AUTHOR(S)	NOTES	
Rage of angels	Sheldon, Sidney,	Recommend to Sarah	
Justice denied	Tanenbaum, Robert.	Favorite legal thriller	
		Save Notes	

15) You can keep your list private, or you can share it. To share your list, click **Share**, and click the orange RSS icon to share through an RSS reader. You can also click **HTML View** to share your list as an HTML link.

You can also download your list into a CSV file by clicking Download CSV.

Legal Thrillers	Hide	Delete List	Download CSV	HTML View
Legal Thrillers that I have read				

16) When you no longer need a list, click **Delete List**.

## Part XIII. Developer Resources

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# **Chapter 73. Introduction**

Developers can use this part to learn more about the programming languages, communication protocols and standards used in Evergreen.

# Chapter 74. Updating translations using Launchpad

This document describes how to update the translations in an Evergreen branch by pulling them from Launchpad, as well as update the files to be translated in Launchpad by updating the POT files in the Evergreen master branch.

### Prerequisites

You must install all of the Python prerequisites required for building translations, per <u>http://evergreen-ils.org/</u><u>dokuwiki/doku.php?id=evergreen-admin:customizations:i18n</u>

- polib
- translate-toolkit
- levenshtein
- <u>setuptools</u>
- simplejson
- <u>lxml</u>

### Updating the translations

1. Check out the latest translations from Launchpad by branching the Bazaar repository:

bzr branch lp:~denials/evergreen/translation-export

This creates a directory called "translation-export".

- 2. Ensure you have an updated Evergreen release branch.
- 3. Run the build/il8n/scripts/update\_pofiles script to copy the translations into the right place and avoid any updates that are purely metadata (dates generated, etc).
- 4. Commit the lot! And backport to whatever release branches need the updates.
- 5. Build updated POT files:

```
cd build/i18n
make newpot
```

This will extract all of the strings from the latest version of the files in Evergreen.

- 6. (This part needs automation): Then, via the magic of git diff and git add, go through all of the changed files and determine which ones actually have string changes. Recommended approach is to re-run git diff after each git add.
- 7. Commit the updated POT files and backport to the pertinent release branches.

# **Appendix A. Attributions**

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# **Appendix B. Licensing**



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# **Appendix C. Admonitions**

• Note



• warning



• caution



• tip



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