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 Attributions section for a full list of authors and contributing organizations. Just like the software it describes, this guide is a work in progress, continually revised to meet the needs of its users, so if you find errors or omissions, please let us know, by contacting the DIG facilitators at docs@evergreen-ils.org.

This guide to Evergreen is intended to meet the needs of 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

Template Toolkit 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 auto suggest feature 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. OPAC-visible 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 prefererences 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

License

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:

```
autoreconf -i
```

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 http://evergreen-ils.org/opensrf.php
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 10.0.0.0/8` 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:

```
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 `cgi-bin` 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":"e5f9827cc0f93b503a1cc66bee6bdd1a",
      "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 http://evergreen-ils.org/listserv.php or contact us on the Freenode IRC network on the #evergreen channel.

License

Chapter 7. Installing the Staff Client

Installing on Windows

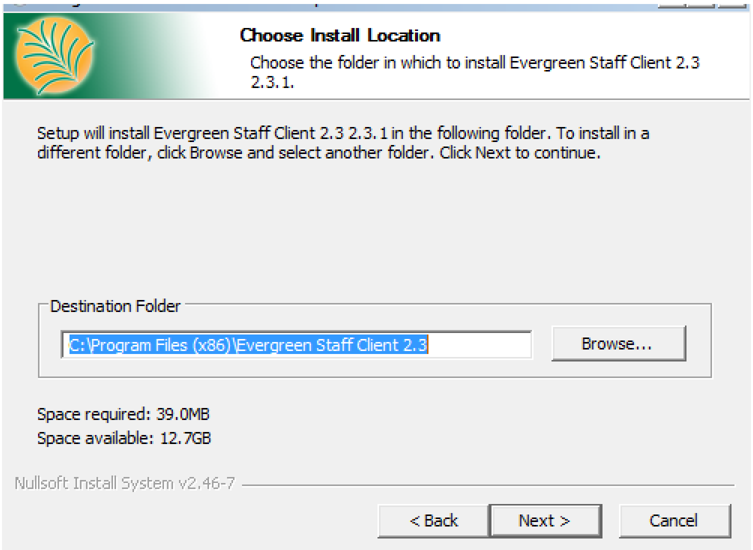
Official Evergreen releases have corresponding Windows based staff clients ready to use.

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

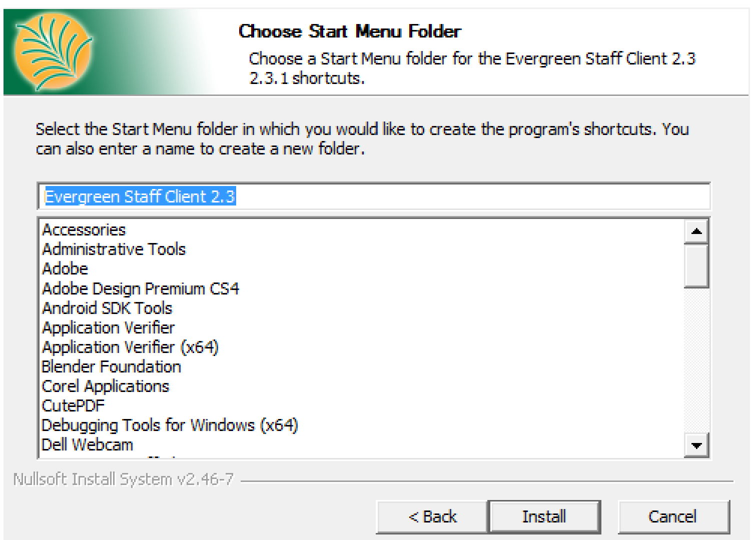
> The version of your staff client will need to match the version of your Evergreen server. If you are unsure about the version of your Evergreen server, contact your system administrator.

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

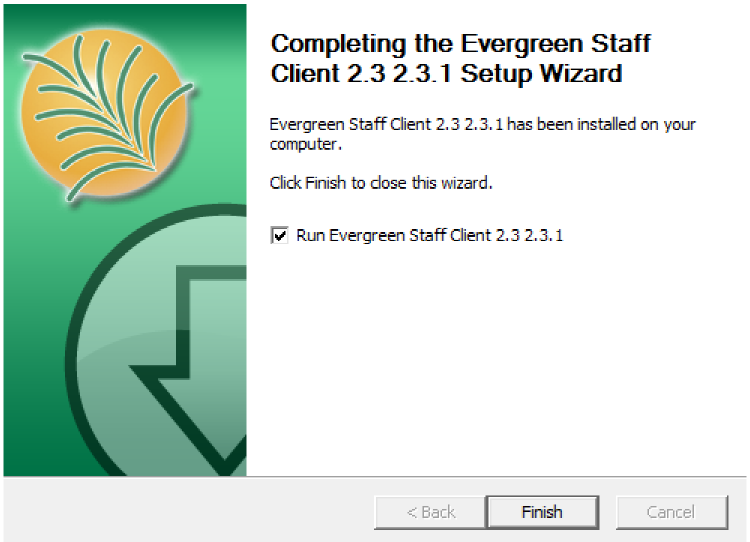
4. Click *Next* to accept desitnation folder.



5. Click *Install*.



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



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 th easiest 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:

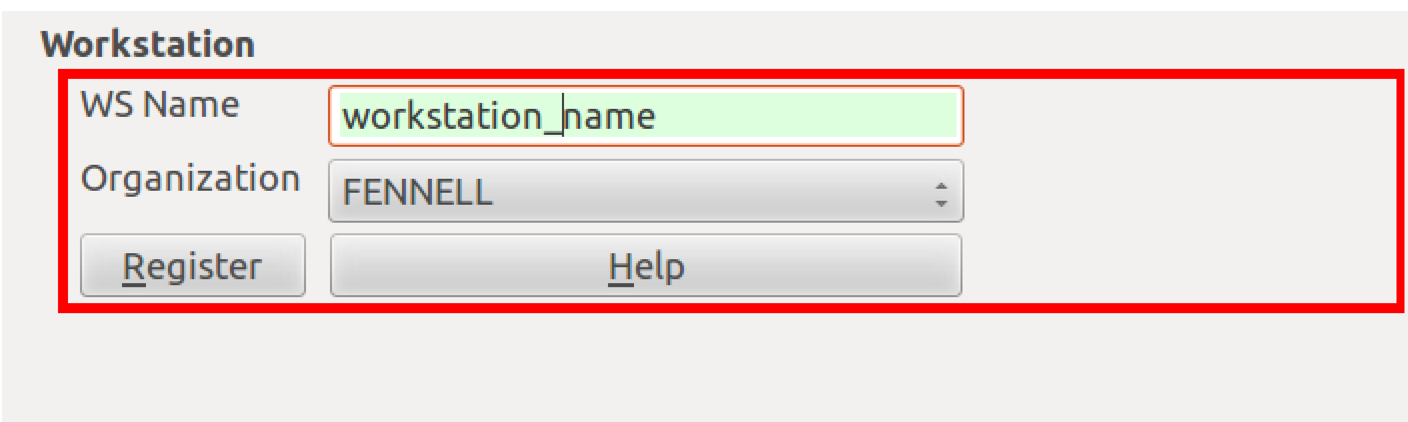
   ```
   ~/evergreen_client_2.2.5/evergreen
   ```

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.



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
   ```

   > **Note**
   > For the latest edition of Evergreen, check the Evergreen download page 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/2.2.4-2.2.5-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.

> **Note:** 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:

```
"buyer":[
    [%   IF   target.provider.edi_default.vendcode && (target.provider.code == 'BT' || target.provider.name.match('(
        {"id-qualifier": 91, "id":"[% target.ordering_agency.mailing_address.san _ ' ' _ target.provider.edi_default
    [%- ELSIF target.provider.edi_default.vendcode && target.provider.code == 'INGRAM' -%]
        {"id":"[% target.ordering_agency.mailing_address.san %]"},
        {"id-qualifier": 91, "id":"[% target.provider.edi_default.vendcode %]"}
    [%- ELSE -%]
        {"id":"[% target.ordering_agency.mailing_address.san %]"}
    [%- END -%]
],
```

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 %]"}
    [%- END -%]
],
```

Part III. System Configuration and Customization

Table of Contents

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 http://localhost/eg/opac/home (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/sites-enabled/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 id="main-content-home">
            <div class="common-full-pad"></div>
            [% INCLUDE "opac/parts/homesearch.tt2" %]
            <div class="common-full-pad"></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).

```
bash$ mkdir -p /openils/var/templates_custom/opac
bash$ cp /openils/var/templates/opac/advanced.tt2 \
        /openils/var/templates_custom/opac/.
bash$ vim /openils/var/templates_custom/opac/advanced.tt2
```

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 br1.concat.ca
    DocumentRoot /openils/var/web/
    DirectoryIndex index.xml index.html index.xhtml
    Include eg_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".

```
bash$ ack-grep "Link 1" /openils/var/templates/opac
/openils/var/templates/opac/parts/topnav_links.tt2
4:            <a href="http://example.com">[% l('Link 1') %]</a>
```

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

Copying the links file into the overrides directory.

```
bash$ cp /openils/var/templates/opac/parts/topnav_links.tt2 \
         /openils/var/templates_BR1/opac/parts/topnav_links.tt2
bash$ vim /openils/var/templates_BR1/opac/parts/topnav_links.tt2
```

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

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

```
<div id="gold-links-holder">
    <div id="gold-links">
        <div id="header-links">
            <a href="http://example.com">[% l('Link 1') %]</a>
            <a href="http://example.com">[% l('Link 2') %]</a>
            <a href="http://example.com">[% l('Link 3') %]</a>
            <a href="http://example.com">[% l('Link 4') %]</a>
            <a href="http://example.com">[% l('Link 5') %]</a>
        </div>
    </div>
</div>
```

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

`");` 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.

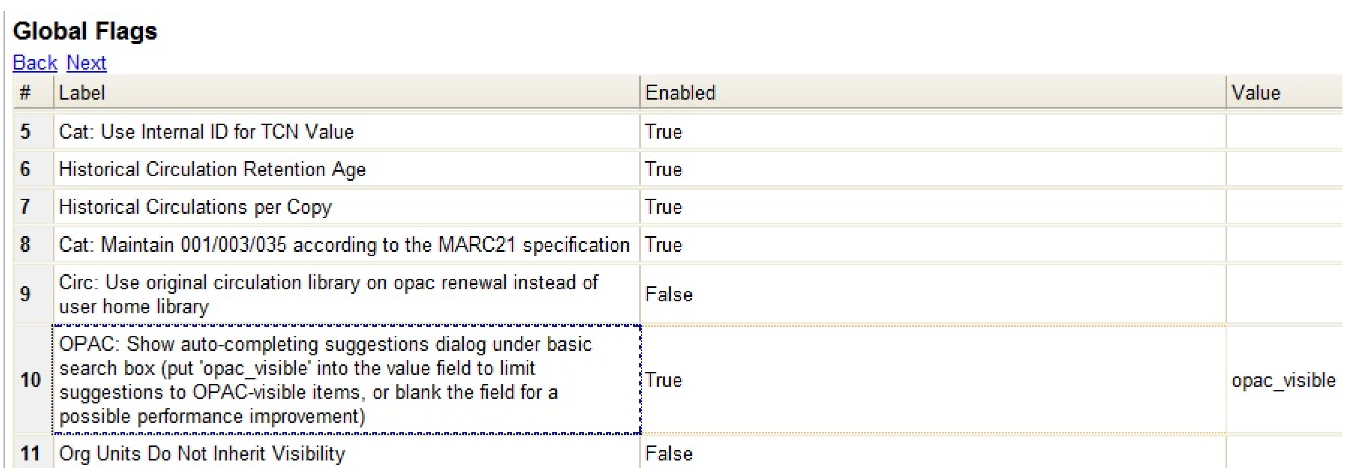
3. Double click anywhere in the row to edit the fields.

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

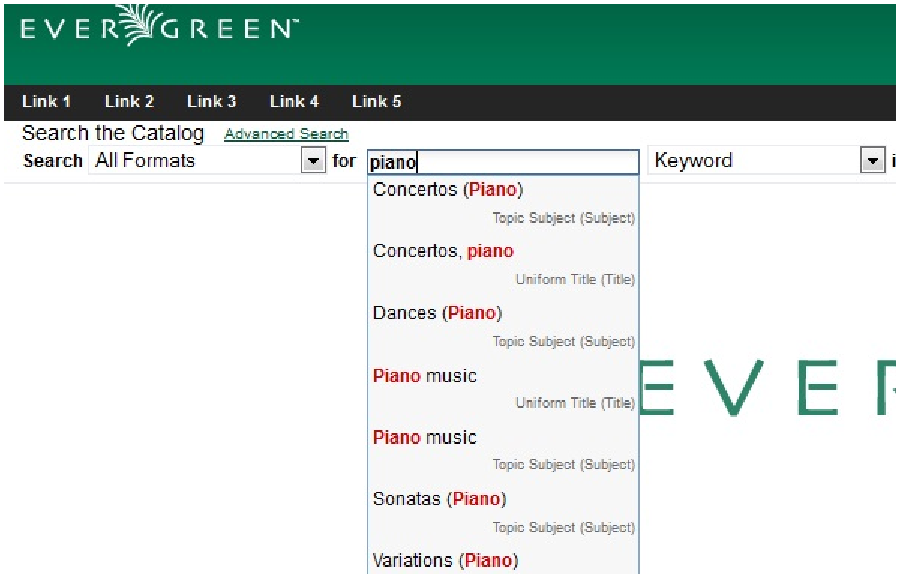
Back Next

#	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.


EVERGREEN
Link 1
Link 2
Link 3
Link 4
Link 5
Search the Catalog
Advanced Search
Search All Formats
for piano
Keyword
Concertos (Piano)
Topic Subject (Subject)
Concertos, piano
Uniform Title (Title)
Dances (Piano)
Topic Subject (Subject)
Piano music
Uniform Title (Title)
Piano music
Topic Subject (Subject)
Sonatas (Piano)
Topic Subject (Subject)
Variations (Piano)

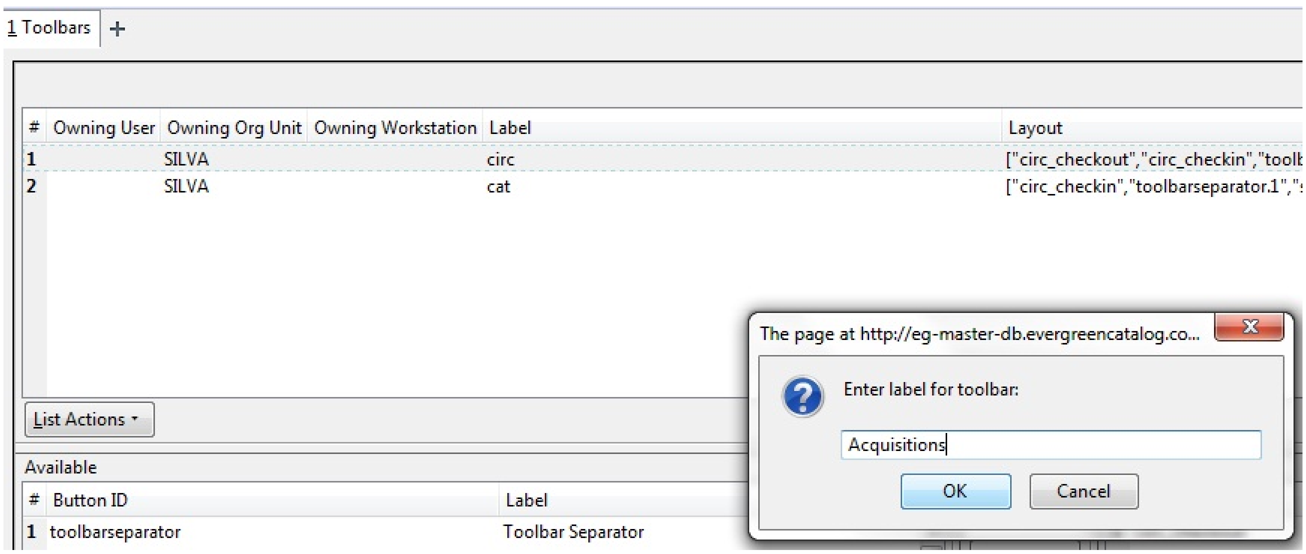
Chapter 13. Customizing the Staff Client

Customizable Toolbar

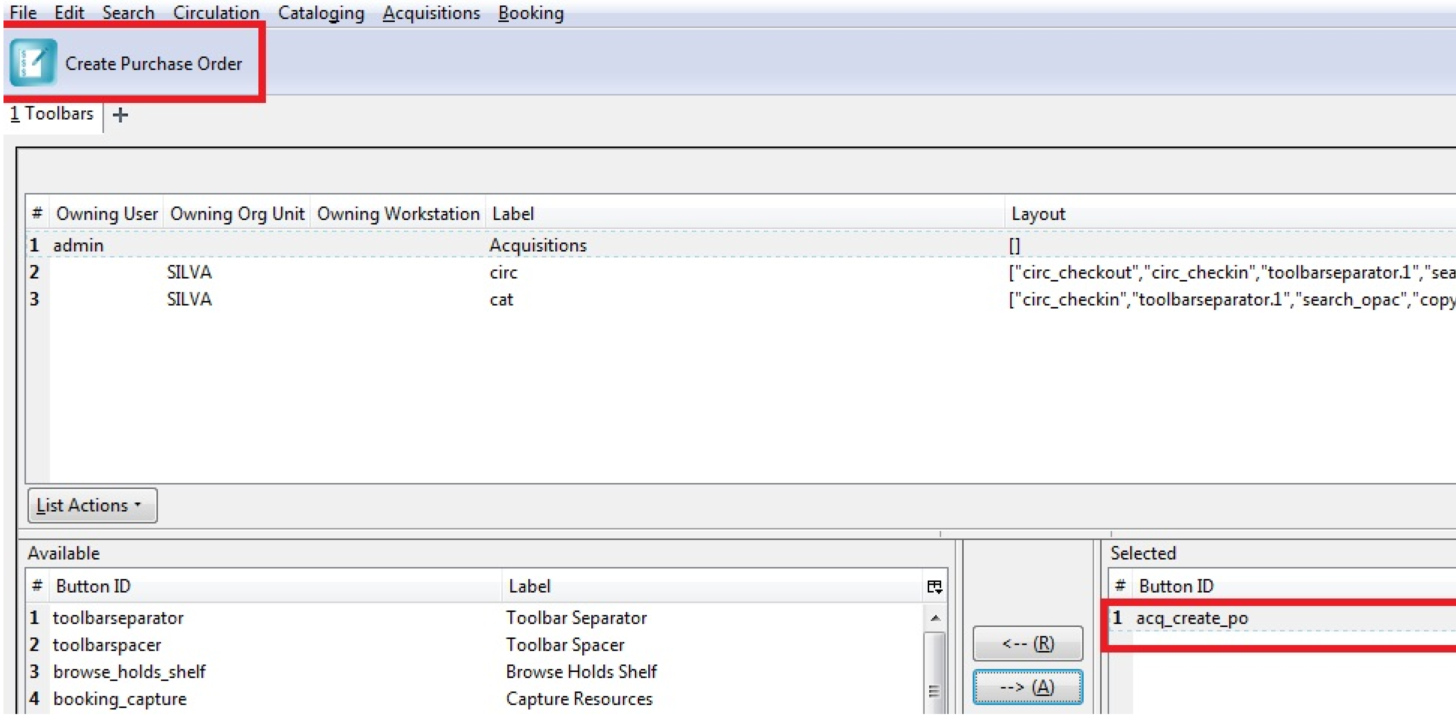
By default, two toolbars are available in the staff client: circulation and cataloging. This feature enables you to customize toolbars in the staff client. You can create toolbars for specific org unit(s), workstation(s), or login(s).

Configure Toolbar

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

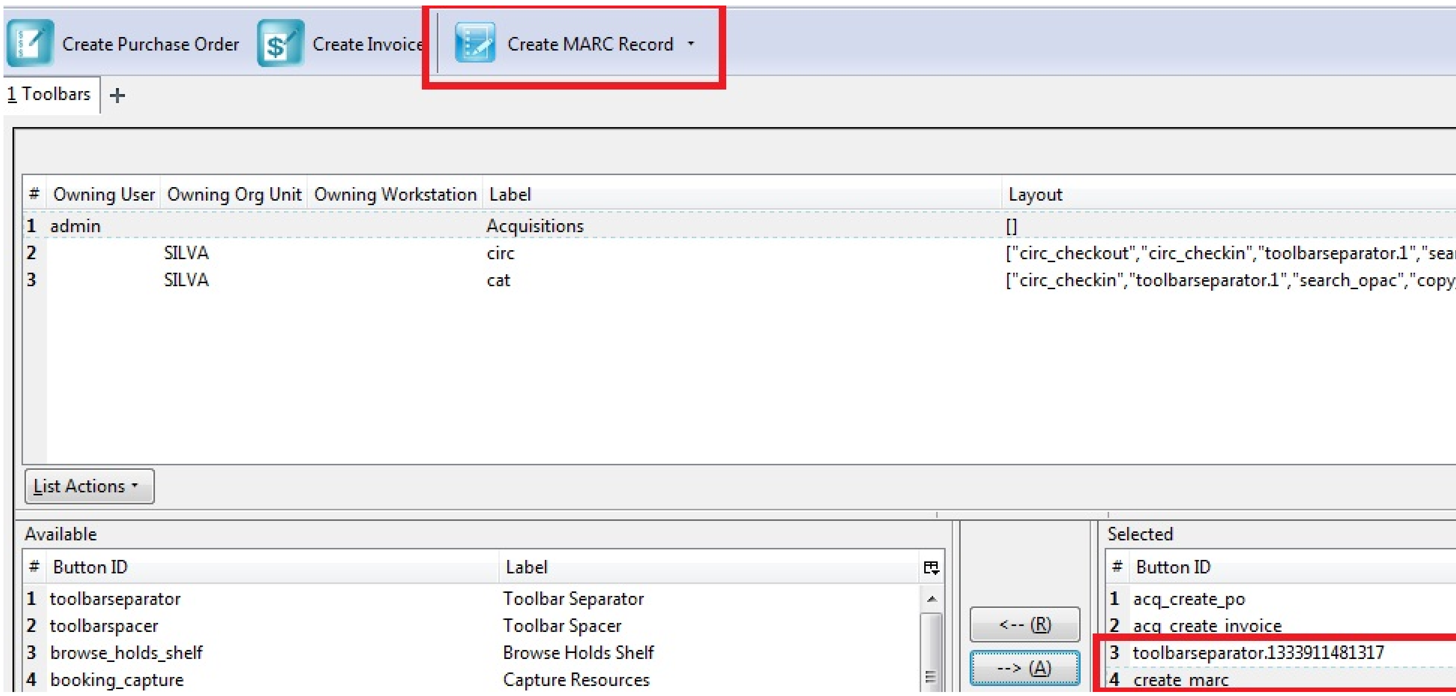


4. Click **Ok**. .Select one of the buttons in the **Available** panel. The **Button ID** describes that action that the button will take, and the **Label** will display in the toolbar.
5. Click the **-# A** button to add the selected function to the **Selected** panel on the bottom right side of the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

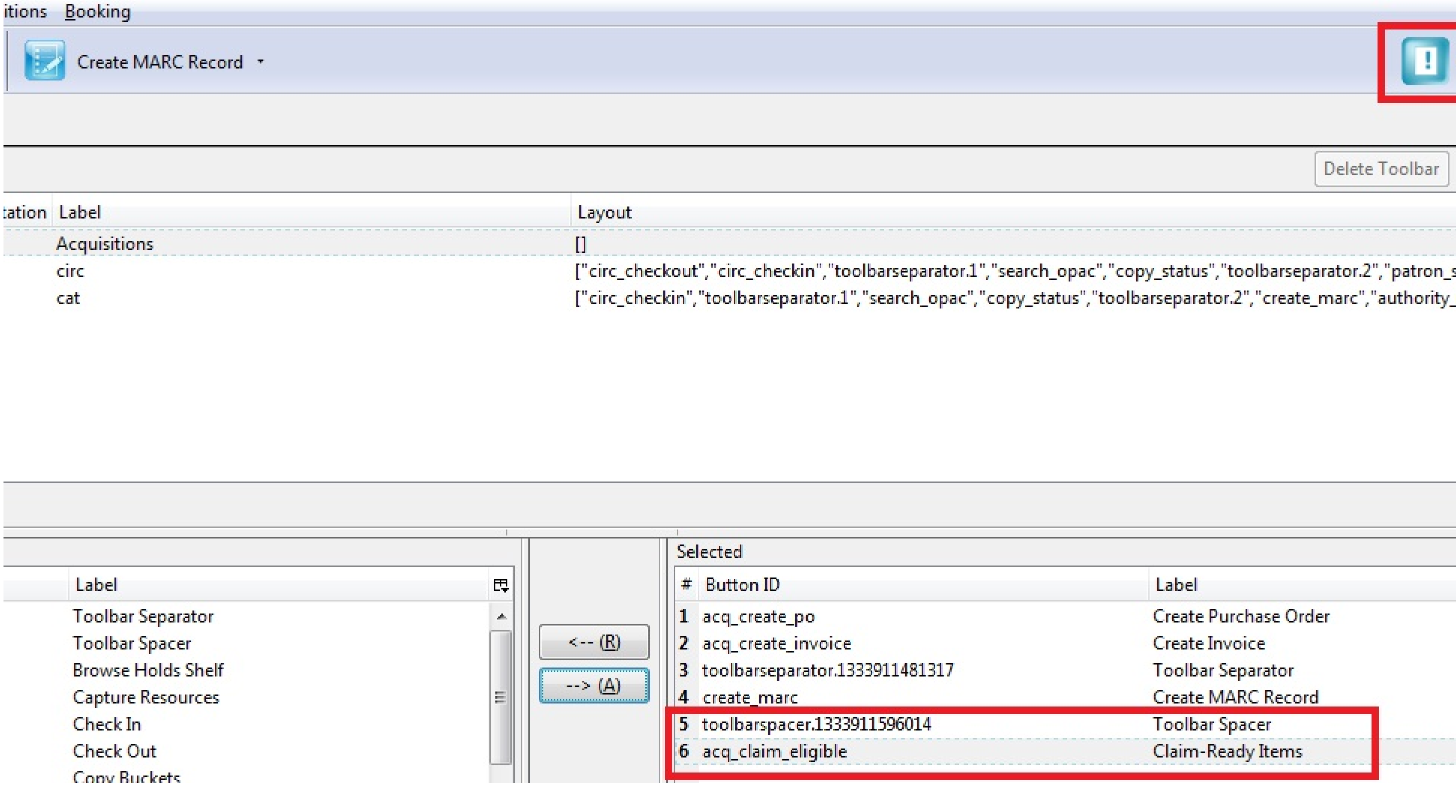


6. Continue adding buttons if desired. The buttons will display in the order that you add them. If you want to reorder the buttons, click the **Up** or **Down** buttons.

7. To separate buttons onto left and right sides of the screen on the same toolbar, select **toolbarspacer**, and click **-# A**.



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



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

Table of Contents

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

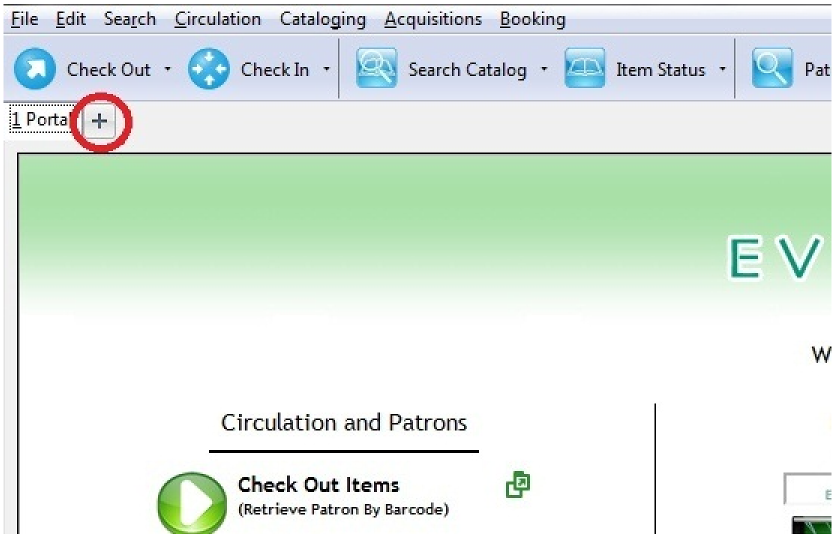
There are several ways to end your Evergreen staff client session:

- 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 **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

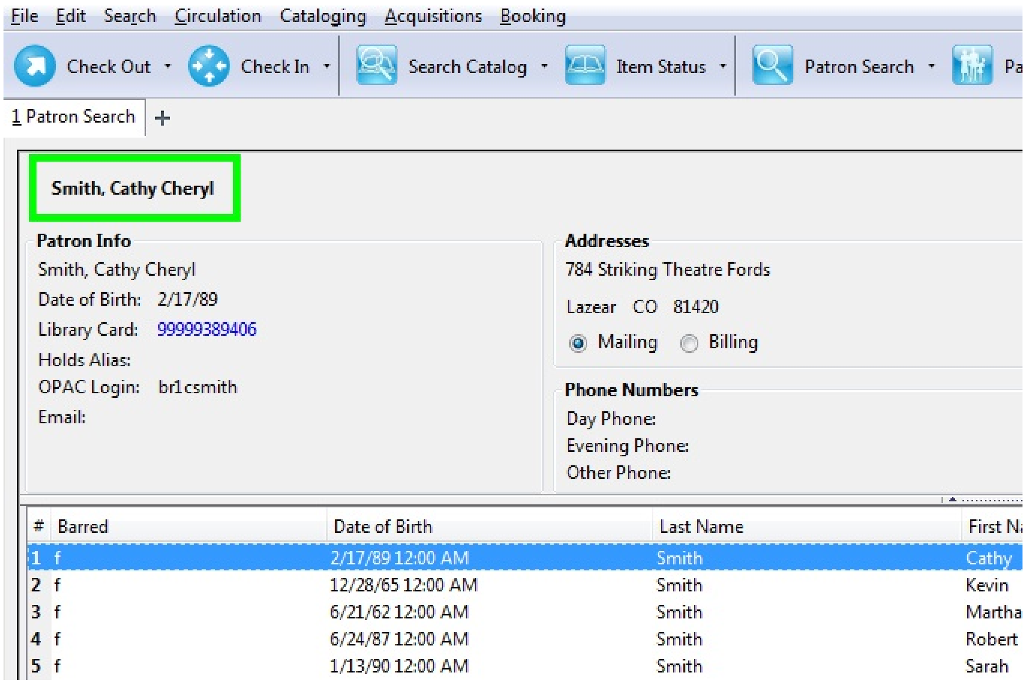
This feature enables you to add a new tab to the Evergreen staff client by clicking the + sign adjacent to the tab that you currently have opened. As in previous versions, you can also add new tabs by clicking **File # New Tab**, or use the hotkey, Ctrl+T.



Chapter 17. New Options for Double Clicking

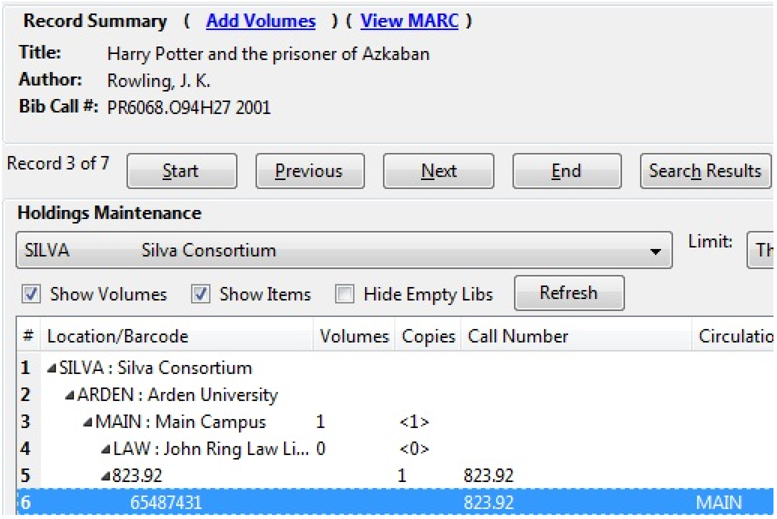
Double Click to Retrieve a Patron's Record

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.



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.



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.

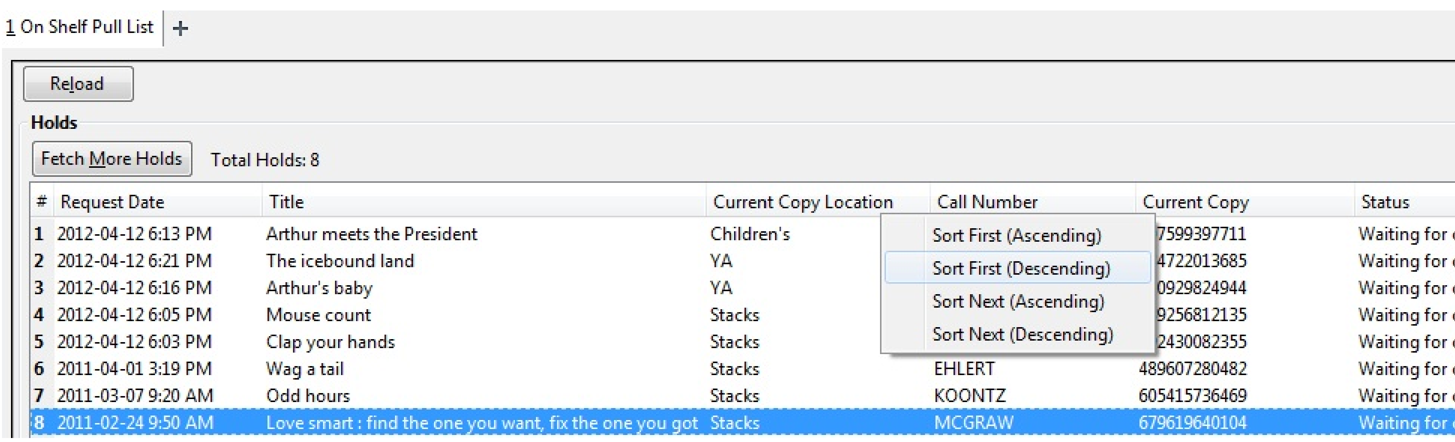
You can also sort the columns on the following Administration screens: Circulation Policies, Hold Policies, Circulation Limit Sets, Barcode Completion, Acquisitions User Request List, and Vandelay Import Errors.

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.

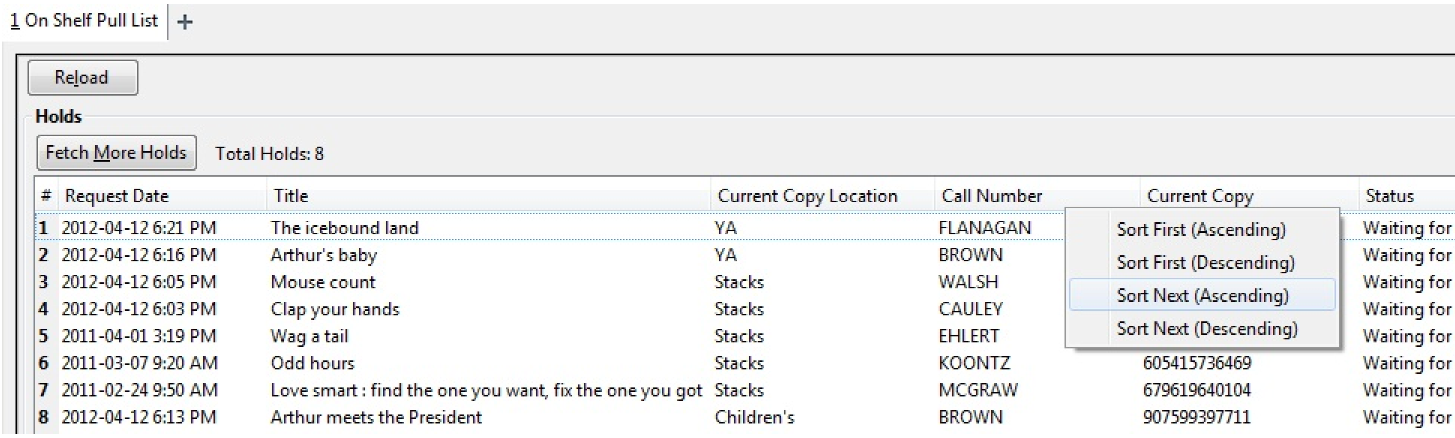
Sorting the On Shelf Pull List

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.

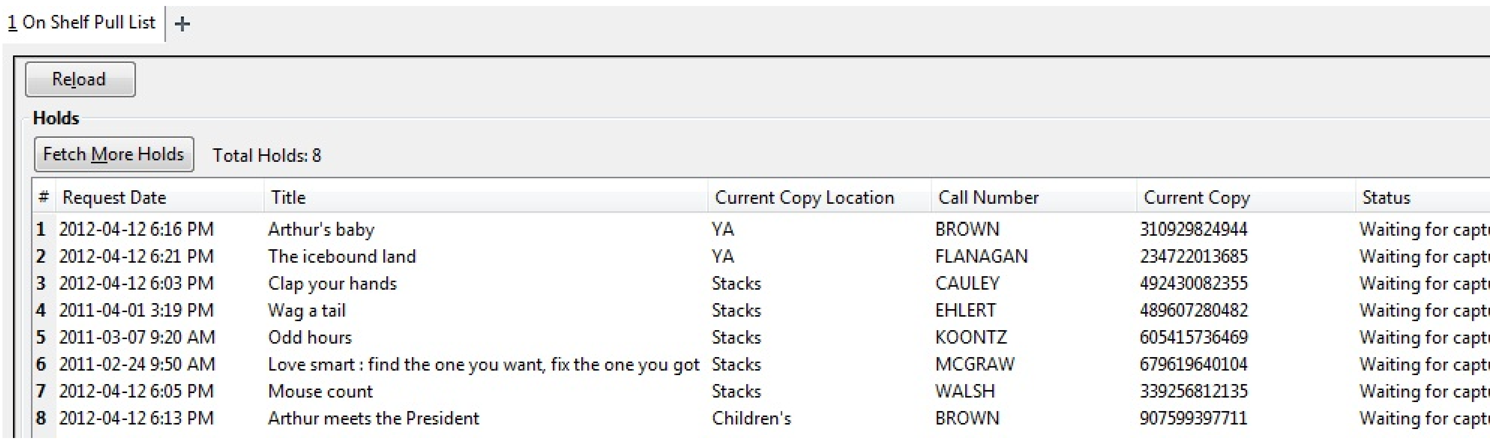
1. Click **Circulation # Pull List for Hold Requests**.
2. The first column that you want to sort is the column, Current Copy Location. Right click the column header, Current Copy Location.
3. Click **Sort First (Descending)**.



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)**.



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



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

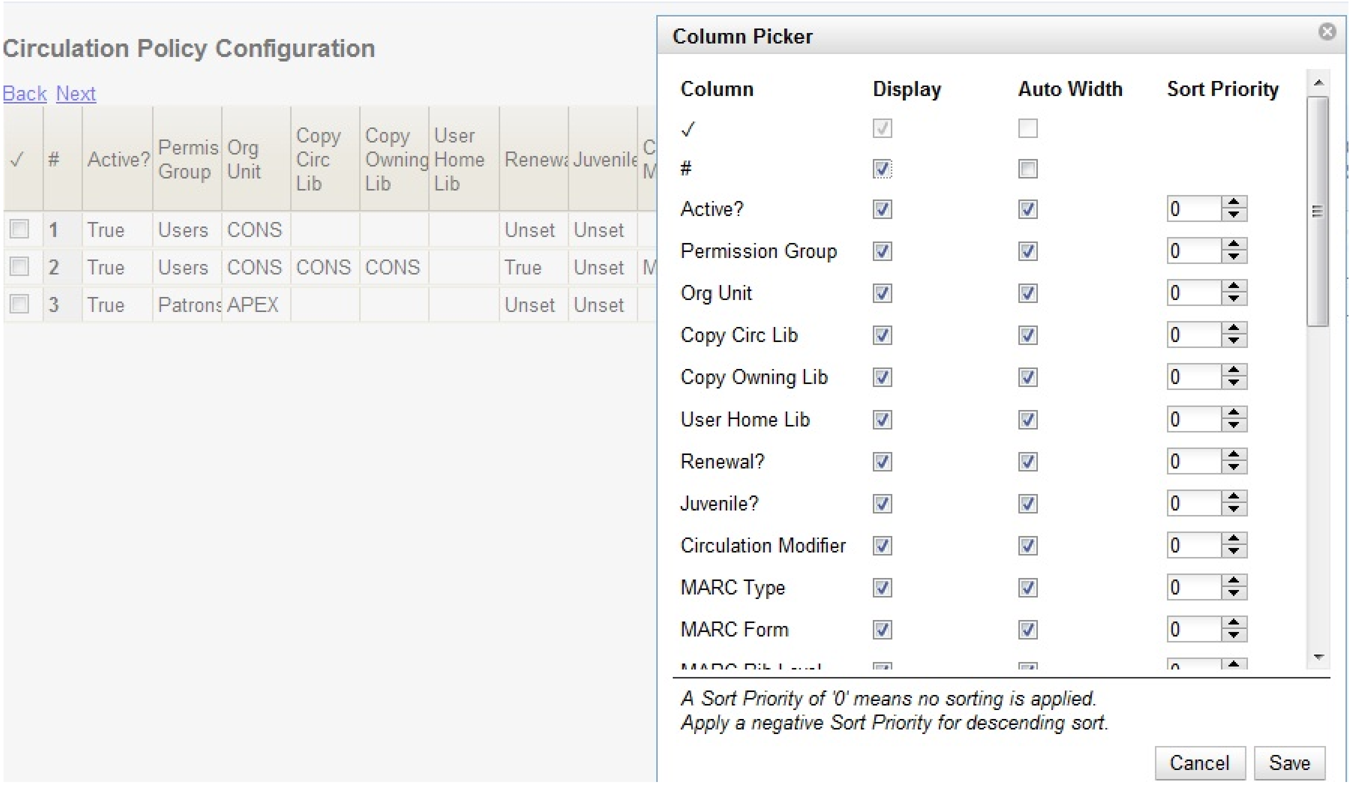
Sorting Circulation Policies

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.



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

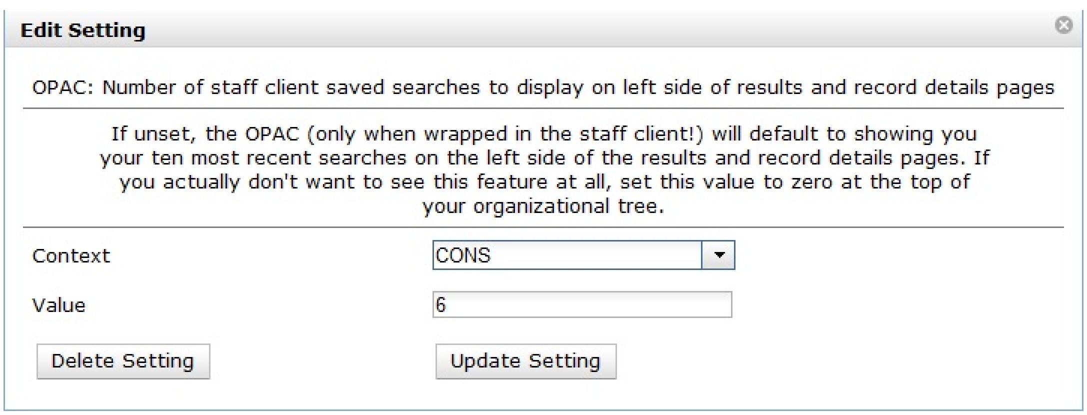
This feature enables you to view your recent searches as you perform them in the staff client. The number of searches that you can view is configurable. This feature is only available through the staff client; it is not available to patrons in the OPAC.

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**



> **Note:** To retain this setting, the system administrator must restart the web server.

If you do not want to save any searches, then you can turn off this feature.

To deactivate this feature:

1. Follow steps 1-4 (one through four) as listed in the previous section.
2. In the **value** field, enter 0 (zero).

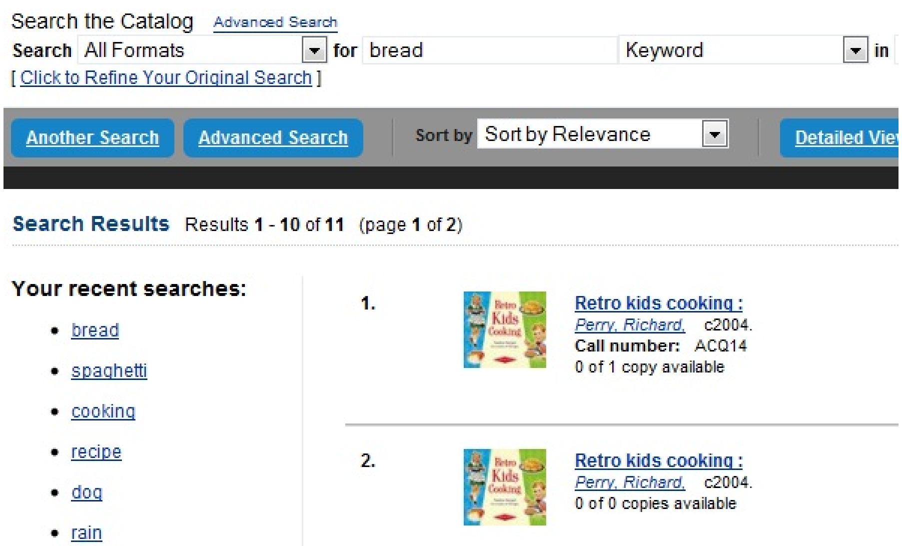
3. Click **Update Setting.** This will prevent you from viewing any saved searches.

Recent Staff Searches

Evergreen will save staff searches that are entered through either the basic or advanced search fields. To view recent staff searches:

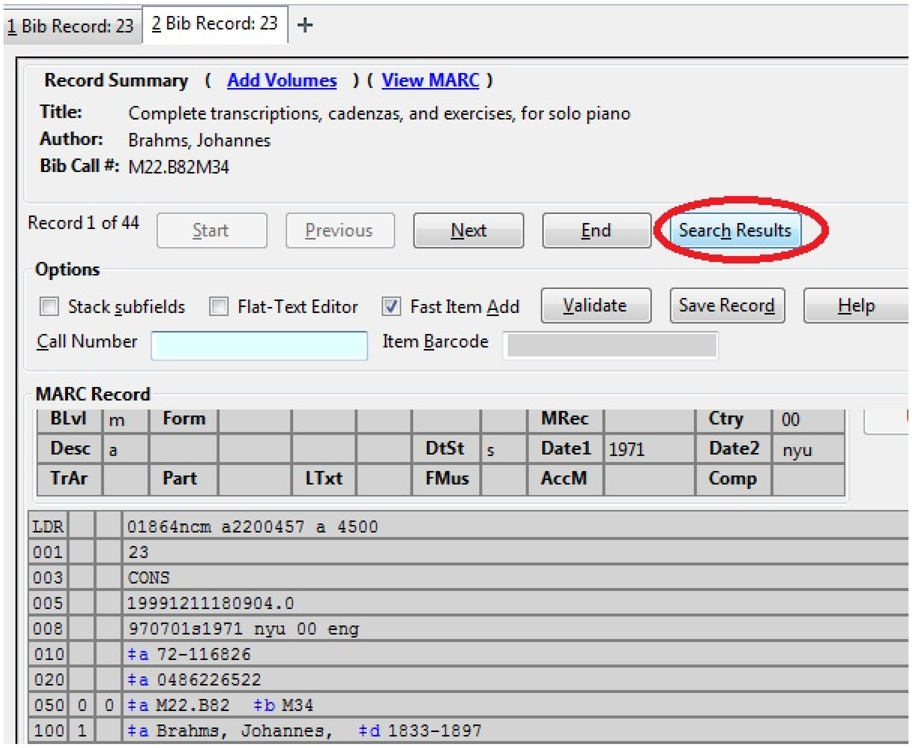
1. Enter a search term in either the basic or advanced search fields.

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.



Chapter 21. Workstation Administration

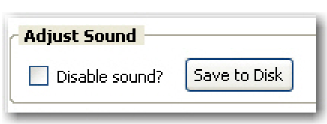
Copy Editor: Copy Location Name First

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.

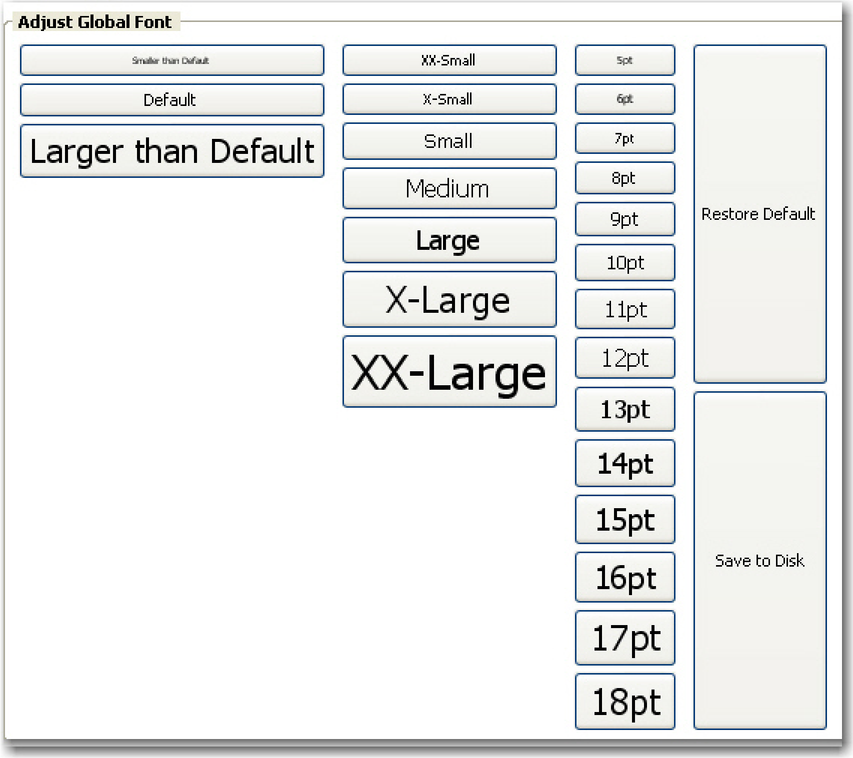
Font and Sound Settings

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*.



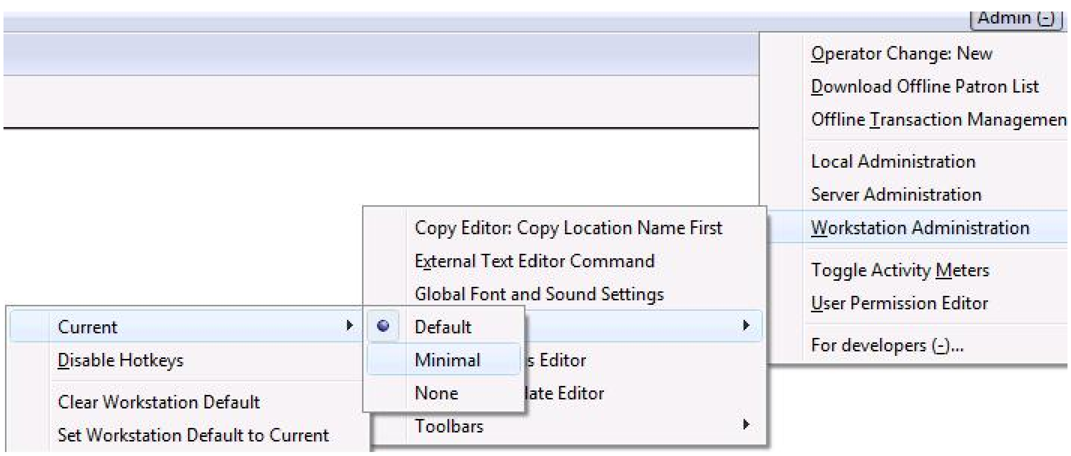
3. To change the size of the font, pick the desired option and click *Save to Disk*.



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.

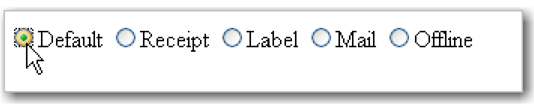
Configure Printers

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.



- **Default**: Default settings for staff client print functions (set for each workstation).

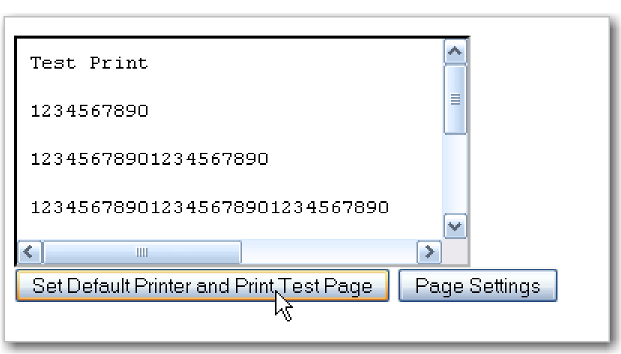
- **Receipt**: Settings for printing receipts.

- **Label**: Printer settings for spine and pocket labels.

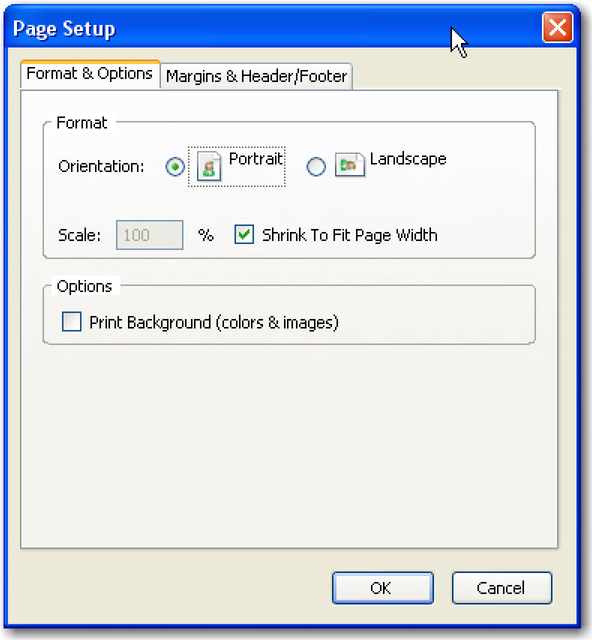
- **Mail**: Settings for printing mailed notices (not yet active).

- **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.



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.



Advanced Settings

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

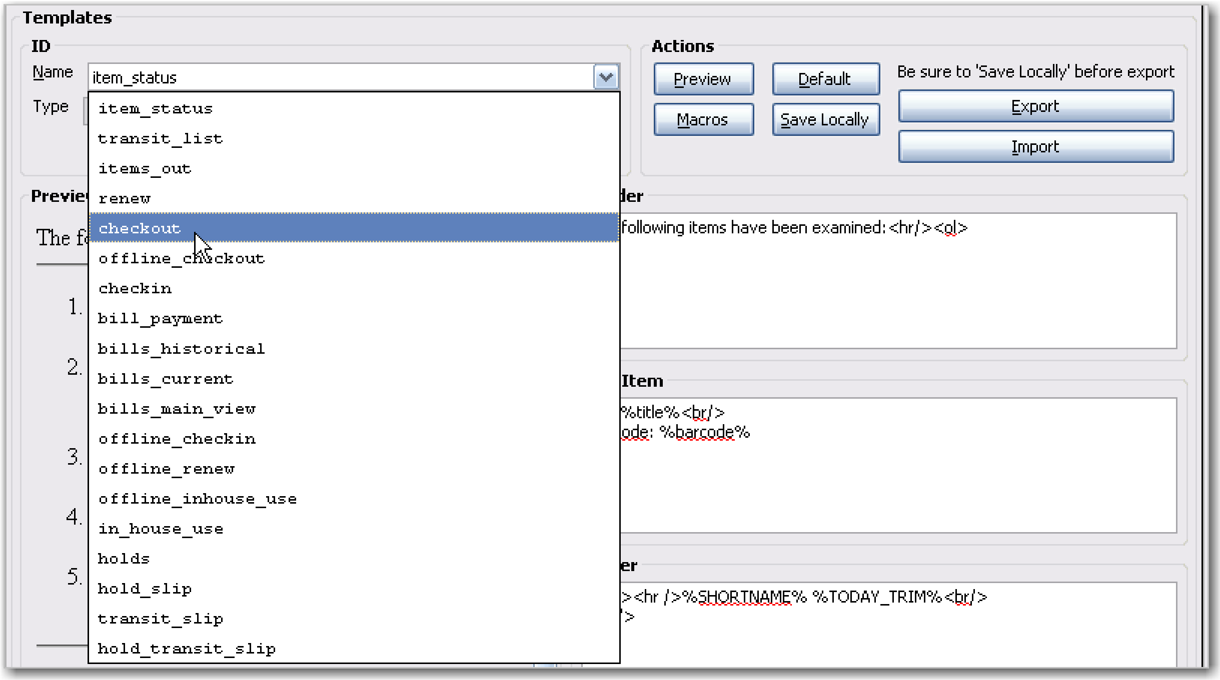
- DOS LPTI Print (sends unformatted text directly to the parallel port)
- Custom/External Print (configuration required)

> 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.

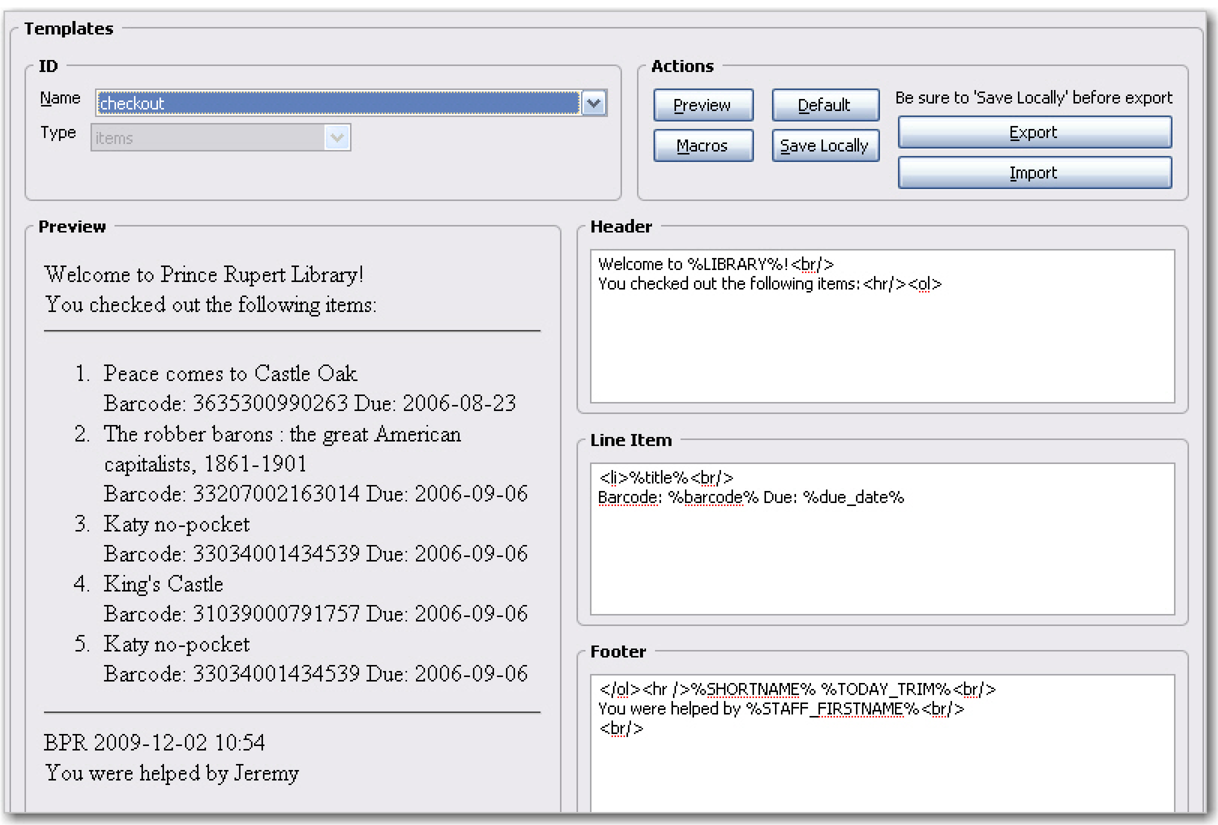
Receipt Template Editor

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.



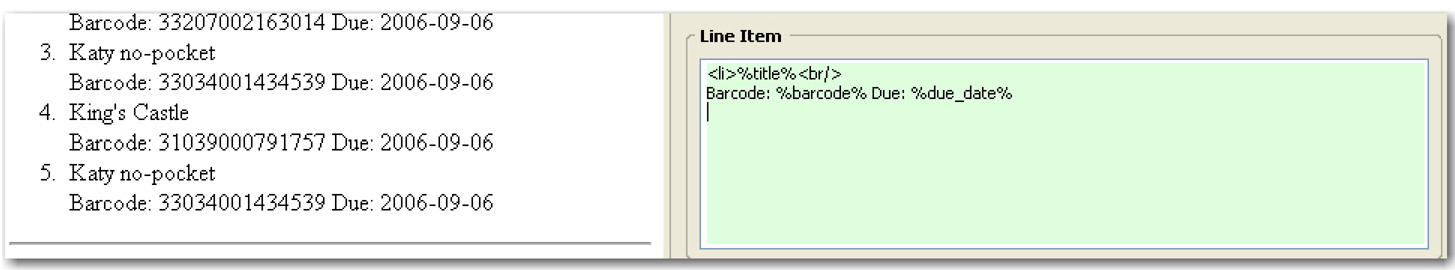
3. This is what the default checkout template looks like. The template preview is on the left hand side. You can edit the *Header*, *Line Item* or *Footer* on the right hand side.



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).

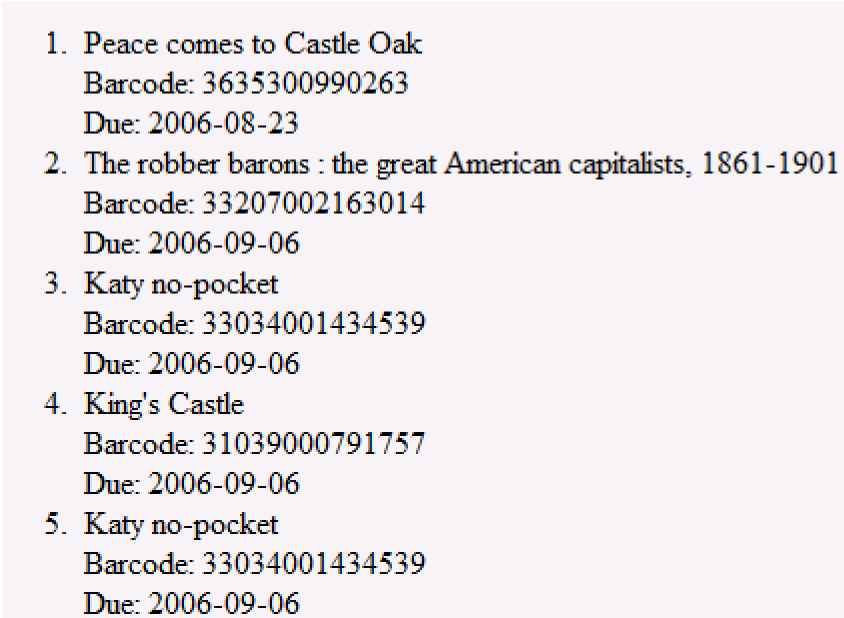
> Receipt templates are marked up with HTML tags. You may use most HTML tags. See http://www.w3schools.com/html/ for more information on HTML tags.
>
> You may insert a link to an image, e.g. your library’s logo, that exists on the web. For example, to inlcude the white Evergreen logo from this document, 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 Library Settings. 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:



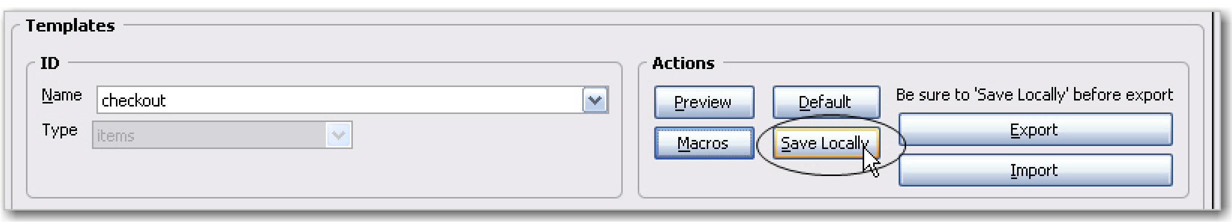
The above is the default *Line Item* in Checkout template. The macro *%barcode%* prints the item barcodes of the books that were checked out. The macro *%due_date%* prints the due date for each item that was checked out. You may add a line break between them: Barcode: *%barcode%* </br> Due: *%due_date%*

The receipt preview will look like this:


1. Peace comes to Castle Oak
   Barcode: 3635300990263
   Due: 2006-08-23
2. The robber barons : the great American capitalists, 1861-1901
   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

> 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.



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:

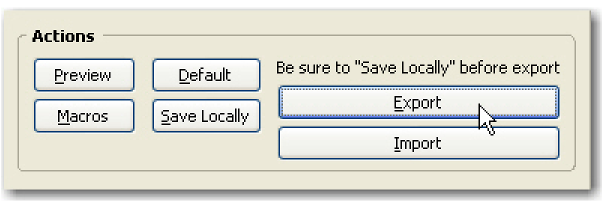
```
<div style="moz-transform: rotate(90deg);height: 300px; width: 200px;">
```

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**.



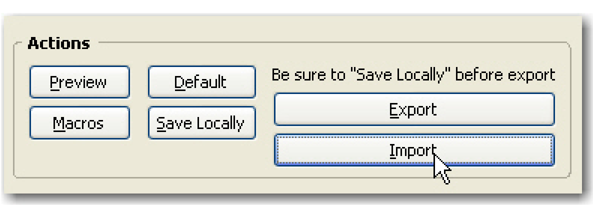
2. Select the location to save the template to, name the template, and click **Save**.

3. Click **OK** to confirm.

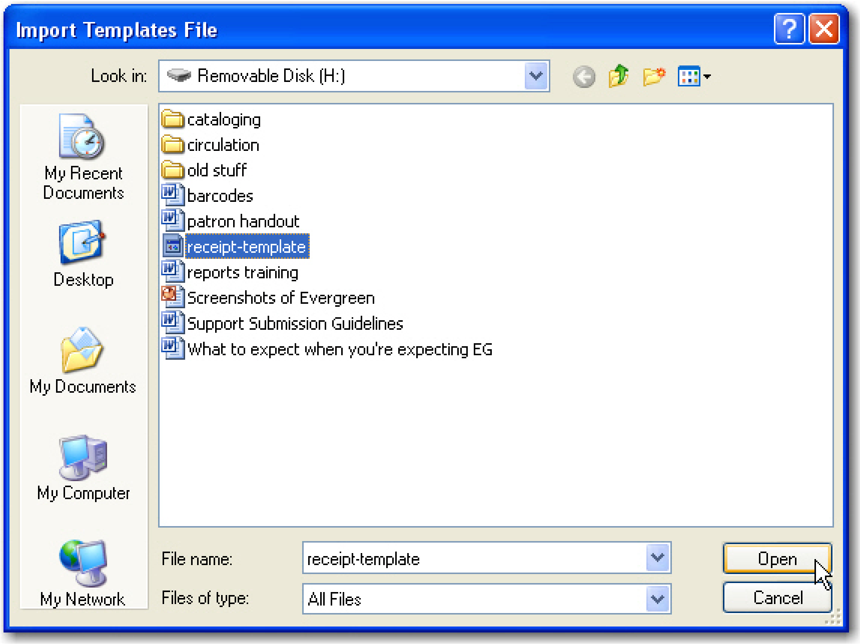
Importing Templates

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**.

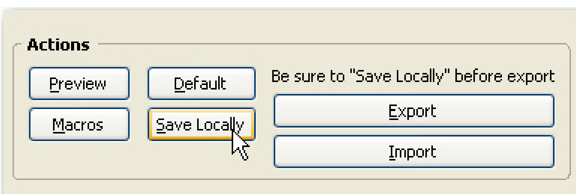


3. Navigate to and select the template file that you want to import. Click **Open**.



4. Click **OK** to confirm on the prompt.

5. Click **Save Locally**.

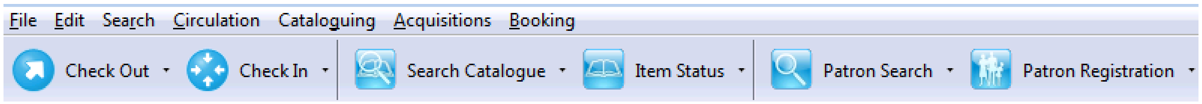


By default all libraries use shared and hard-coded templates for Hold Slip and Transit Slip. Libraries can switch to using their own templates by setting up a library setting: Use legacy hardcoded receipts/slips. Details see Library Settings.

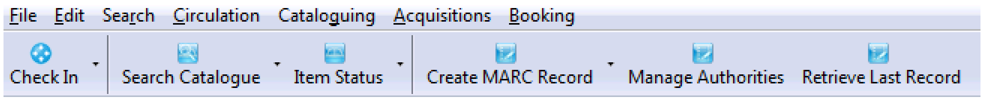
Button Bar/Toolbar

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



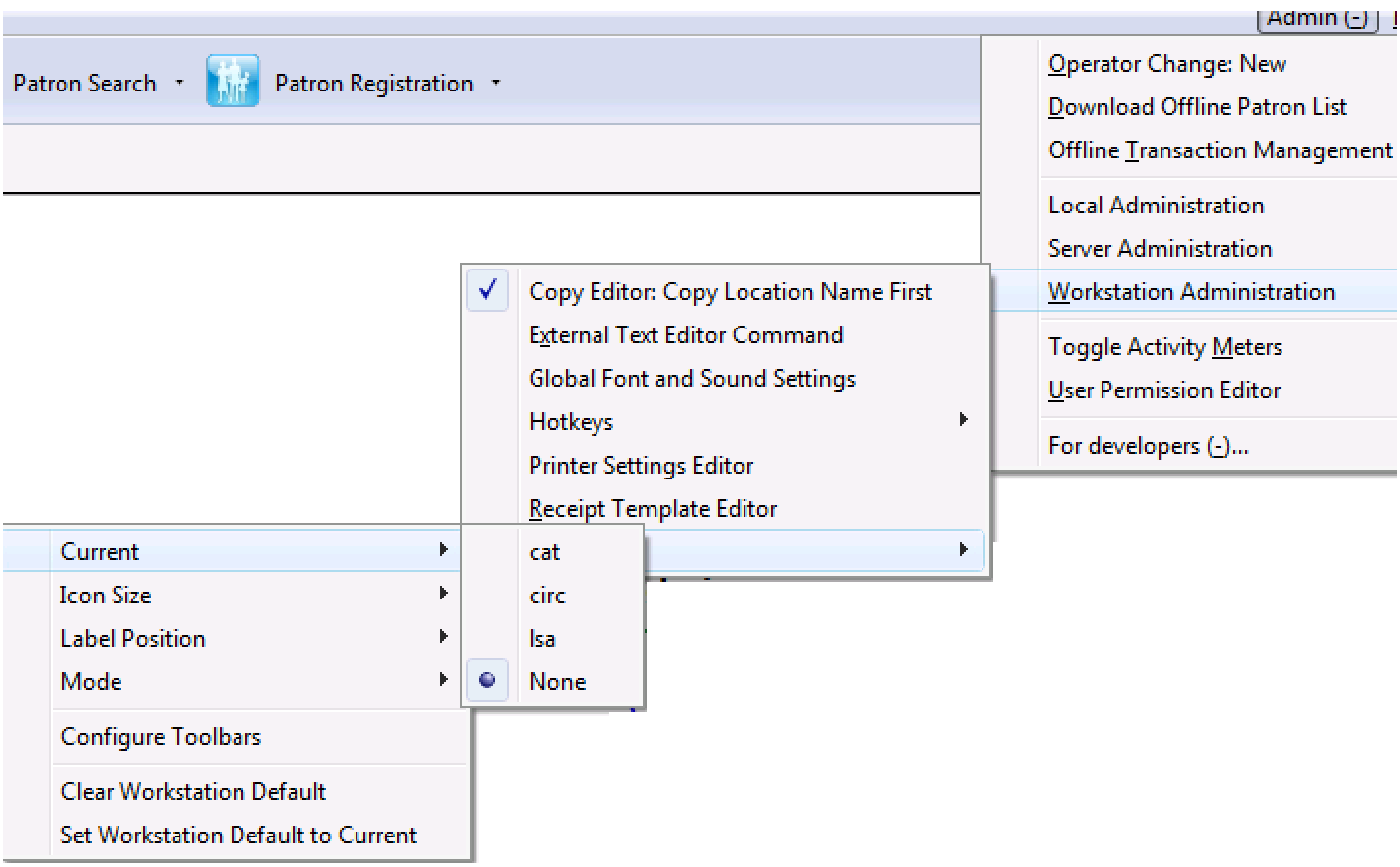
Cataloguing Buttons



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 Library Settings 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**.



2. Choose a group from the list.

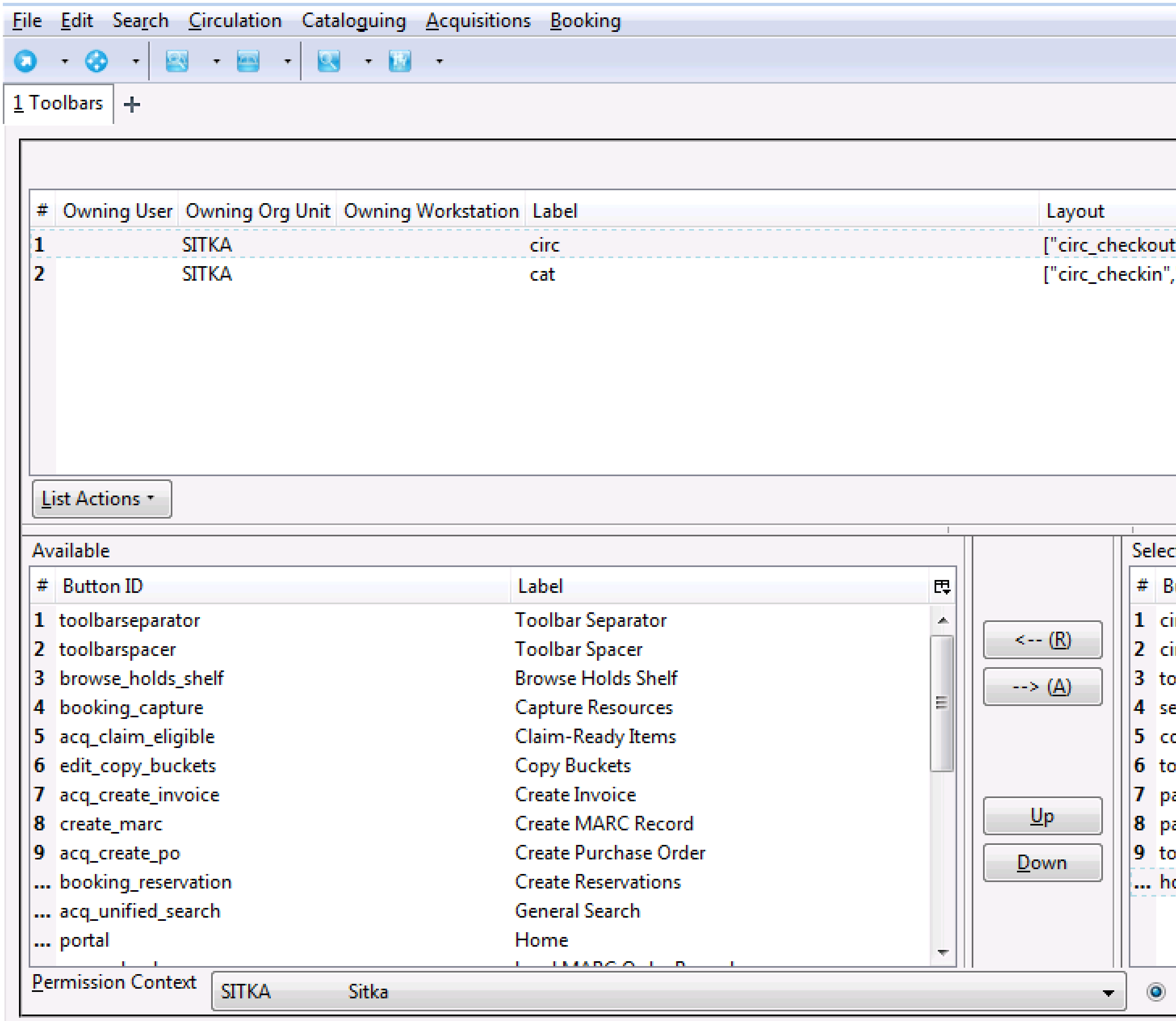
3. Go back to the above menu. Select **Set Workstation Default to Current**. The above selected toolbar group is set as default for this workstation.

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**



3. In the prompt window type in a name for the new group, and then click **OK**.

4. 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.

5. Check one of the radio buttons: **Owning Org Unit**, **Owning Workstation**, or **Owning User** to specify the new group should be availalbe 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

Table of Contents

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. Doubleclick. The popup 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

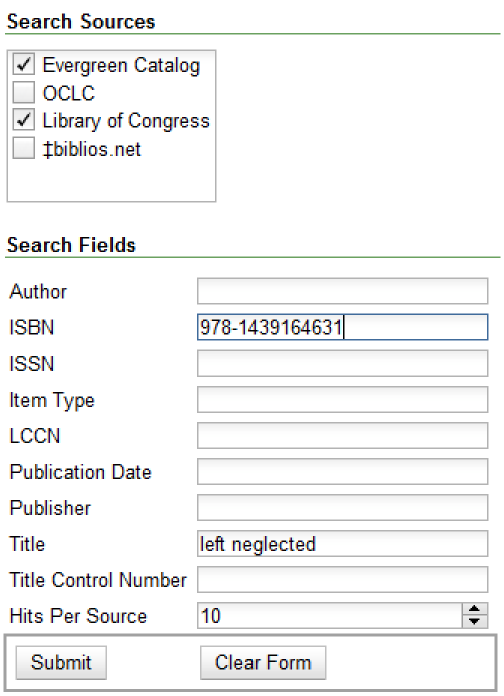
Edit an exchange rate just as you would edit a currency type.

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.

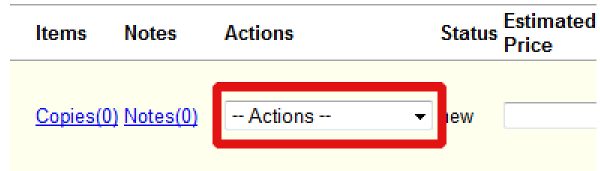


3. A list of results will appear. Click the *Copies* link to add copy information to the line item. See Line Item Feratures for more information.

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).

> note
>
> The rule of parental inheritance applies to this list.

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

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**.

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**:

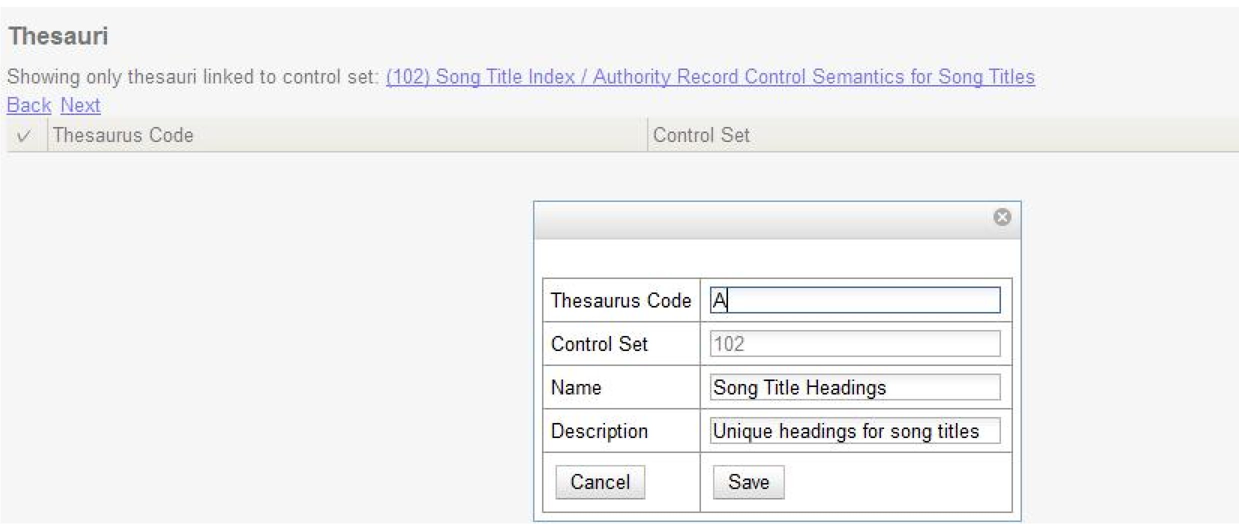
1. Click **Admin** # **Server Administration** # **Authorities** # **Control Sets**, and choose the hyperlinked thesaurus that you want to access, or click **Admin** # **Server Administration** # **Authorities** # **Thesauri**.

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.



Authority Fields

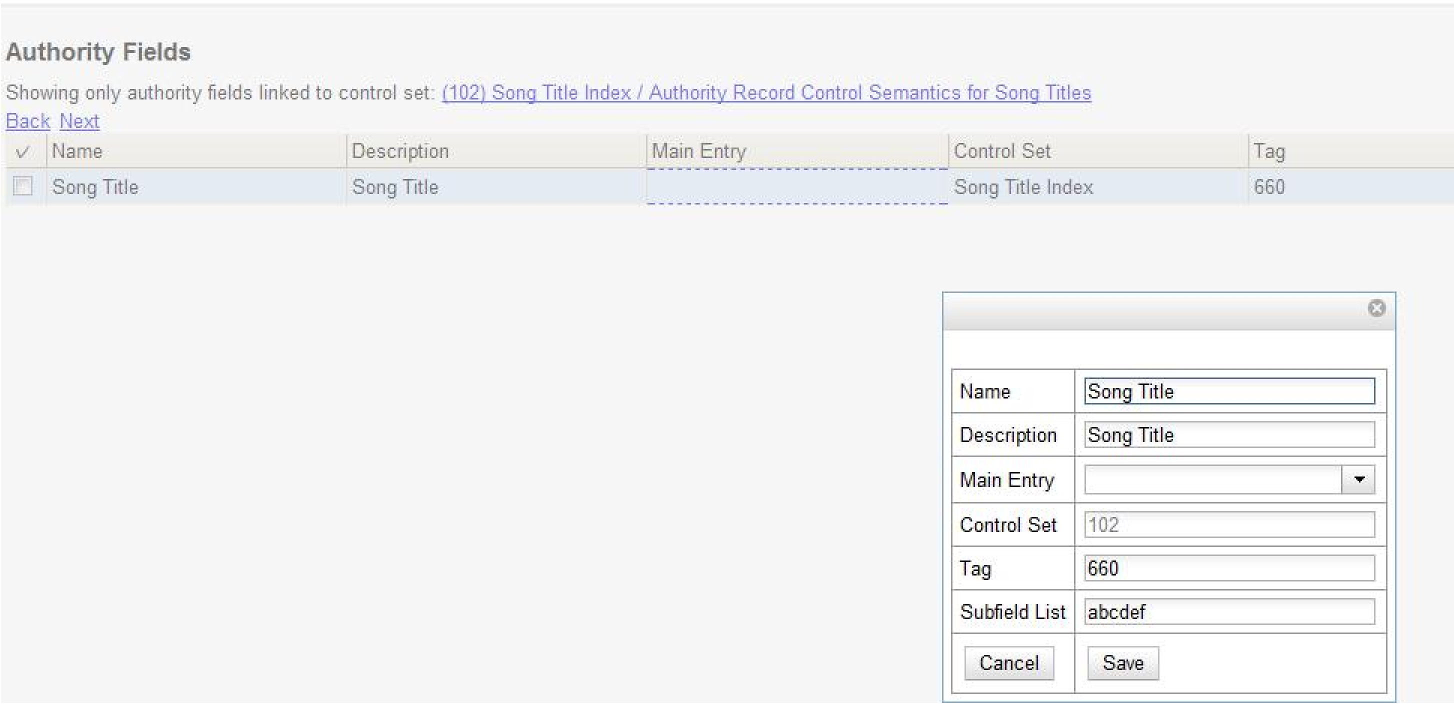
Authority fields indicate the tags and subfields that should be entered in the authority record. Authority fields also enable you to specify the type of data that should be entered in a tag. For example, in an authority record governed by a Library of Congress control set, the 100 tag would contain a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



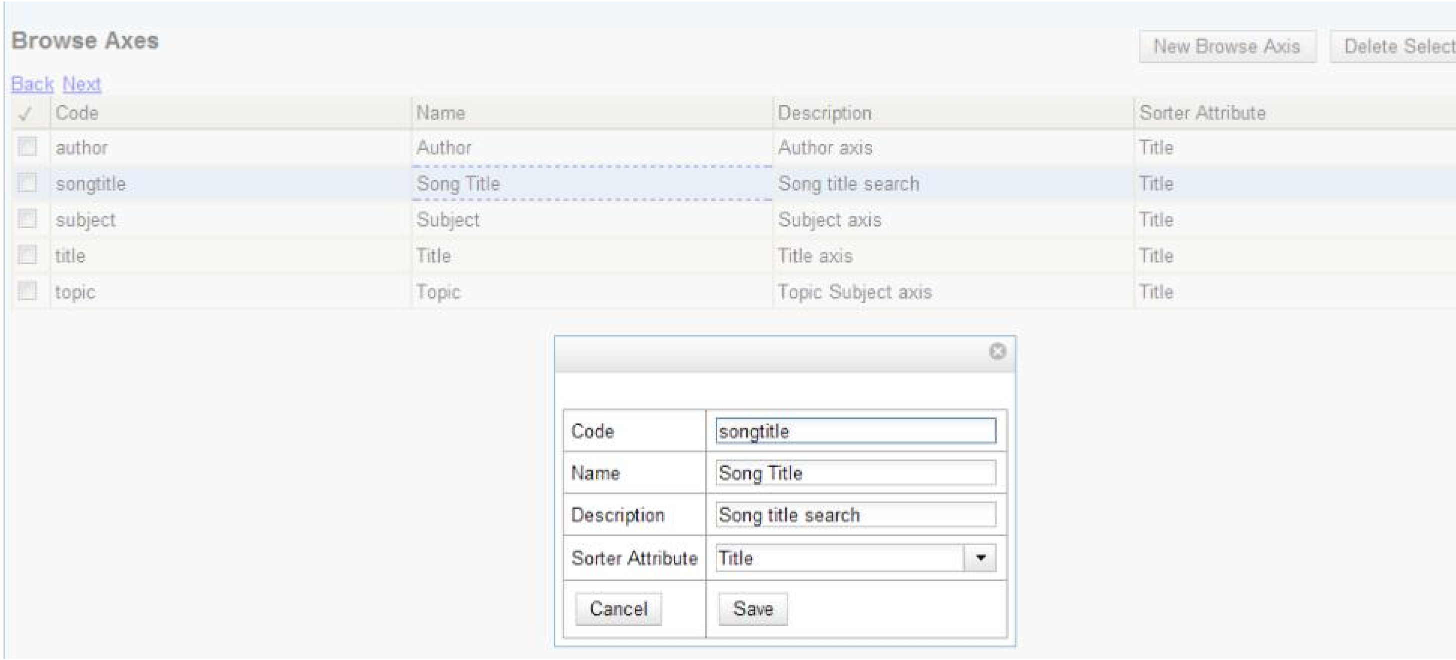
10. Create the corresponding tag in the bibliographic record that should contain this information. Click the **None** link in the **Controlled Bib Fields** column.
11. Click **New Control Set Bib Field**.
12. Add the corresponding tag in the bibiographic record.
13. Click **Save**.

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.



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**.

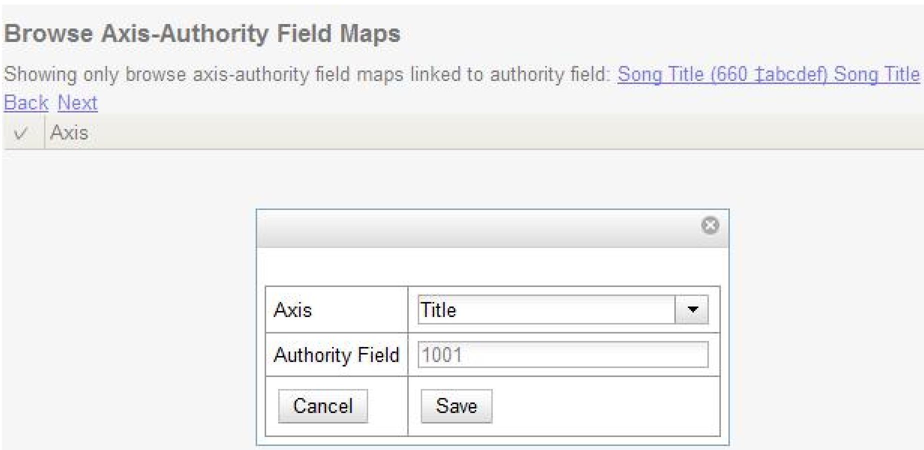
8. Choose the control set to which you will add the axis. Click **Authority Fields**

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**.



OPAC Searching of Authorities

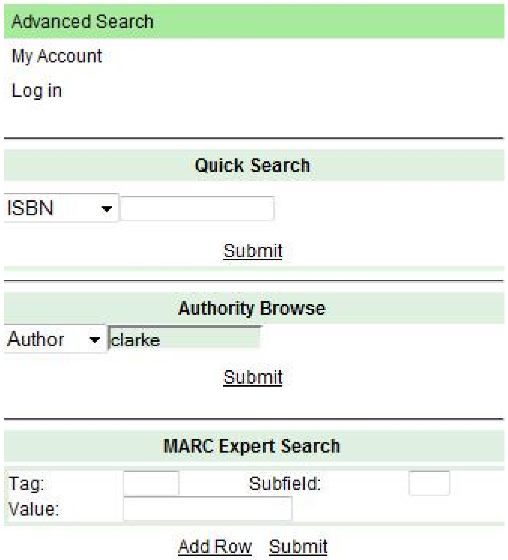
Patrons and librarians can browse authorities through the OPAC.

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.



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.

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:

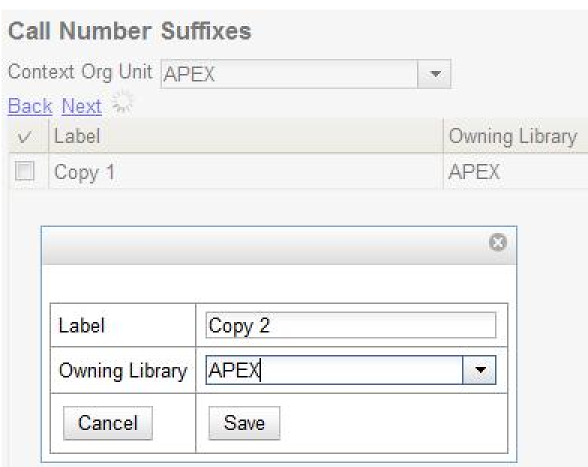
1. Select **Admin # Server Administration # Call Number Prefixes**.

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**.



Configure call number suffixes

Call number suffixes are codes that succeed a call number.

To configure call number suffixes:

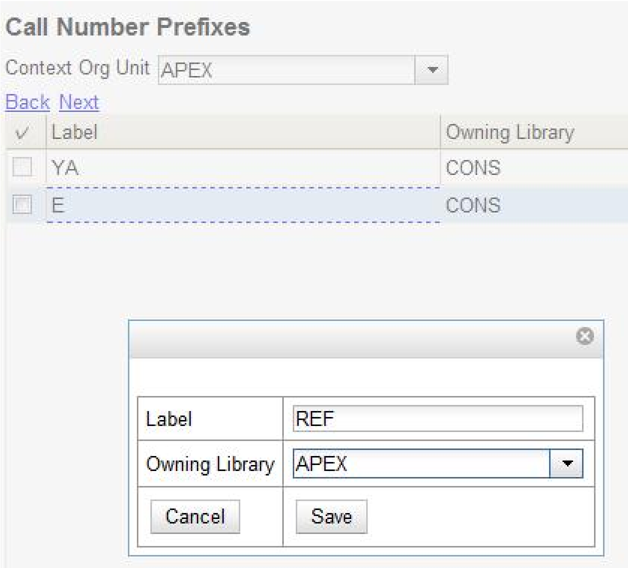
1. Select **Admin # Server Administration # Call Number Suffixes**.

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**.



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.

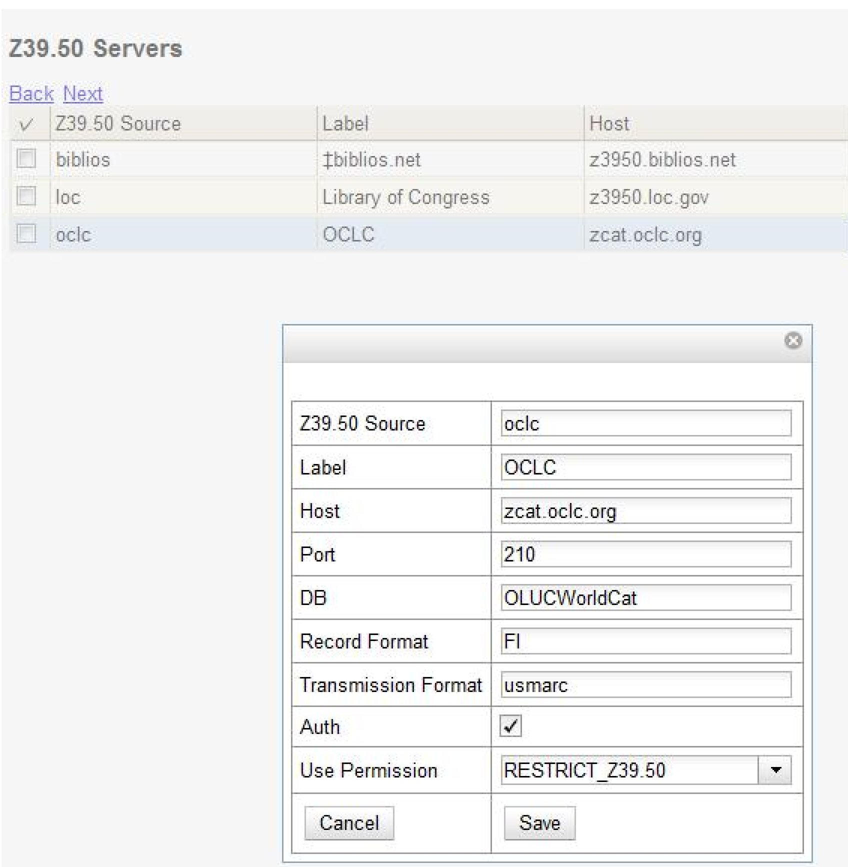
> You must be authorized to add permission types at the database level to add a new permission.

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.



4) Click **Add**.

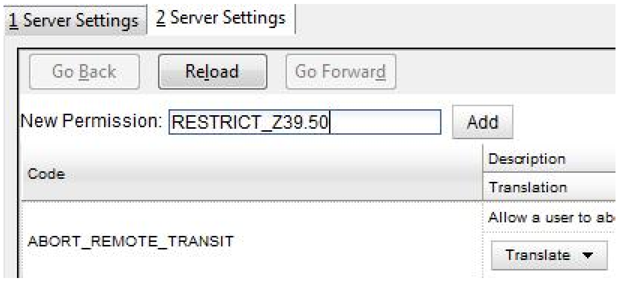
5) The new permission appears in the list of permissions.

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.



4) Click **Save**.

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

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

> 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.

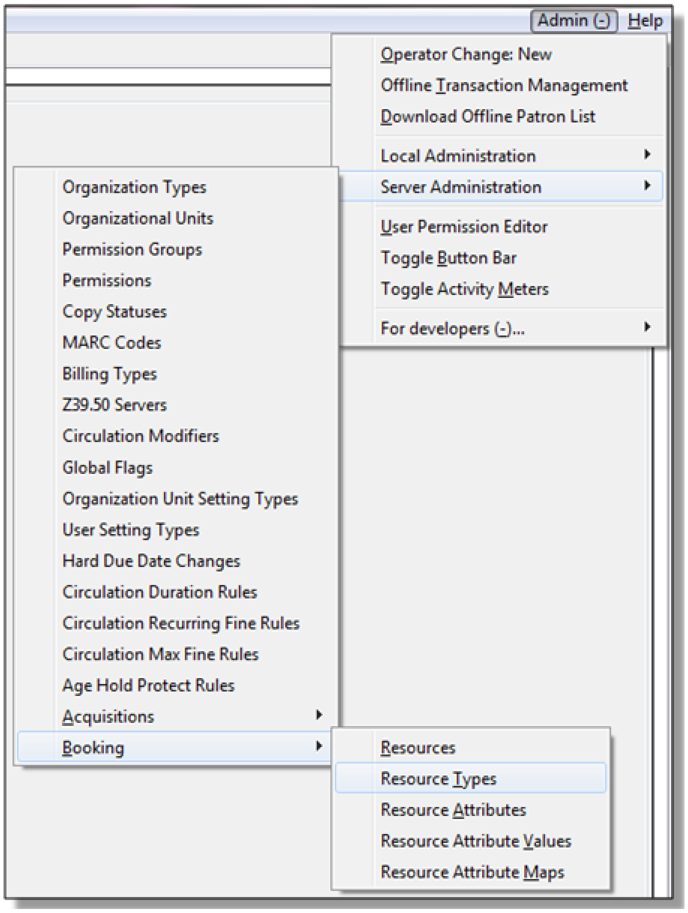
The following pieces make up a non-bibliographic resource:

- Resource Type
- Resource Attribute
- Resource Attribute Values
- Resource
- Resource Attribute Map

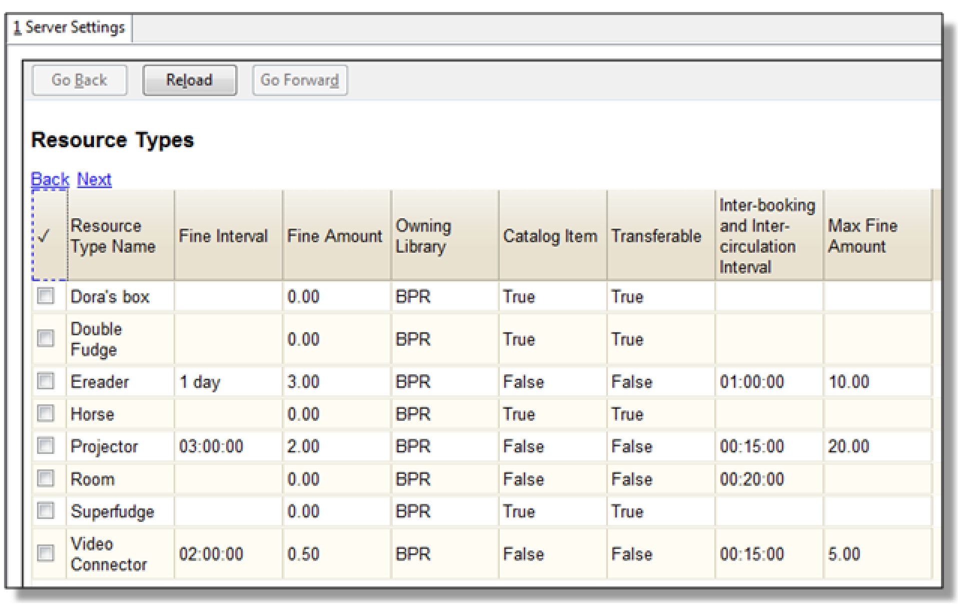
You need to create resource types and resource attributes (features of the resource types), and add booking items (resources) to individual resource type. Each resource attribute may have multiple values. You need to link the applicable features (resource attributes and values) to individual item (resource) 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.



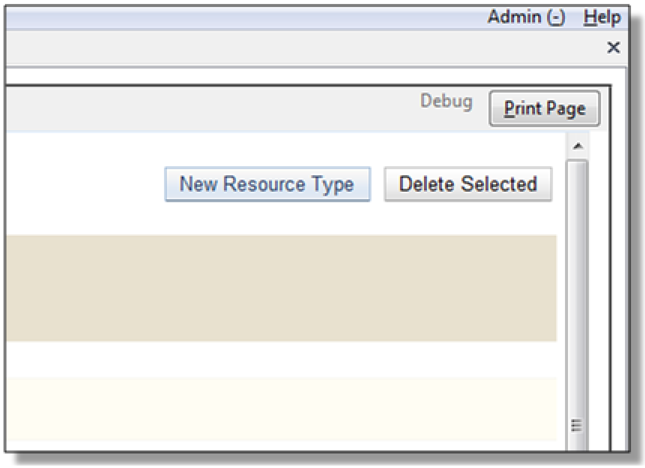
2) A list of current resource types will appear. Use Back and Next buttons to browse the whole list.



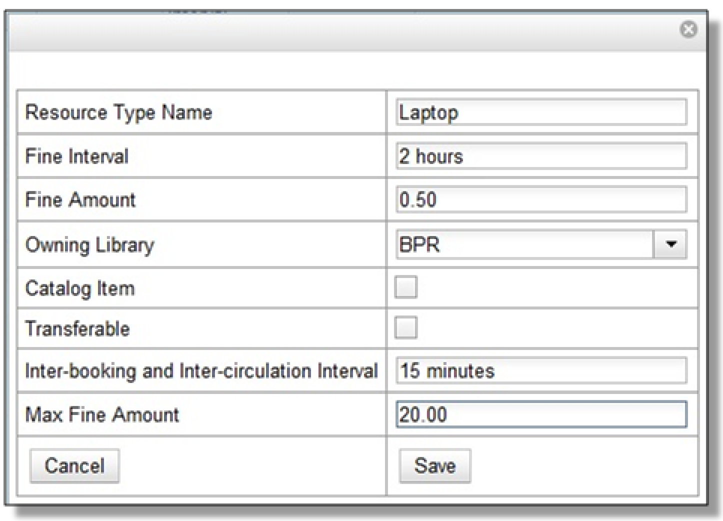
✓	Resource Type Name	Fine Interval	Fine Amount	Owning Library	Catalog Item	Transferable	Inter-booking and Inter-circulation Interval	Max Fine Amount
	Dora's box		0.00	BPR	True	True		
	Double Fudge		0.00	BPR	True	True		
	Ereader	1 day	3.00	BPR	False	False	01:00:00	10.00
	Horse		0.00	BPR	True	True		
	Projector	03:00:00	2.00	BPR	False	False	00:15:00	20.00
	Room		0.00	BPR	False	False	00:20:00	
	Superfudge		0.00	BPR	True	True		
	Video Connector	02:00:00	0.50	BPR	False	False	00:15:00	5.00

> **Note**
> You may also see cataloged items in the list. Those items have been marked bookable or booked before.

3) To create a new resource type, click New Resource Type in the top right corner, .



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



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

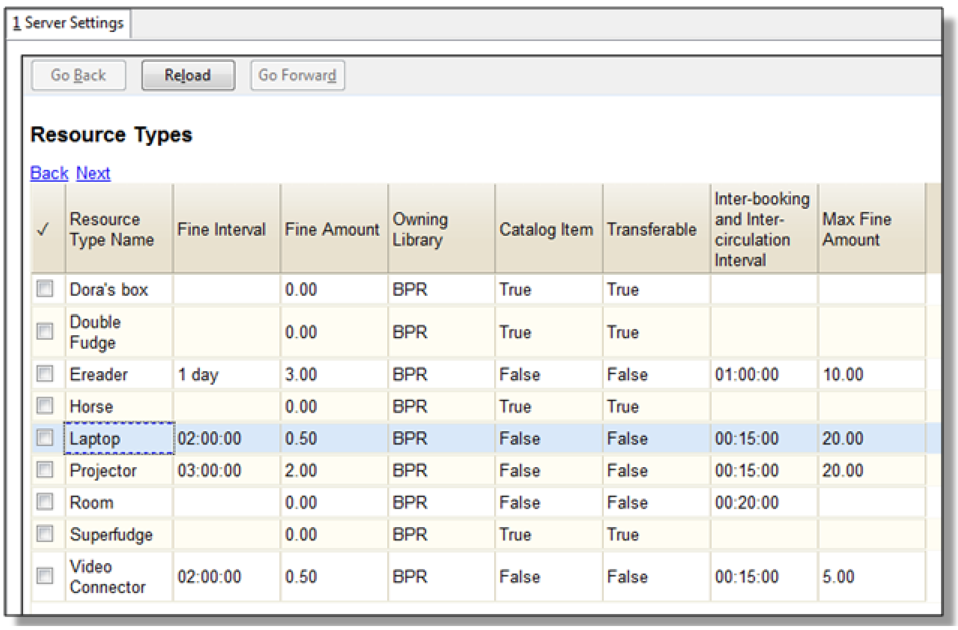
> note
>
> - second(s), minute(s), hour(s), day(s), week(s), month(s), year(s)
> - sec(s), min(s)
> - s, m, h
> - 00:00:30, 00:01:00, 01:00:00

- Fine Amount - The amount that will be charged at each Fine Interval.
- Owning Library - The home library of the resource.

- Catalog Item - (Function not currently available.)
- Transferable - This allows the item to be transferred between libraries.
- Inter-booking and Inter-circulation Interval - The amount of time required by your library between the return of a resource and a new reservation for the resource. This interval uses * the same input conventions as the Fine Interval.
- Max Fine Amount - The amount at which fines will stop generating.

5) Click Save when you have entered the needed information.

6) The new resource type will appear in the list.



Resource Types

Back Next

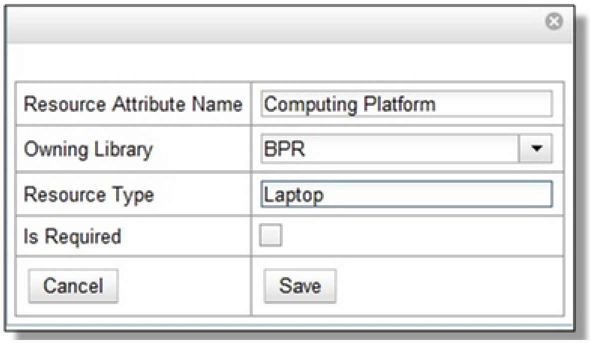
✓	Resource Type Name	Fine Interval	Fine Amount	Owning Library	Catalog Item	Transferable	Inter-booking and Inter-circulation Interval	Max Fine Amount
	Dora's box		0.00	BPR	True	True		
	Double Fudge		0.00	BPR	True	True		
	Ereader	1 day	3.00	BPR	False	False	01:00:00	10.00
	Horse		0.00	BPR	True	True		
	Laptop	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.



- Resource Attribute Name - Give your attribute a name.
- Owning Library - The home library of the resource.
- Resource Type - Type in the first letter to list then choose the Resource Type to which the Attribute is applicable.
- Is Required - (Function not currently available.)

4) Click Save when the necessary information has been entered.

5) The added attribute will appear in the list.

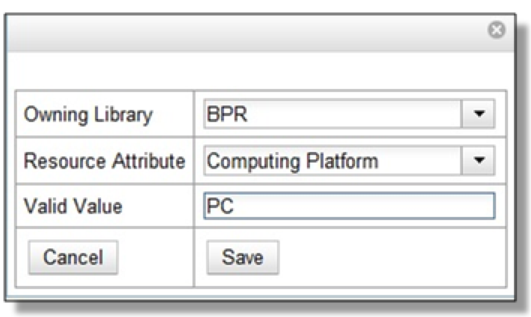
> **note**
>
> One resource type may have multiple attributes. You may repeat the above procedure to add more.

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.



- 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.

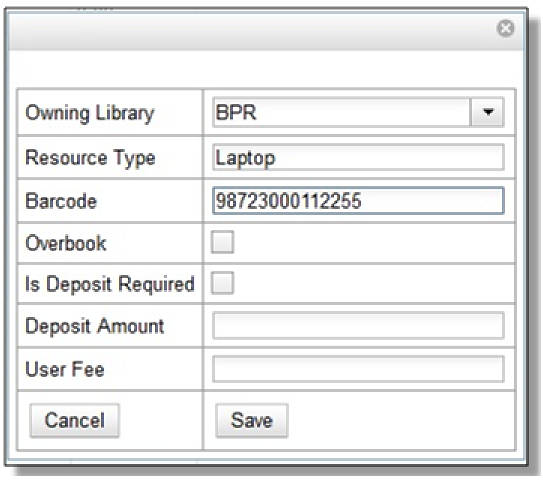
5) The attribute value will appear in the list. Each attribute should have at least two values attached to it; repeat this process for all applicable attribute values.

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.



- 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.

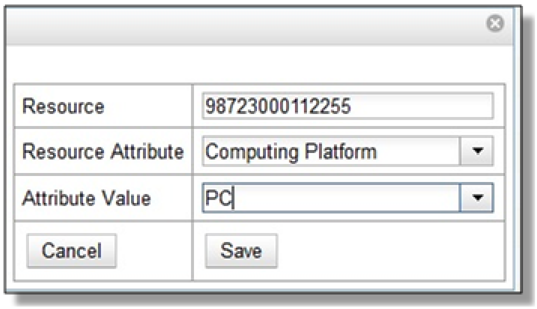
> One resource type may have multiple resources attached.

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.



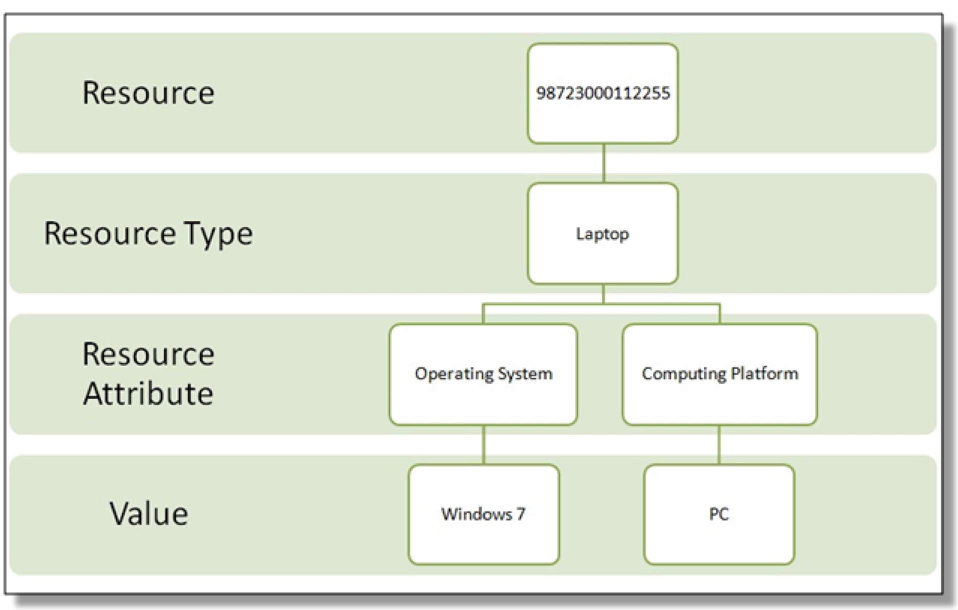
- Resource - Enter the barcode of your resource.
- Resource Attribute - Select an attribute that belongs to the Resource Type.
- Attribute Value - Select a value that belongs to your chosen attribute and describes your resource. If your attribute and value do not belong together you will be unable to save.

4) Click Save once you have entered the required information.

> note
> A resource may have multiple attributes and values. Repeat the above steps to map all.

5) The resource attribute map will appear in the list.

Once all attributes have been mapped your resource will be part of a hierarchy similar to the example below.



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*.

> Note: 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.

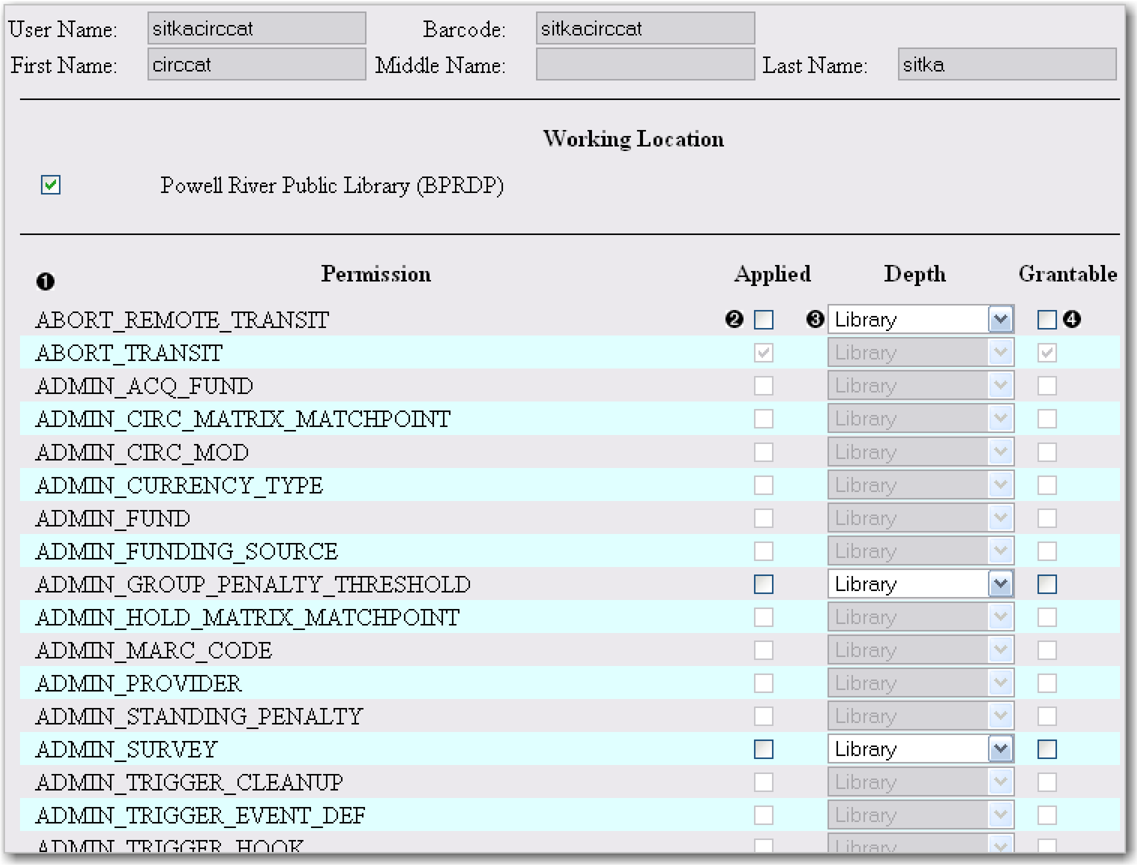
1. Log in as a Local System Administrator.

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.



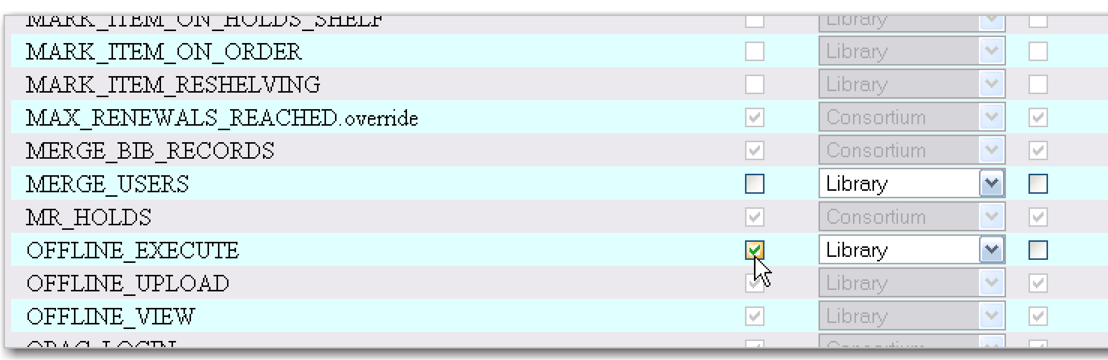
1) List of permission names.

2) If checked the permission is granted to this account.

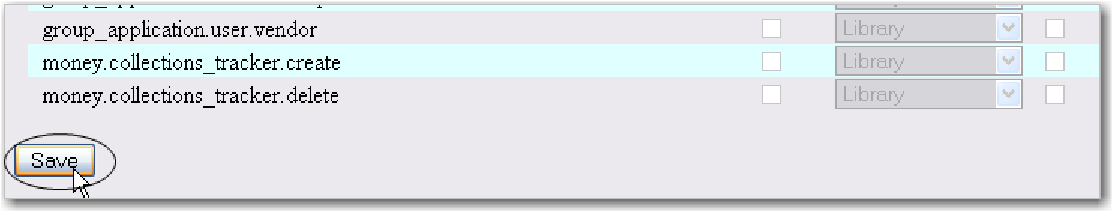
3) Depth limits application to the staff member's library and should be left at the default.

4) If checked this staff account will be able to grant the new privilege to other accounts (not recommended).

4. To allow processing of offline transactions check the Applied column next to *OFFLINE_EXECUTE*.



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



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

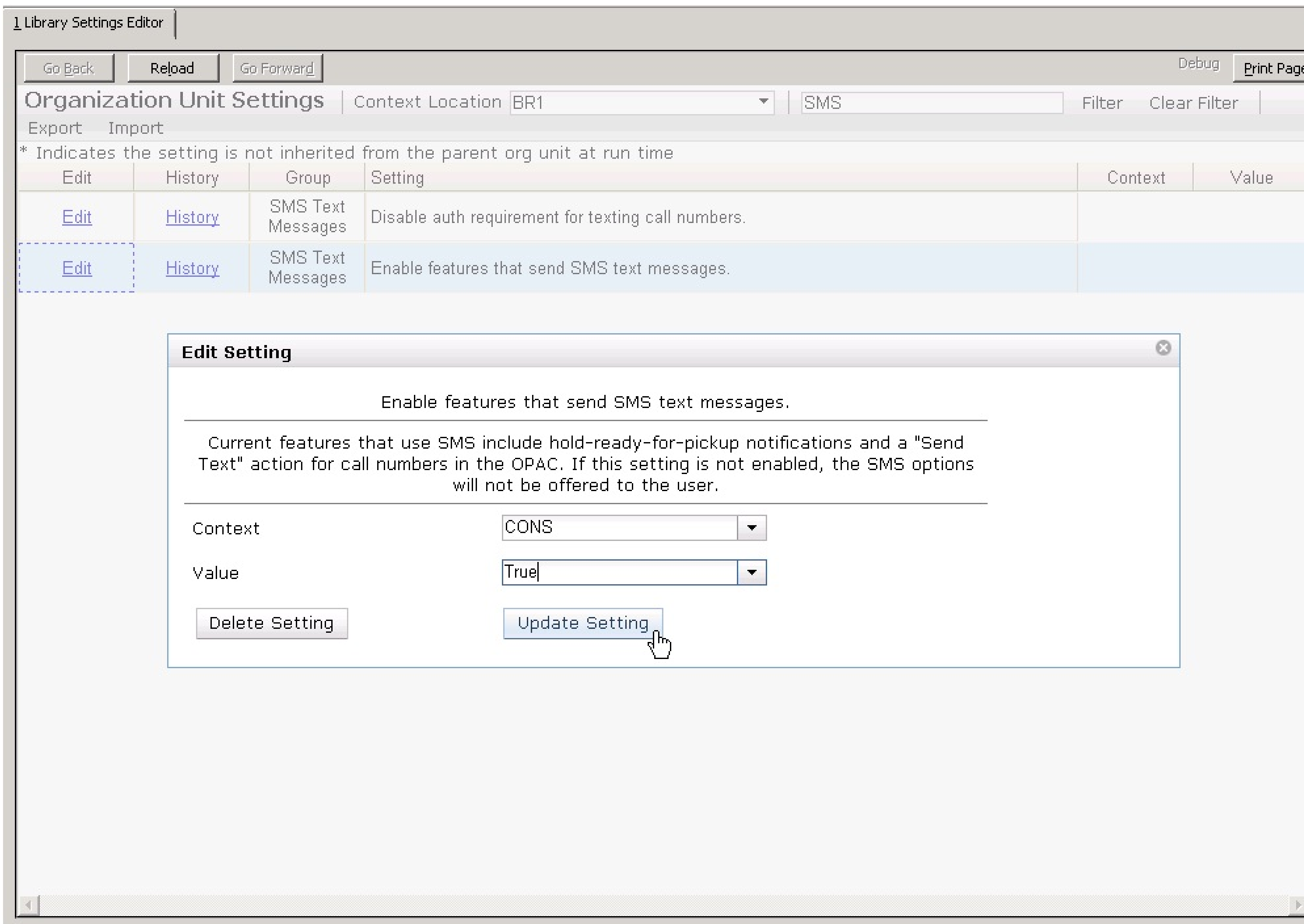
You cannot receive text messages from Evergreen by default. You must enable this feature to receive hold notices and copy information from Evergreen via text message.

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.**



Authenticate Patrons

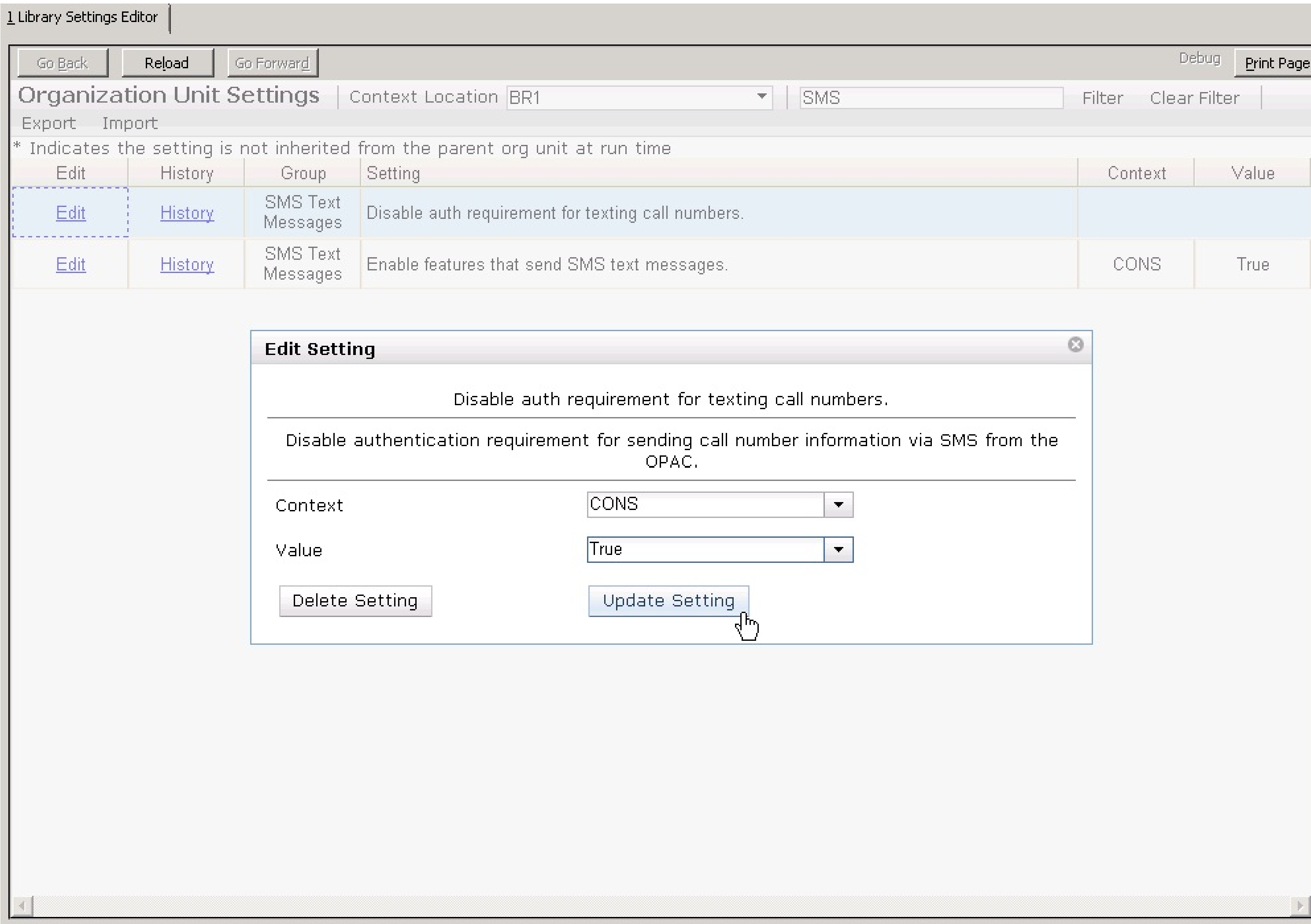
By default, you must be logged into your OPAC account to send a text message from Evergreen. However, if you disable this setting, you can text message copy information without having to login to your OPAC account.

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.**



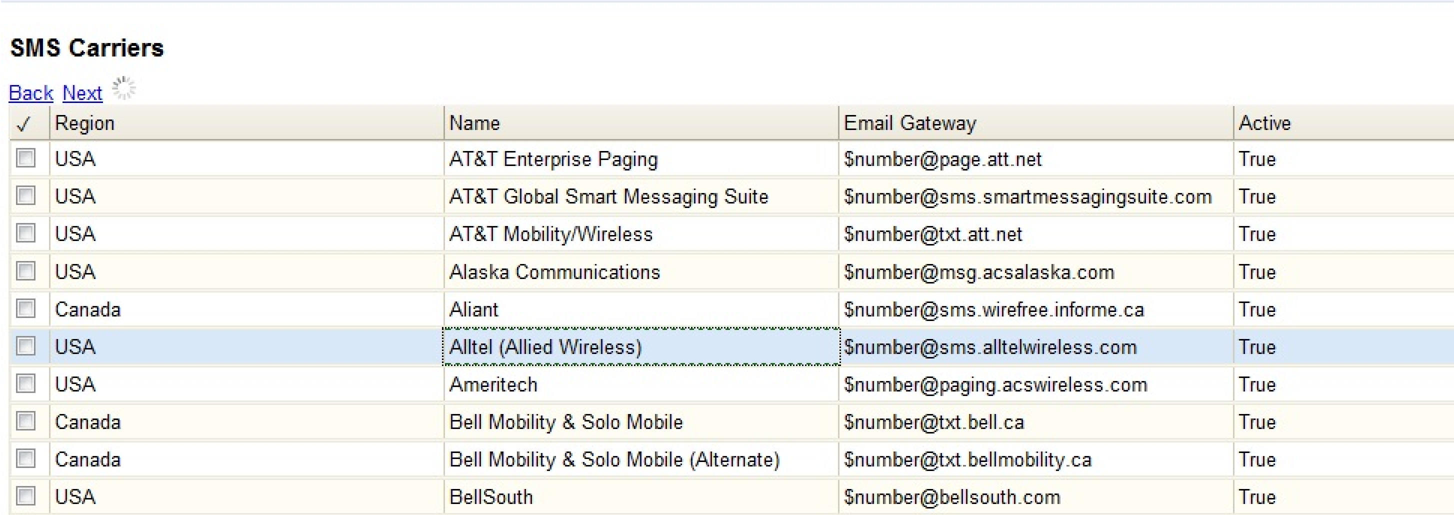
Configure SMS Carriers

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**.

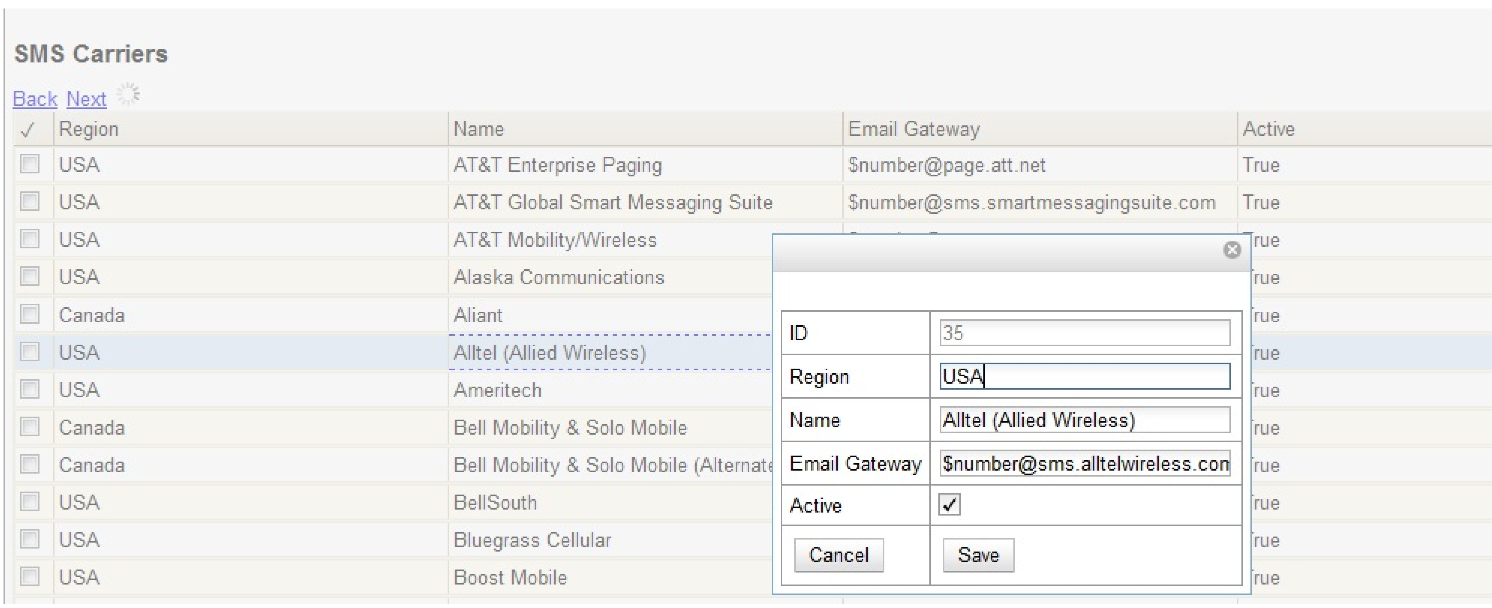
2. To add a new carrier, click the **New Carrier** button in the top right corner of the screen. To edit an existing carrier, double click in any white space in the carrier's row.


SMS Carriers

Back Next

✓	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.



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.

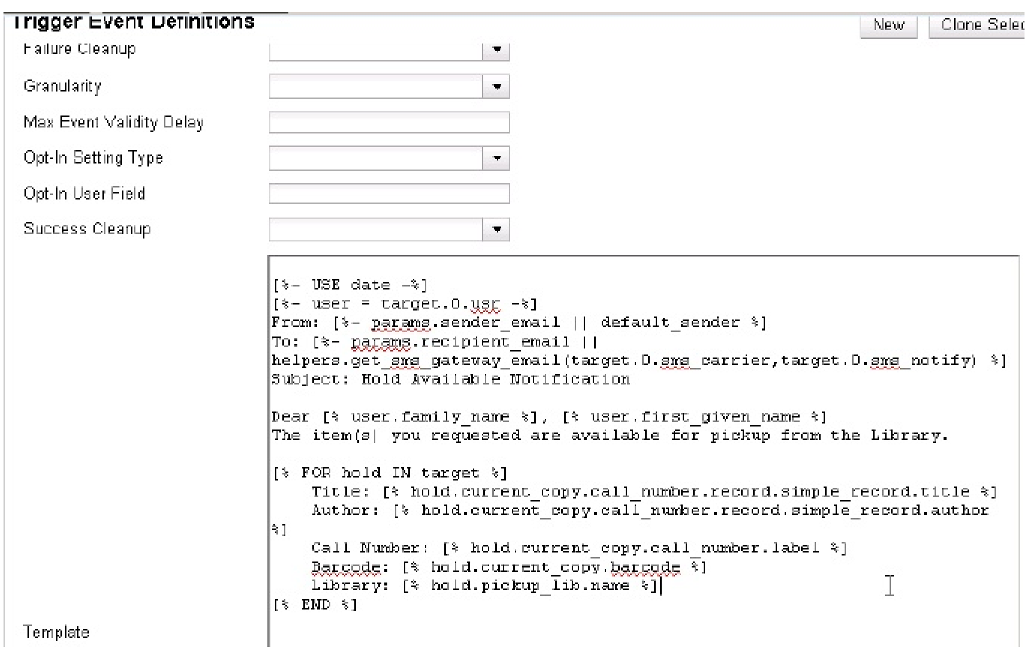
To configure the text of the SMS text message:

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.

√	Owning Library	Name	Hook	Enabled	Processing Delay	Processing Delay Context Field	Processing Group Context Field	Reactor	Validator	Granularity
☐	CONS	Items from Queued Bib Records	vandelay.impo	True	00:05:00		record.queue.(	ProcessTempl	NOOP_True	on-demand
☐	CONS	CSV Output for Queued Authority Records	vandelay.queu	True	00:05:00		queue.owner	ProcessTempl	NOOP_True	print-on-demand
☐	CONS	CSV Output for Queued Bib Records	vandelay.queu	True	00:05:00		queue.owner	ProcessTempl	NOOP_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::UserReq	
☐	CONS	Email Notice	aur.ordered	False	00:05:00			SendEmail	Acq::UserReq	
☐	CONS	Email Notice	aur.received	False	00:05:00			SendEmail	Acq::UserReq	
☐	CONS	Email Output for Import Items from Queued Bib Records	vandelay.impo	True	00:05:00		record.queue.(	SendEmail	NOOP_True	
☐	CONS	Email Output for Queued Authority Records	vandelay.queu	True	00:05:00		queue.owner	SendEmail	NOOP_True	
☐	CONS	Email Output for Queued Bib Records	vandelay.queu	True	00:05:00		queue.owner	SendEmail	NOOP_True	
☐	CONS	Hold Cancelled (No Target) Email Notification	hold_request.c	False	00:30:00	cancel_time	usr	SendEmail	HoldIsCancelle	
☐	CONS	Hold Expires from Shelf Soon	hold_request.s	False	-1 days	shelf_expire_ti	usr	SendEmail	HoldIsAvailabl	
☐	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	HoldIsAvailabl	

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.

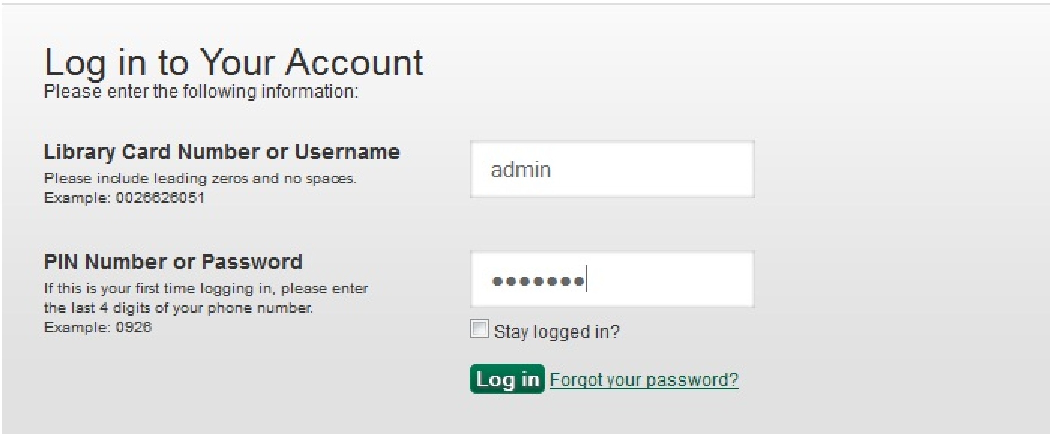



```
[%- USE date -%]
[%- user = target.0.usr -%]
From: [%- params.sender_email || default_sender %]
To: [%- params.recipient_email ||
helpers.get_sms_gateway_email(target.0.sms_carrier,target.0.sms_notify) %]
Subject: Hold Available Notification

Dear [% user.family_name %], [% user.first_given_name %]
The item(s) you requested are available for pickup from the Library.

[% 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.current_copy.call_number.label %]
    Barcode: [% hold.current_copy.barcode %]
    Library: [% hold.pickup_lib.name %]
[% END %]
```

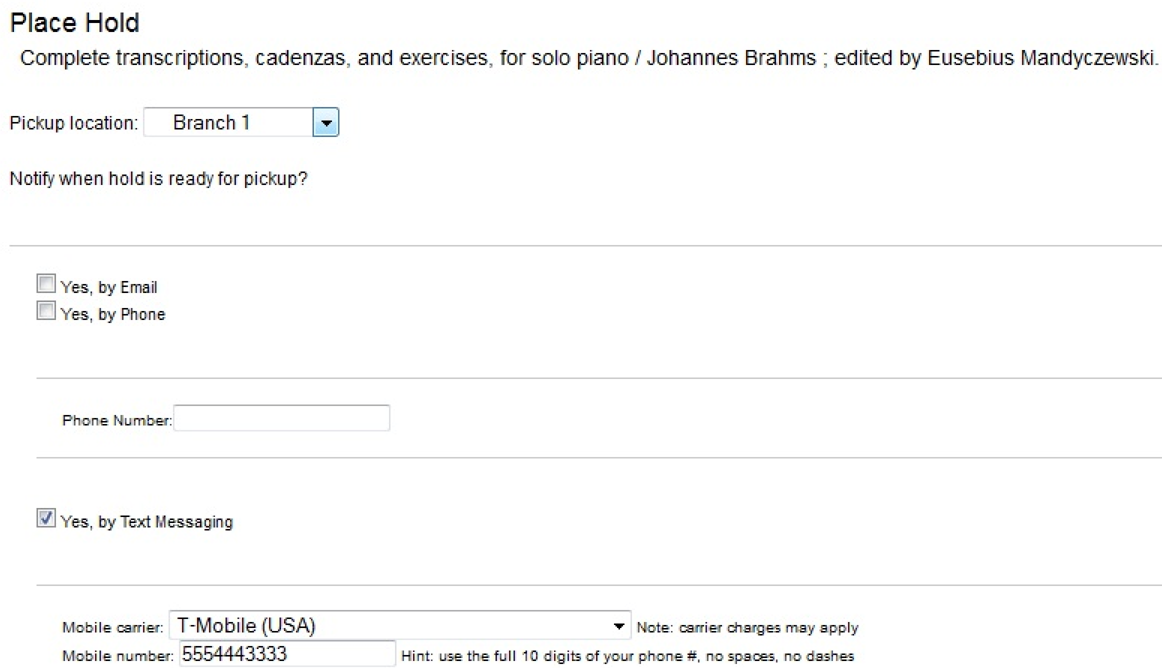
Receiving Holds Notices via Text Message

You can receive notification that your hold is ready for pickup from a text message that is sent to your mobile phone.

1. Login to your account.



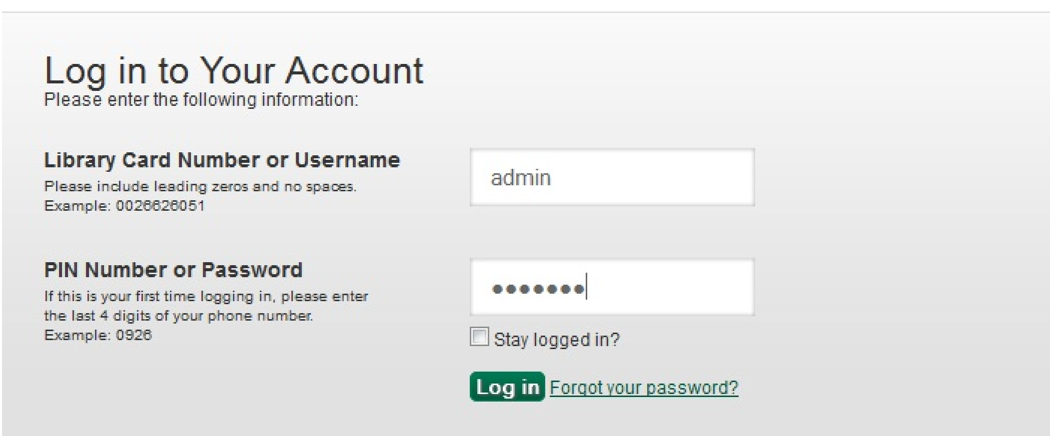
2. Search the catalog.
3. Retrieve a record, and click the **Place Hold** link.
4. Select the option to retrieve hold notification via text message.
5. Choose an SMS Carrier from the drop down menu. NOTE: You can enter your SMS carrier and phone number into your **Account Preferences** to skip steps five and six.
6. Enter a phone number.
7. Click **Submit.**



Sending Copy Locations via Text Message

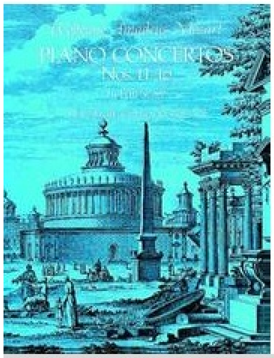
You can search the catalog for an item, and, after retrieving results for the item, click a hyperlink to send the copy location in a text message.

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.



2. Search the catalog, and retrieve a title with copies.

3. Click the **Text** link adjacent to the call number.



Piano concertos nos. 11-16.
Mozart, Wolfgang Amadeus, 1756-1791 (Author). Mozart, Wolfgang Amadeus, 1756-1791 (Credited).

Available copies

- 3 copies at Consortium.

Current holds

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

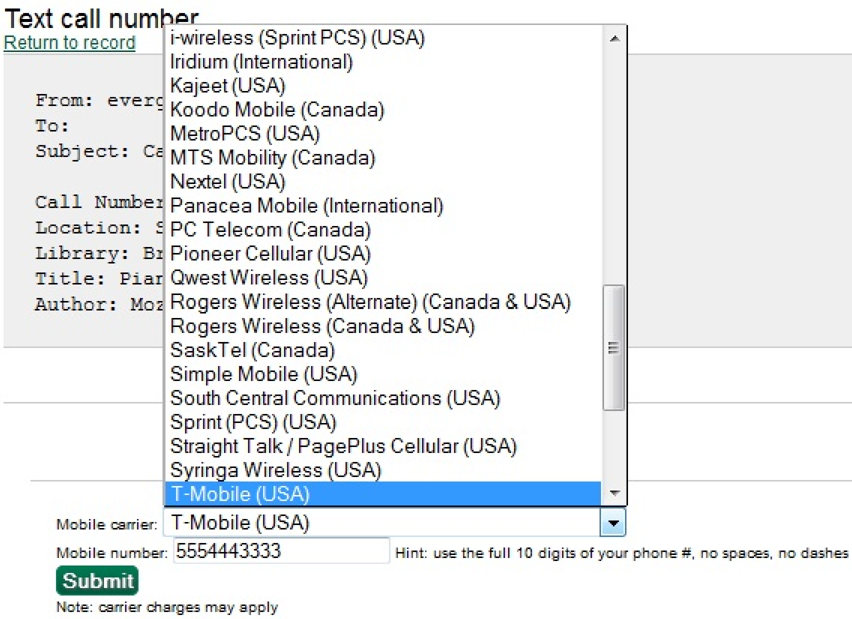
4. The text of the SMS Text Message appears.

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,
```

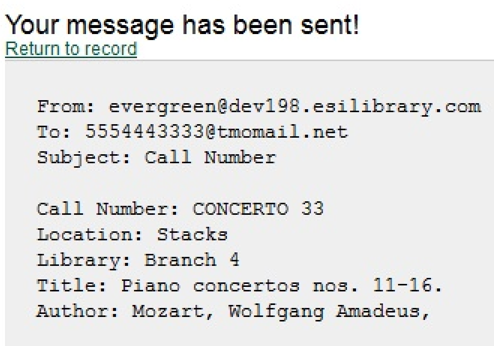
5. Choose an SMS Carrier from the drop down menu. NOTE: You can enter your SMS carrier and phone number into your **Account Preferences** to skip steps five and six.

6. Enter a phone number.



7. Click **Submit**.

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



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.

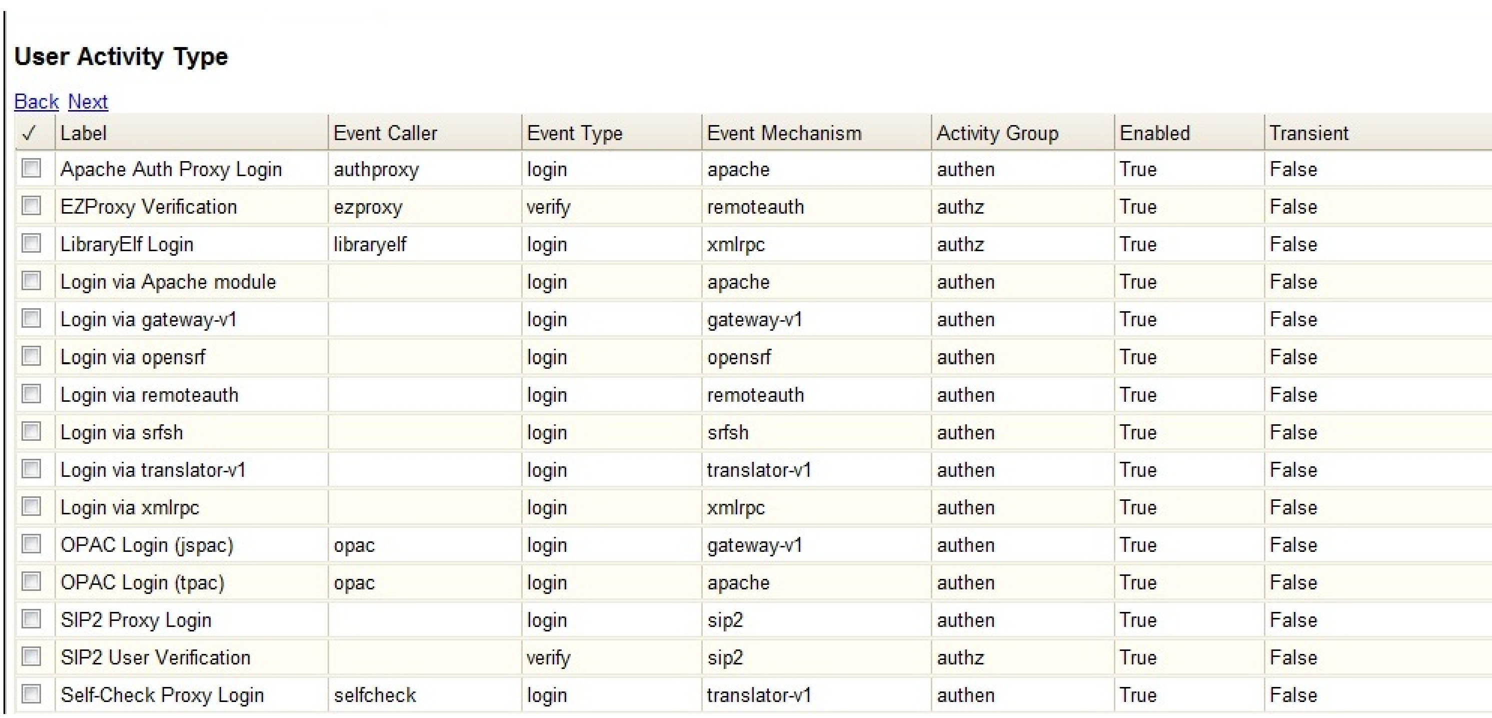
The **Event Caller** describes the third party software or Evergreen interface that interacts with the Evergreen database and is responsible for managing the communication between the parties.

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**.



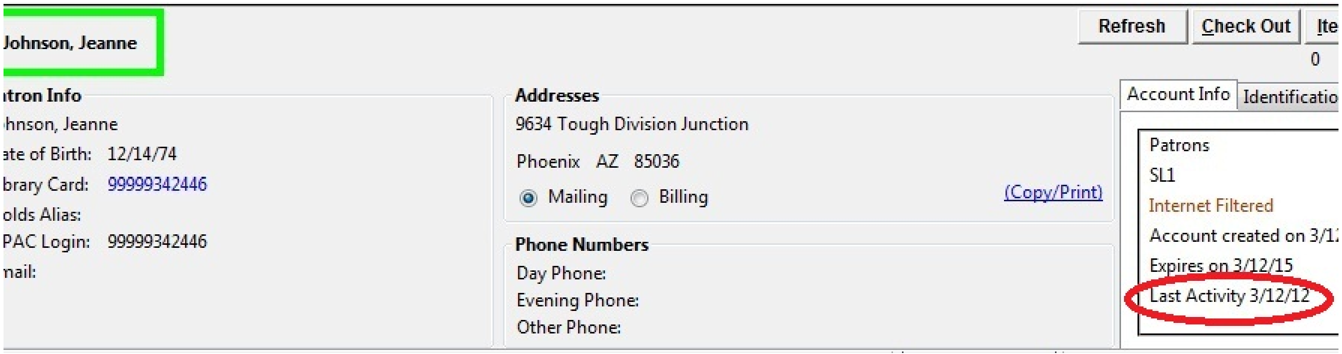
User Activity Type

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	opensrf	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.



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

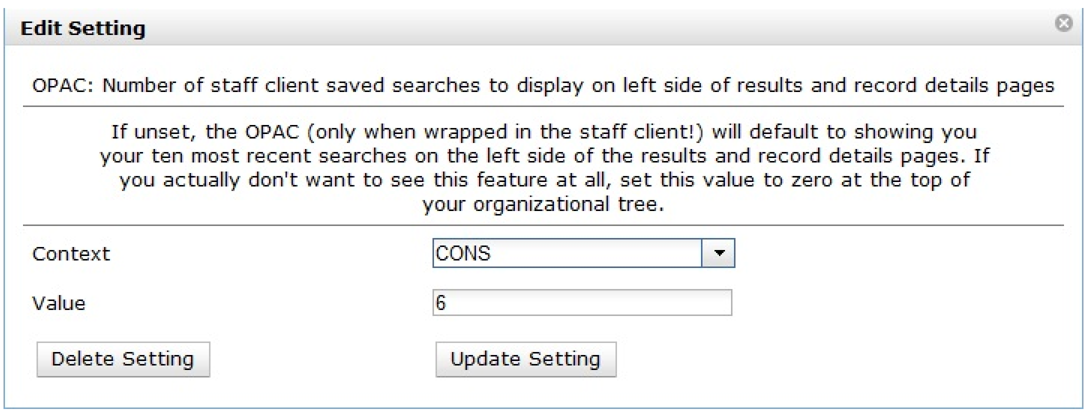
This feature enables you to view your recent searches as you perform them in the staff client. The number of searches that you can view is configurable. This feature is only available through the staff client; it is not available to patrons in the OPAC.

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**



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.

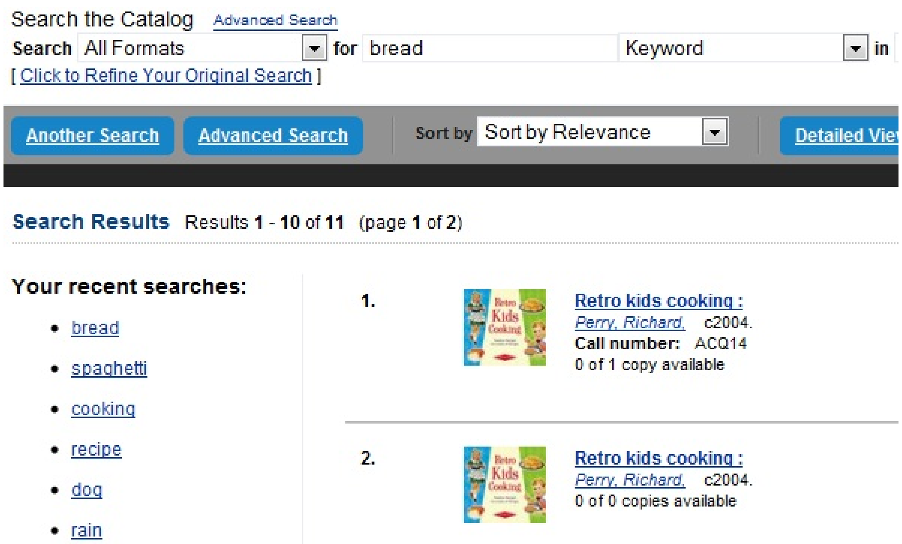
To deactivate this feature:

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:

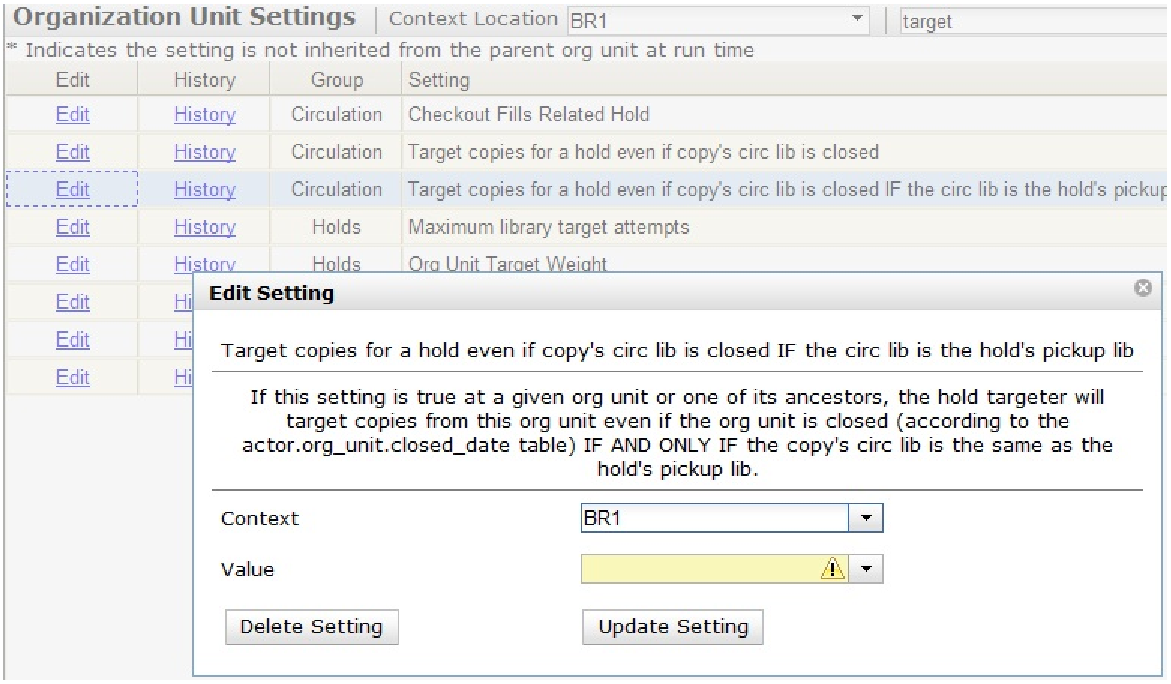
1. Click **Admin # Local Administration # Library Settings # Charge fines on overdue circulations when closed**
2. Click **Edit**.
3. Set the value to **True**.
4. Click **Update Setting**.

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.

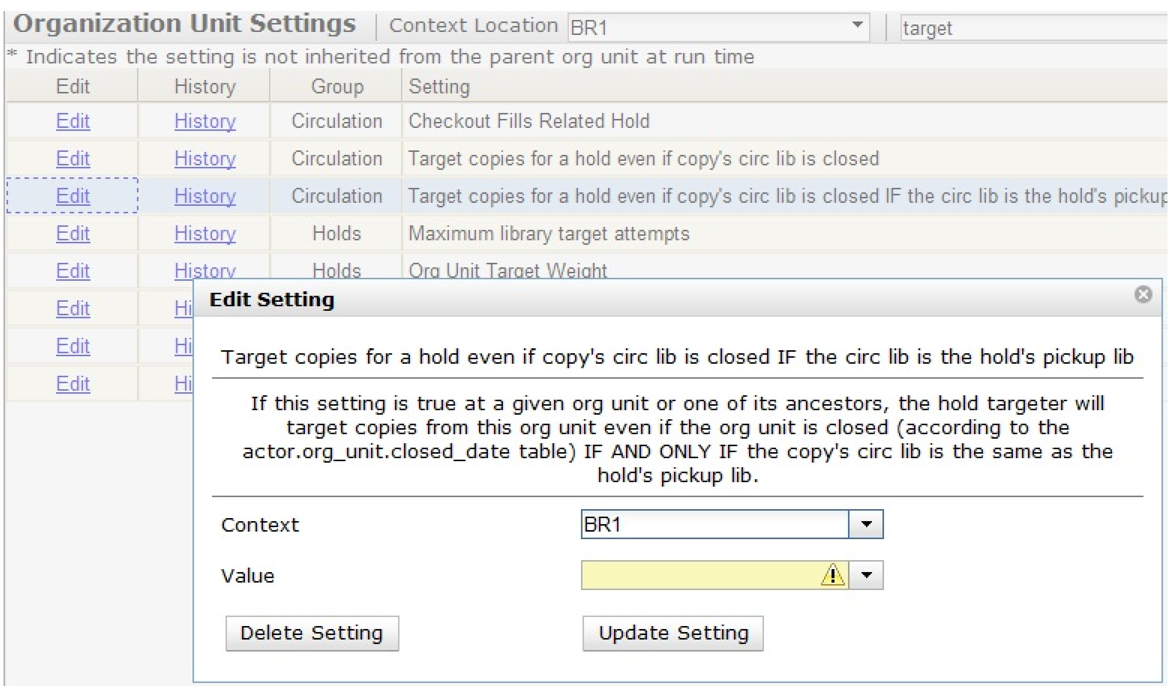
Use the following setting to target copies for holds at closed circulating libraries:

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**.



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**.



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.

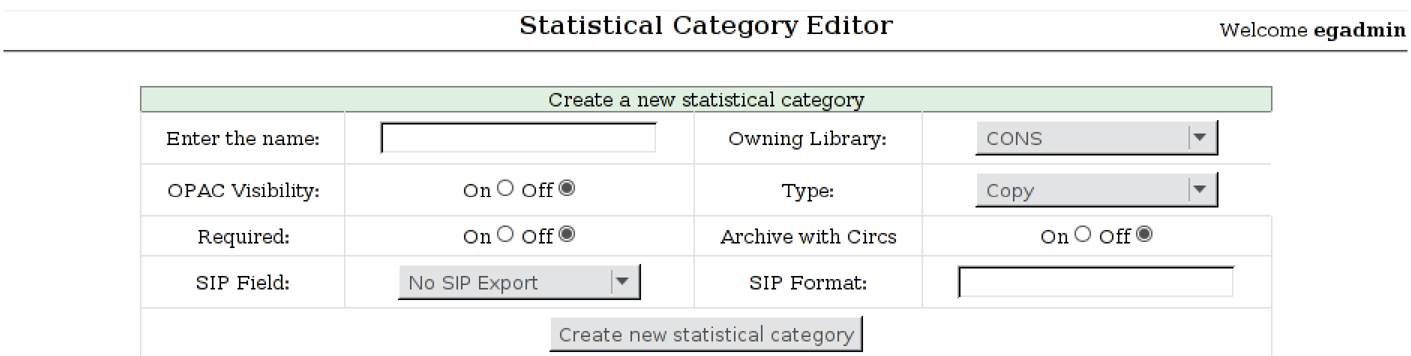
1. Click **Admin # Local Administration # Statistical Categories Editor.**

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

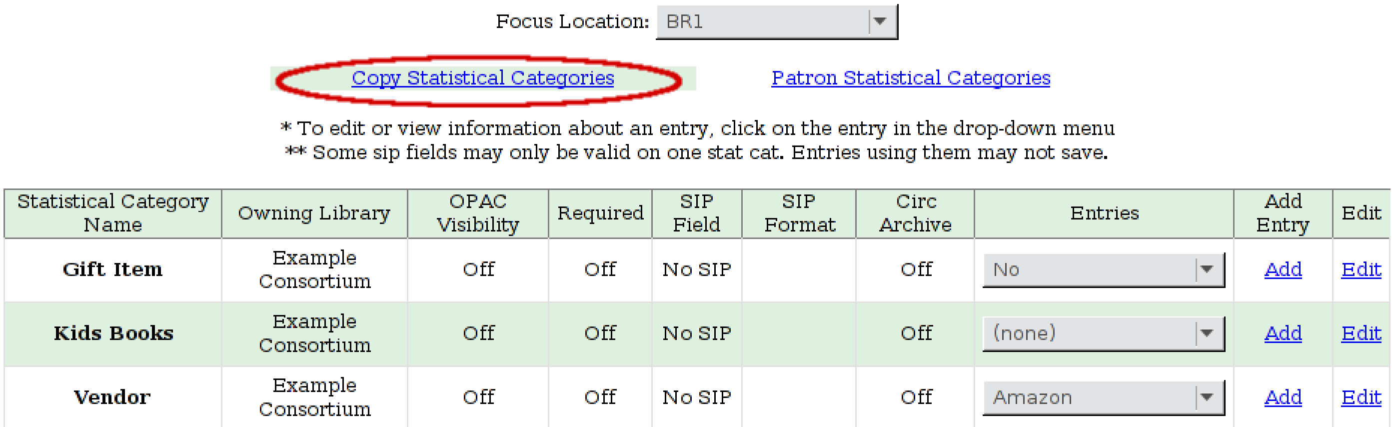
Copy stat cats appear in the *Copy Editor*, also known as the *Edit Item Attributes* screen. You might use copy stat cats to track books you have bought from a specific vendor, or donations.

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



- *OPAC Visibility*: Should the category be displayed in the OPAC?
- *Required*: Must the category be assigned a value when editing the item attributes?
- *Archive with Circs*: Should the category and its values for the copy be archived with aged circulation data?
- *SIP Field*: Select the SIP field identifier that will contain the category and its value
- *SIP Format*: Specify the SIP format string

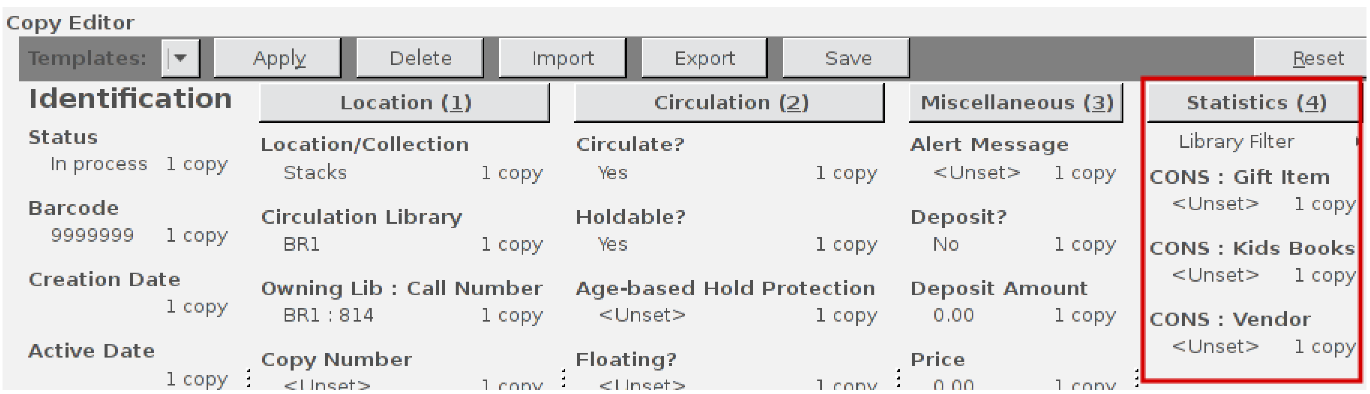
Some sample copy stat cats:



Statistical Category Name	Owning Library	OPAC Visibility	Required	SIP Field	SIP Format	Circ Archive	Entries	Add Entry	Edit
Gift Item	Example Consortium	Off	Off	No SIP		Off	No	Add	Edit
Kids Books	Example Consortium	Off	Off	No SIP		Off	(none)	Add	Edit
Vendor	Example Consortium	Off	Off	No SIP		Off	Amazon	Add	Edit

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.

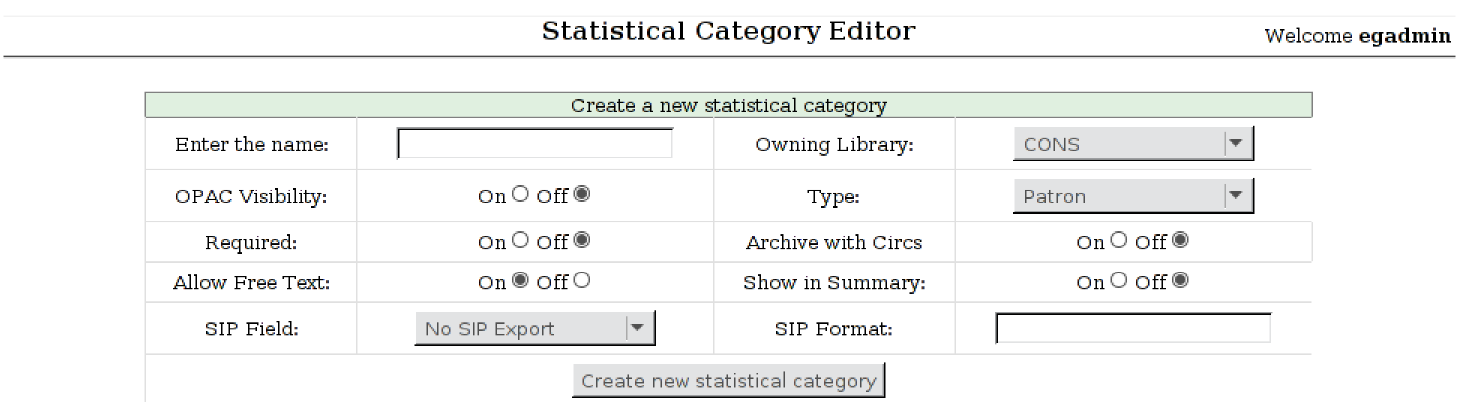
This is how the copy stat cats appear in the *Copy Editor*:



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:



- *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

Copy Statistical Categories   Patron Statistical Categories

* 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.

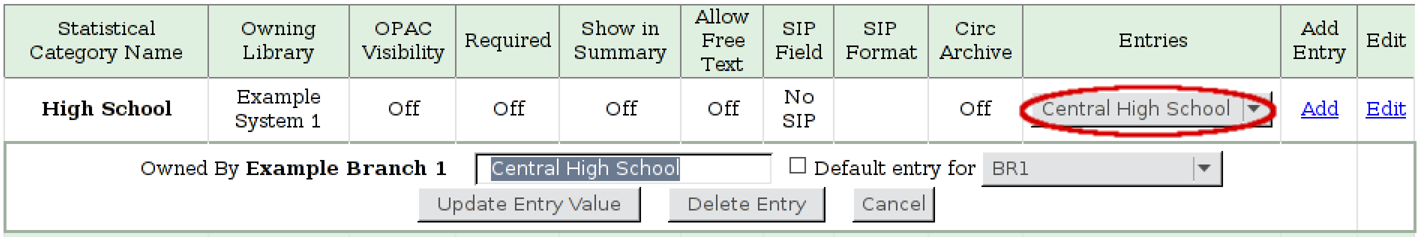
Statistical Category Name	Owning Library	OPAC Visibility	Required	Show in Summary	Allow Free Text	SIP Field	SIP Format	Circ Archive	Entries	Add Entry	Edit
High School	Example System 1	Off	Off	Off	Off	No SIP		Off	West High School*	Add	Edit
Preferred Library	Example System 1	Off	Off	Off	Off	No SIP		Off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

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	Edit

Enter the value of the new entry: SYS1 ☐ Default entry for SYS1
Create new entry Cancel

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



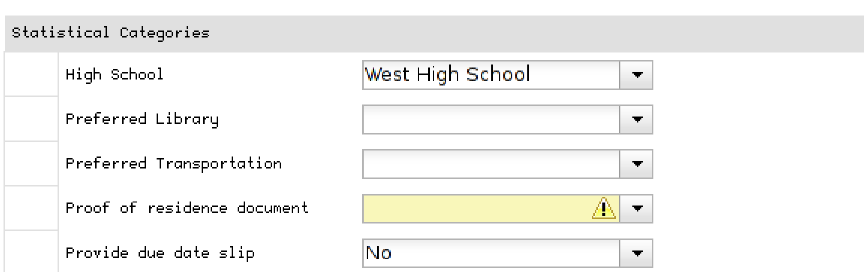
An **organizational unit** (consortium, library system branch library, sub library, etc.) may create their own categories and entries, or supplement categories defined by a higher-level org unit with their own entries.

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:



Part VII. Acquisitions

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Chapter 36. Acquisitions

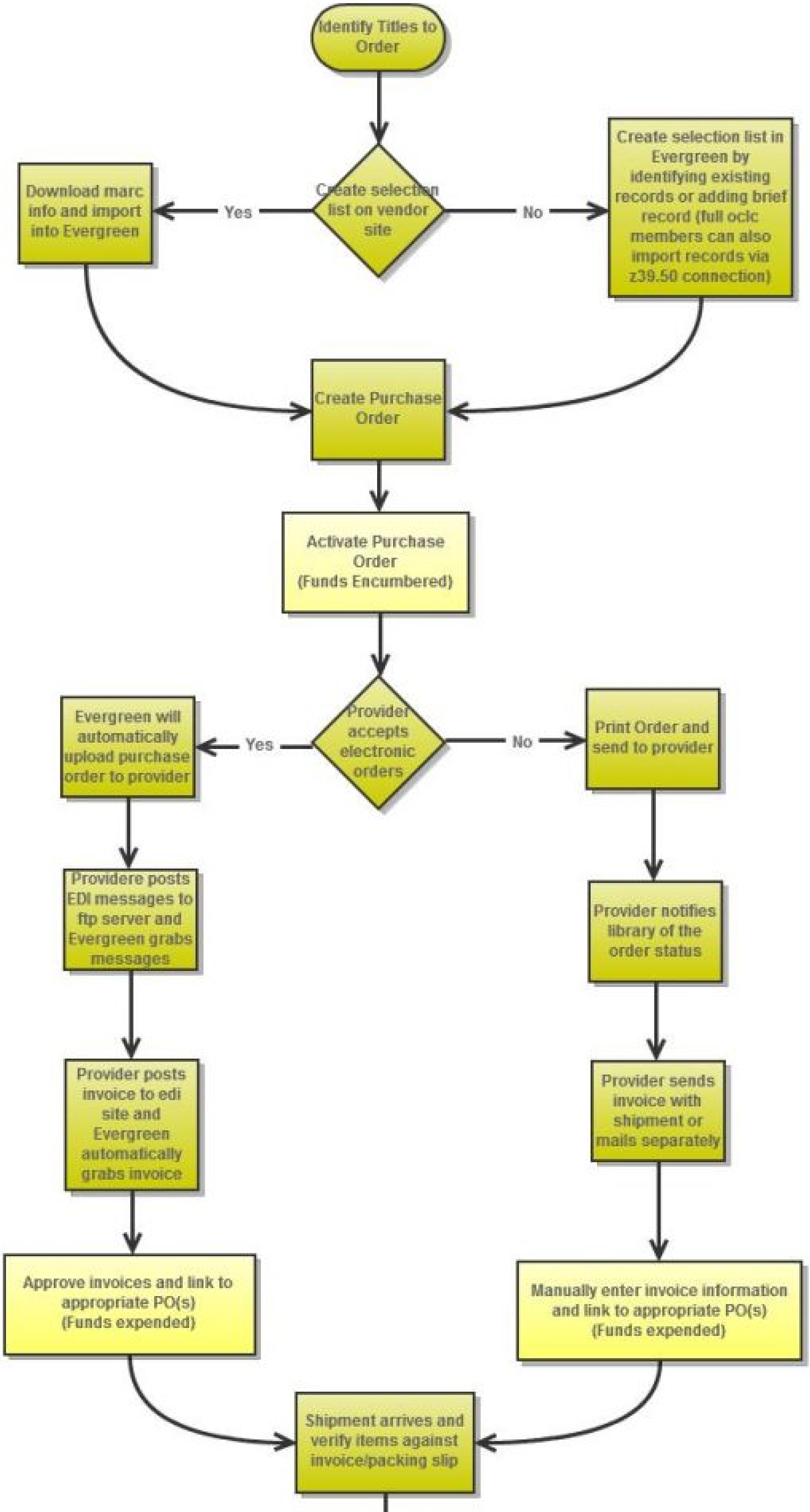
This section is intended for those who are responsible for managing and processing acquisitions.

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 Batch Importing MARC Records 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.


Identify Titles to Order
Create selection list on vendor site
Yes
No
Download marc info and import into Evergreen
Create selection list in Evergreen by identifying existing records or adding brief record (full oclc members can also import records via z39.50 connection)
Create Purchase Order
Activate Purchase Order (Funds Encumbered)
Provider accepts electronic orders
Yes
No
Evergreen will automatically upload purchase order to provider
Print Order and send to provider
Providere posts EDI messages to ftp server and Evergreen grabs messages
Provider notifies library of the order status
Provider posts invoice to edi site and Evergreen automatically grabs invoice
Provider sends invoice with shipment or mails separately
Approve invoices and link to appropriate PO(s) (Funds expended)
Manually enter invoice information and link to appropriate PO(s) (Funds expended)
Shipment arrives and verify items against invoice/packing slip

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 Add Brief Records, Upload MARC Order Records, or find records through the MARC Federated Search. 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.

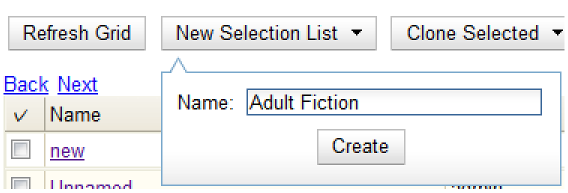
Selection lists can also be created through the My Selection Lists interface:

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.



Add items to a selection list

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

Clone selection lists

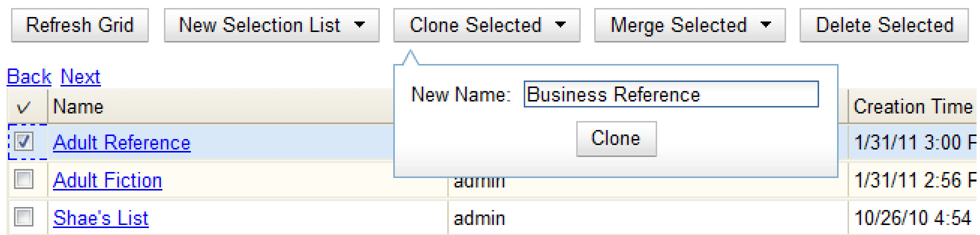
Cloning selection lists enables you to copy one selection list into a new selection list. You can maintain both copies of the list, or you can delete the previous list.

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.



Merge selection lists

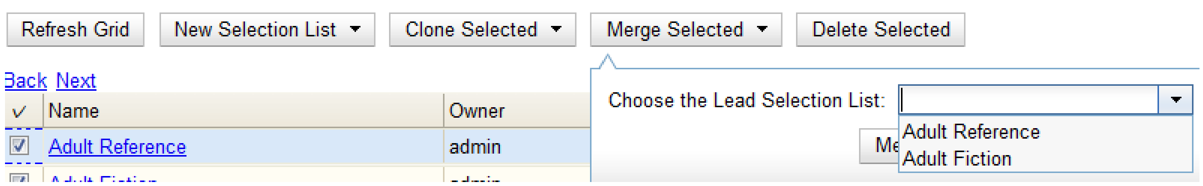
You can merge two or more selection lists into one selection list.

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.



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.

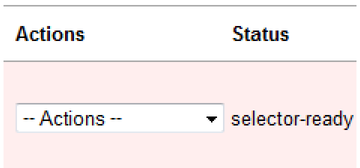
1. If you want to mark part of a selection list ready for selector, then you can check the box(es) of the line item(s) that you wish to mark ready for selector. If you want to mark the entire list ready for selector, then skip to step 2.

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.



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.

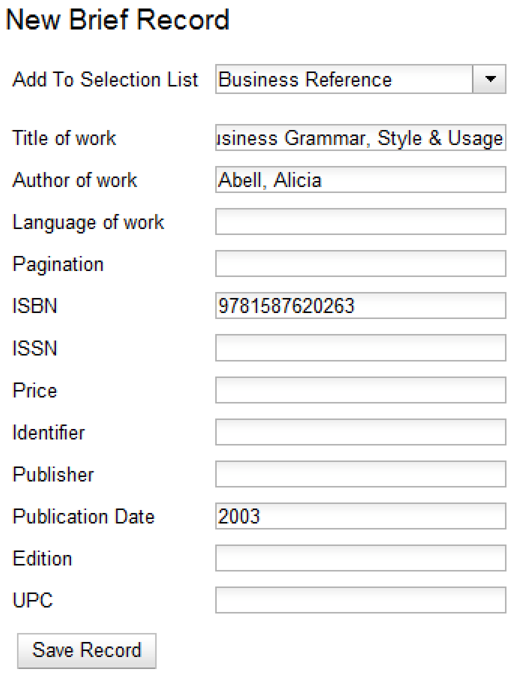
Add brief records to a selection list

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.

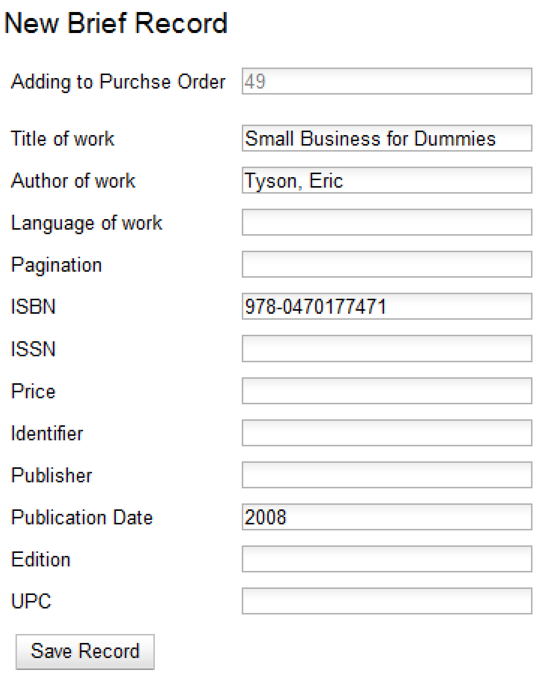
4. Click Save Record.



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 purchase orders 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.

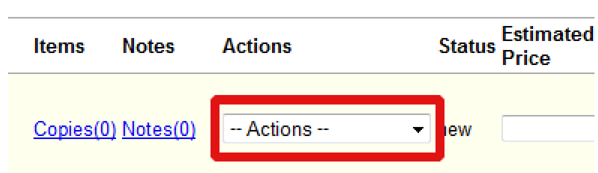


MARC Federated Search

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 section on Line Items for more information.
4. Click the Notes link to add notes or line item alerts to the line item. See the section on Line Items 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

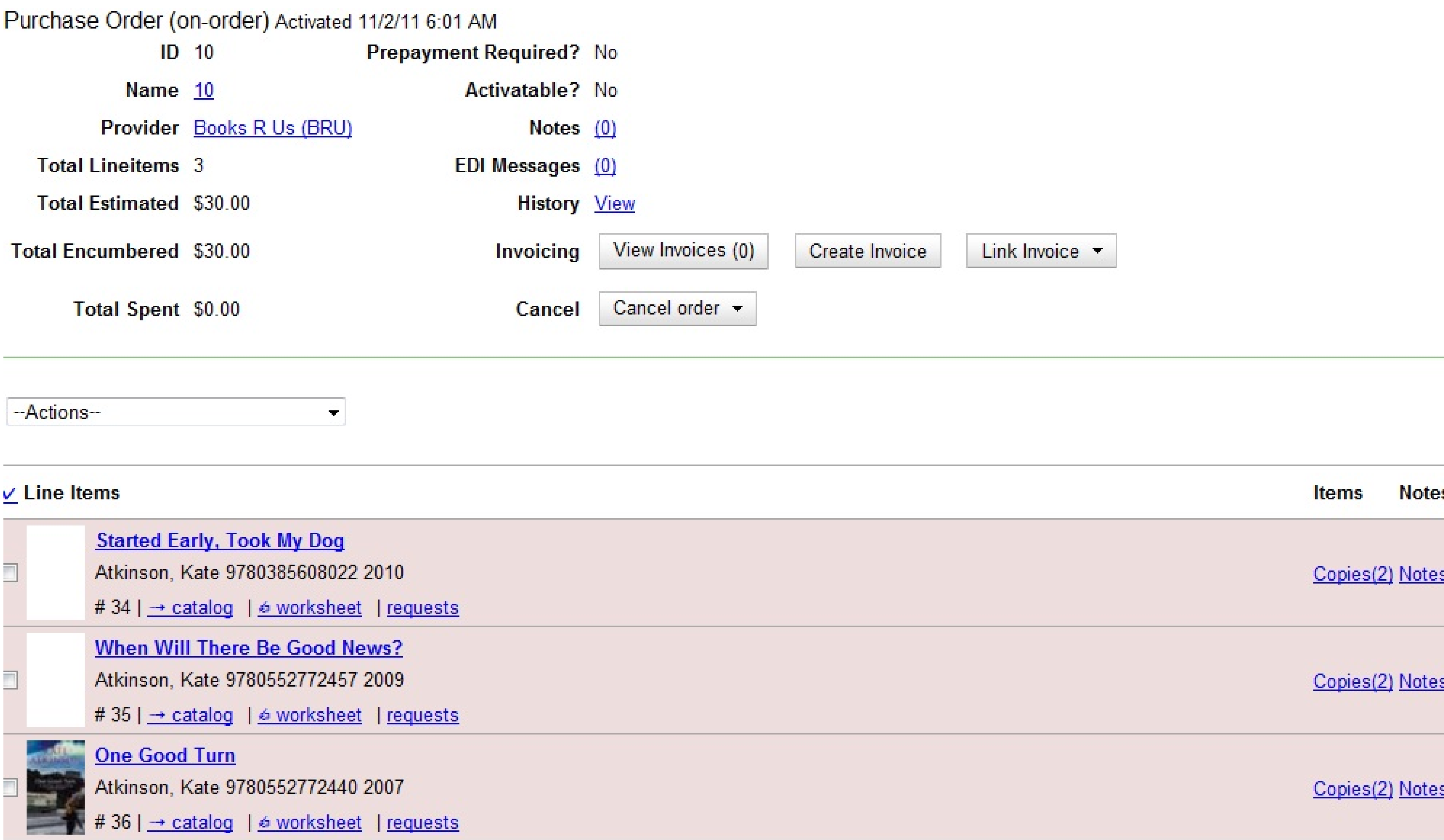
This feature enables users to receive items from an invoice. Staff can receive individual copies, or they can receive items in batch.

Receive Items in Batch (List Mode)

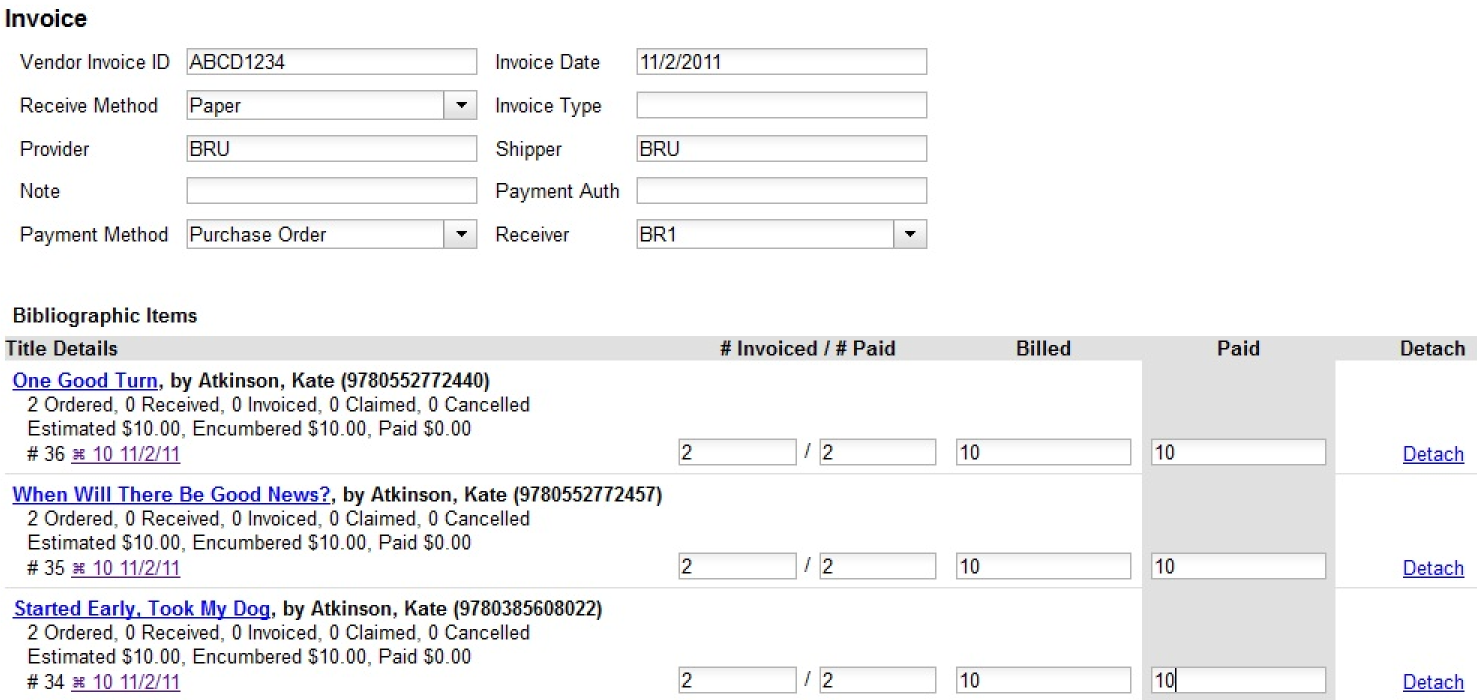
In this example, we have created a purchase order, added line items and copies, and activated the purchase order. We will create an invoice from the purchase order, receive items, and invoice them. We will receive the items in batch from the invoice.

1) Retrieve a purchase order.

2) Click **Create Invoice**.



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.



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

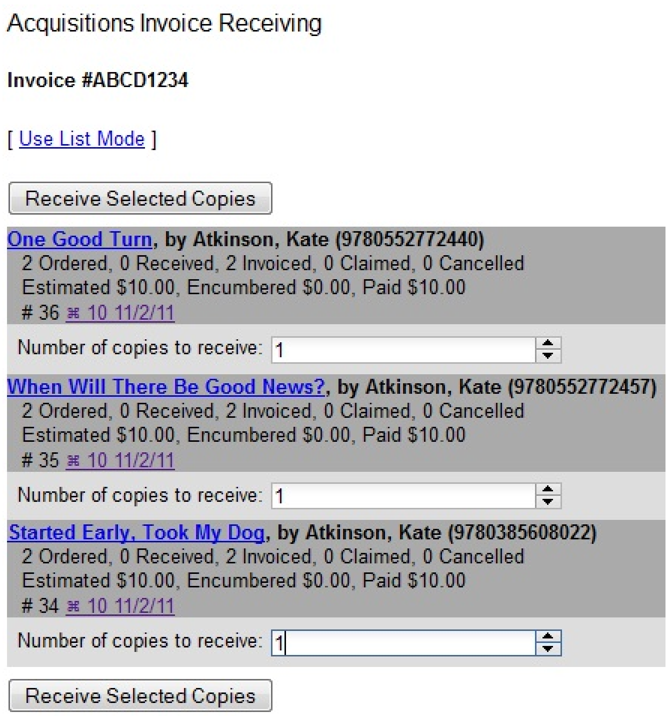
5) The screen refreshes. In the top right corner of the screen, click **Receive Items**.

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.

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

8) Click **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)

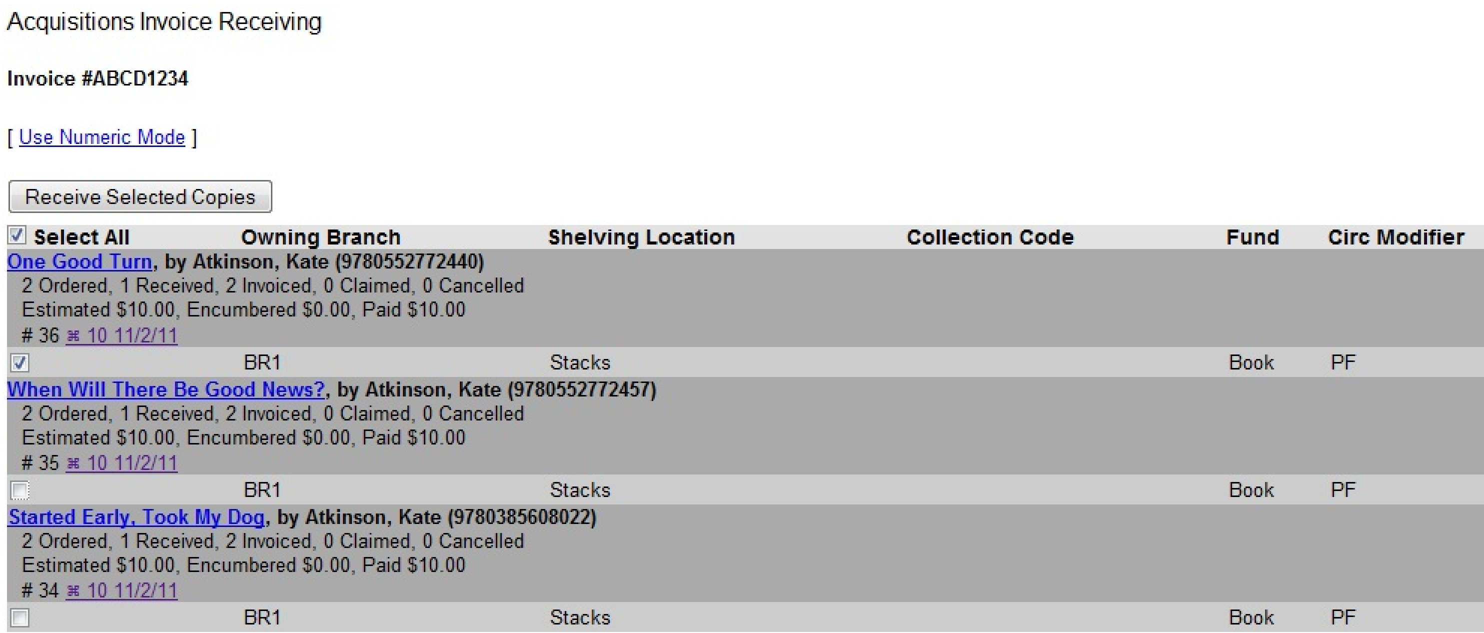
In this example, we have created a purchase order, added line items and copies, and activated the purchase order. We will create an invoice from the purchase order, receive items, and invoice them. We will receive specific copies from the invoice. This function may be useful to libraries who purchase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



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.

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.

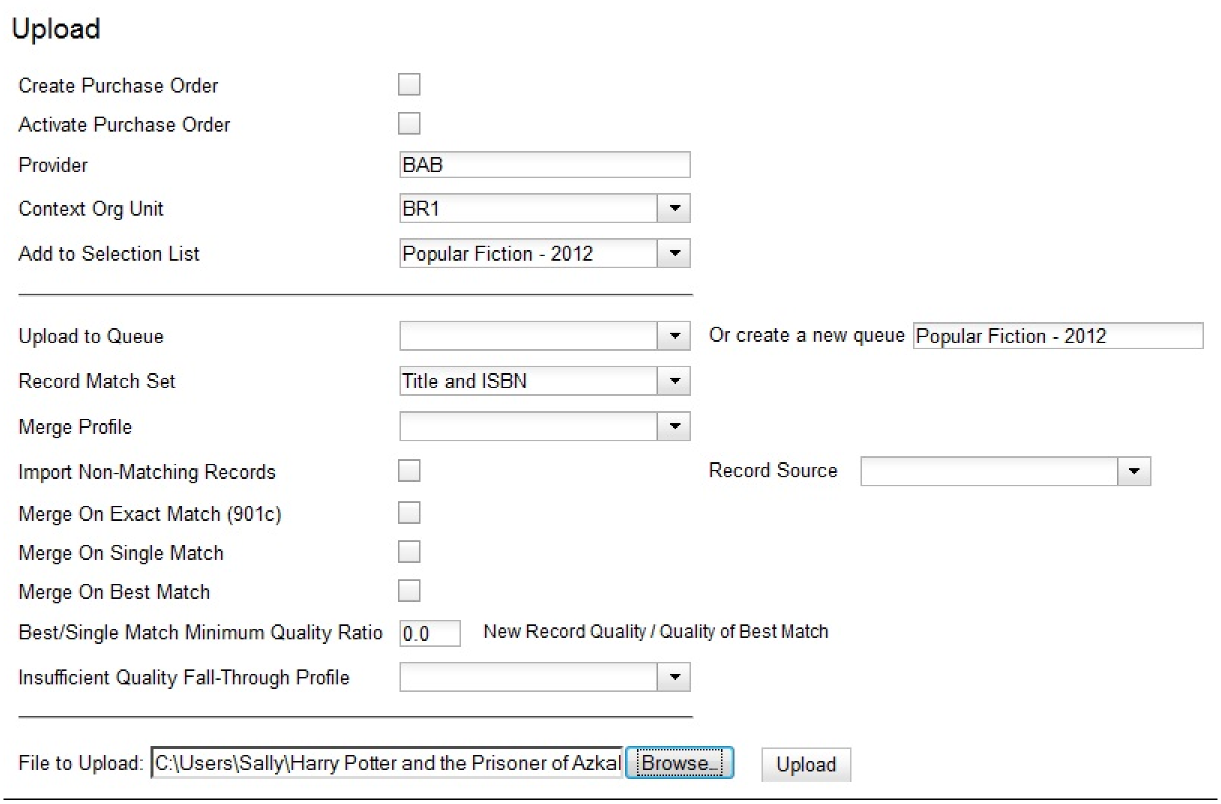
Use Cases for Vandelay Integration into Acquisitions

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.

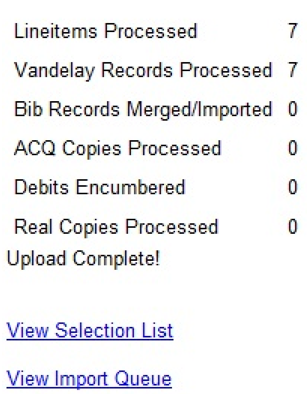
Example 1: Using the Acquisitions MARC Batch Load interface, upload MARC records to a selection list and a Vandelay queue, and match queued records with existing catalog records.

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**.

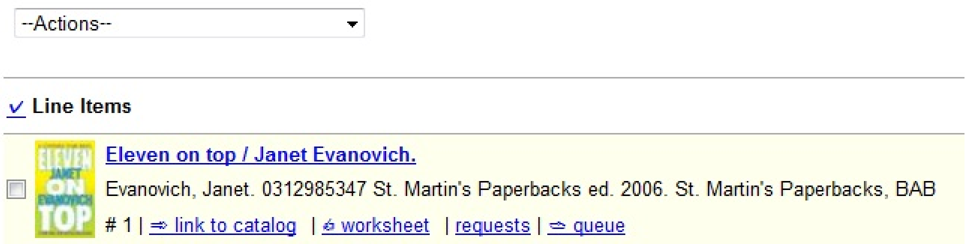


9. The processed items appear at the bottom of the screen.

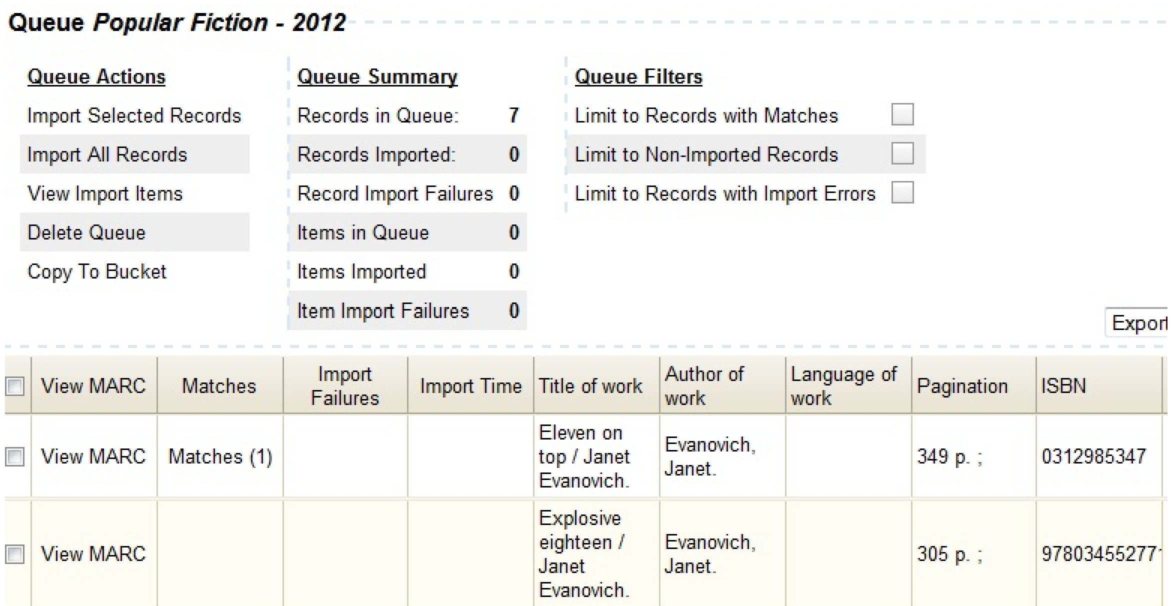


10. You can click the link(s) to access the selection list or the import queue. Click the link to **View Selection List**.

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.



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.



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.

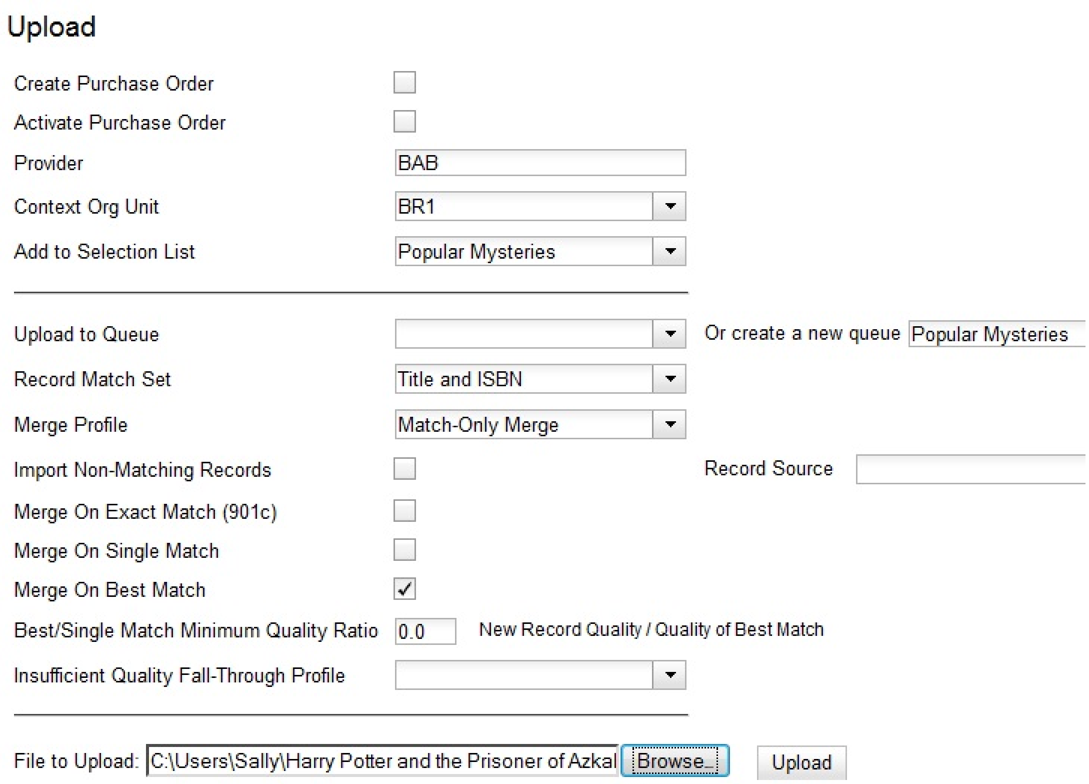
1. Click **Acquisitions** # **Load MARC Order Records**
2. Add MARC order records to a **Selection list** and/or a **Purchase Order.** Check the box to create a purchase order if desired.
3. Select a **Provider** from the drop down menu, or begin typing the code for the provider, and the field will auto-fill.
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**.



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**.

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

Table of Contents

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**.

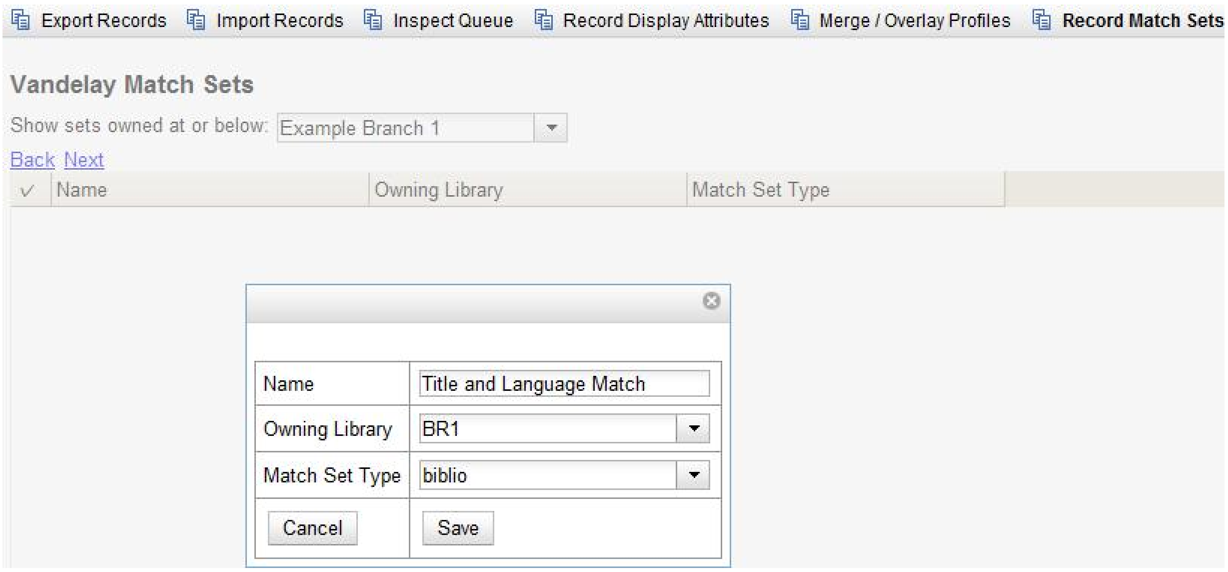
2) Create a new record match set. Click **Record Match Sets # New Match Set**.

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**.



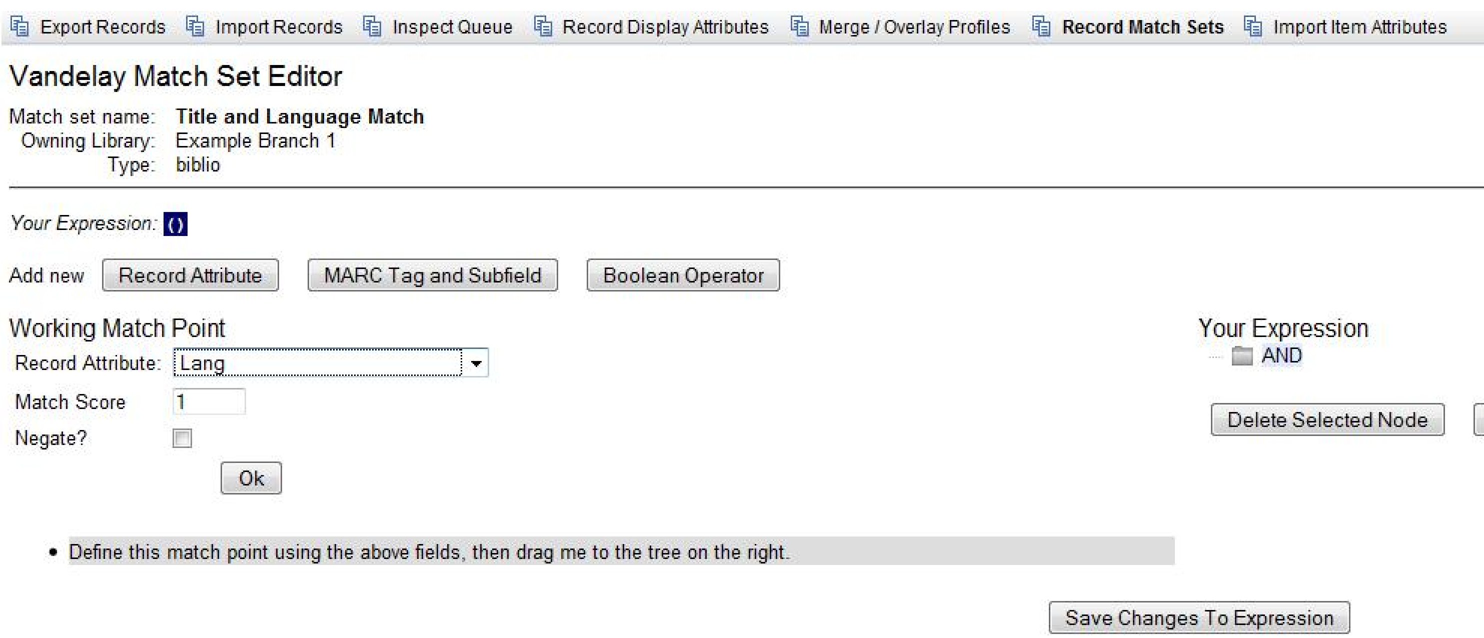
7) The screen will refresh to list the record match set that you created. Click the link to the record match set.

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.

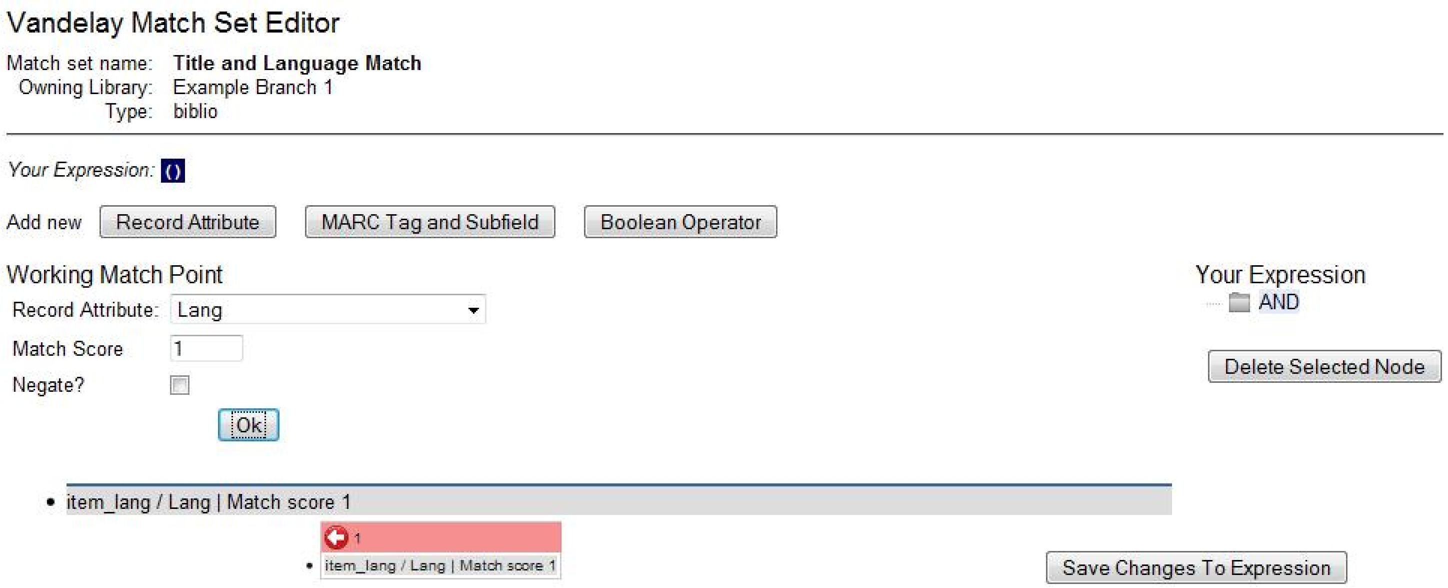
10) Enter a **Match Score.** The **Match Score** indicates the relative importance of that match point as Evergreen evaluates an incoming record against an existing record. You can enter any integer into this field. The number that you enter is only important as it relates to other match points. Recommended 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.

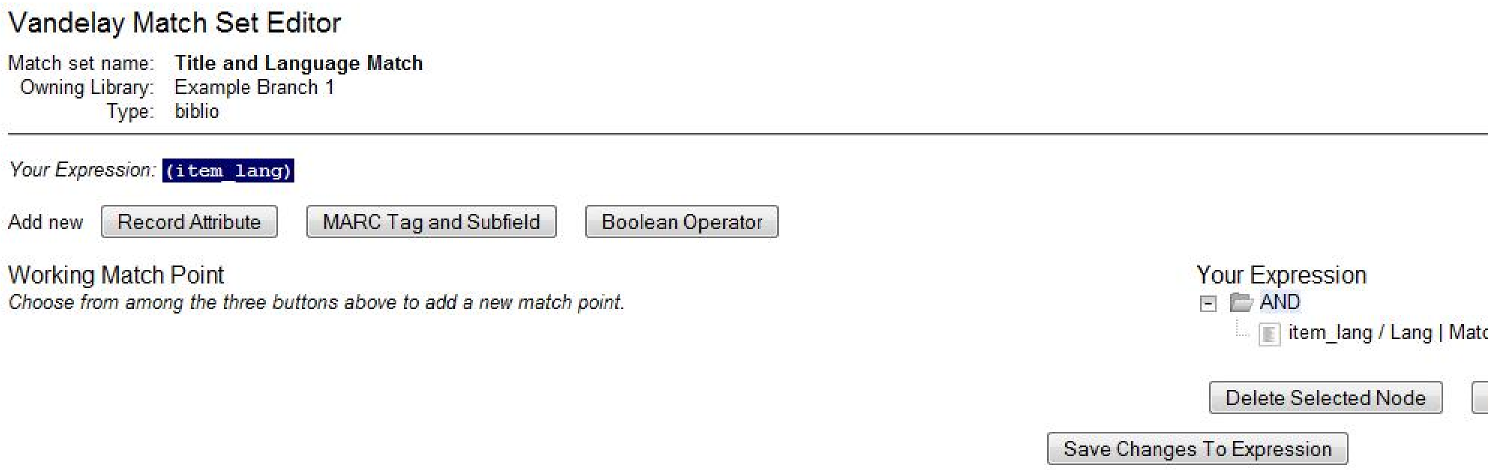


12) Click **Ok.**

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



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



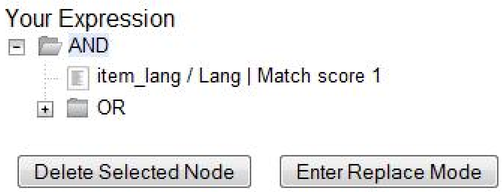
14) Enter another **Boolean Operator** to further refine your match set.

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.



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

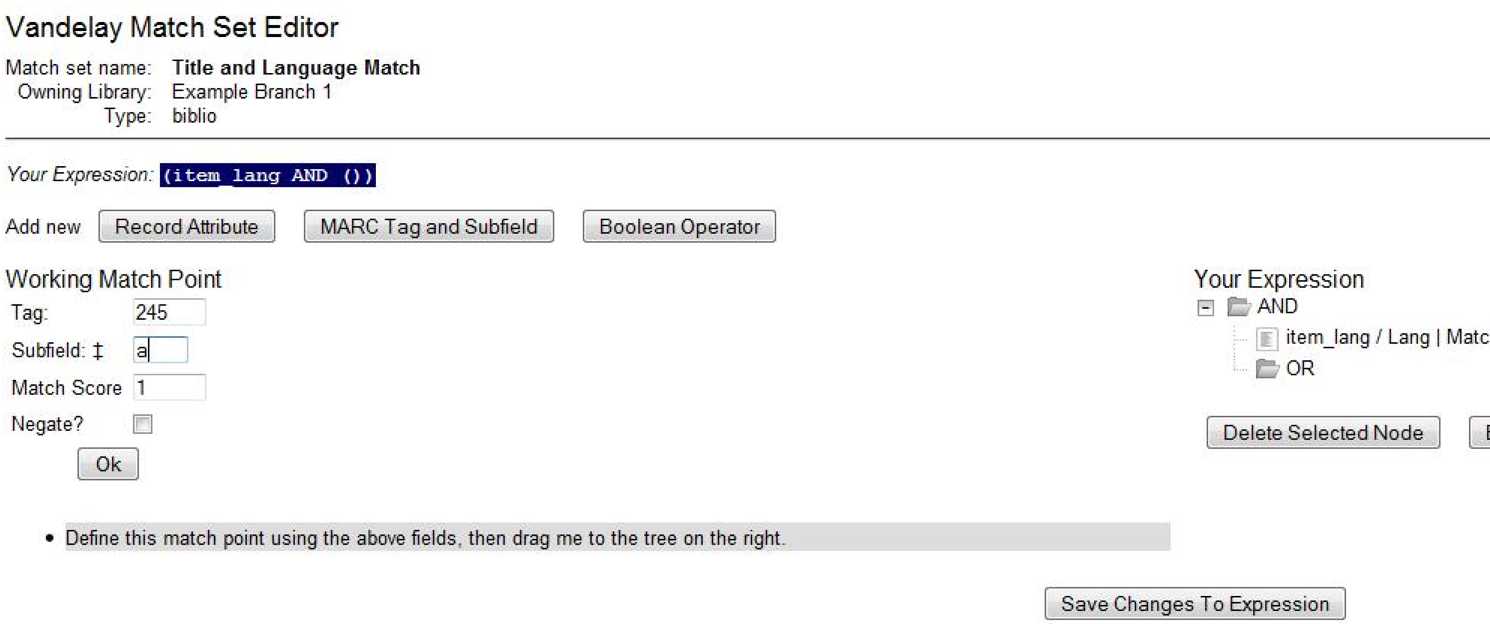
20) Enter a **MARC tag** on which you want the records to match.

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.

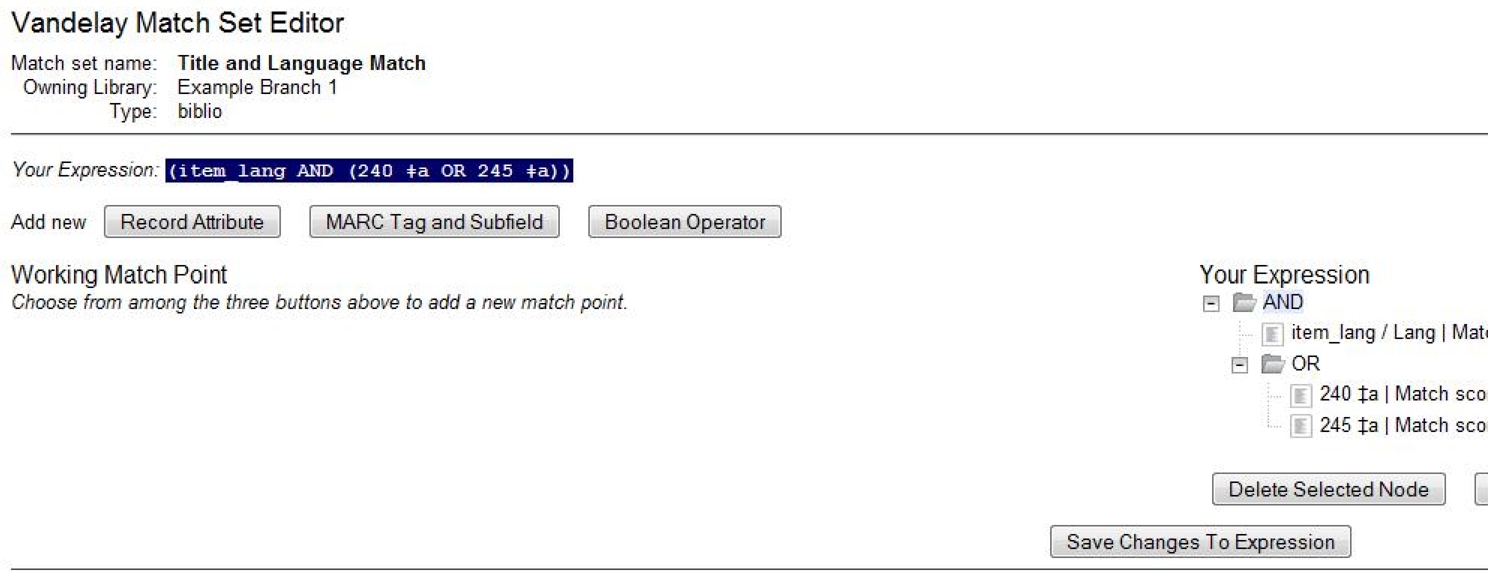
24) Click **Ok.**



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**.



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.

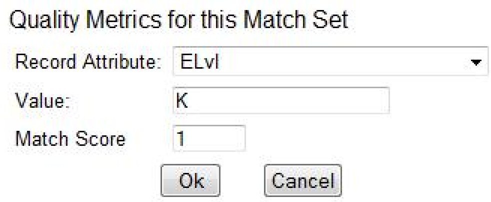
3) Click **Record Attribute.**

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**.



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.

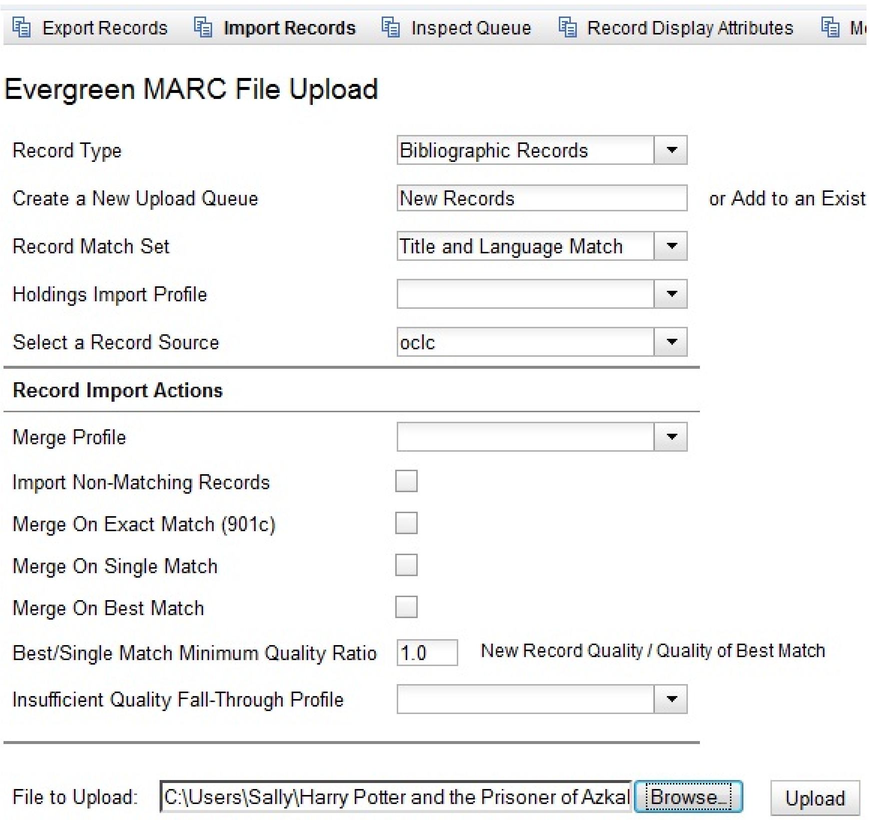
> Quality ratio affects only the **Merge on Single Match** and **Merge on Best Match** options.

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.

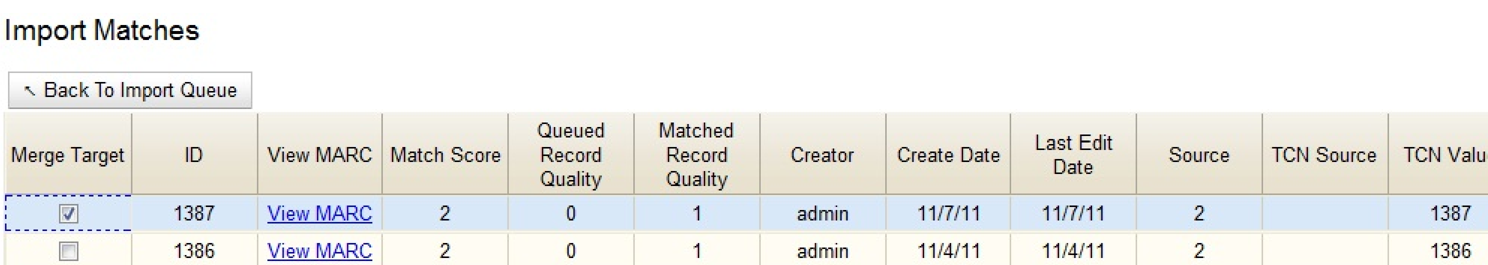
9) Select an **Insufficient Quality Fall-Through Profile** if desired. This field enables you to indicate that if the inbound record doees not meet the configured quality standards, then you may still import the record using an alternate merge profile. This field is typically used for selecting a merge 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.



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

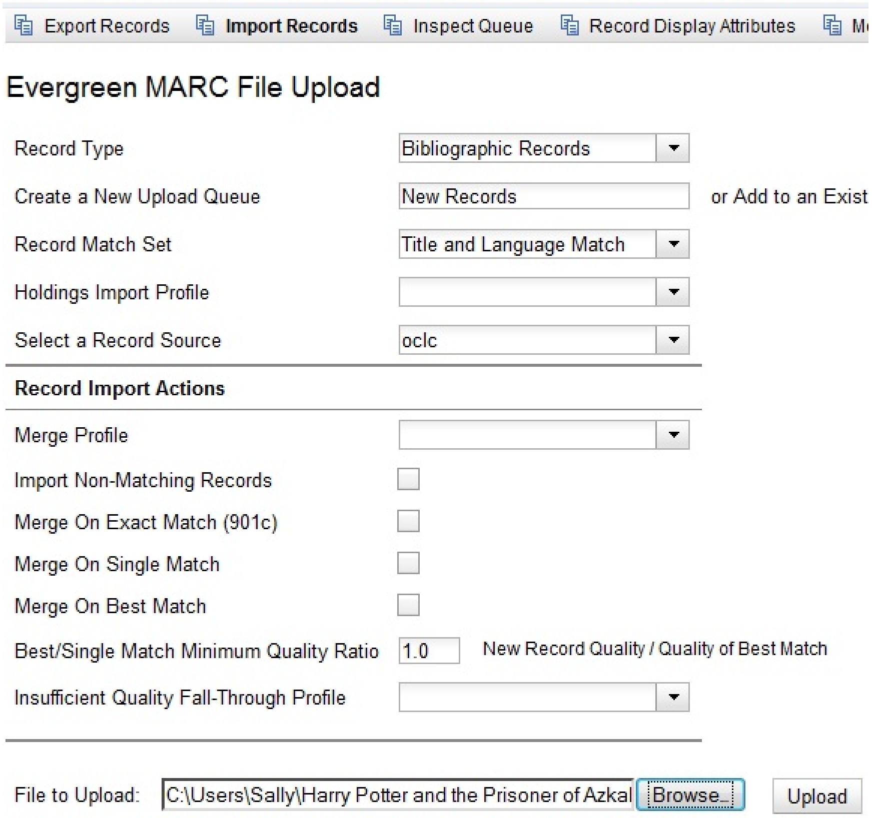
12) If Evergreen indicates that matching records exist, then click the **Matches** link to view the matching records. Check the box adjacent to the existing record that you want to merge with the incoming record.



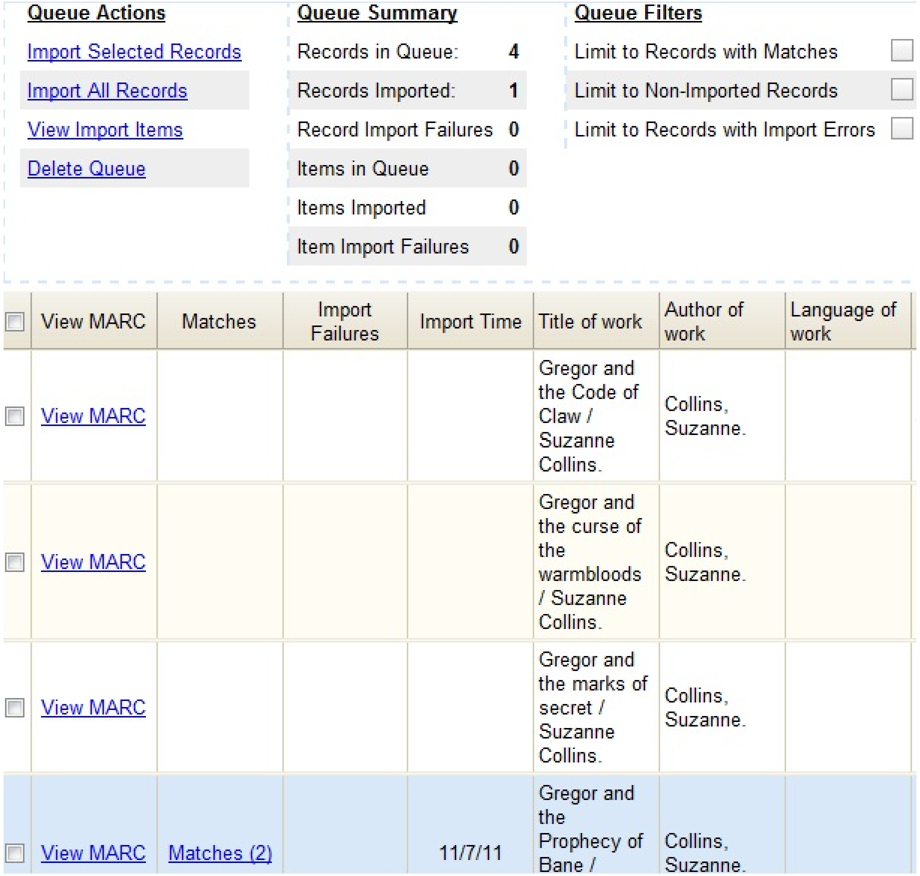
13) Click **Back to Import Queue**.

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

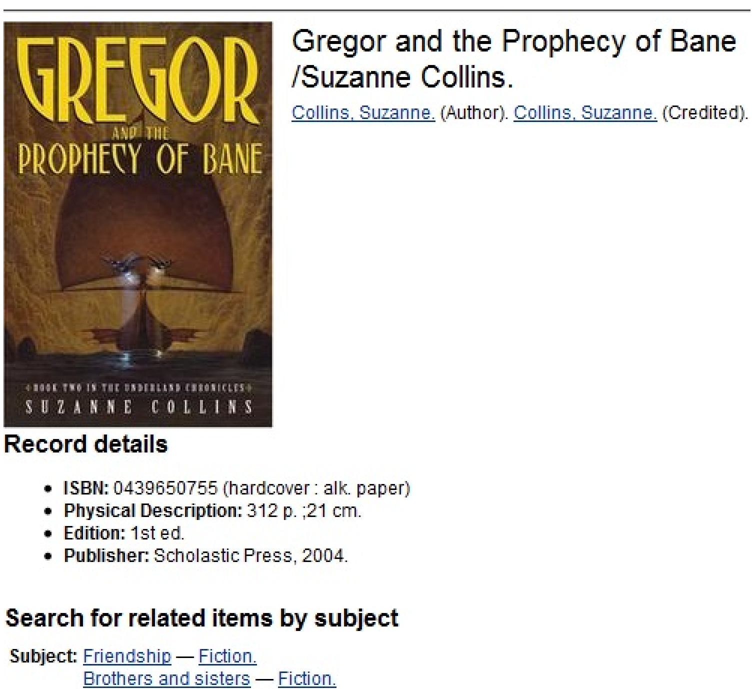
15) A pop up window will offer you the same import choices that were present on the **Import Records** screen. You can choose one of the import options, or click **Import**.



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.



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



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.

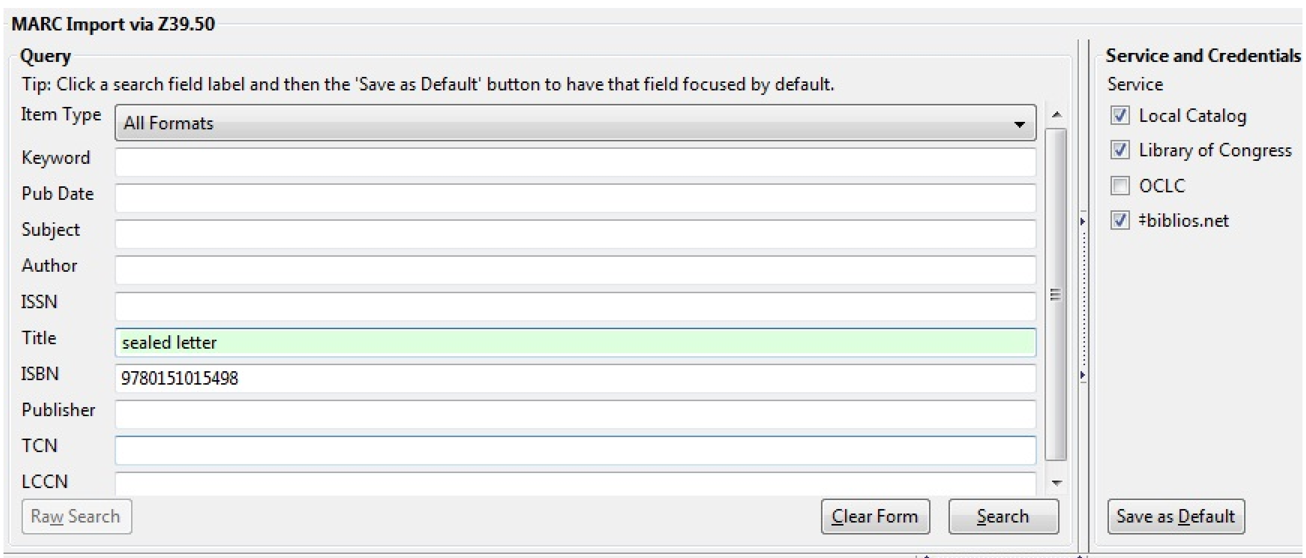
To Overlay an Existing Record via Z39.50 Import:

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.

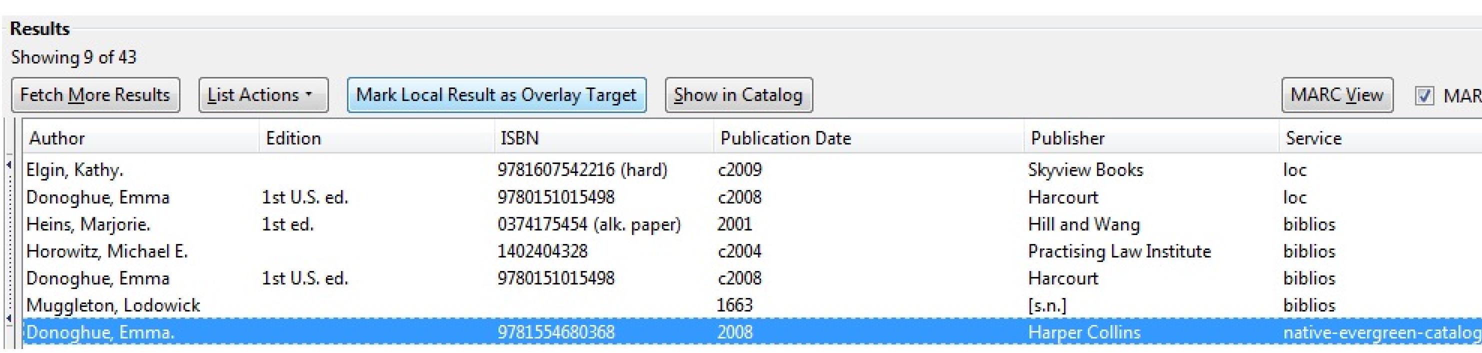
4) Click **Search**.



5) The results will appear in the lower window.

6) Select the record in the local catalog that you wish to overlay.

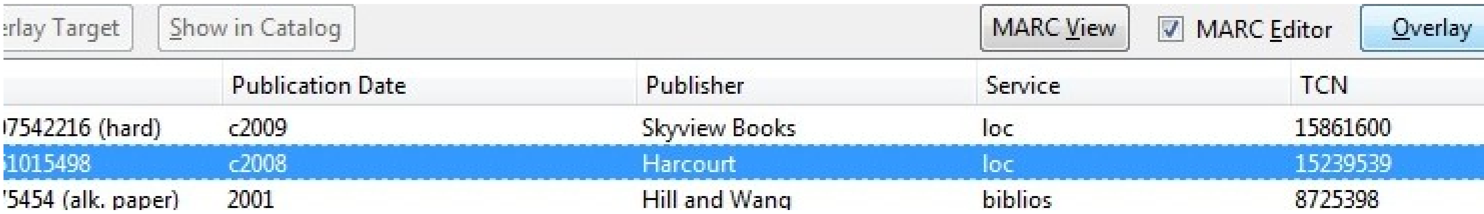
7) Click **Mark Local Result as Overlay Target**



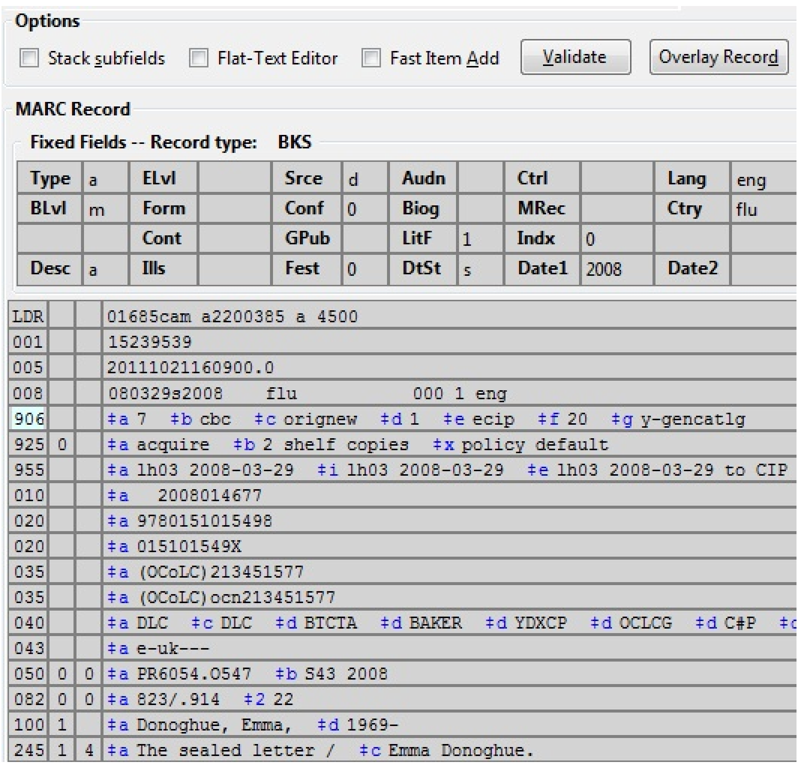
8) A confirmation message appears. Click **OK**.

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

10) Click **Overlay.**

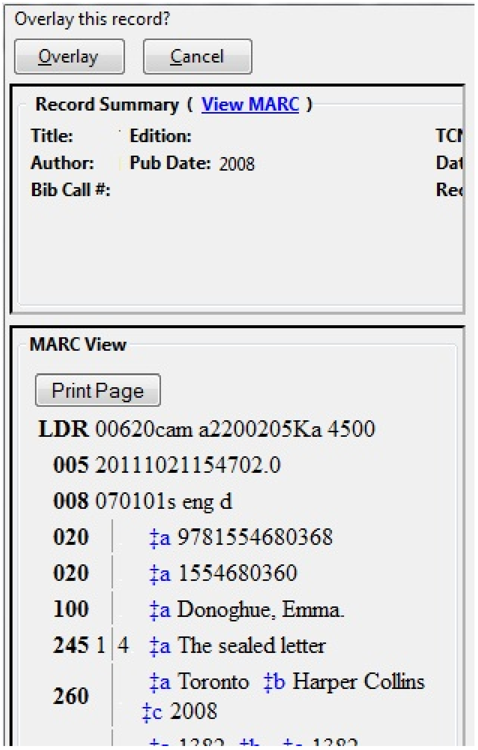


11) The record that you selected will open in the MARC Editor. Make any desired changes to the record, and click **Overlay Record**.



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**.



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.

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.

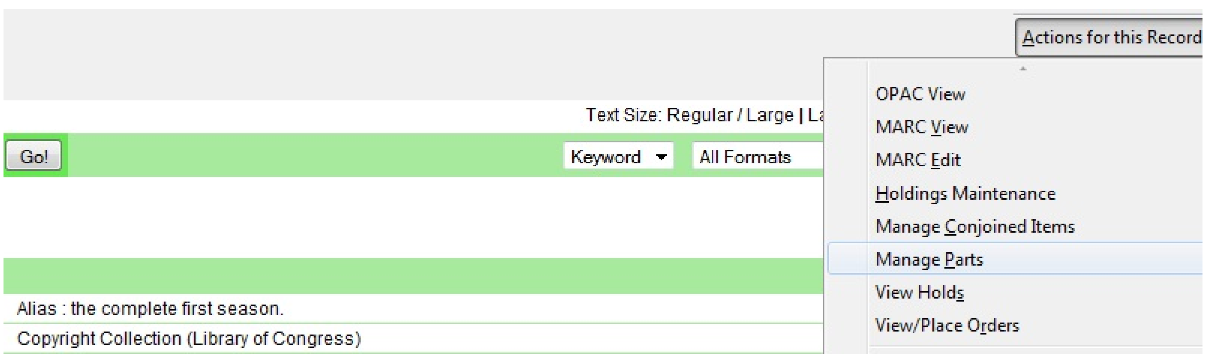
Four new permissions are used by this functionality: CREATE_MONOGRAPH_PART, UPDATE_MONOGRAPH_PART, DELETE_MONOGRAPH_PART and MAP_MONOGRAPH_PART. Thes e permissions should be assigned at the consorial level to those groups or users that will make use of the features described below.

Add a monograph part to an existing record

To add a monograph part to an existing record in the catalog:

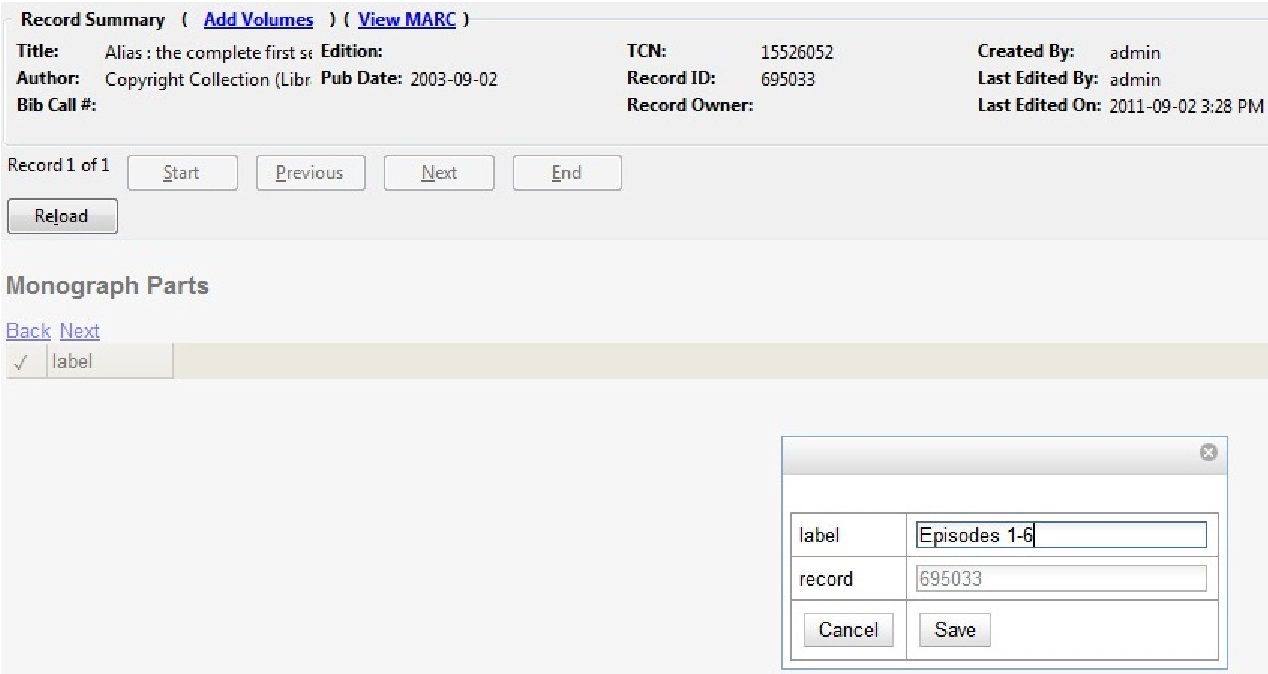
1) Retrieve a record.

2) Click **Actions for this Record # Manage Parts**



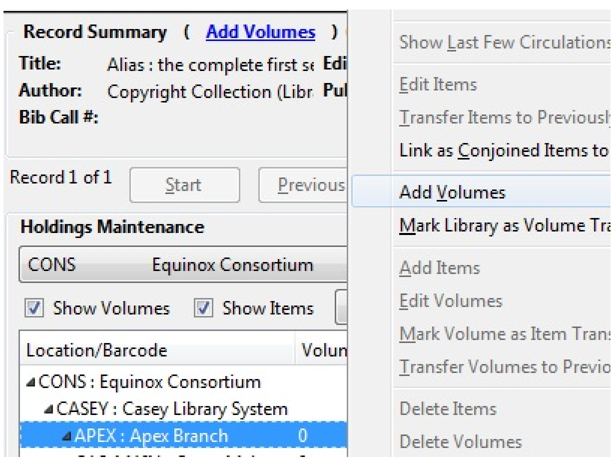
3) Click **New Monograph Part**

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.



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**.

To add a volume and copy to your workstation library or other libraries, click **Actions for this Record # Holdings Maintenance # Add Volumes**.

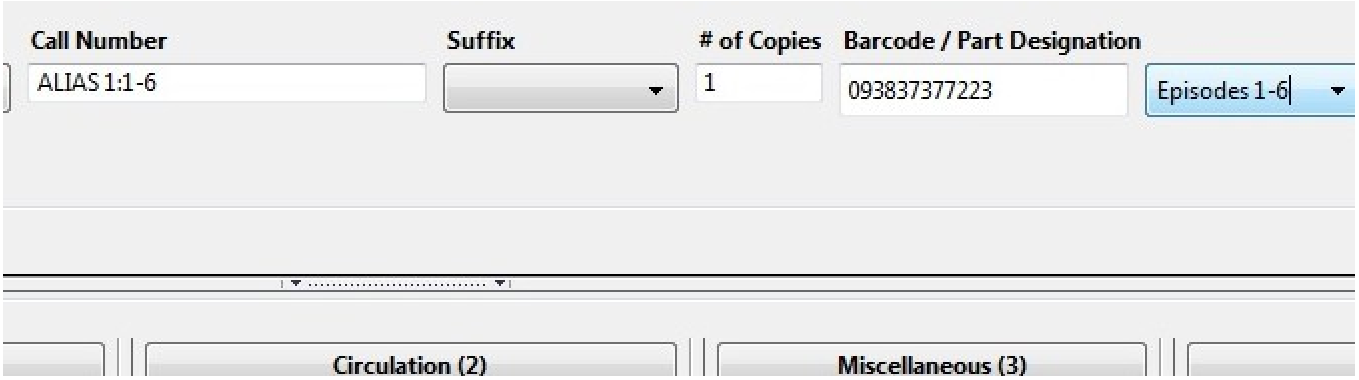


6) The **Unified Volume/Copy Creator** opens. Enter the number of volumes that you want to add to the catalog and the volume description.

7) Enter the number of copies and barcode(s) of each item.

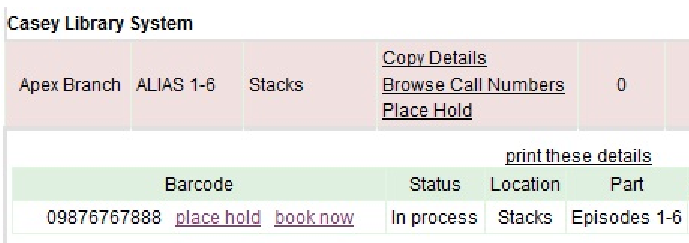
8) Select the **part designation** from the drop down menu adjacent to the barcode field.

9) Apply a template to the copies, or edit fields in the **Copy Editor**.



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.



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.

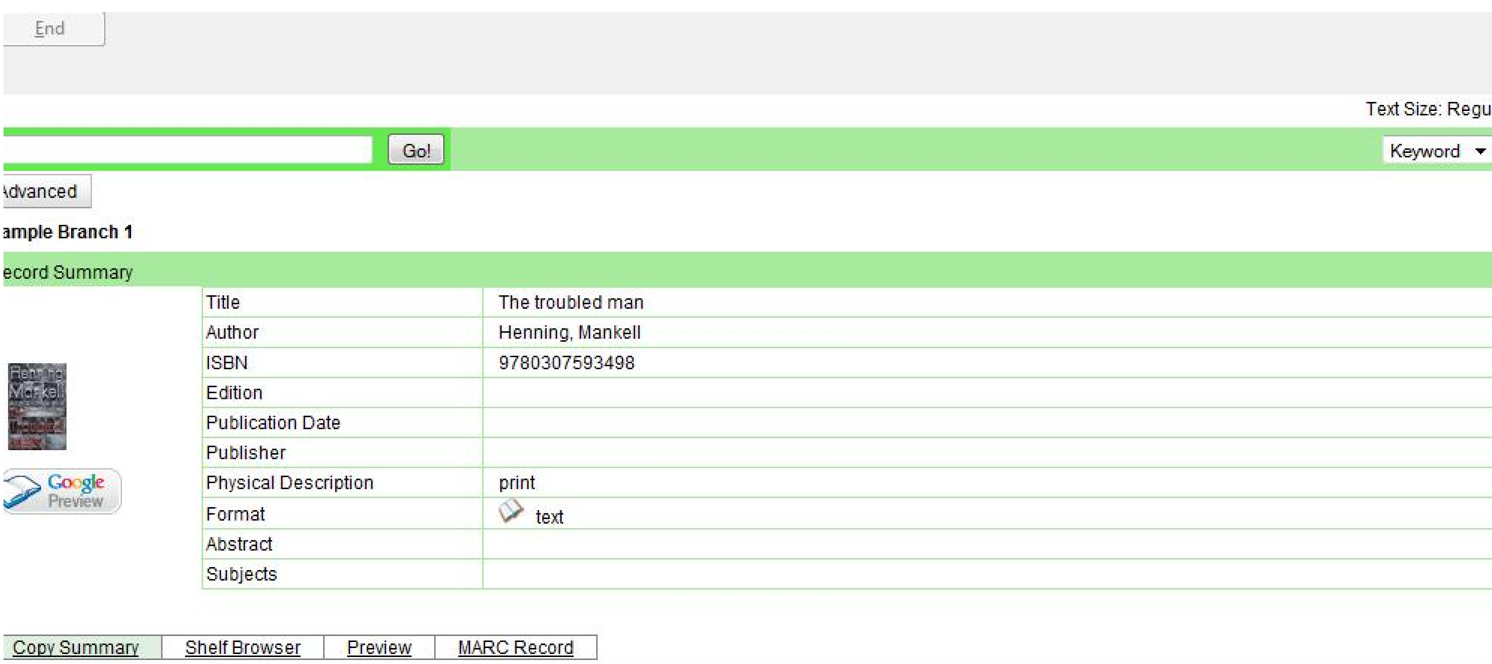
In the example below, a librarian has created a bibliographic record for two bestselling items. These books are available as physical copies in the library, and they are available as e-reader downloads. The librarian will link the copy of the Kindle to the bibliographic records that are available on 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.

2) Click **Actions for this Record # Mark as Target for Conjoined Items.**

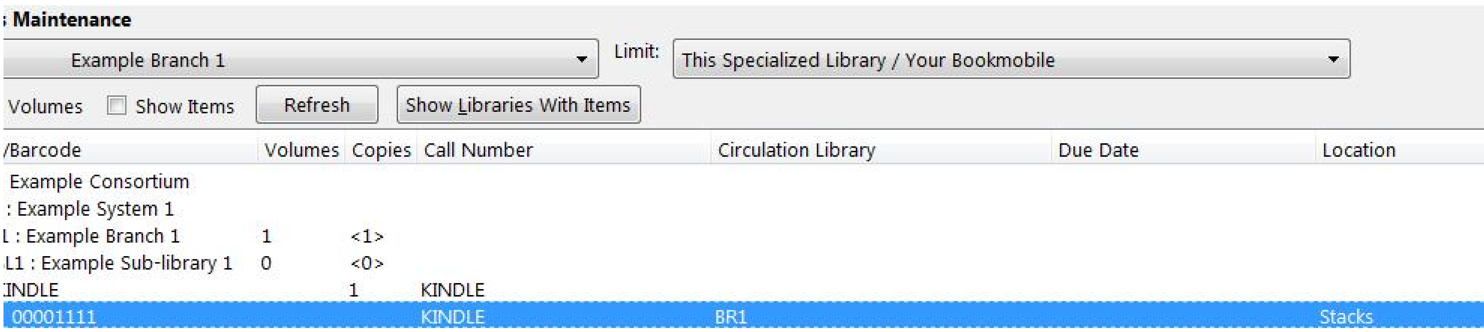


3) A confirmation message will appear. Click **OK.**

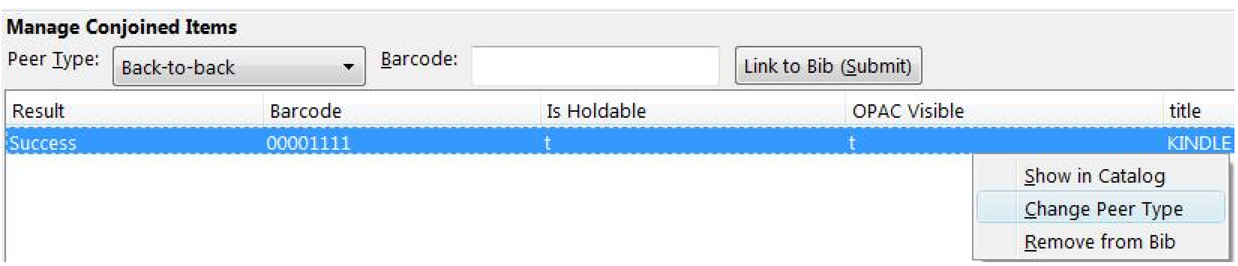
4) In a new tab, retrieve the bibliographic record with the item that you want to link to the other record.

5) Click **Actions for this Record # Holdings Maintenance.**

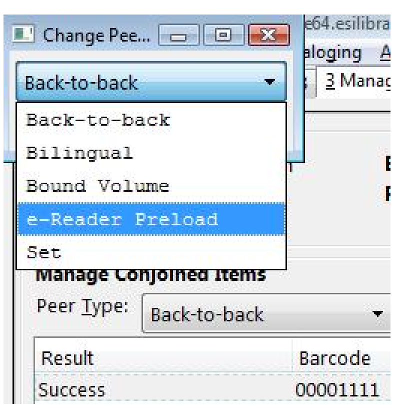
6) Select the copy that you want to link to the other bibliographic record. Right-click, or click **Actions for Selected Rows # Link as Conjoined Items to Previously Marked Bib Record.**



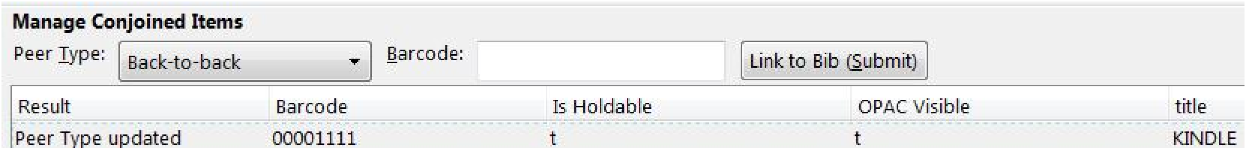
7) The **Manage Conjoined Items** interface opens in a new tab. This interface enables you to confirm the success of the link, and to change the peer type if desired. The **Result** column indicates that you created a successful link between the item and the bib record.



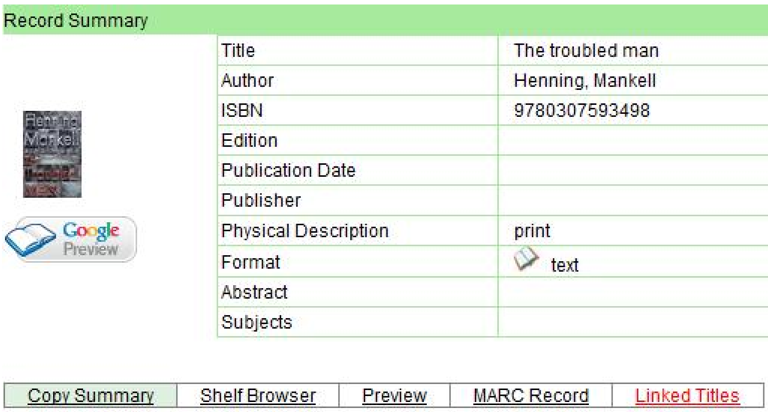
The default peer type, **Back-to-back**, was set as the peer type for our item. To change a peer type after the link has been created, right-click or click **Actions for Selected Items # Change Peer Type**. A drop down menu will appear. Select the desired peer type, and click **OK.**



8) The **Result** column will indicate that the **Peer Type** [has been] **Updated.**



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.**

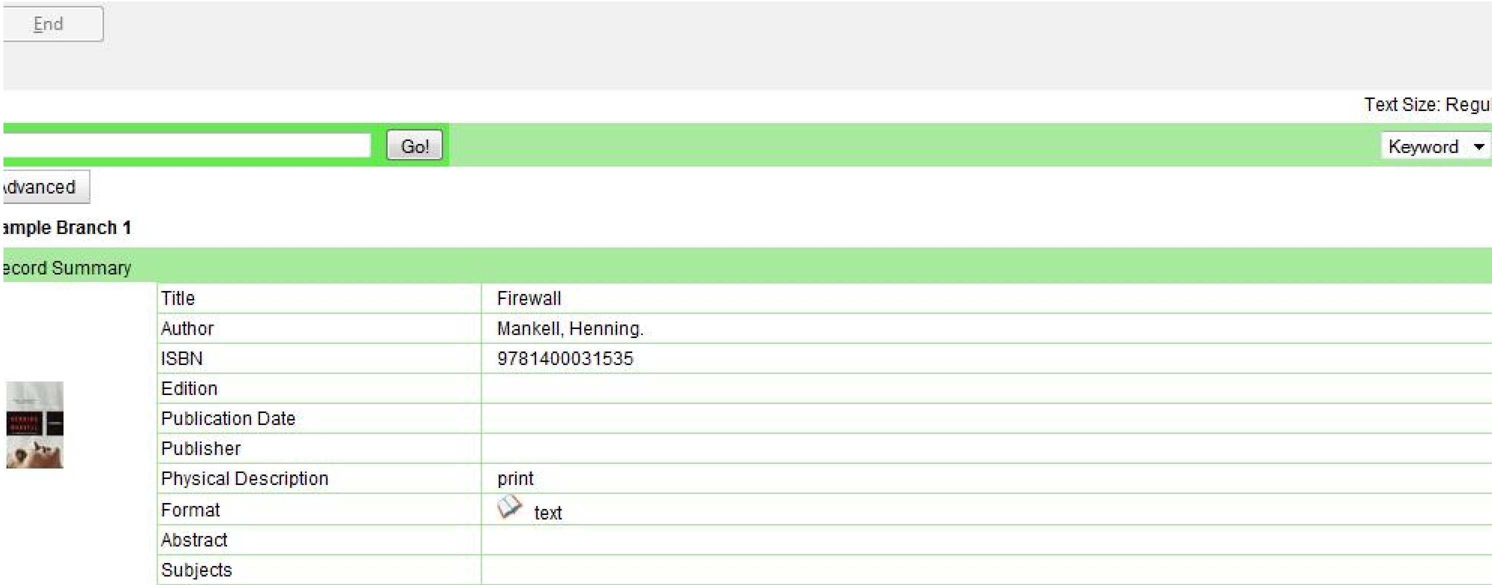


10) To view the copy details, including the peer type, click **Copy Details.**

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.

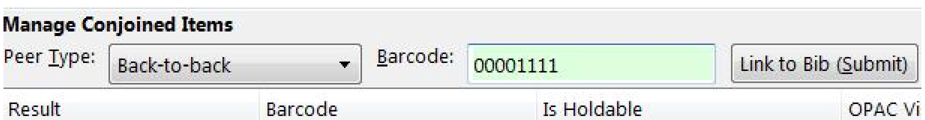
2) Click **Actions for this Record # Manage Conjoined Items.**



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).**



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

Table of Contents

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 use 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.

Table 45.1. Serials Control View and Alternate Serials Control View Comparison

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

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.

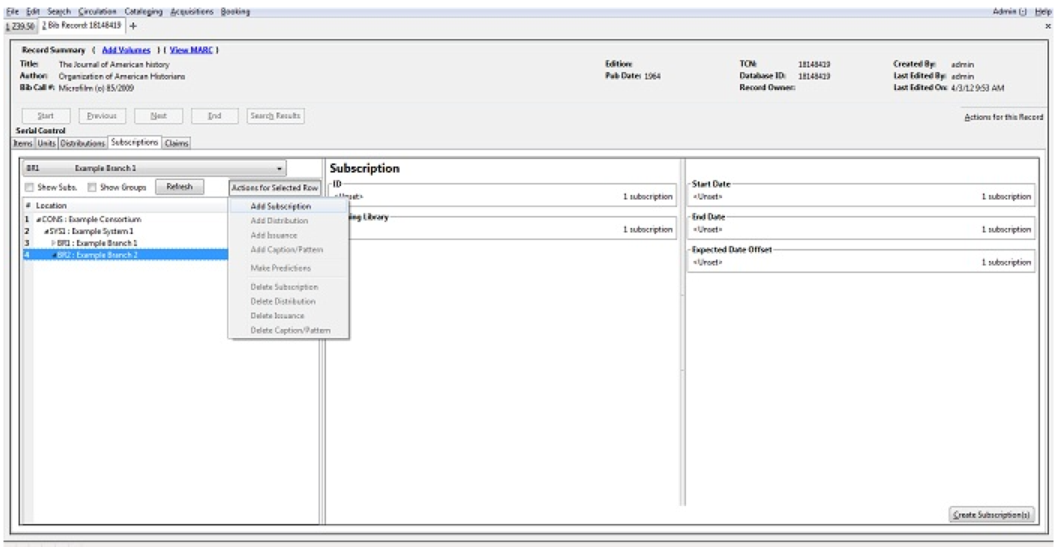
> **Note:** From the copy template interface, you can delete copy templates that have never been used.

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.



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.

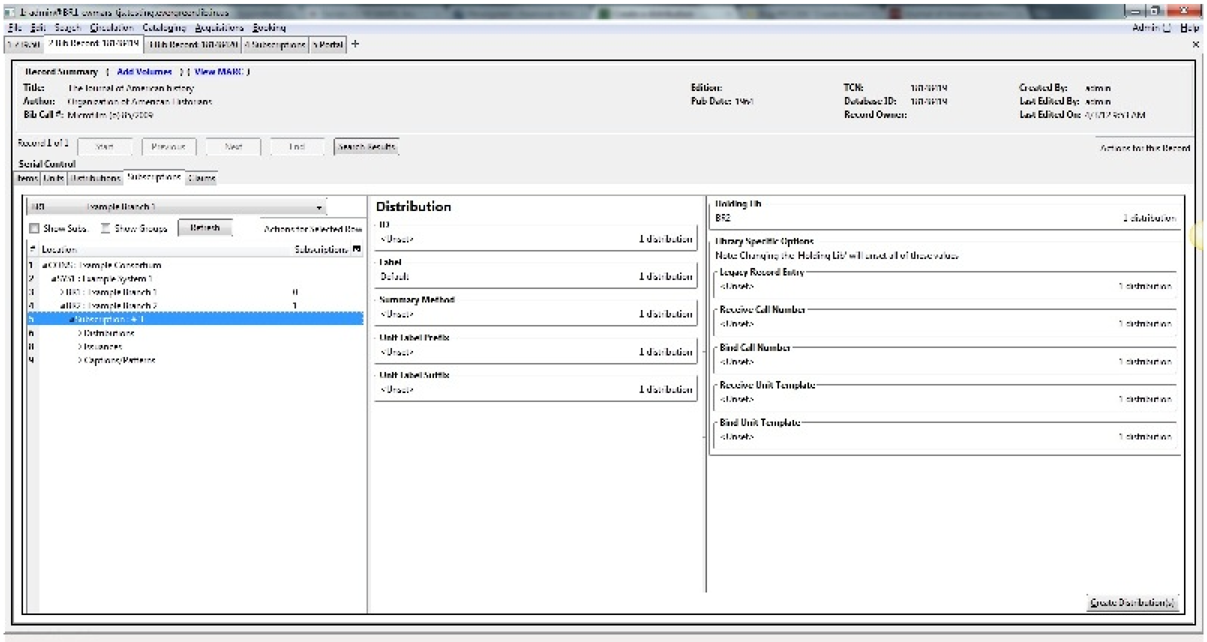
7. When finished, click Create Subscription(s) in the bottom right corner of the screen.

8. A confirmation message appears. Click OK.

> **Note:** 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.



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

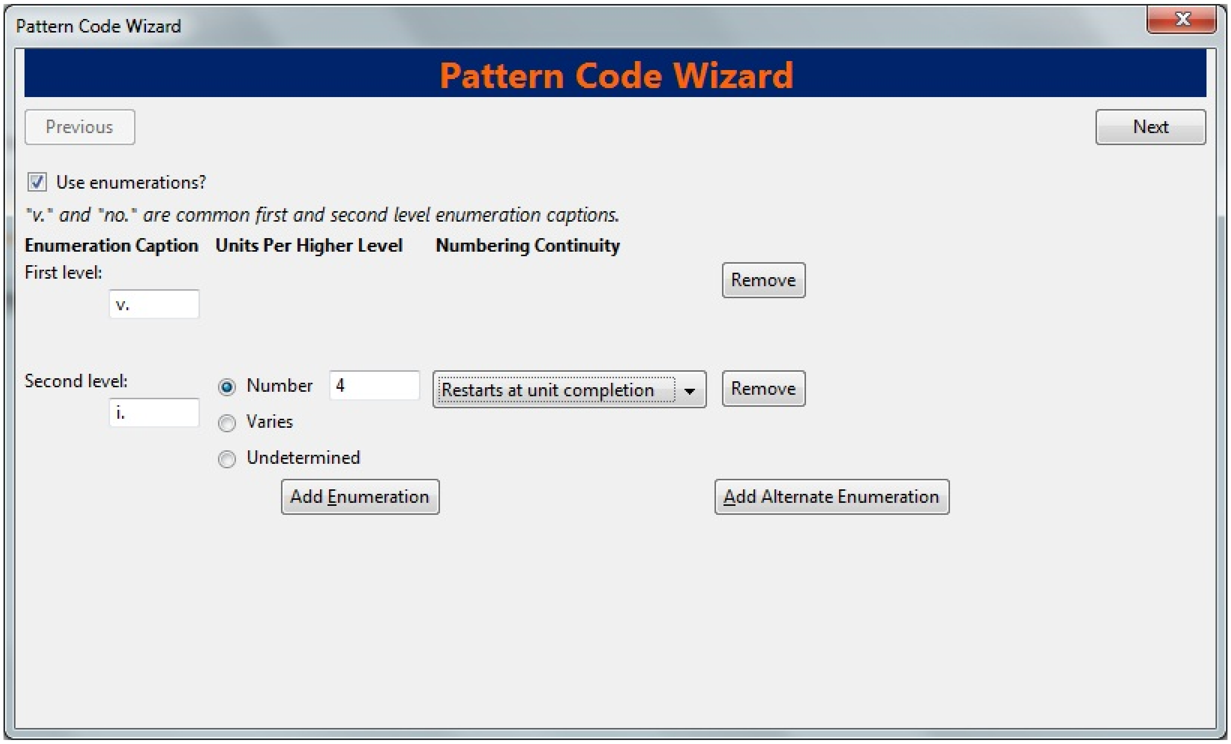
4. In the Pattern Code dbox, you can enter a JSON representation of the 85X tag by hand, or you can click the Pattern CodeWizard to enter the information in a user-friendly format.

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



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.

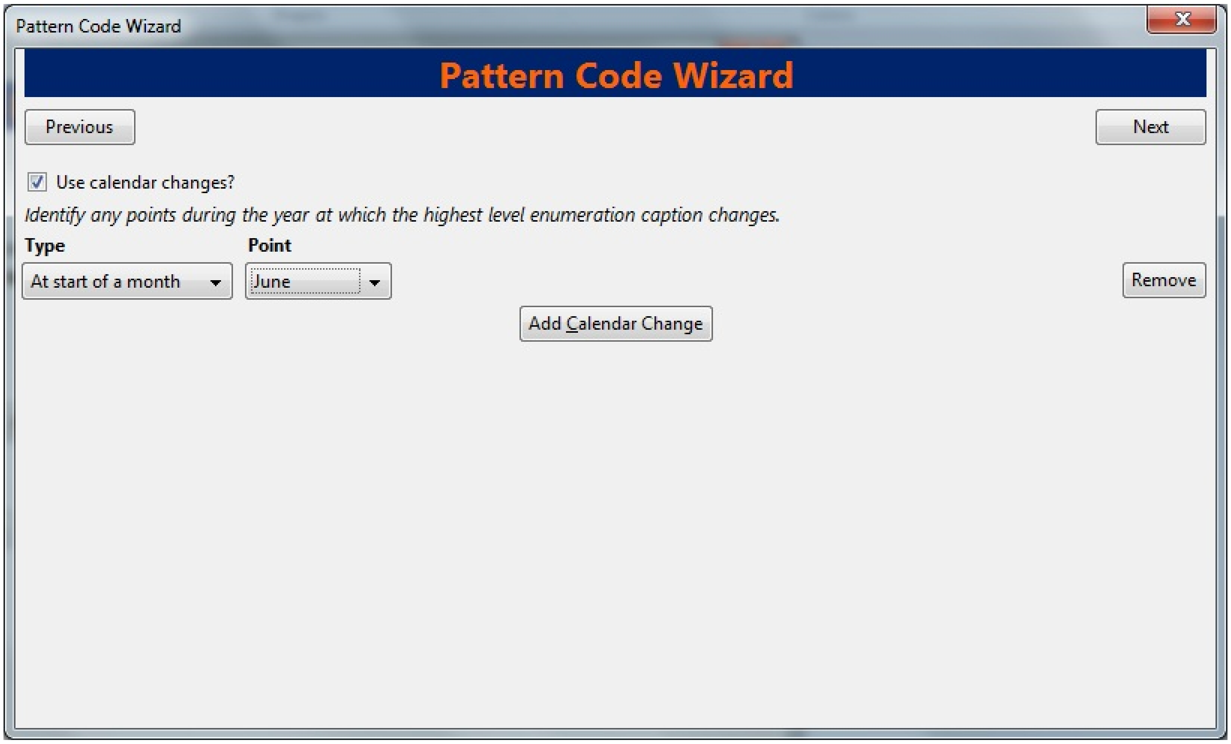
6. Choose the enumeration scheme from the drop down menu. This conforms to $v in the 853, 854, and 855 MARC tags.

> note
>
> You can add up to six levels of enumeration.

7. Add Alternate Enumeration if desired.

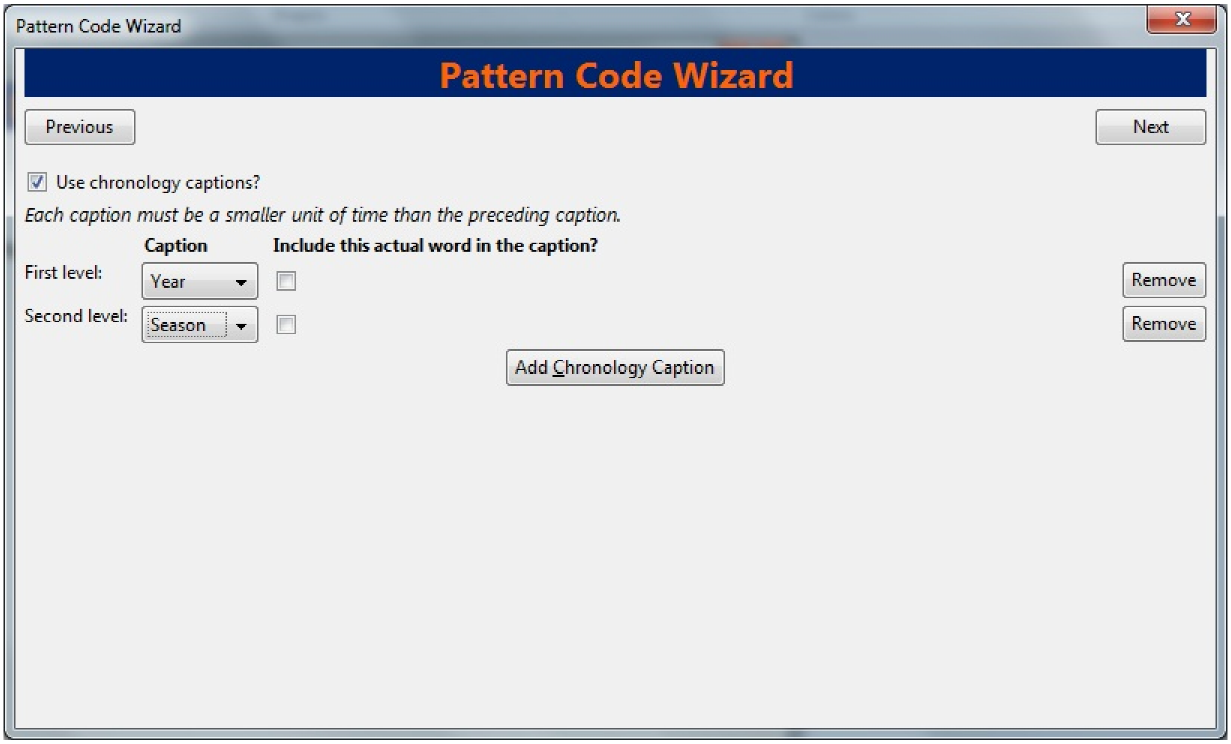
8. When you have completed the enumerations, click Next.

Page 2: Calendar



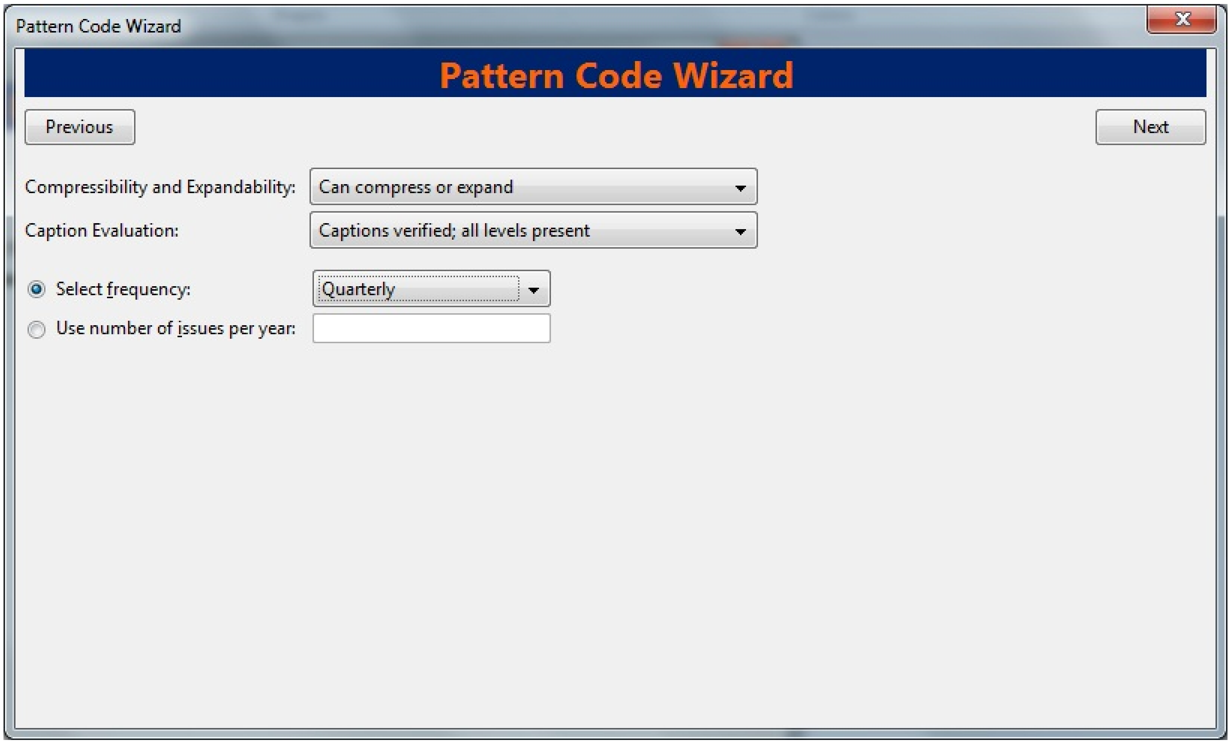
1. To use months, seasons, or dates in your caption, check the box adjacent to Use calendar changes.
2. Identify the point in the year at which the highest level enumeration caption changes.
3. In the Type drop down menu, select the points during the year at which you want the calendar to restart.
4. 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



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



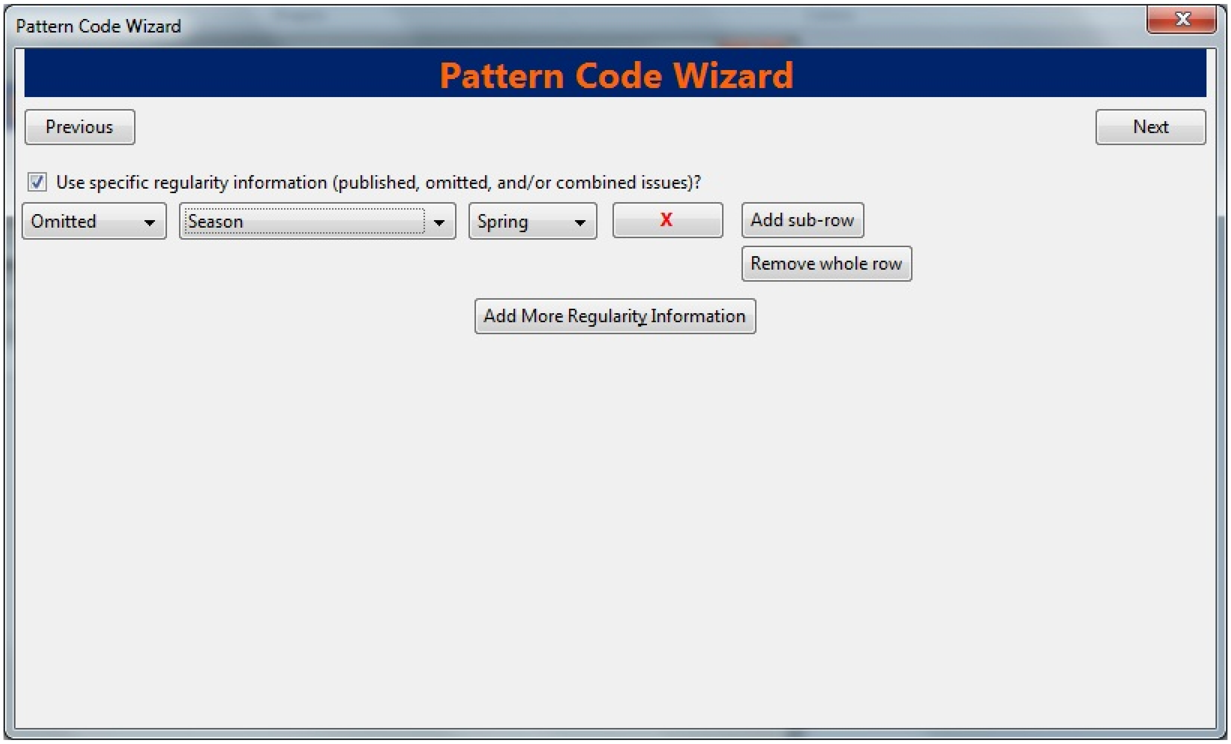
1. Select the appropriate option for compressing or expanding your captions in the catalog from the compressibility and expandability drop down menu. The entries in the drop down menu correspond to the indicator codes and the subfield $w in the 853 tag. Compressibility and expandability correspond to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



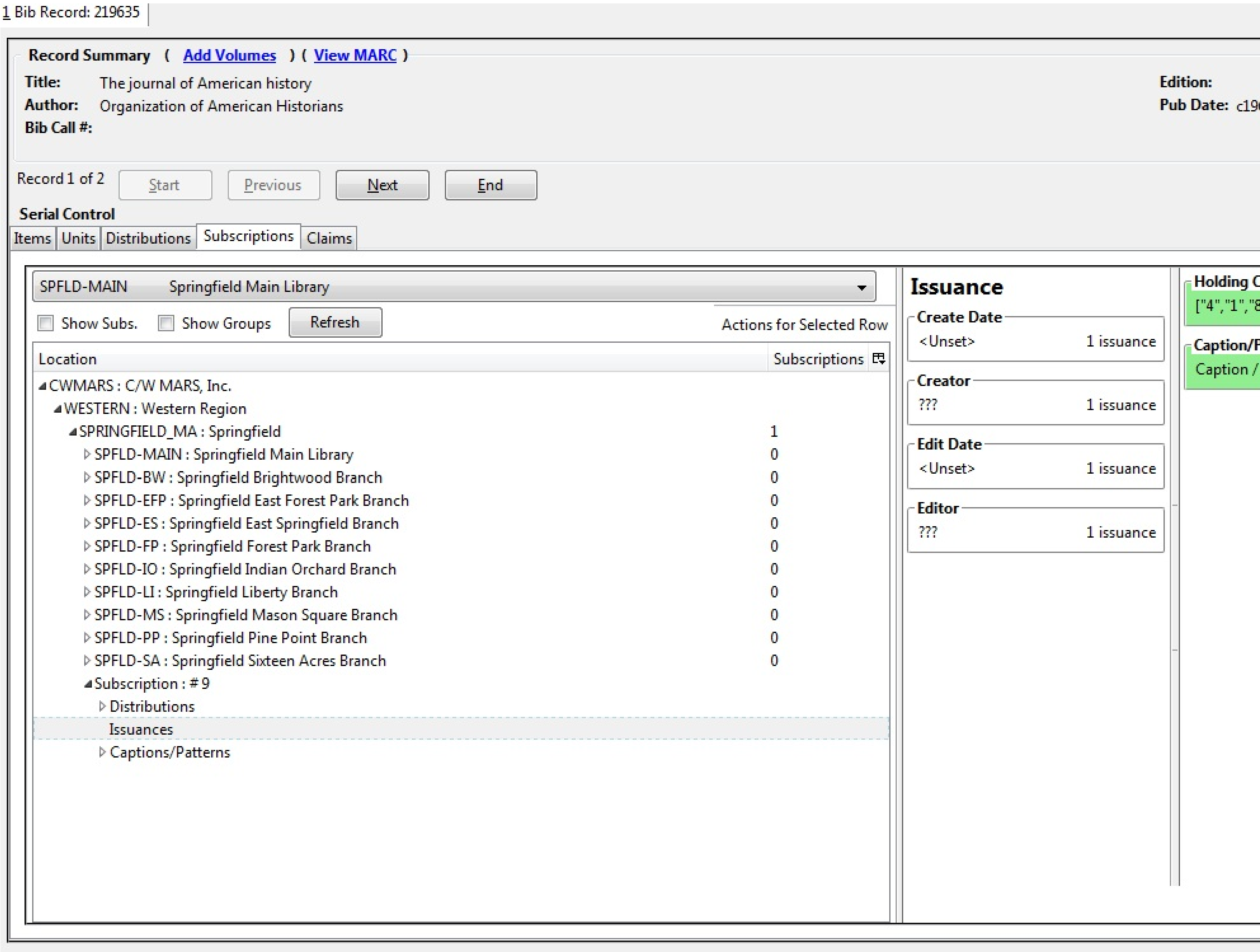
1. If needed, check box for Use specific regularity information
2. Choose the appropriate information for combined, omitted or published issues
3. Choose the appropriate frequency and issue
4. Add additional rows as required

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.



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.

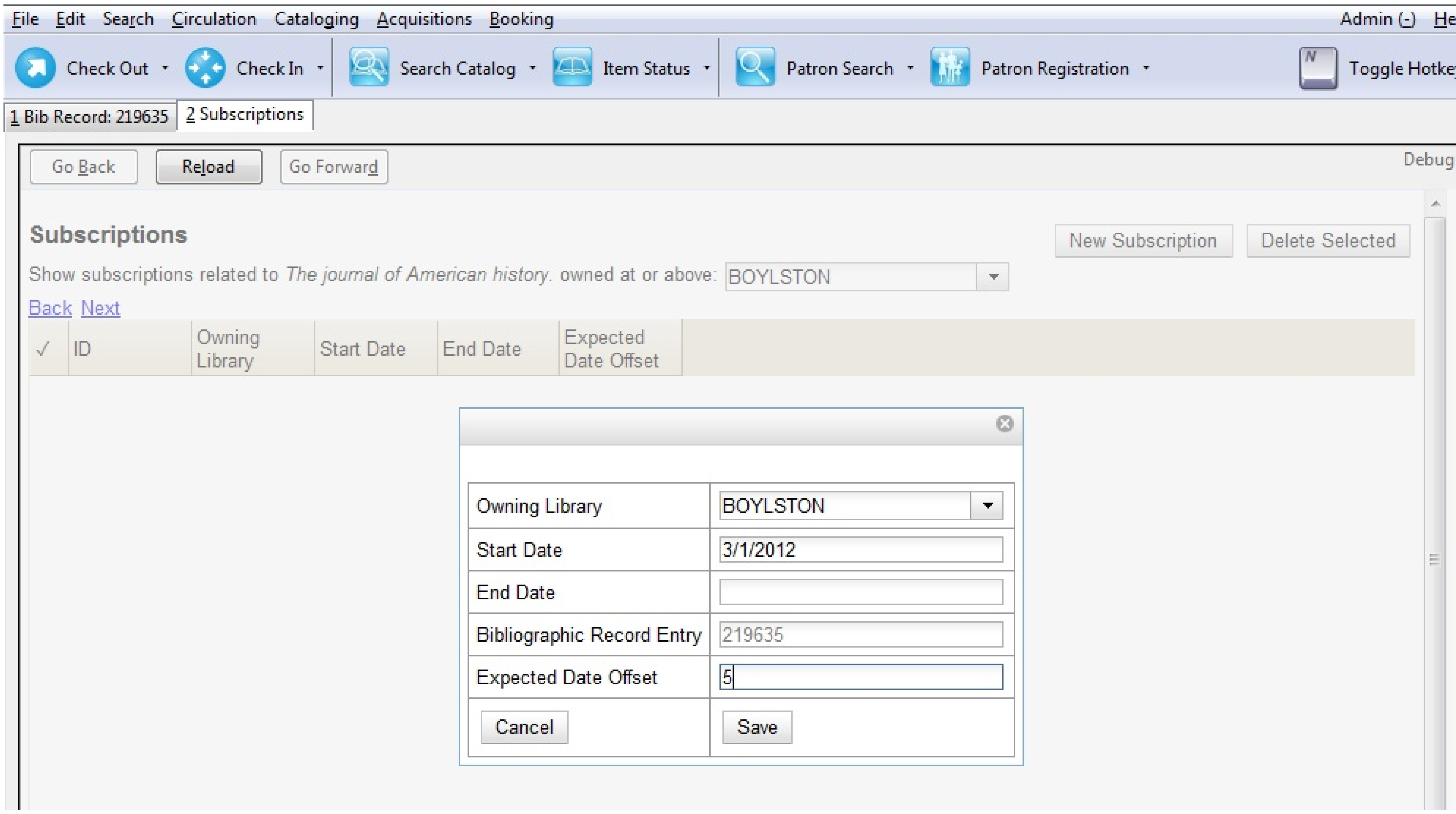
Chapter 48. Alternate Serial Control View

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.



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.

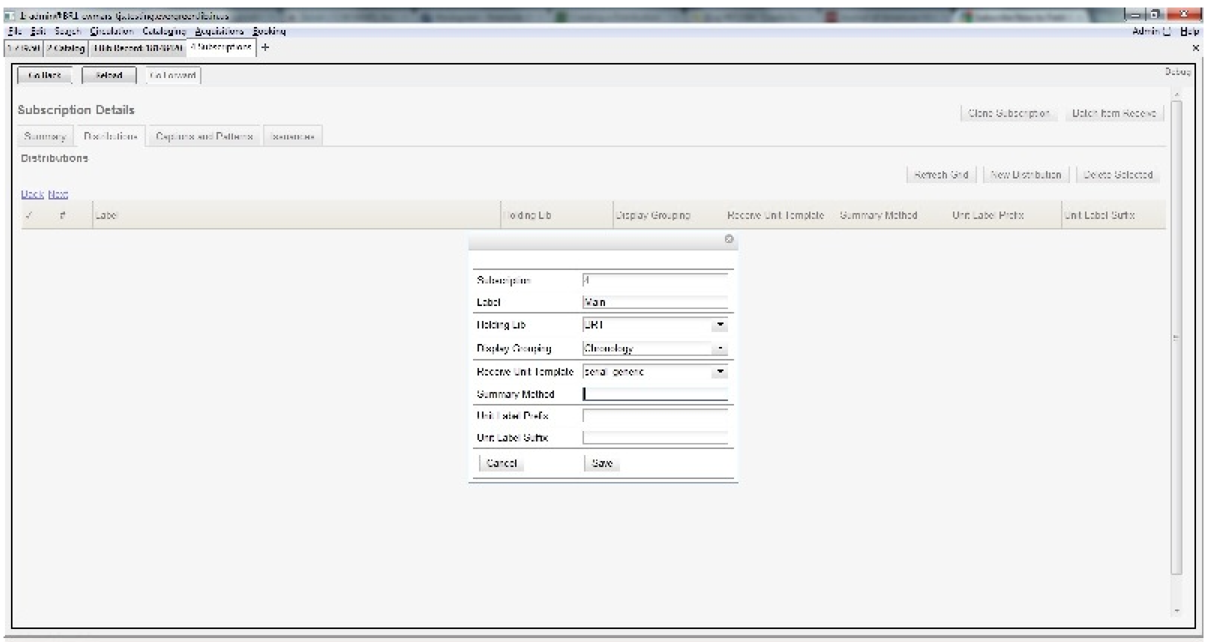
7. Enter the difference between the nominal publishing date of an issue and the date that you expect to receive your copy in the Expected Date Offset. For example, if an issue is published the first day of each month, but you receive the copy two days prior to the publication date, then enter -2 days 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.



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.

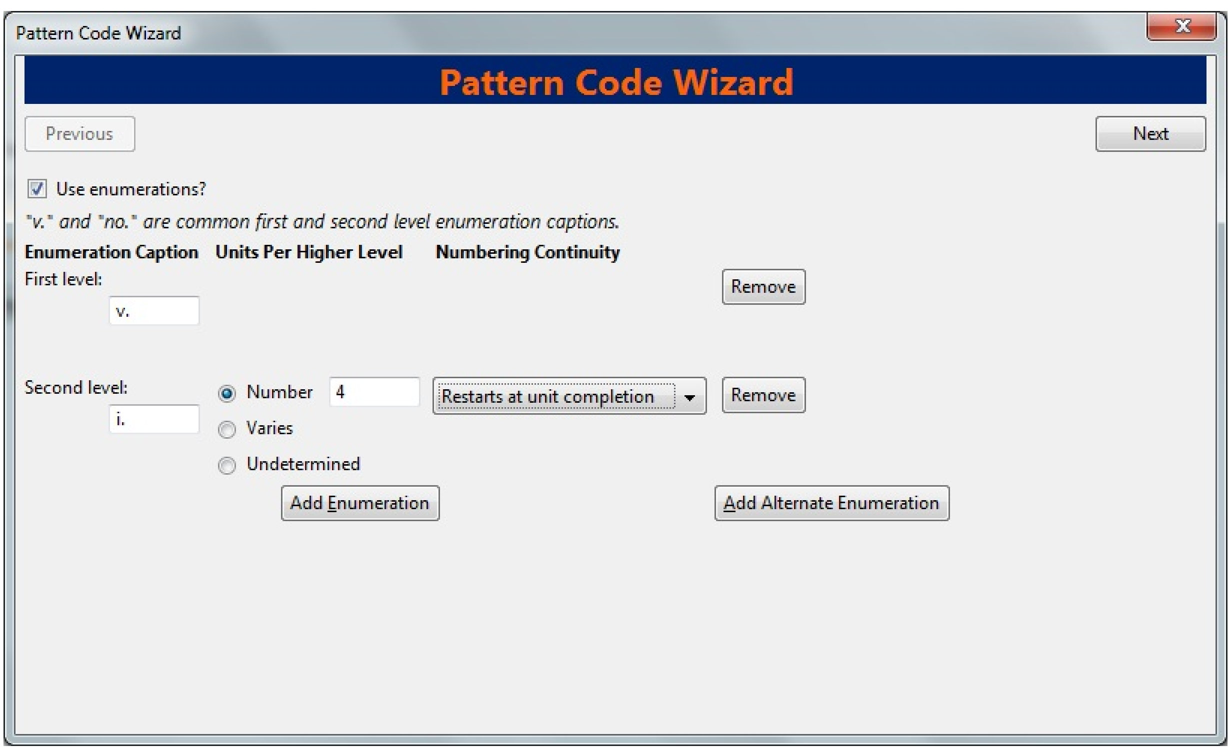
> note
>
> A subscription may have multiple captions and patterns listed in the subscripiton details, but only one Caption and Pattern can be active at any time. If you want to add multiple patterns, e.g. for Basic and Supplement, Click Add Caption and Pattern.

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



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.

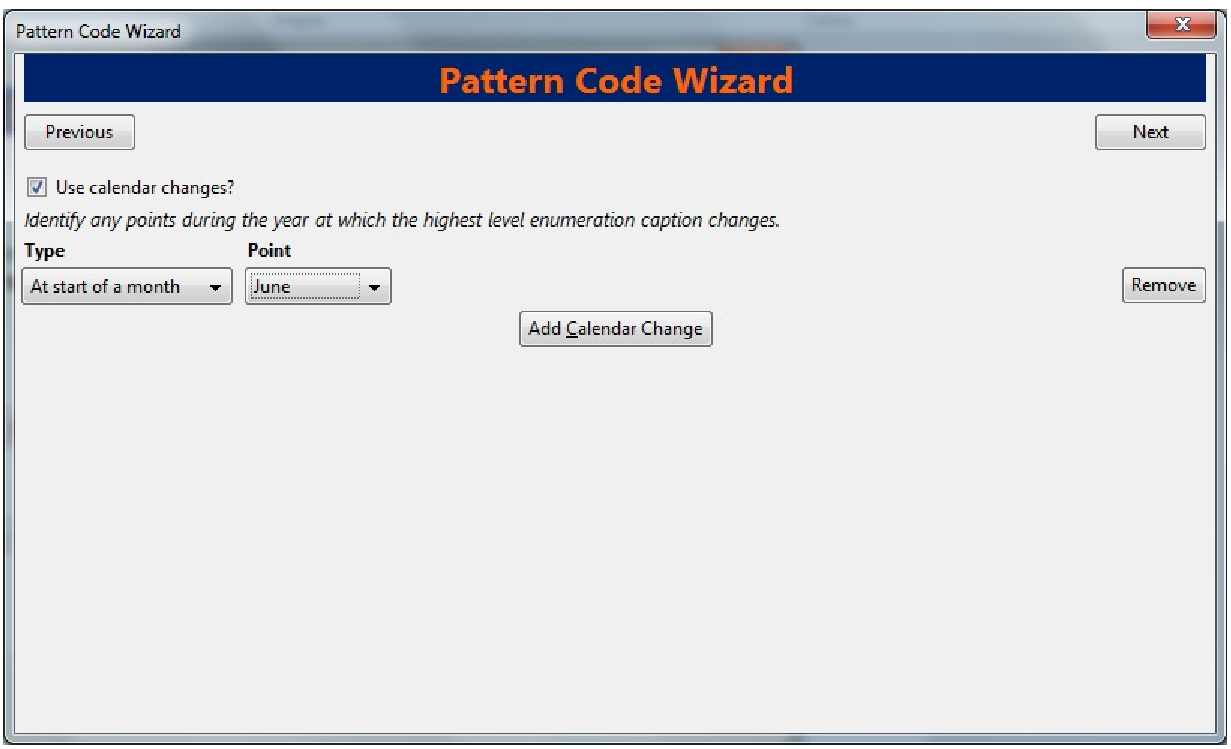
6. Choose the enumeration scheme from the drop down menu. This conforms to $v in the 853, 854, and 855 MARC tags.

> 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



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.

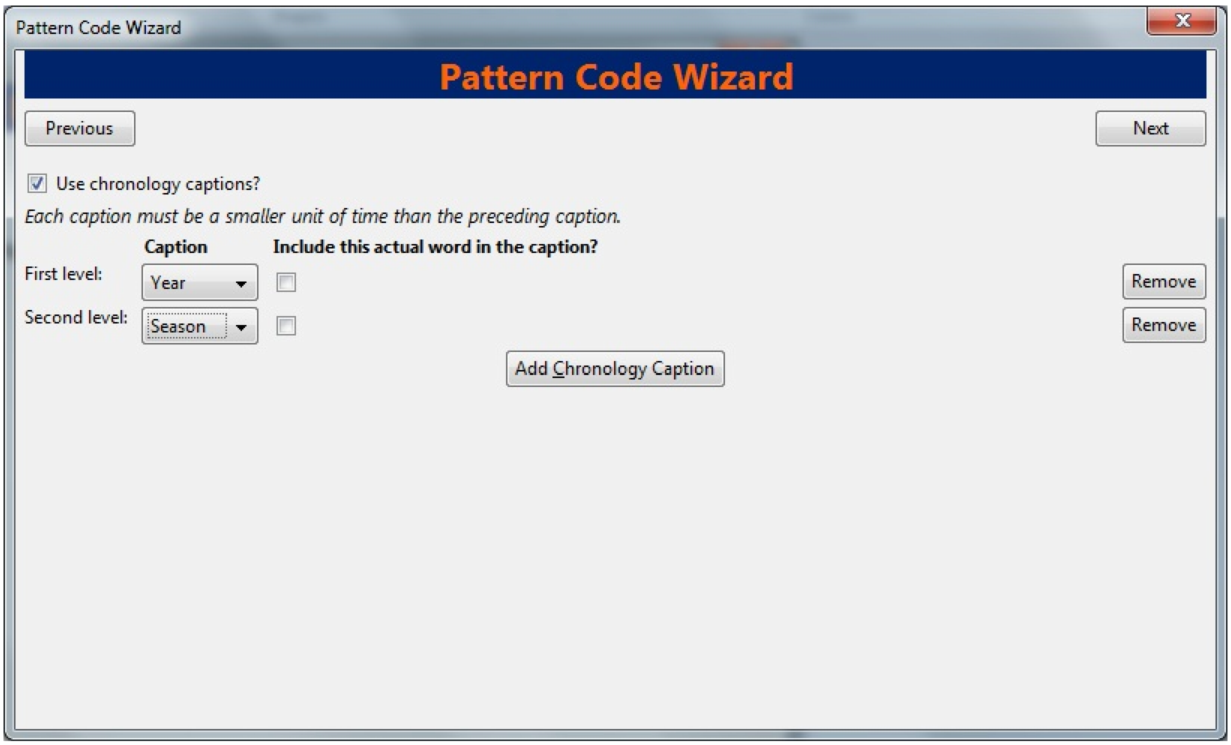
3. In the Type drop down menu, select the points during the year at which you want the calendar to restart.

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



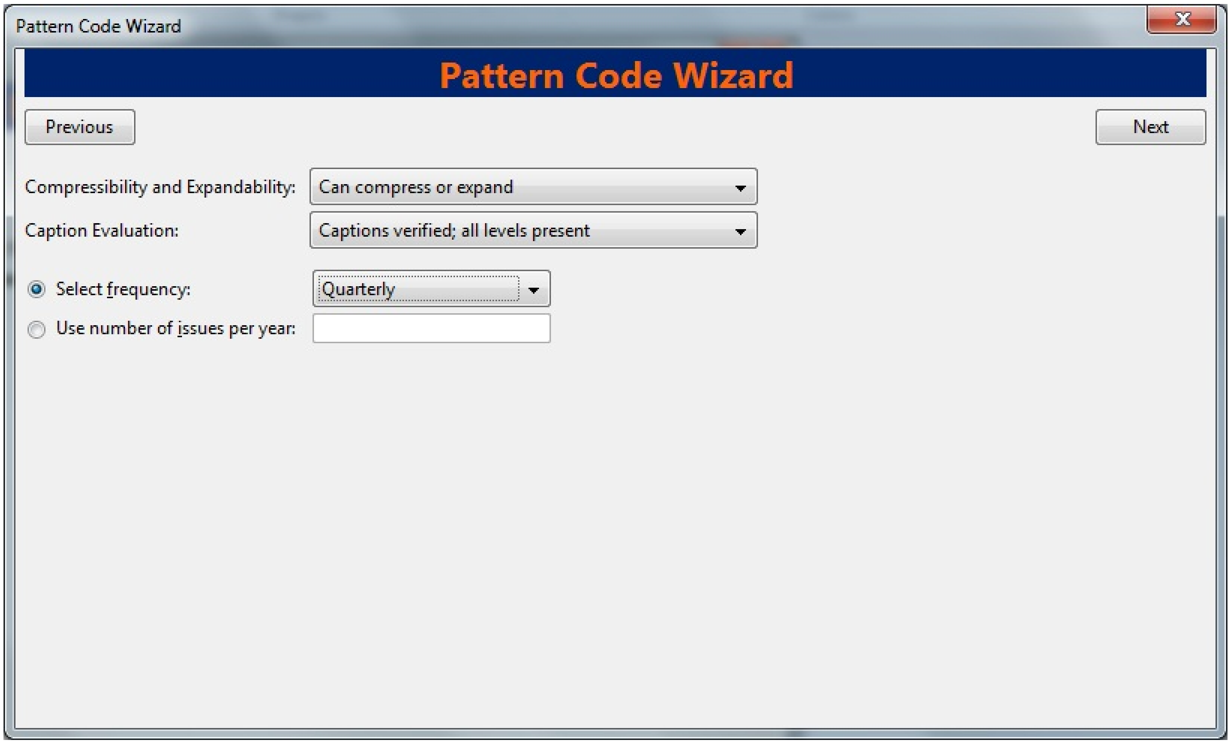
1. To add chronological units to the captions, check the box adjacent to Use chronology captions.

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



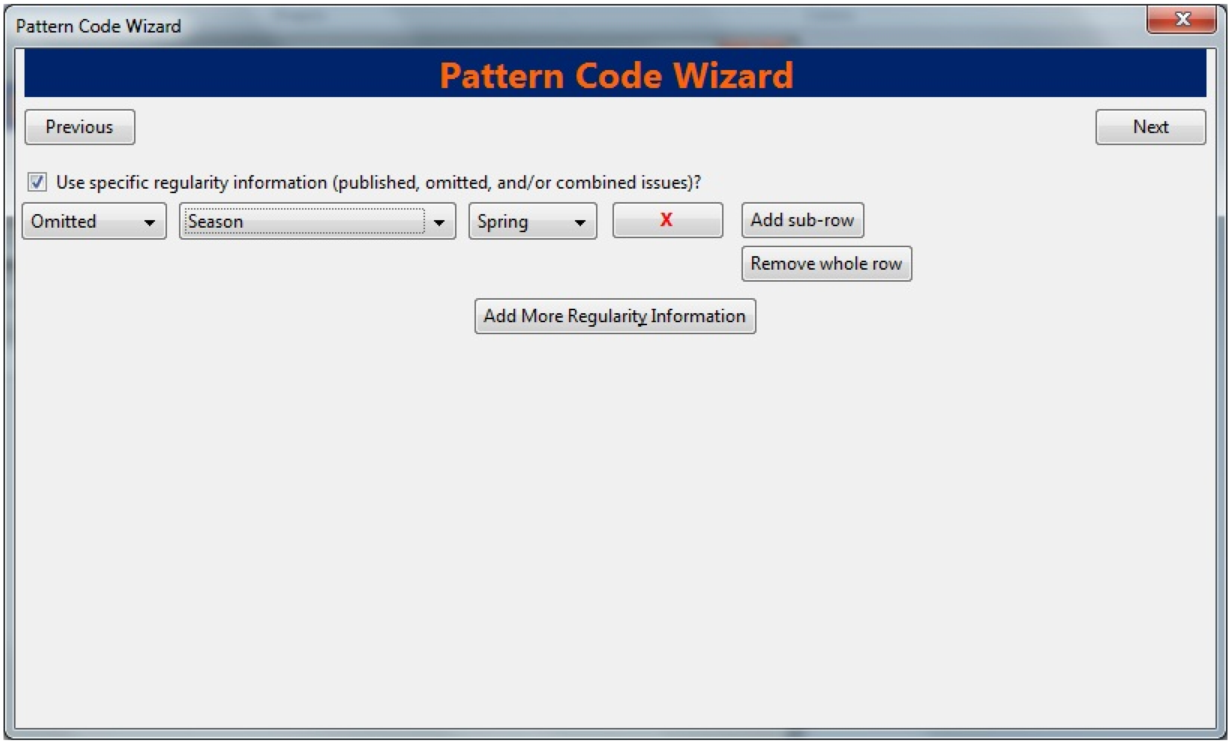
1. Select the appropriate option for compressing or expanding your captions in the catalog from the compressibility and expandability drop down menu. The entries in the drop down menu correspond to the indicator codes and the subfield $w in the 853 tag. Compressibility and expandability correspond to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



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

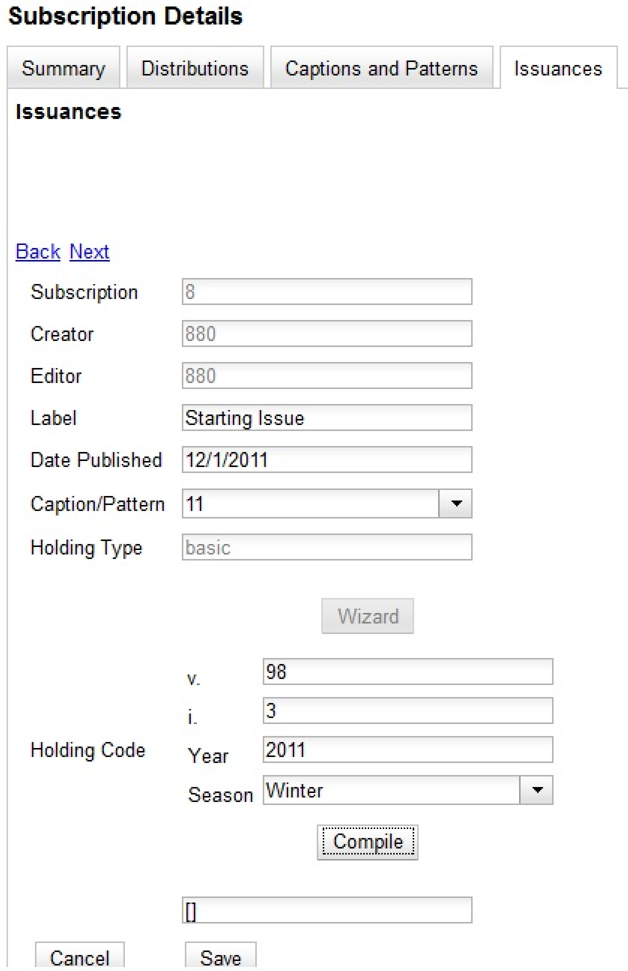
1. To complete the wizard, click Create Pattern Code.

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.



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

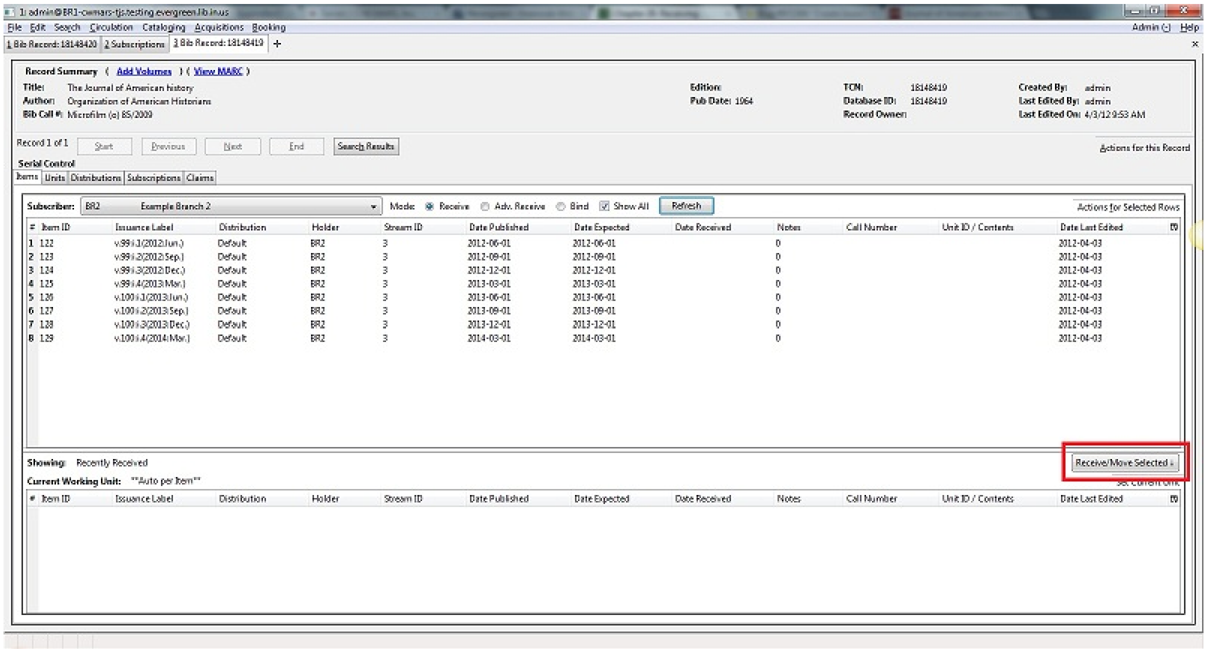
```
. To access Serial Control View, open a serials record, and click Actions for this Record >> Serial Control. This ope
. Click the subscriptions tab
. Click on the appropriate link to edit


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



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.

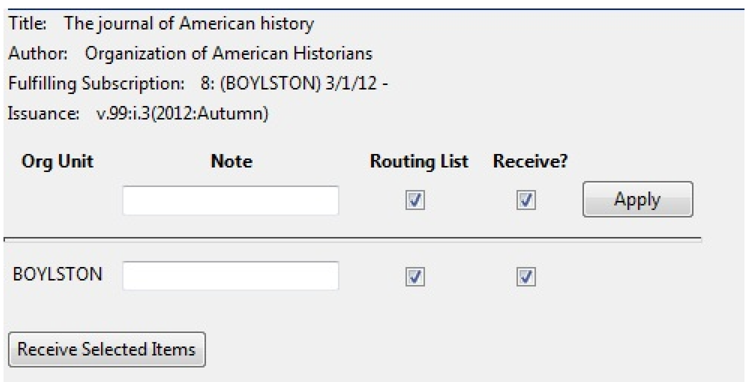
Batch Receiving

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.



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.

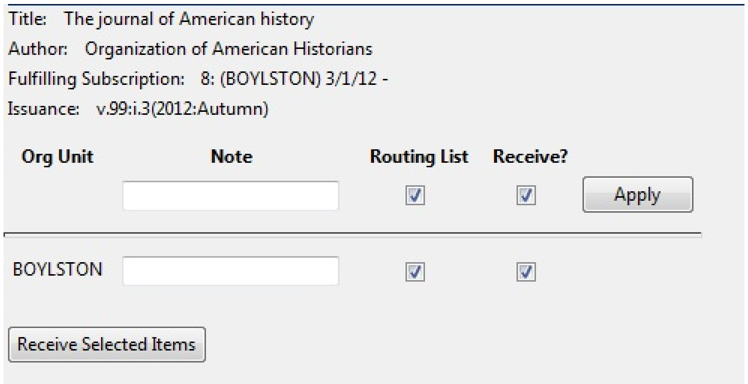
6. Click Apply. The note should appear in the note field in each distribution.

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.



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 abilitiy 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.

> **note** 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**.

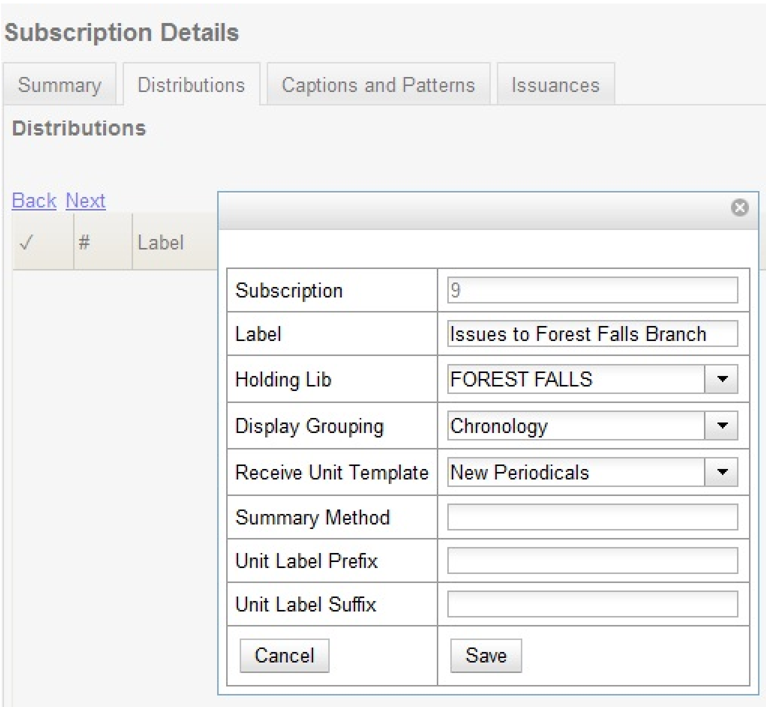
4. Create a label to identify the distribution.

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**.



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

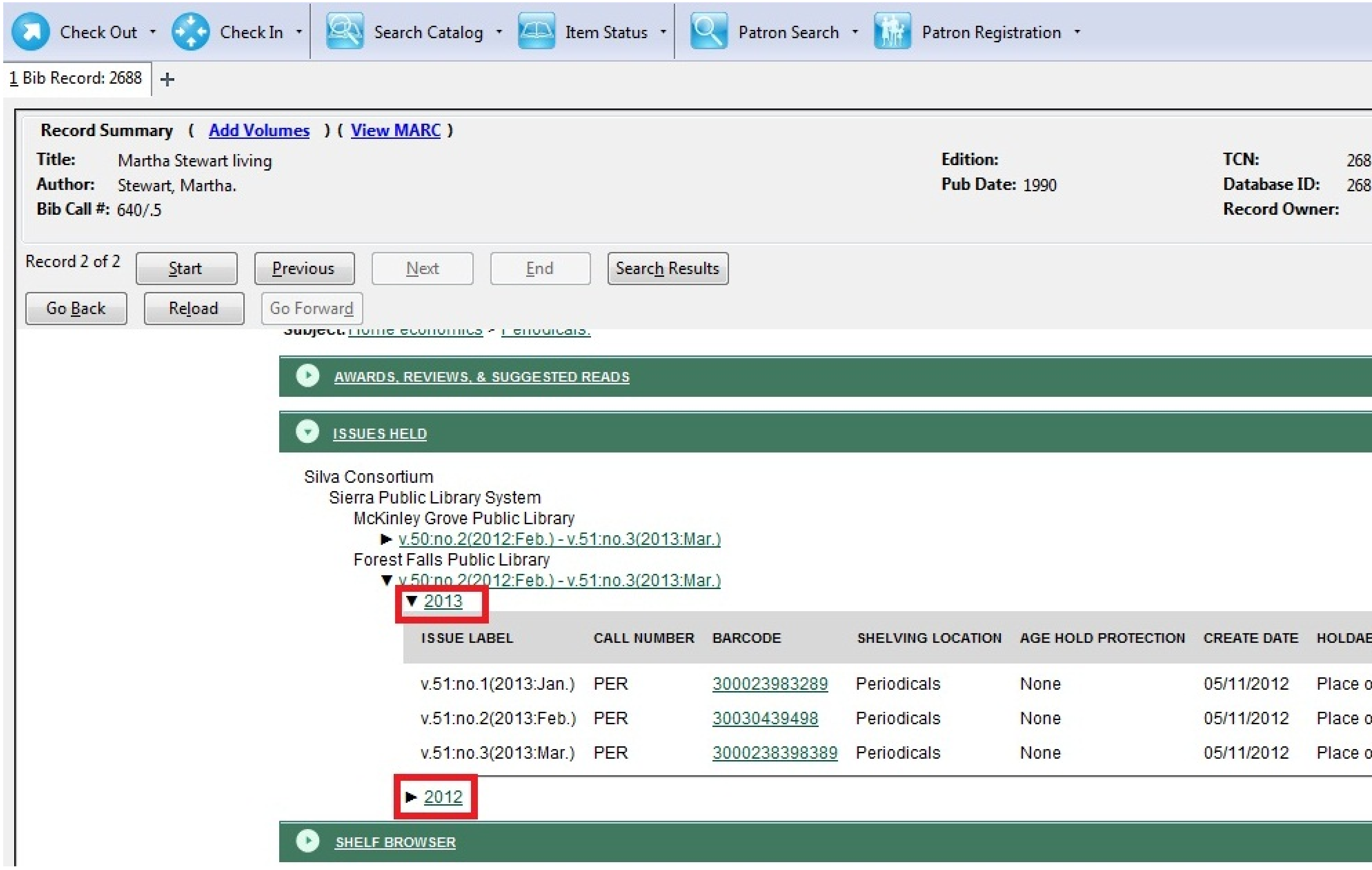
10. Complete the creation of your subscription.

11. Retrieve the record from the catalog.

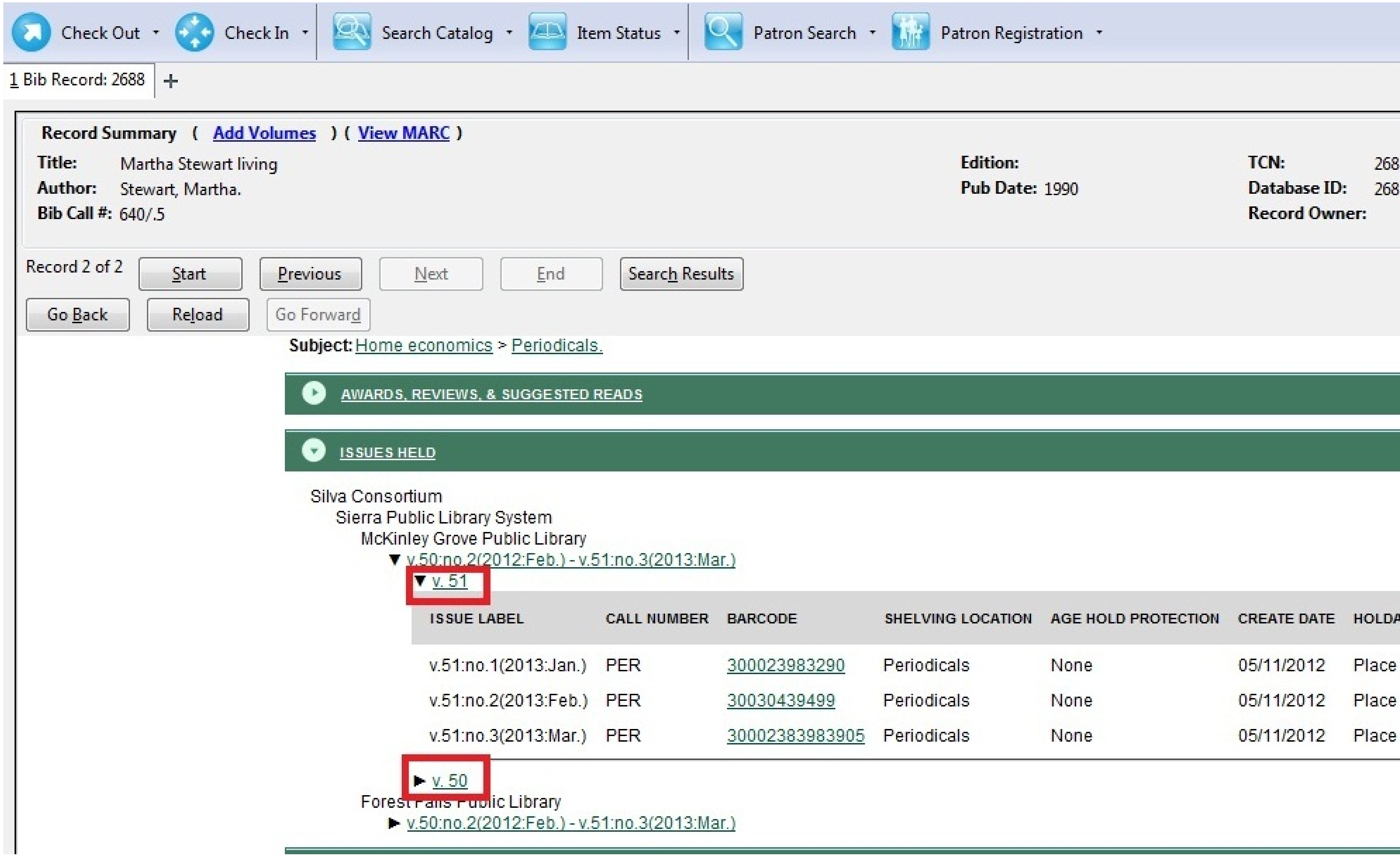
12. Scroll down to and click the **Issues Held** link. The issues label for each branch appears.

13. Click the hyperlinked issues label.

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



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


Check Out
Check In
Search Catalog
Item Status
Patron Search
Patron Registration
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 Owner:
Record 2 of 2
Start
Previous
Next
End
Search Results
Go Back
Reload
Go Forward
Subject: Home economics > Periodicals.
AWARDS, REVIEWS, & SUGGESTED READS
ISSUES HELD
Silva Consortium
Sierra Public Library System
McKinley Grove Public Library
v.50:no.2(2012:Feb.) - v.51:no.3(2013:Mar.)
v. 51
ISSUE LABEL
CALL NUMBER
BARCODE
SHELVING LOCATION
AGE HOLD PROTECTION
CREATE DATE
v.51:no.1(2013:Jan.) PER 300023983290 Periodicals None 05/11/2012 Place
v.51:no.2(2013:Feb.) PER 30030439499 Periodicals None 05/11/2012 Place
v.51:no.3(2013:Mar.) PER 30002383983905 Periodicals None 05/11/2012 Place
v. 50
v.50:no.2(2012:Feb.) - v.51:no.3(2013:Mar.)

Part X. Circulation

Table of Contents

Chapter 54. Introduction

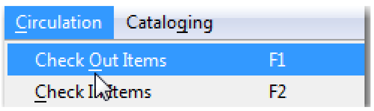
Use this section for understanding the circulation procedures in the Evergreen system.

Chapter 55. Circulating Items

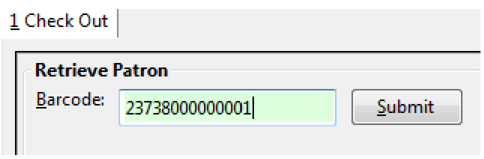
Check Out (F1)

Regular Items

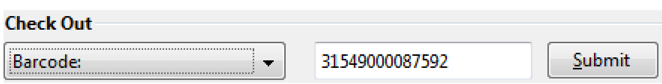
1) To check out an item press **F1**, click **Check Out** on the Circulation toolbar, or select **Circulation # Check Out Items**.



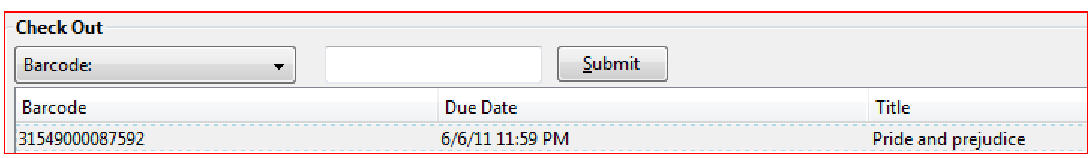
2) Scan or enter patron’s barcode and click **Submit** if entering barcode manually. If scanning, number is submitted automatically.



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



4) Due date is now displayed.



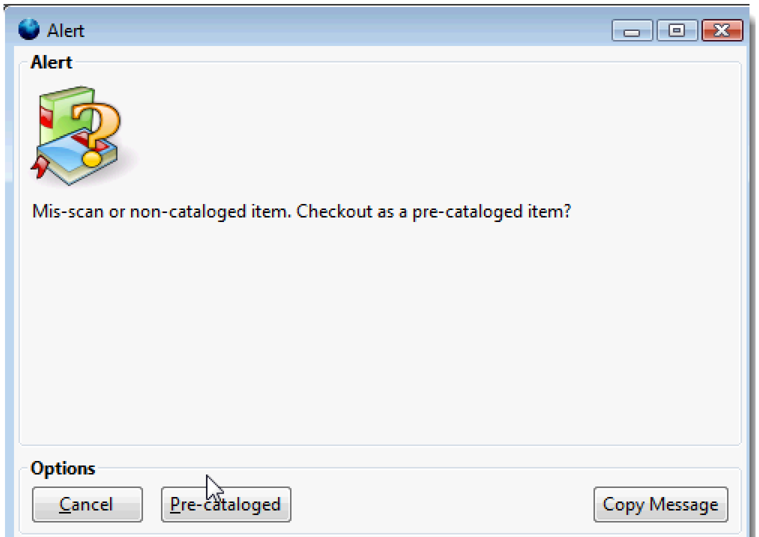
5) When all items are scanned, hit the **F1** key or click the **Check Out** button on the Circulation toolbar to generate slip receipt or to exit patron record if not printing slip receipts.

Pre-cataloged Items

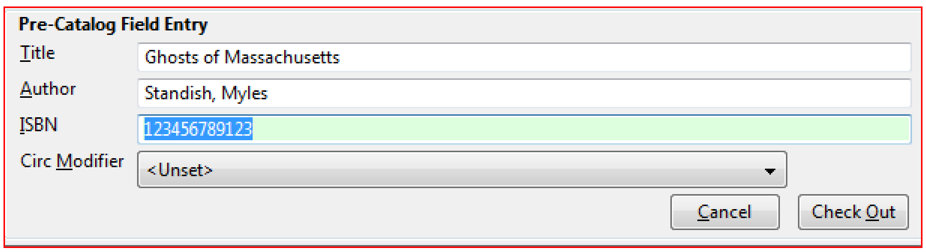
1) Go to patron’s **Check Out** screen by clicking **Circulation # Check Out Items**.

2) Scan the item barcode.

3) At prompt, click **Pre-Cataloged**.



4) Enter required information and click **Check Out**.

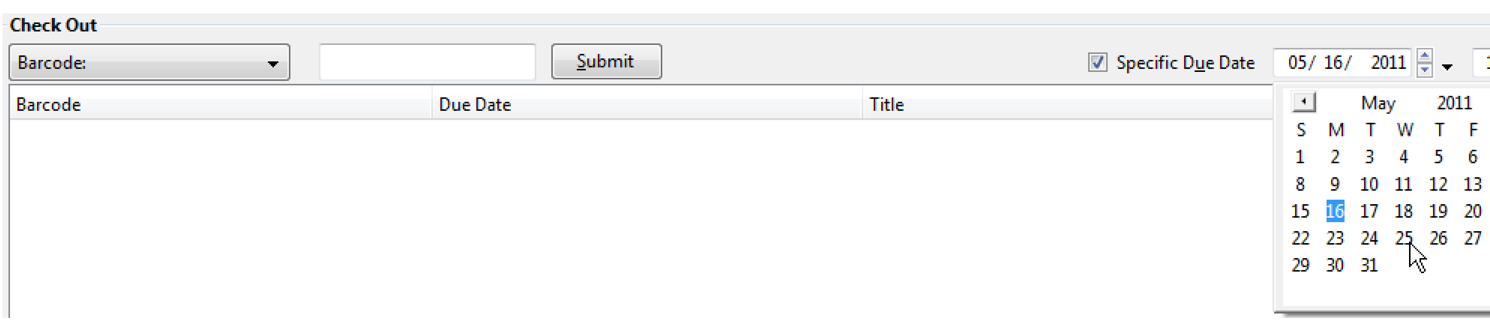


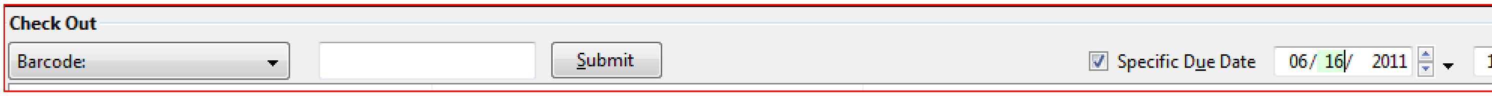
On check-in, Evergreen will prompt staff to re-route the item to cataloging.

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.

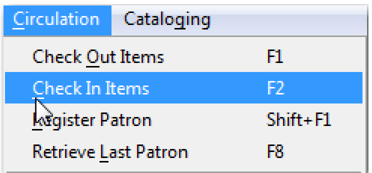




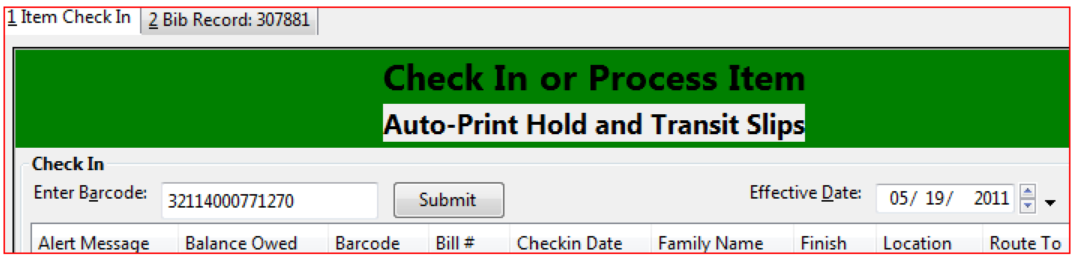
Check In (F2)

Regular check in

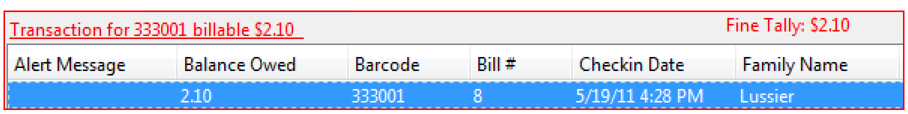
1) To check in an item, select **Circulation # Check In Items**, click **Check In** on the Circulation toolbar, or press **F2**.



2) Scan item barcode or enter manually and click **Submit**.



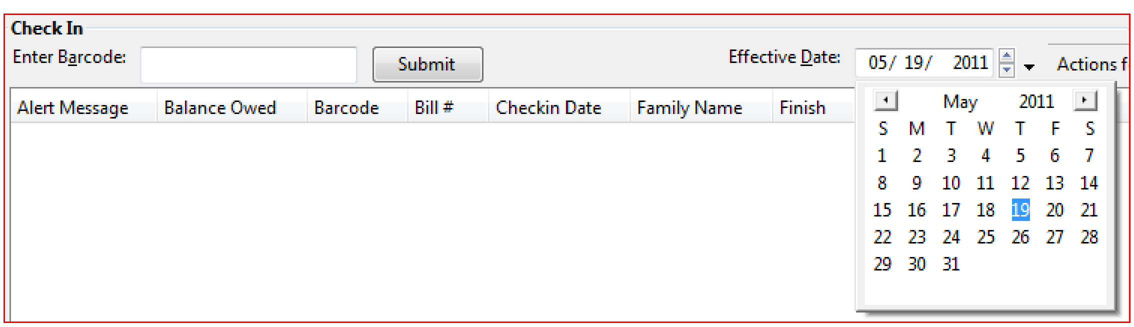
3) If there is an overdue fine associated with the checkin, an alert will appear at the top of the screen with a fine tally for the current checkin session. To immediately handle fine payment, click the alert to jump to the patron's bill record.



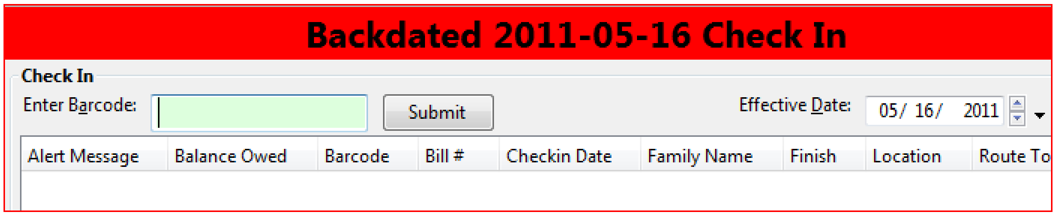
Backdated check in

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.



2) The top green bar changes to red. The new effective date is now displayed in the header.

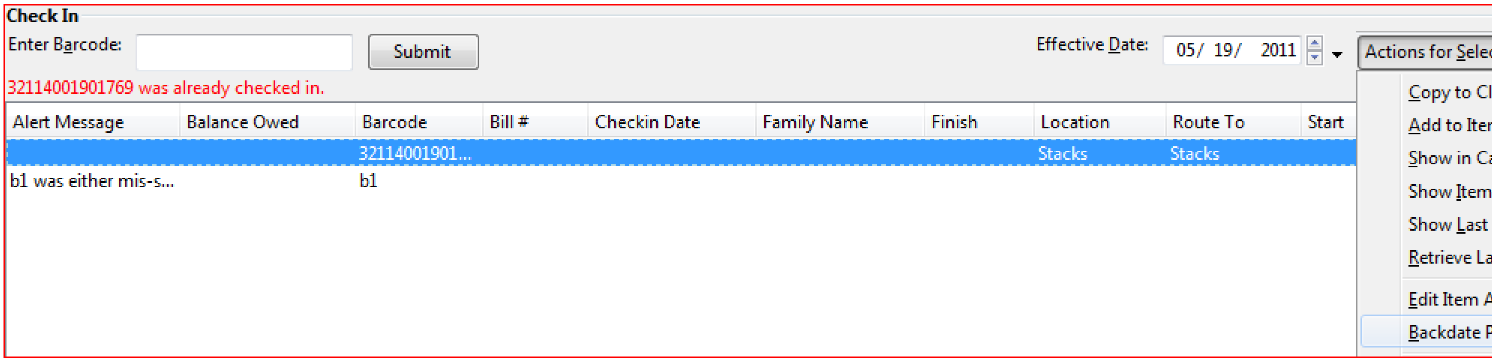


3) Move the cursor to the **Barcode** field. Scan the items. When finishing backdated check-in, change the **Effective Date** back to today's date.

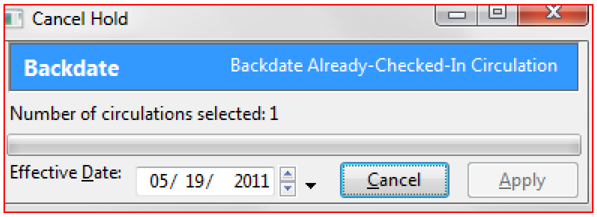
Backdate Post-Checkin

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.



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.



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.

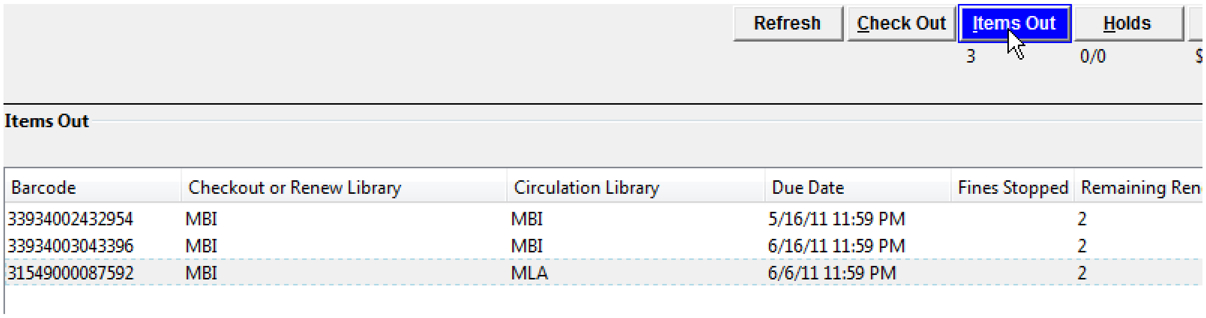
These options may be selected simultaneously. The selected option is displayed in the header area.

Renewal and Editing the Item's Due Date

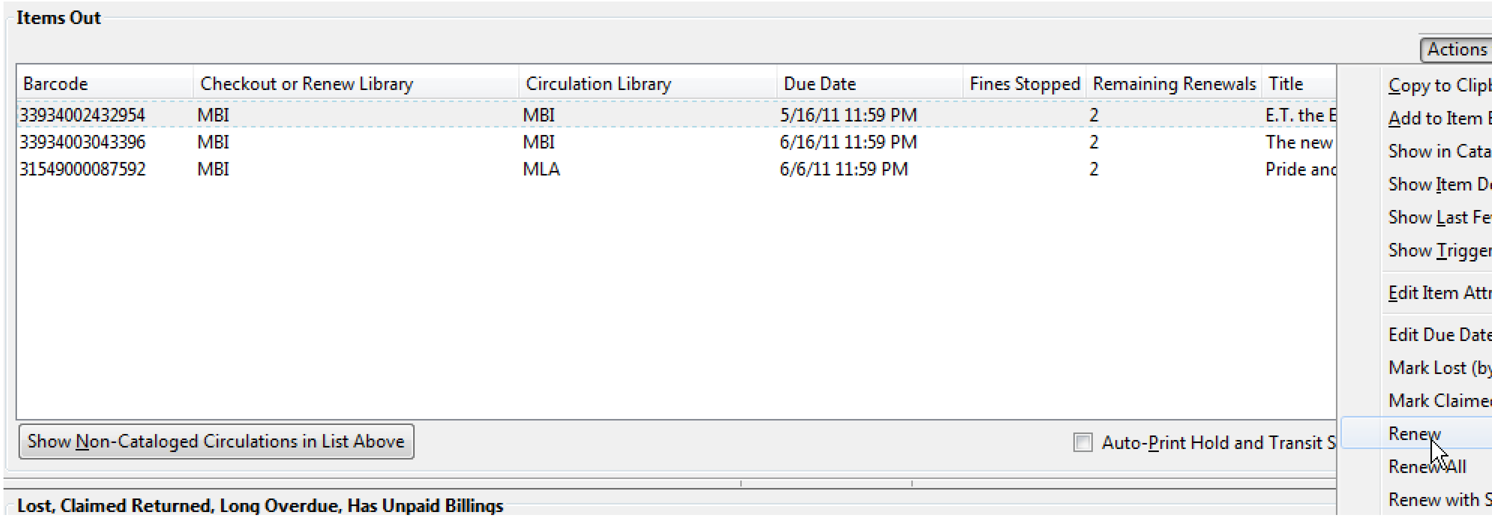
Checked-out items can be renewed if your library's policy allows it. The new due date is calculated from the renewal date. Existing loans can also be extended to a specific date by editing the due date or renewing with a specific due date.

Renewing via a Patron's Account

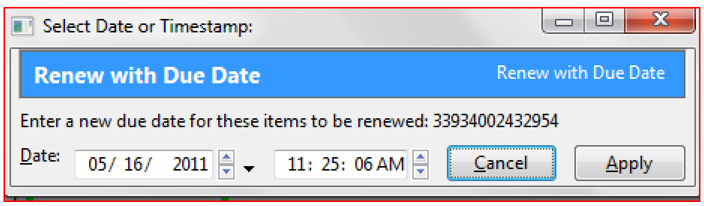
1) Retrieve the patron record and go to the **Items Out** screen.



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.



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**.

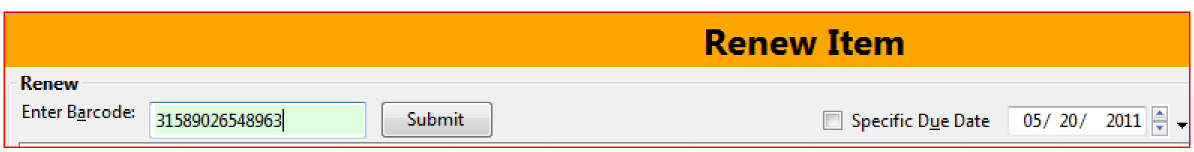


Renewal can also be done on the **Item Status** screen. See the section called Item Status (F5) for more information.

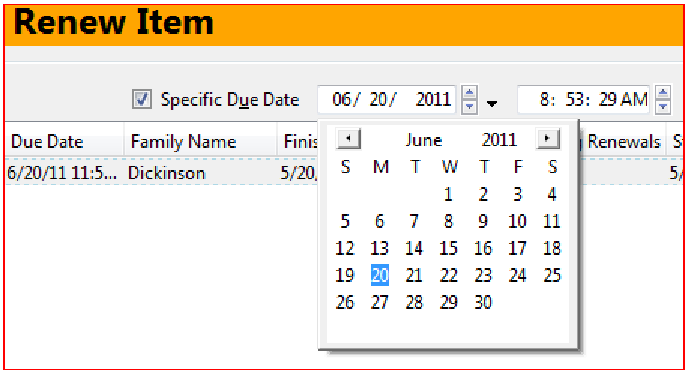
Renewing by Item Barcode

1) To renew items by barcode, select **Circulation** # **Renew Items** or press **CTRL-F2**.

2) Scan or manually entire the item barcode.



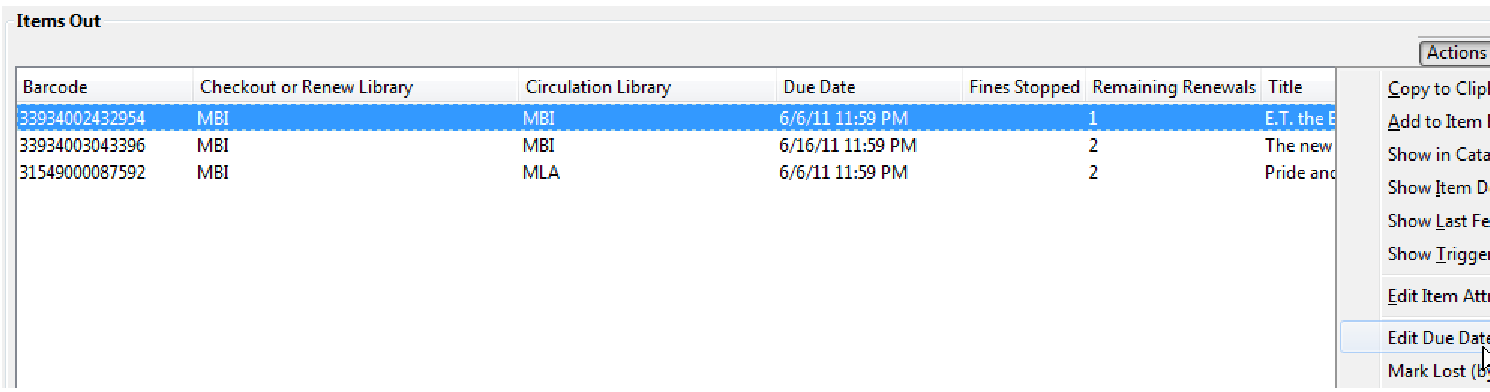
3) If you want to specify the due date, click **Specific Due Date** and select a new due date from the calendar.



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**.



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.

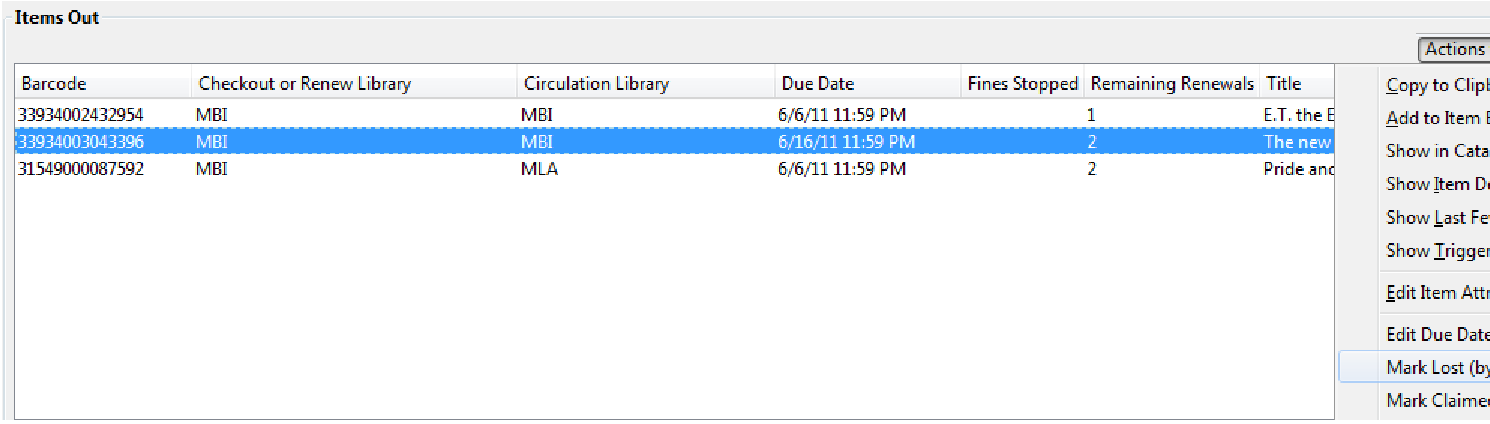
Editing a due date is not included in the renewal count.

Marking Items Lost and Claimed Returned

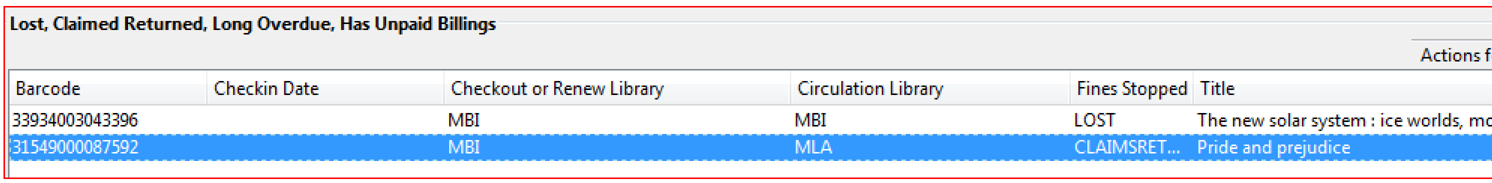
Lost Items

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

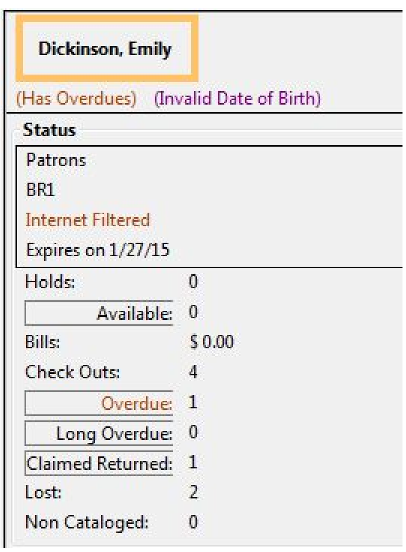
2) Select the item. Click on **Actions for Selected Items # Mark Lost (by Patron)**.



3) The lost item now displays in the **Lost/Claimed Returned/Long Overdue, Has Unpaid Billings** section of the patron record.



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

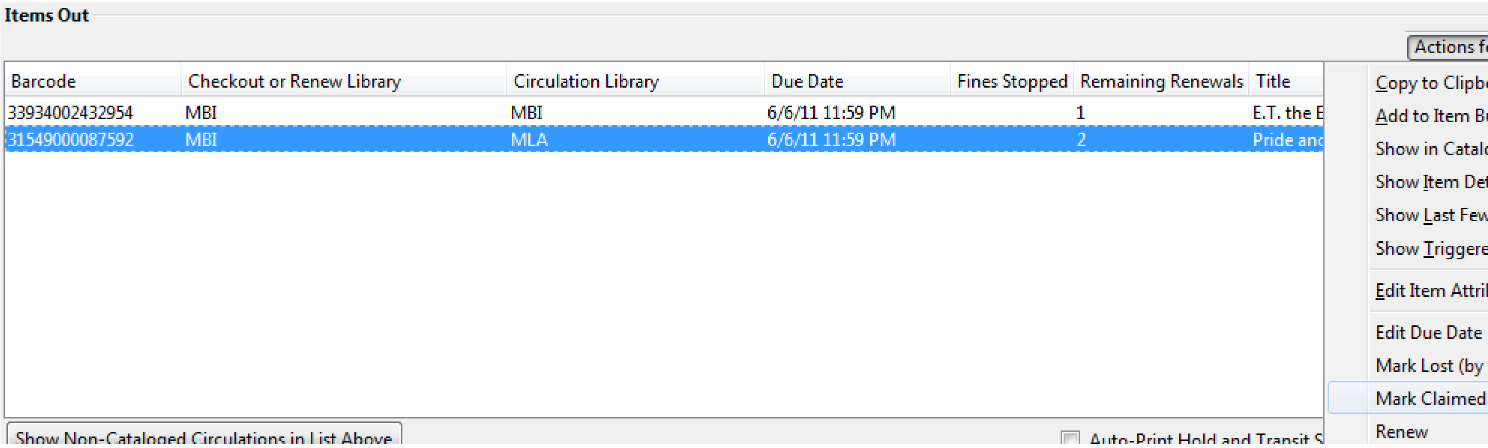
If an item is returned after a lost bill has been paid and the library's policy is to void the replacement fee for lost-then-returned items, there will be a negative balance in the bill. A refund needs to be made to close the bill and the circulation record. Once the outstanding amount has been refunded,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

If you need to balance a bill with a negative amount 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.

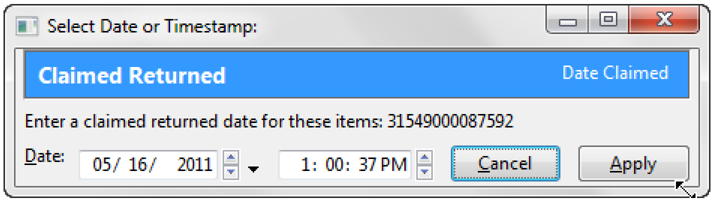
Claimed Returned Items

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

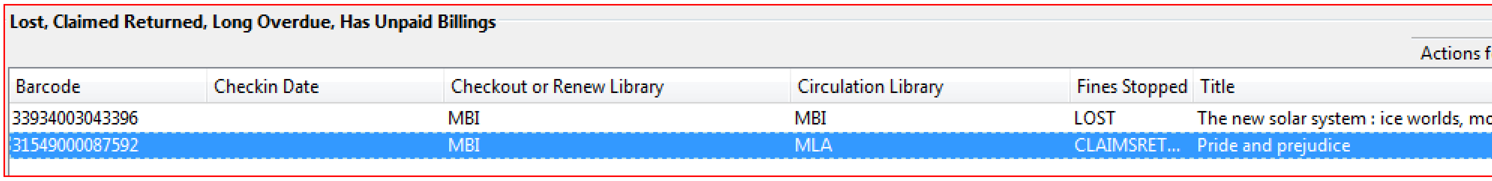
2) Select the item, then select **Actions for Selected Items # Mark Claimed Returned** from the dropdown menu.



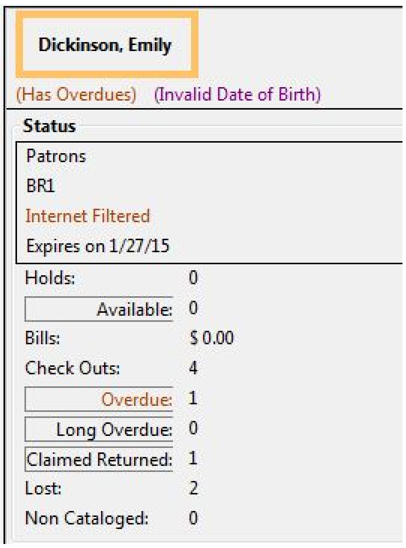
3) Select a date and click **Apply**.



4) The Claimed Returned item now displays in the **Lost/Claimed Returned/Long Overdue, Has Unpaid Billings** section of the patron record.



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.

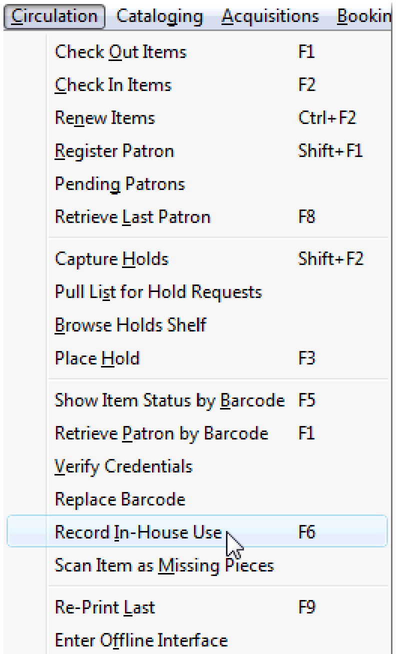


More on Claimed Returned Items

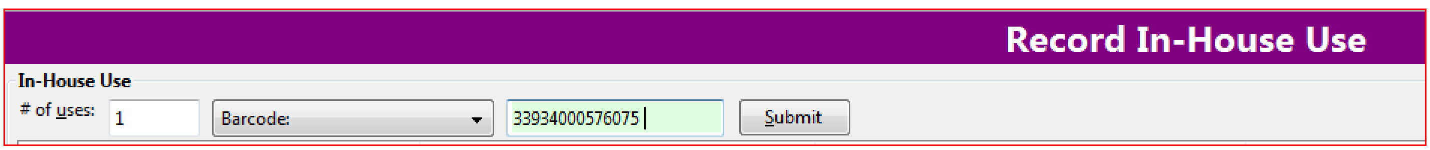
- The date entered for a Claimed Returned item establishes the fine. If the date given has passed, bills will be adjusted accordingly.
- When a Claimed Returned item is returned, if there is an outstanding bill associated with it, the item will not disappear from the **Items Out** screen. It will disappear 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**.



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



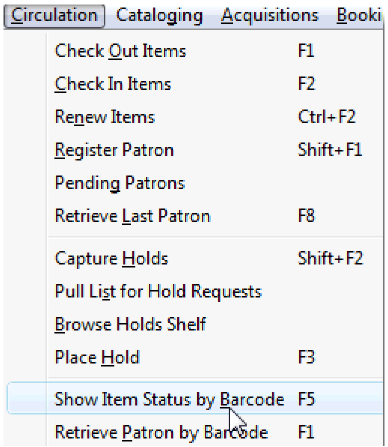
The statistics of in-house use are separated from circulation statistics. The in-house use count of cataloged items is not included in the items' total use count.

Item Status (F5)

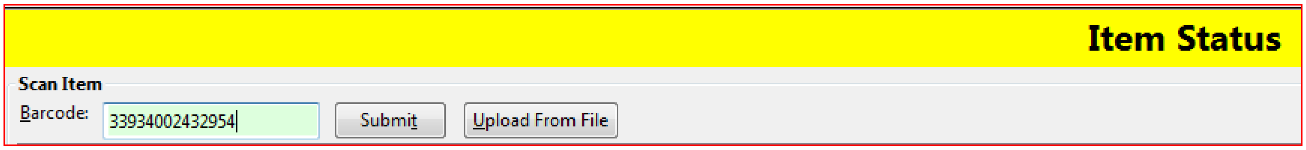
The Item Status screen is very useful. Many actions can be taken by either circulation staff or catalogers on this screen. Here we will cover some circulation-related functions, namely checking item status, viewing past circulations, inserting item alert messages, marking items missing or damaged, etc.

Checking item status

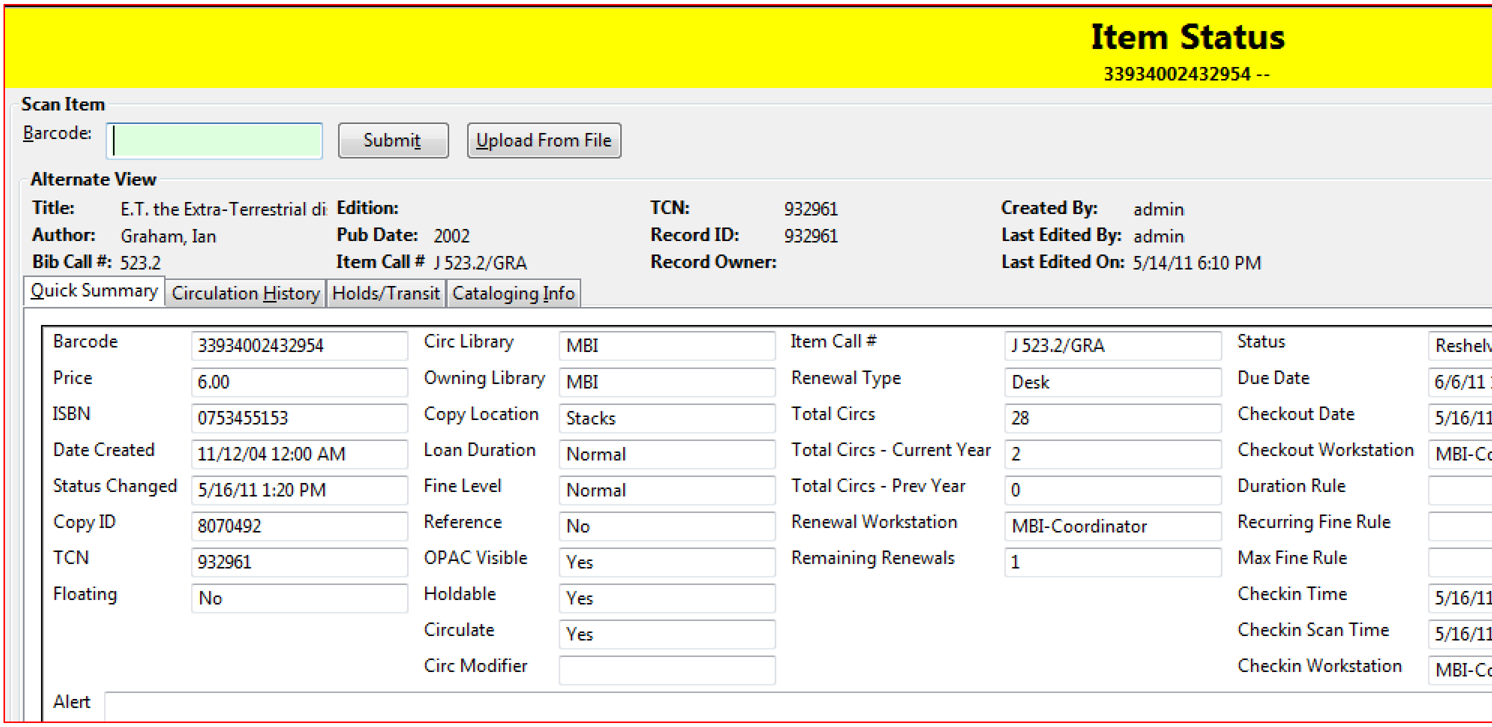
1) To check the status of an item, select **Search # Search for copies by Barcode** or **Circulation # Show Item Status by Barcode**; click the **Item Status button** on the circulation or cataloging toolbar; or press **F5**.



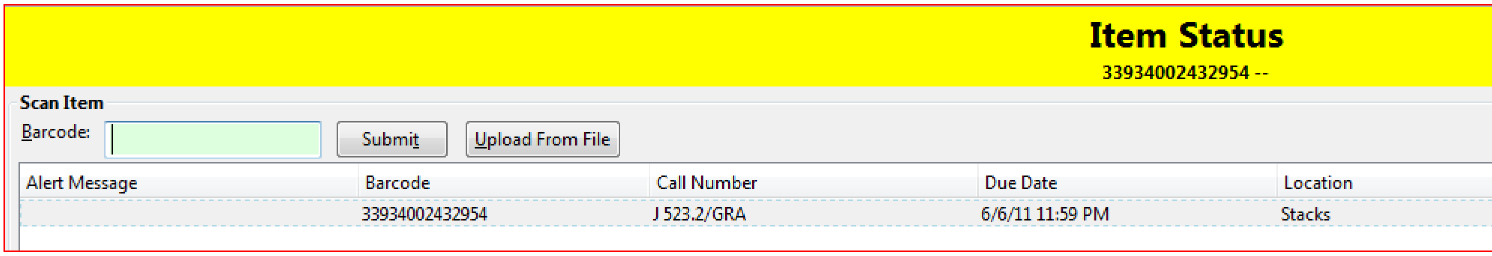
2) Scan the barcode or type it and click **Submit**. The current status of the item is displayed with selected other fields. You can use the column picker to select more fields to view.



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



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



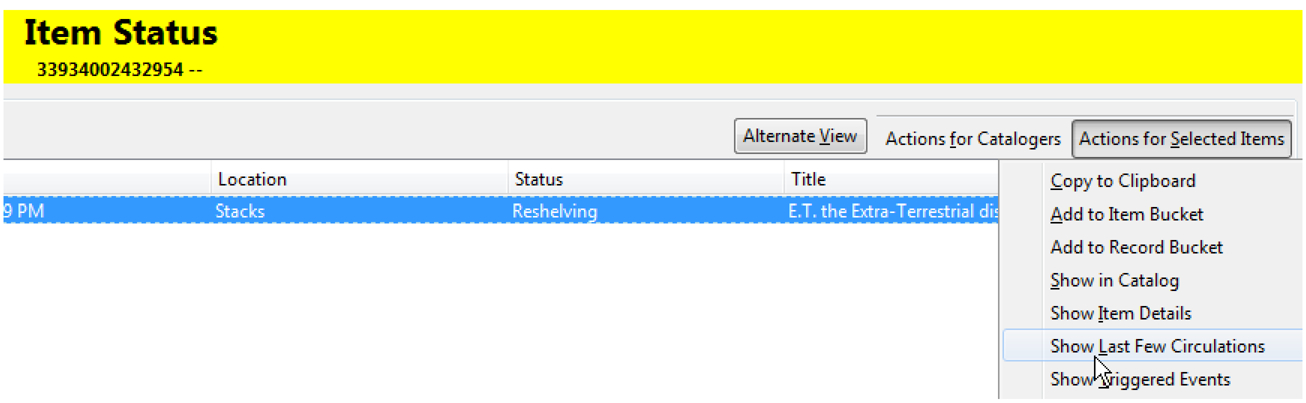
If the item’s status is "Available", the displayed due date refers to the previous circulation’s due date.

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.

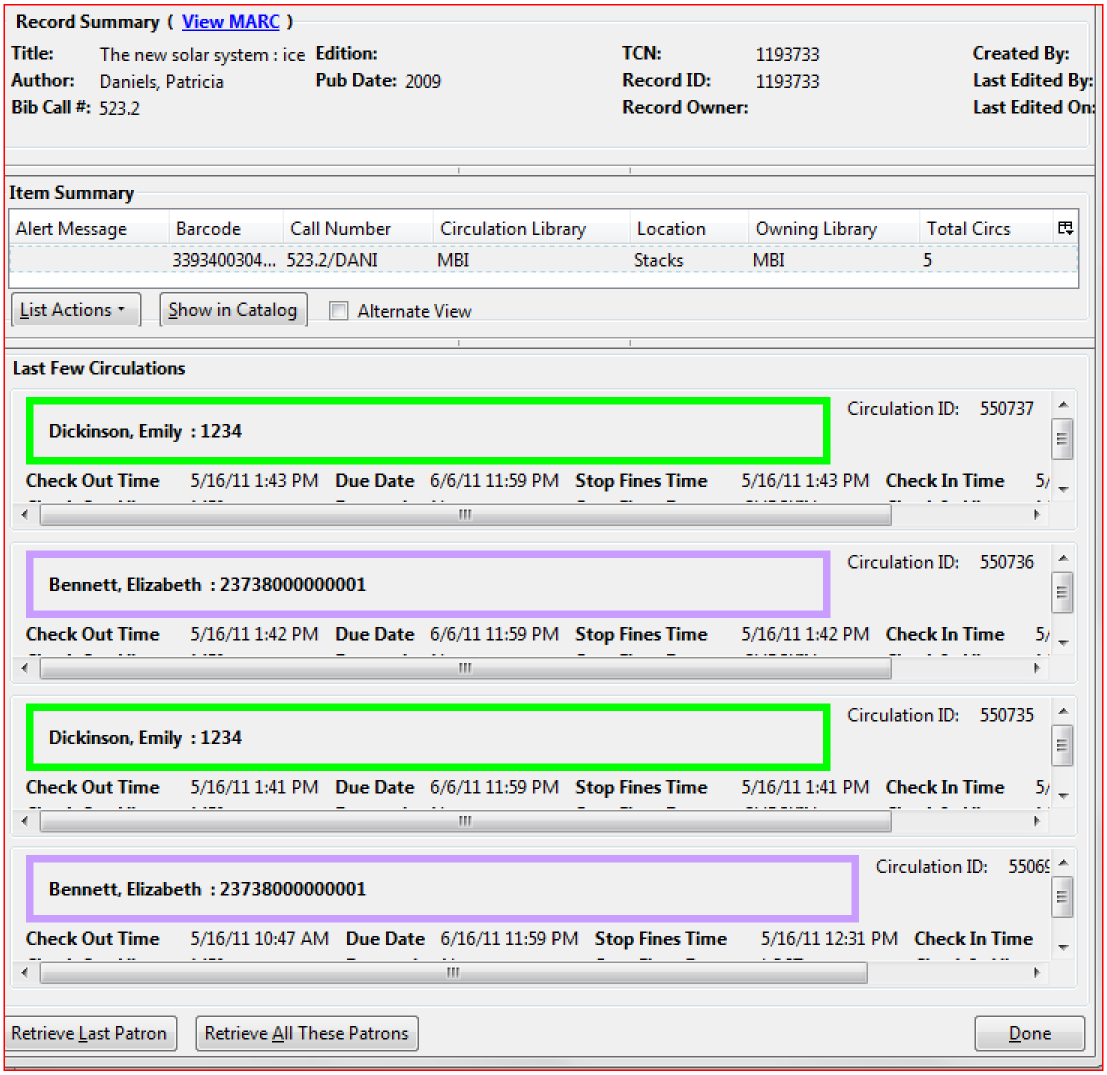
Viewing past circulations

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**.



3) The item’s recent circulation history is displayed.



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).

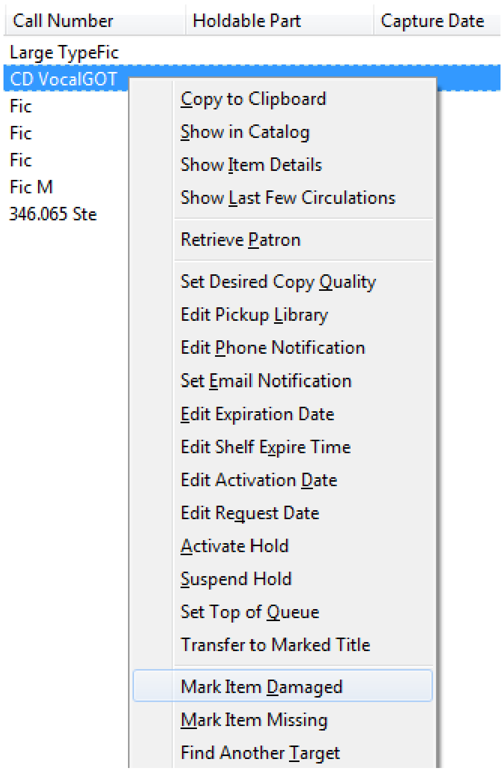
The number of items that displays in the circulation history can be set in Local **Administration # Library Settings Editor**.

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.

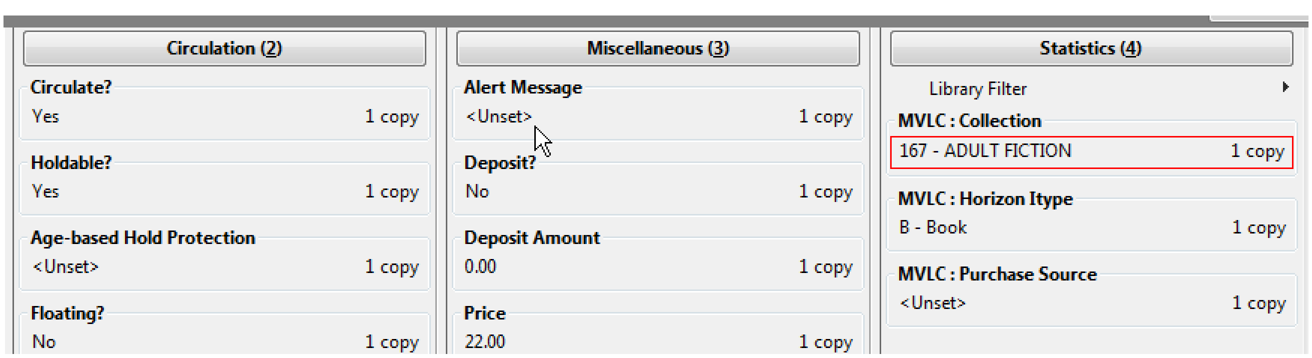
3) Following the above procedure, you can check in and renew items by using the **Check in Items** and **Renew Items** on the dropdown menu.

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**.



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

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

Chapter 56. Booking Module

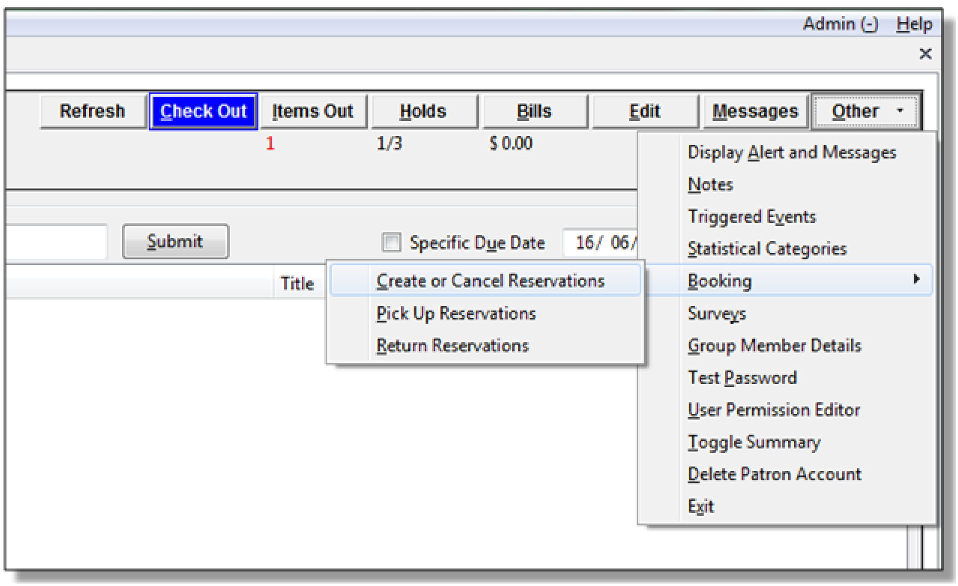
Creating a Booking Reservation

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.

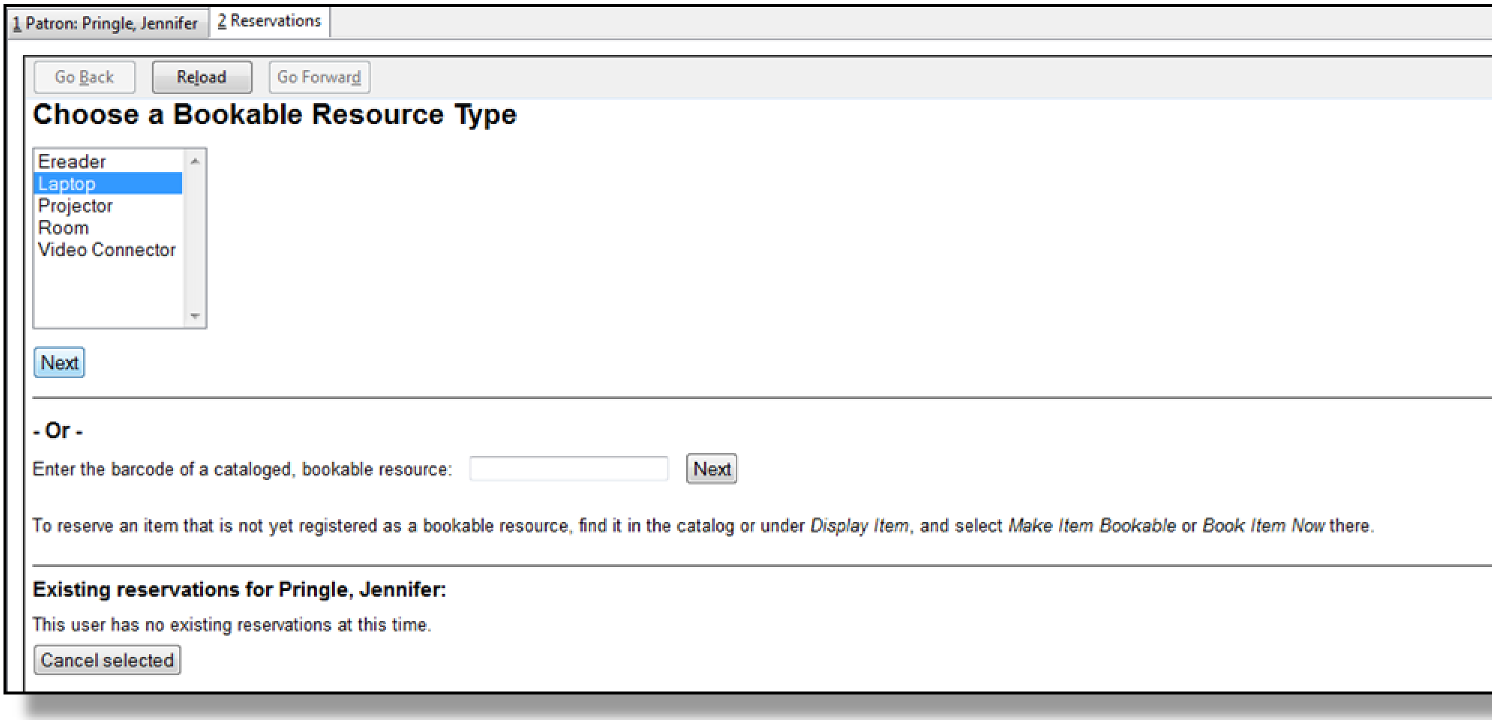
To create a reservation from a patron record

1) Retrieve the patron's record.

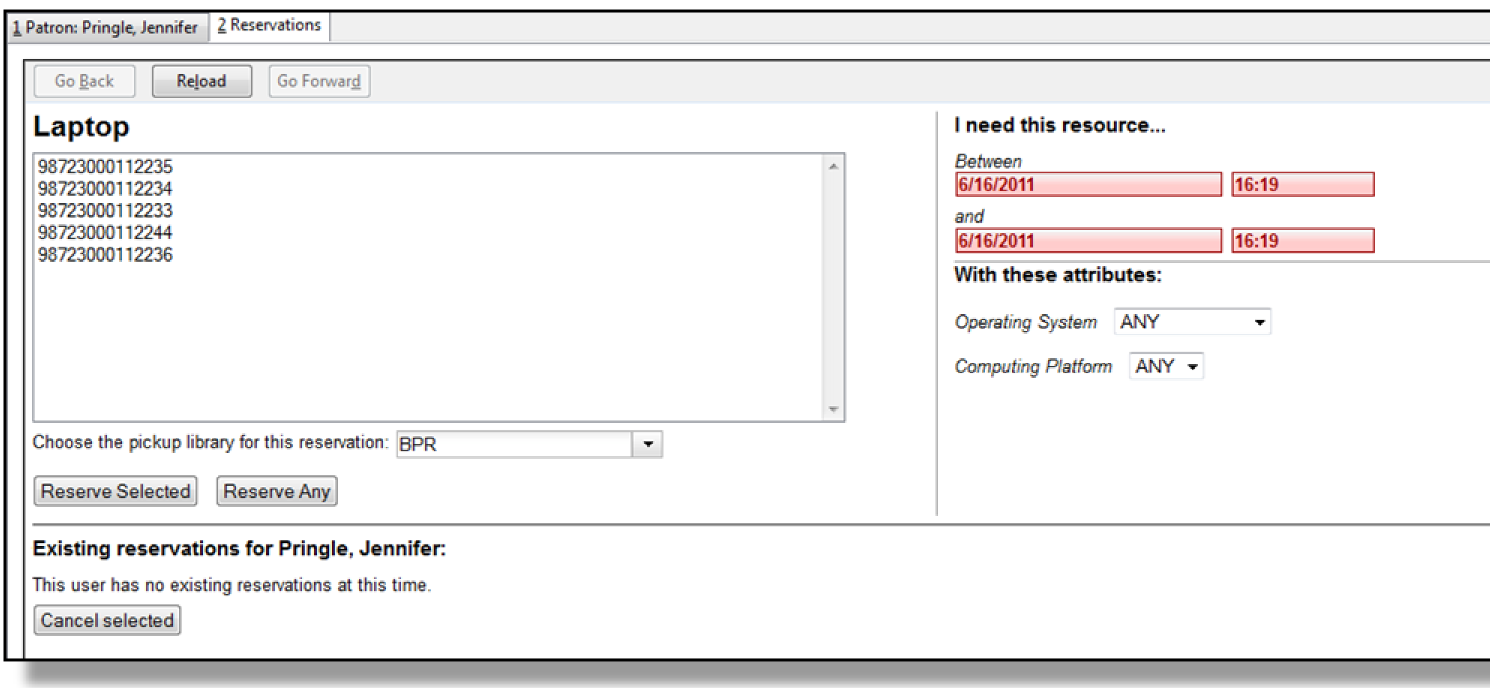
2) Select Other -# Booking -# Create or Cancel Reservations. This takes you to the Reservations Screen.



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.

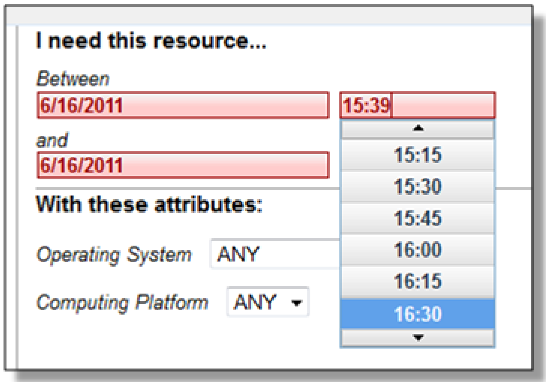


4) For non-catalogued resources, the Bookable Resource Type and the items associated with the type will appear.



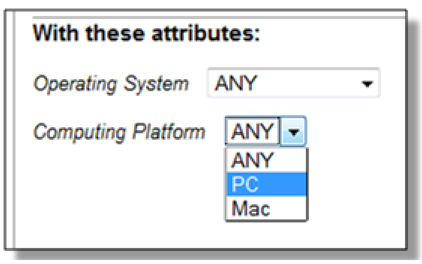
For catalogued items, the title and the item will display in the box.

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.

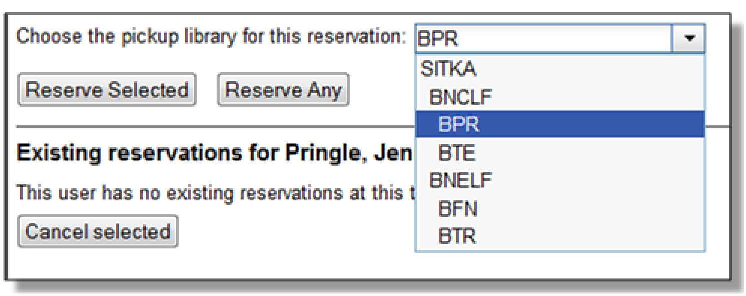


If incorrect date and time is selected, the date/time boxes will appear in red. For example, if the time for which the reservation is set has already passed, the boxes will appear in red. There must be at least 15 minutes between the creation of the reservation and the start time of the reservation.

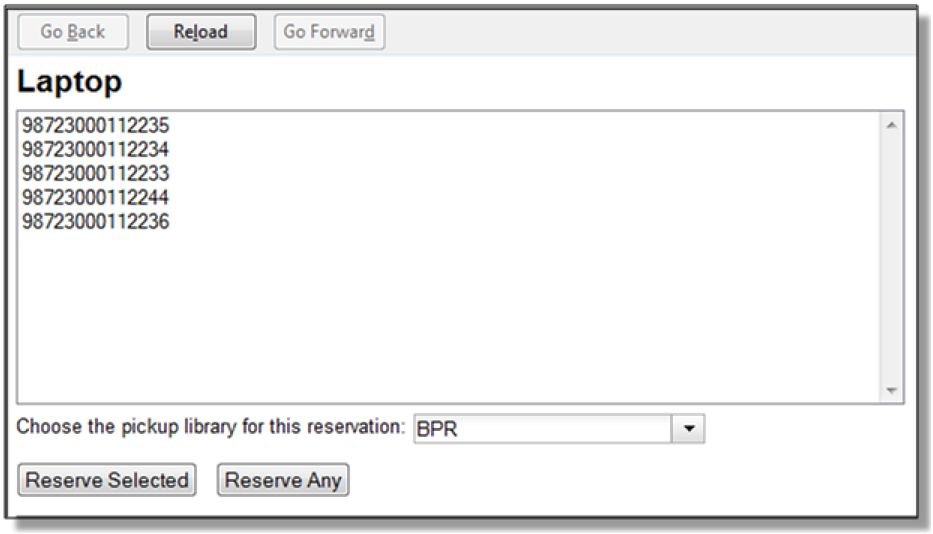
6) For non-catalogued resources, patrons may specify special feature(s), if any, of the resource. With these attributes: allows you to do so. For example, if a patron is booking a laptop he/she can choose between PC and Mac and even choose a specific operating system if they need to. Click the drop down arrow to select your option from the list.



7) Select the pickup location from the dropdown list.

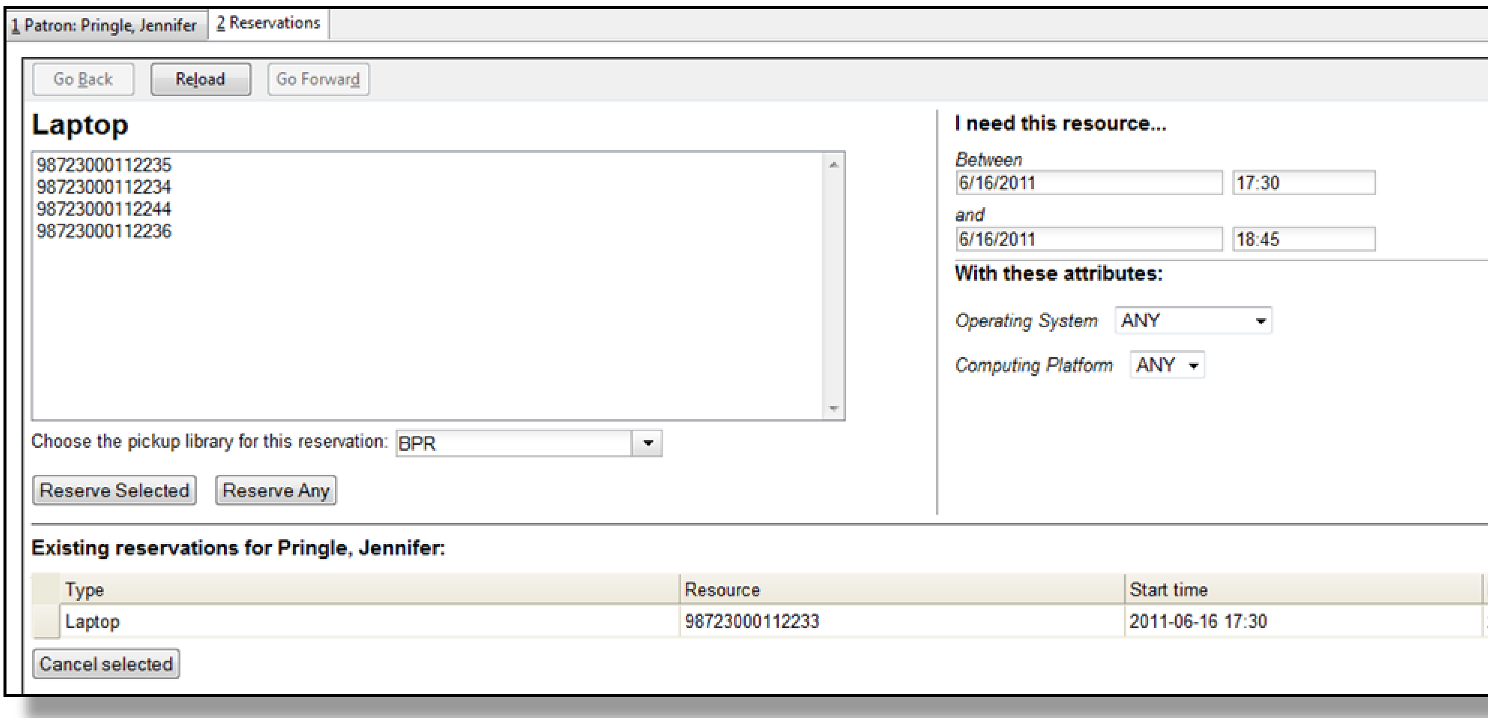


8) If there are multiple copies of the resource and any item listed is acceptable, click Reserve Any. To choose a specific item, select it and then click Reserve Selected.



9) A message will confirm that the action succeeded. Click OK on the prompt.

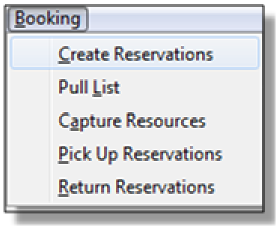
10) The screen will refresh and the reservation will appear below the patron's name at the bottom of the screen.



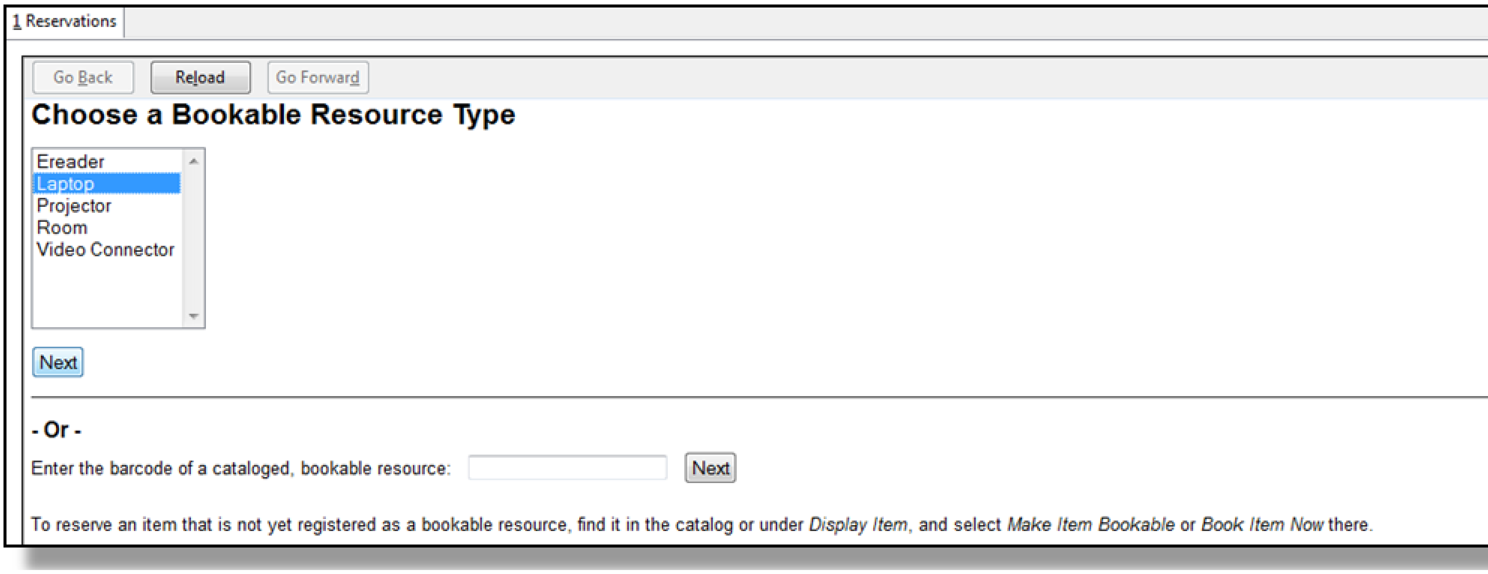
To create a reservation from a booking resource

You need to know the barcode of the patron when you create a reservation for him/her from a booking resource.

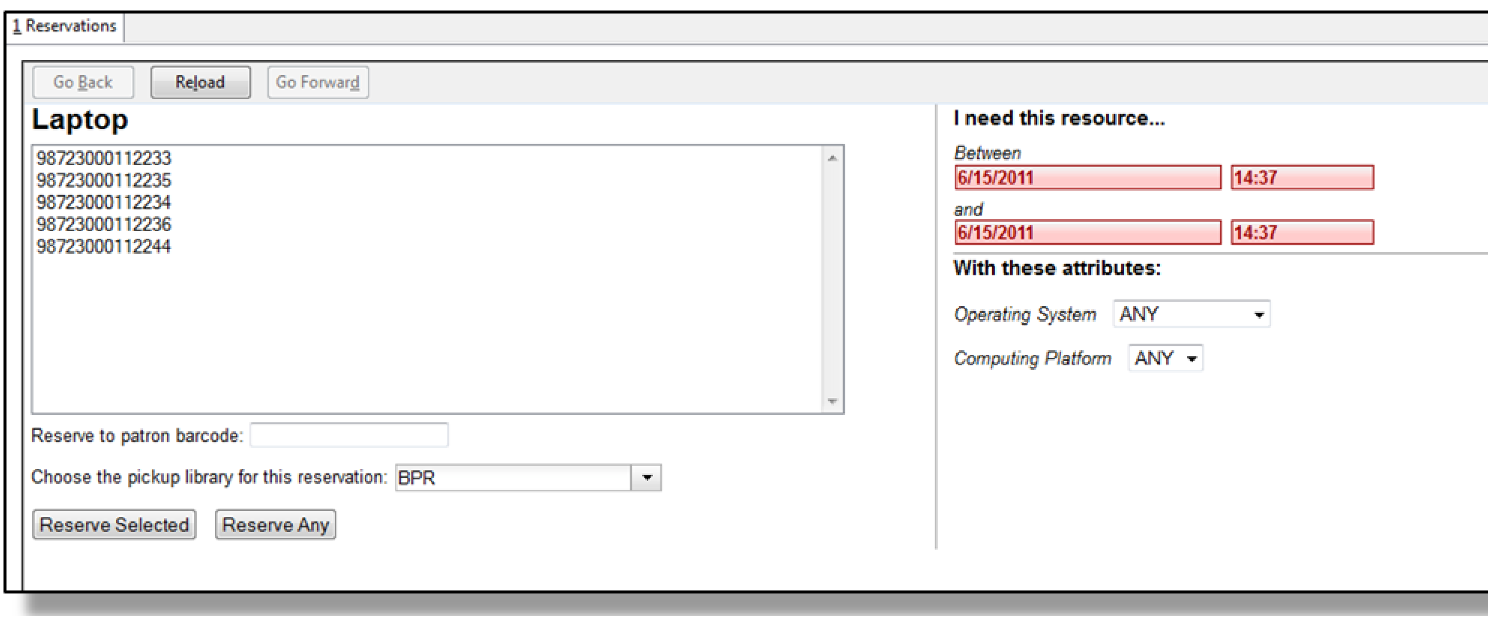
1) From the Booking menu, select Create Reservations



2) Choose a Bookable Resource Type and click Next or enter the barcode of a catalogued resource and click Next.



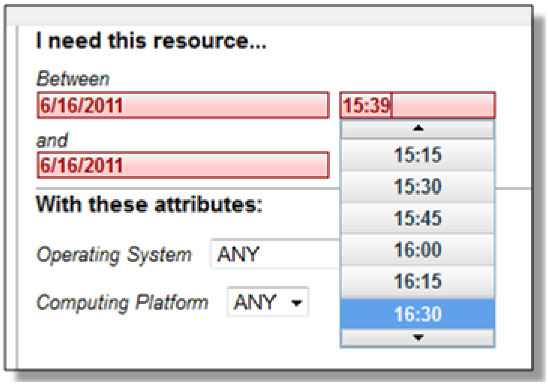
3) For non-catalogued resources, a screen showing the Bookable Resource Type and the items associated with the type will appear.



For catalogued resources, the title and item will appear.

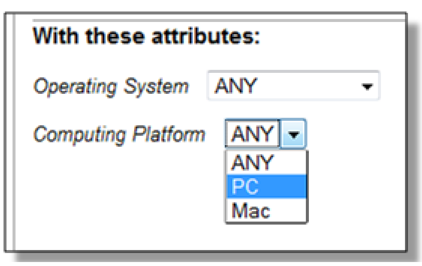
4) Enter the user’s barcode in the Reserve to patron barcode box. The user’s existing reservations, if any, will appear at the bottom of the screen.

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.

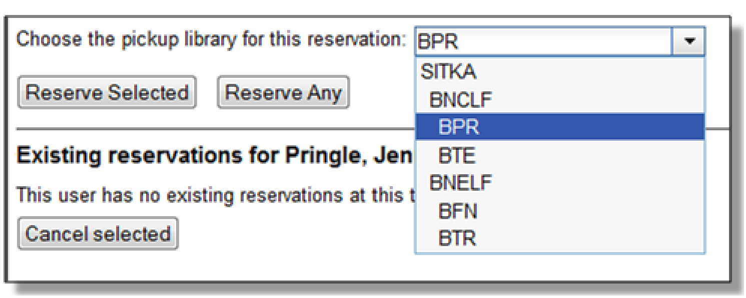


If incorrect date and time is selected, the date/time boxes will appear in red. For example, if the time for which the reservation is set has already passed, the boxes will appear in red. The times must be set correctly for the reservation to be created. There must be at least 15 minutes between the creation of the reservation and the start time of the reservation.

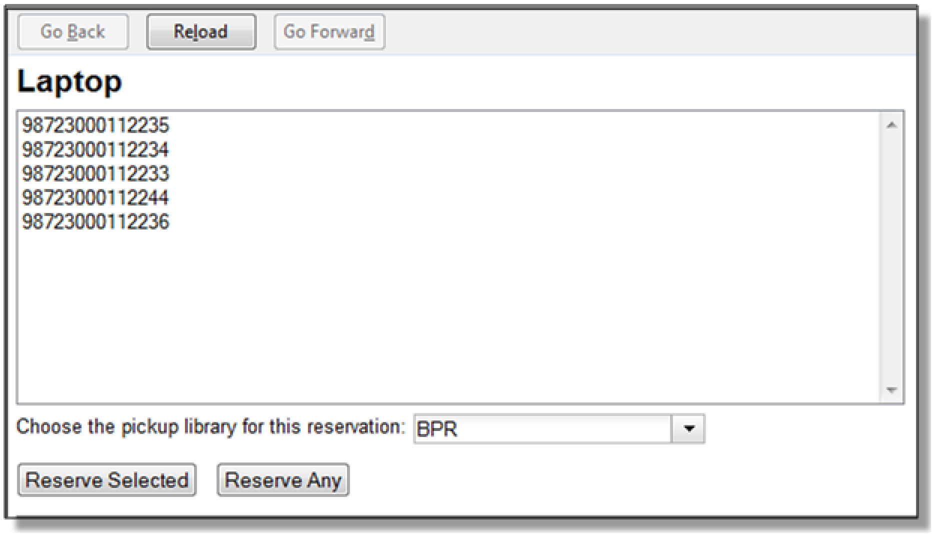
6) For non-catalogued resources, patrons may specify special feature(s), if any, of the resource. The With these attributes: allows you to do so. For example, if a patron is booking a laptop they can choose between PC and Mac and even choose a specific operating system if they need to. Click the dropdown arrow to select your option from the list.



7) Select the pickup location from the dropdown list.

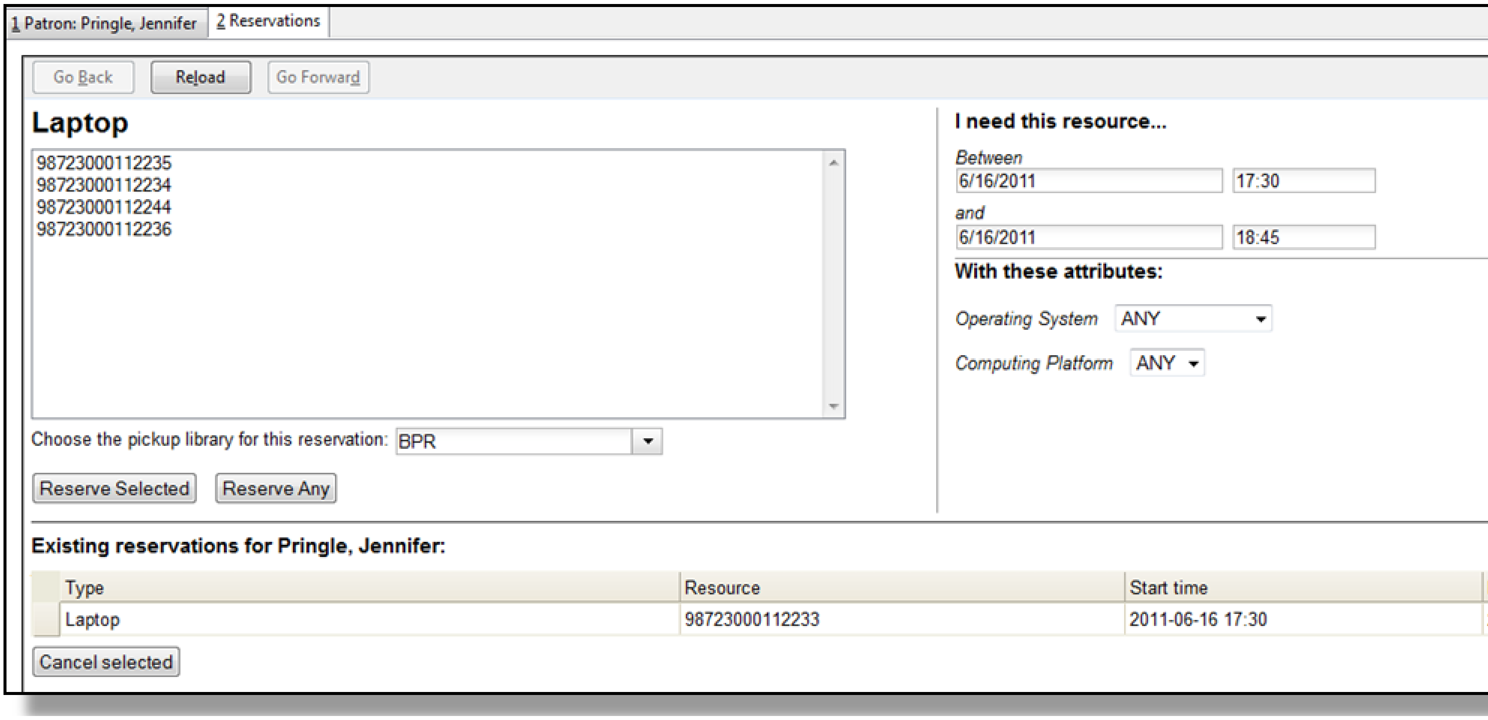


8) If there are multiple copies of the resource and any item listed is acceptable, click Reserve Any. To choose a specific item, select it and then click Reserve Selected.



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.



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.

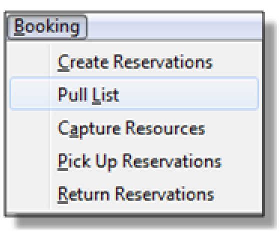
9) The screen will refresh, and the reservation will appear below the user's name.

> **Note:** 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

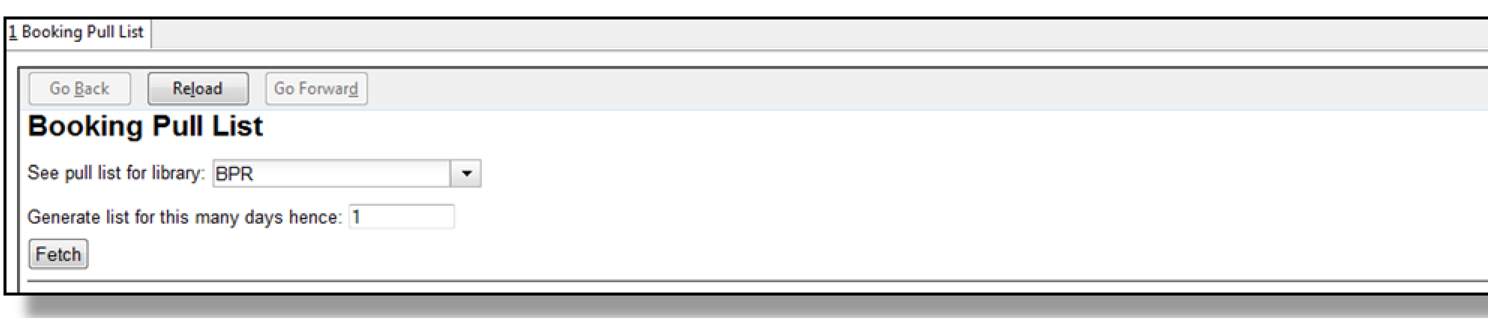
Reservation pull list can be generated dynamically on the Staff Client.

1) To create a pull list, select Booking -# Pull List.

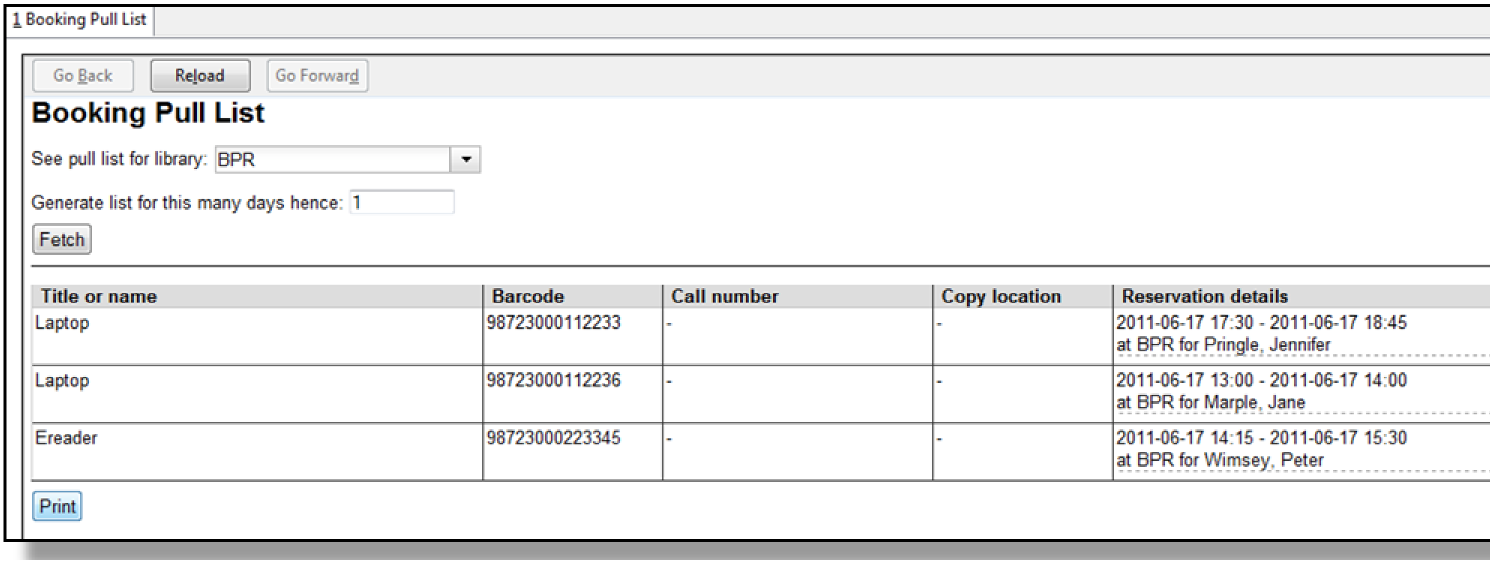


2) You can decide how many days in advance you would like to pull reserved items. Enter the number of days in the box adjacent to Generate list for this many days hence. For example, if you would like to pull items that are needed today, you can enter 1 in the box, and you will retrieve items that need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

3) Click Fetch to retrieve the pull list.



4) The pull list will appear. Click Print to print the pull list.

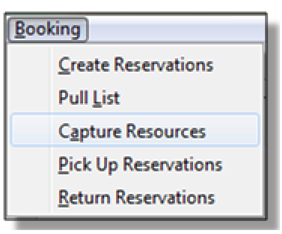


Capturing Items for Reservations

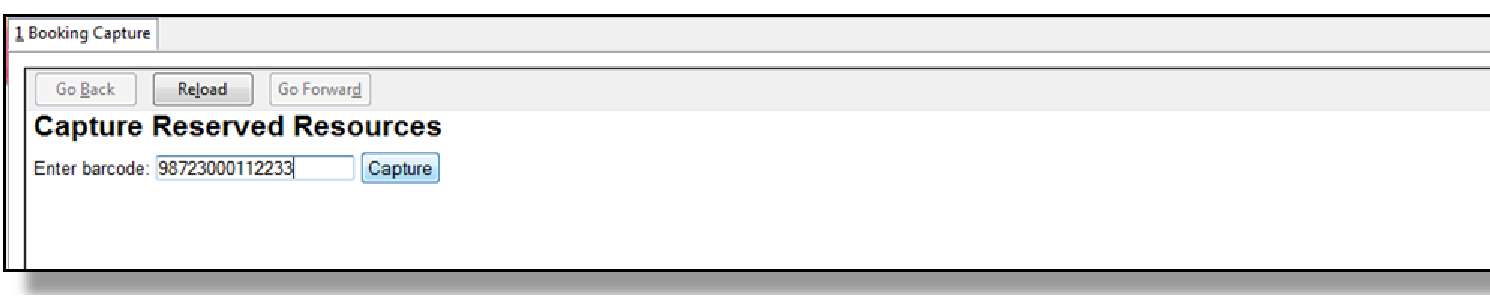
Reservations must be captured before they are ready to be picked up by the patron.

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

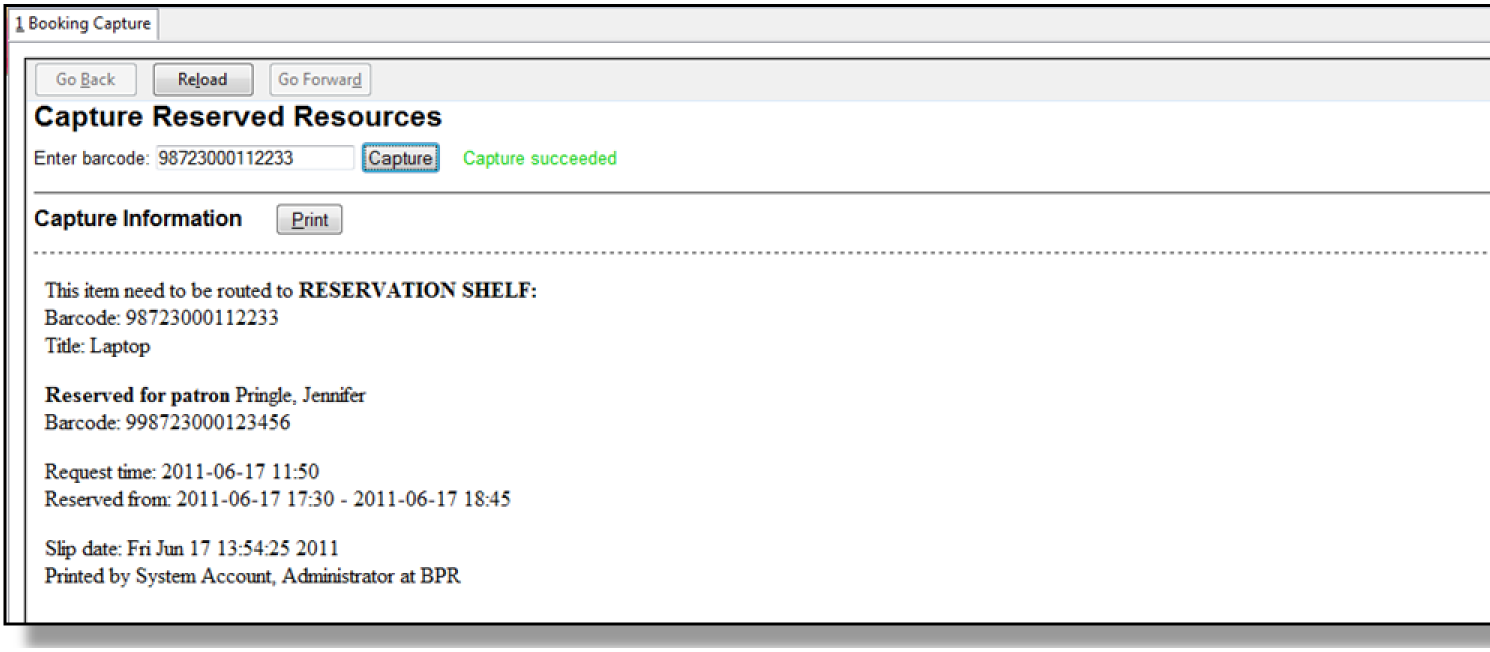
1) In the staff client, select Booking -# Capture Resources.



2) Scan the item barcode or type the barcode then click Capture.



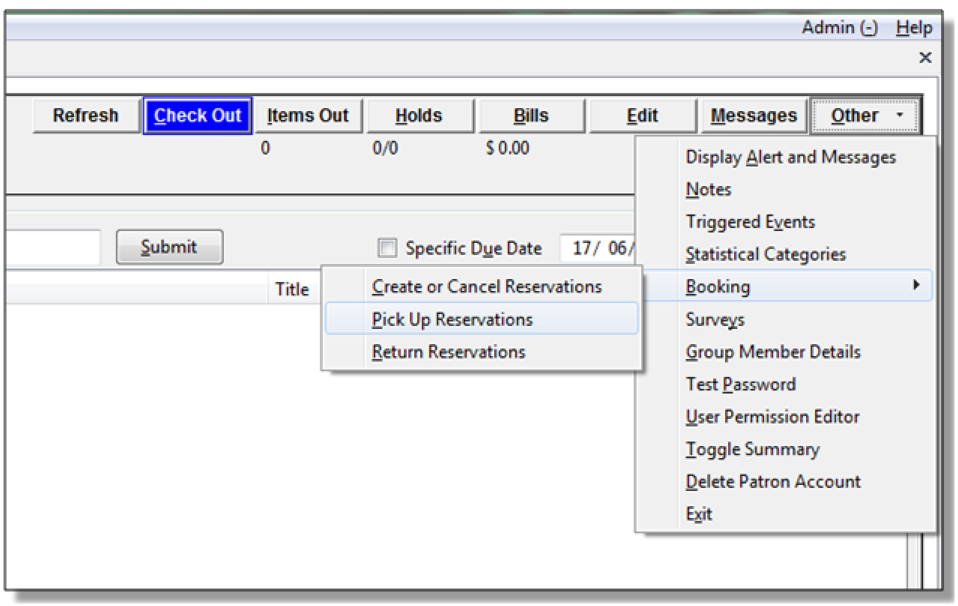
3) The message Capture succeeded will appear to the right. Information about the item will appear below the message. Click Print button to print a slip for the reservation.

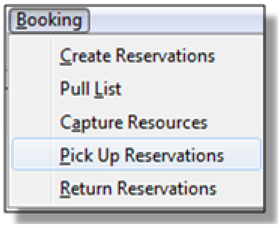


Picking Up Reservations

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.

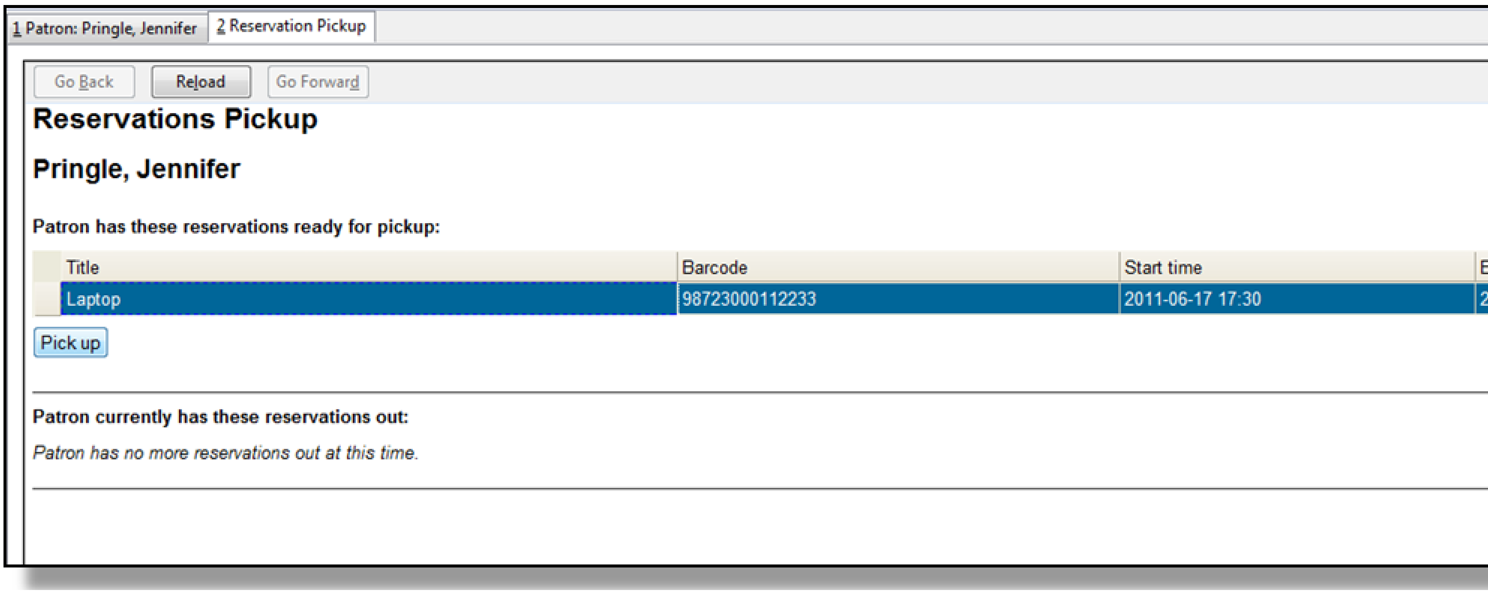
1) Ready-for-pickup reservations can be listed from Other -# Booking -# Pick Up Reservations within a patron record or Booking -# Pick Up Reservations.



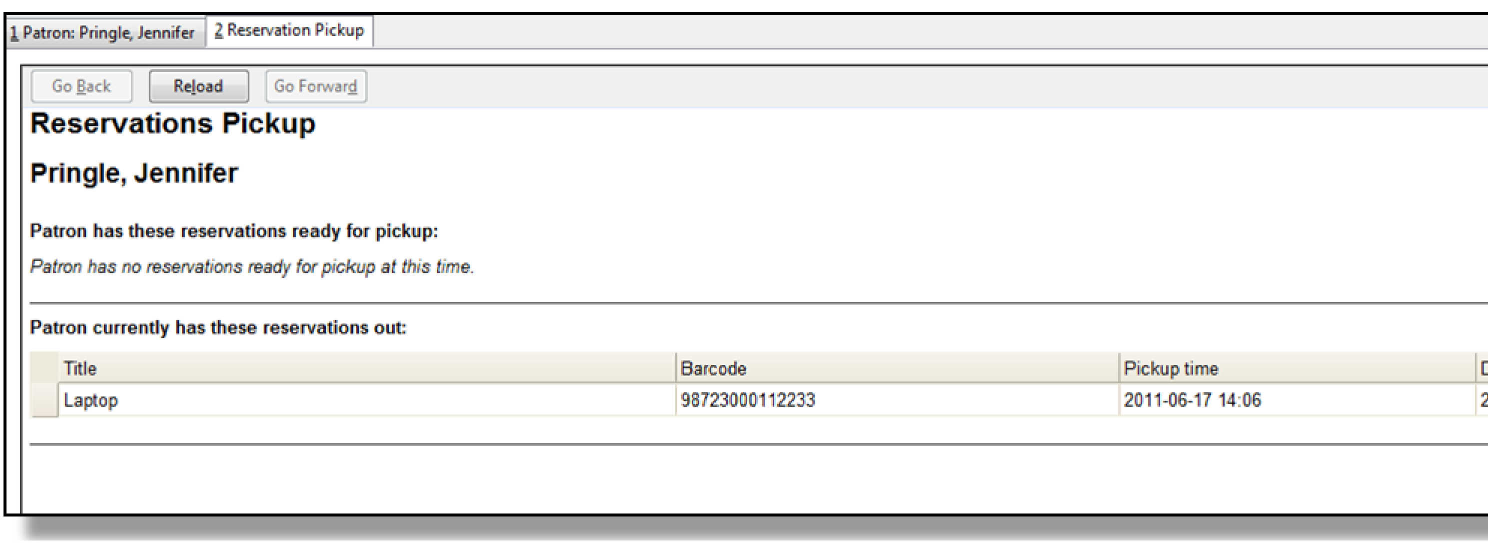


2) Scan the patron barcode if using Booking -# Pick Up Reservations.

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



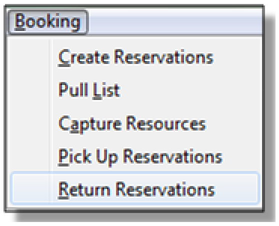
4) The screen will refresh to show that the patron has picked up the reservation(s).



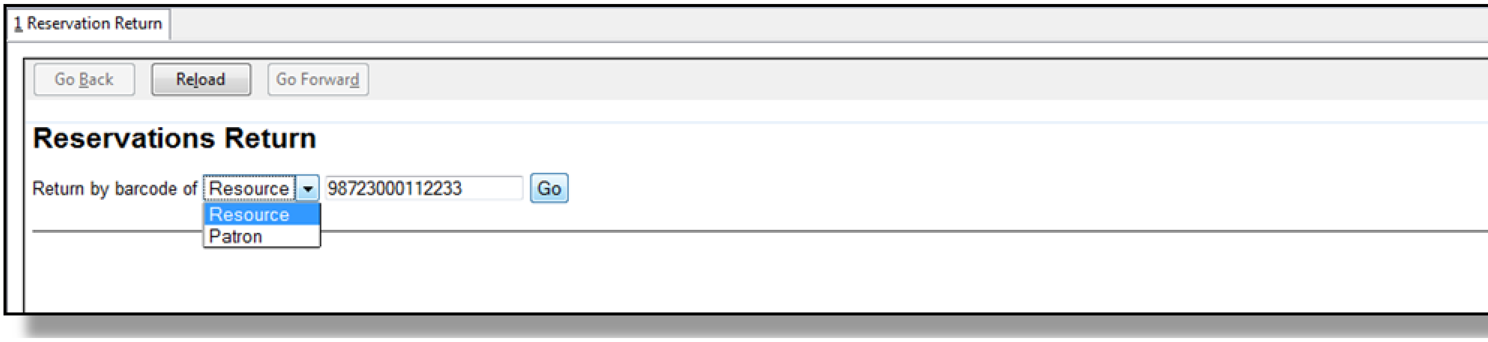
Returning Reservations

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

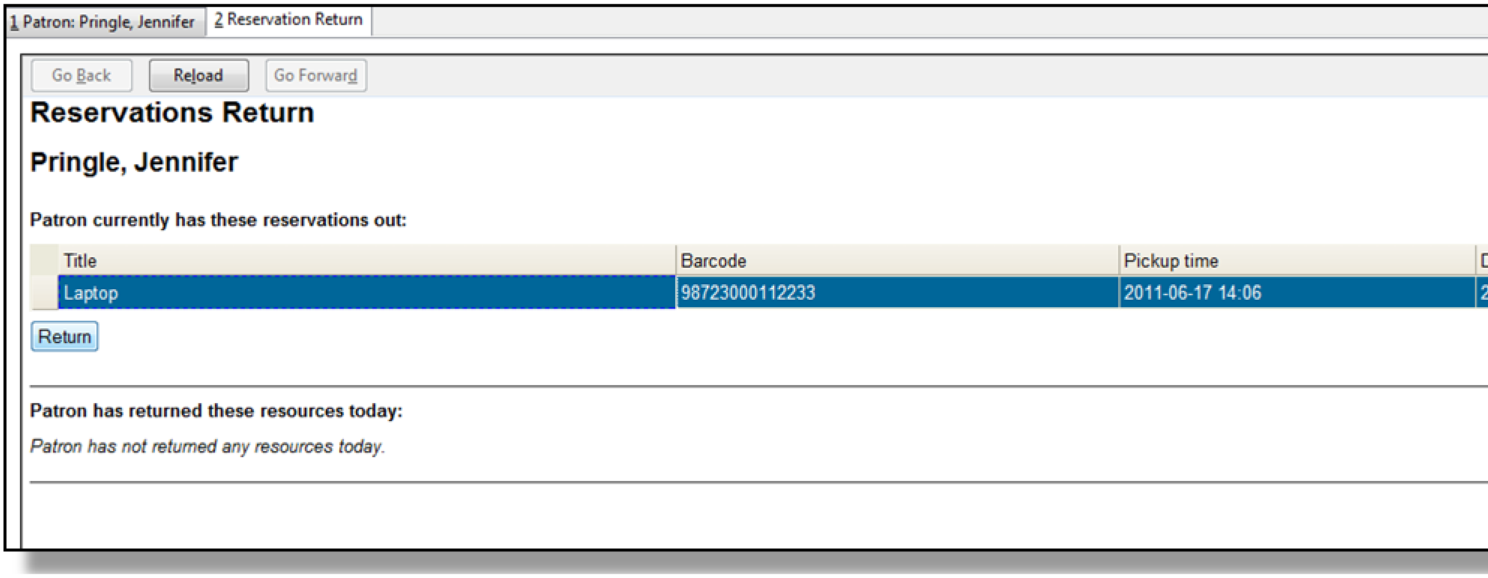


2) You can return the item by patron or item barcode. Here we choose Resource to return by item barcode. Scan or enter the barcode, and click Go.

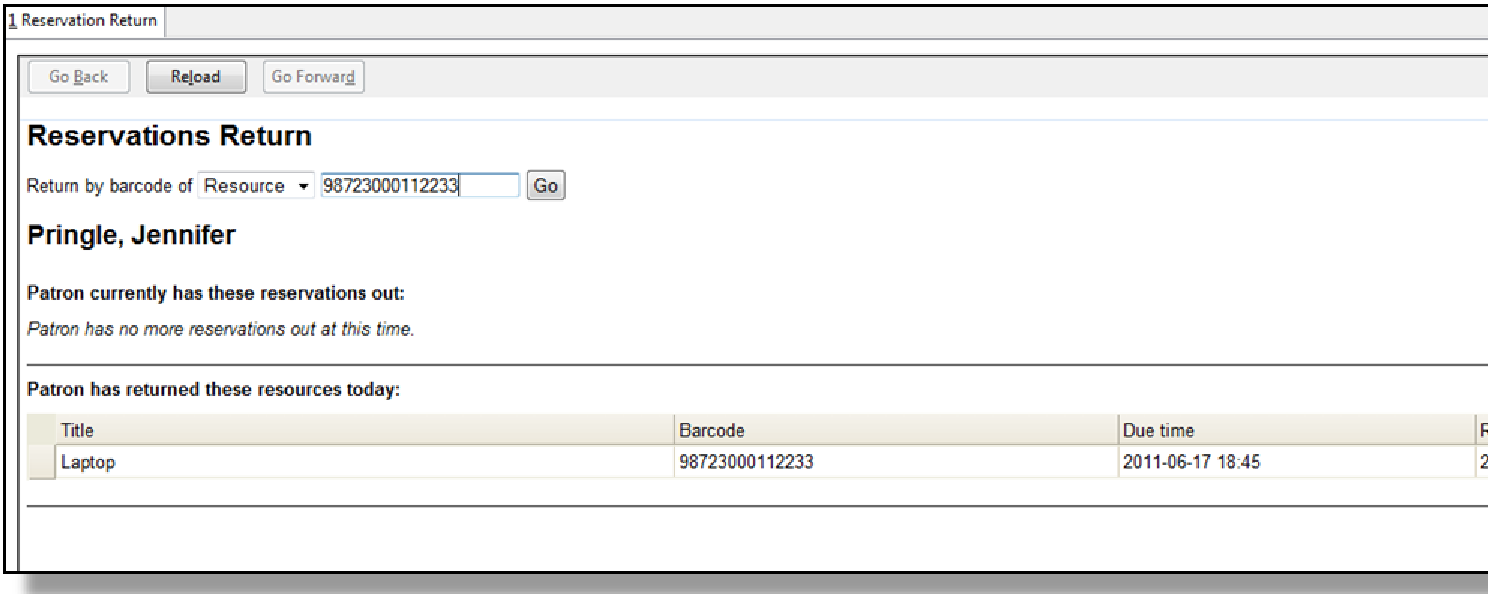


3) A pop up box will tell you that the item was returned. Click OK on the prompt.

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.



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



Reservations can be returned from within patron records by selecting Other -# Booking -# Return Reservations

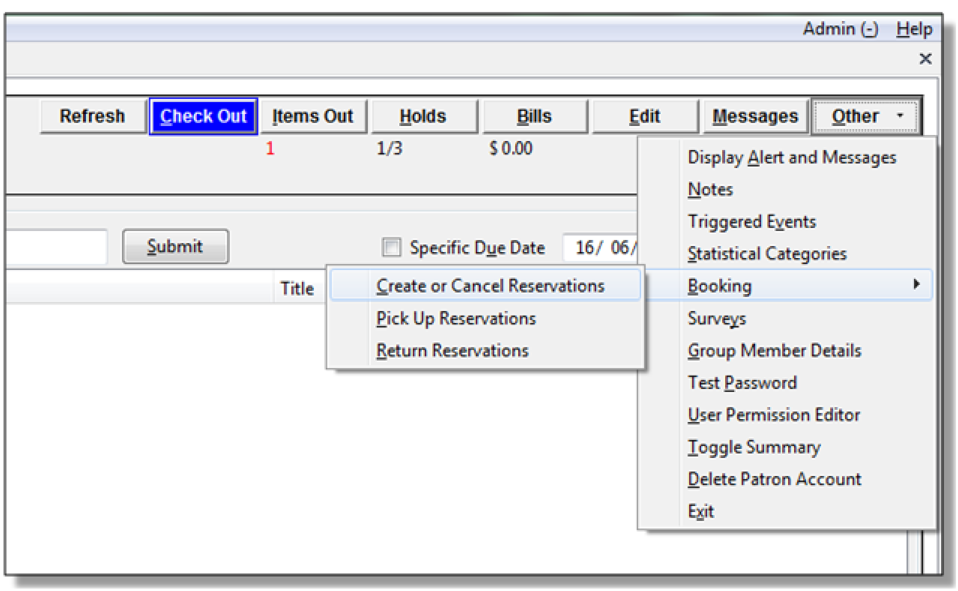
Cancelling a Reservation

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

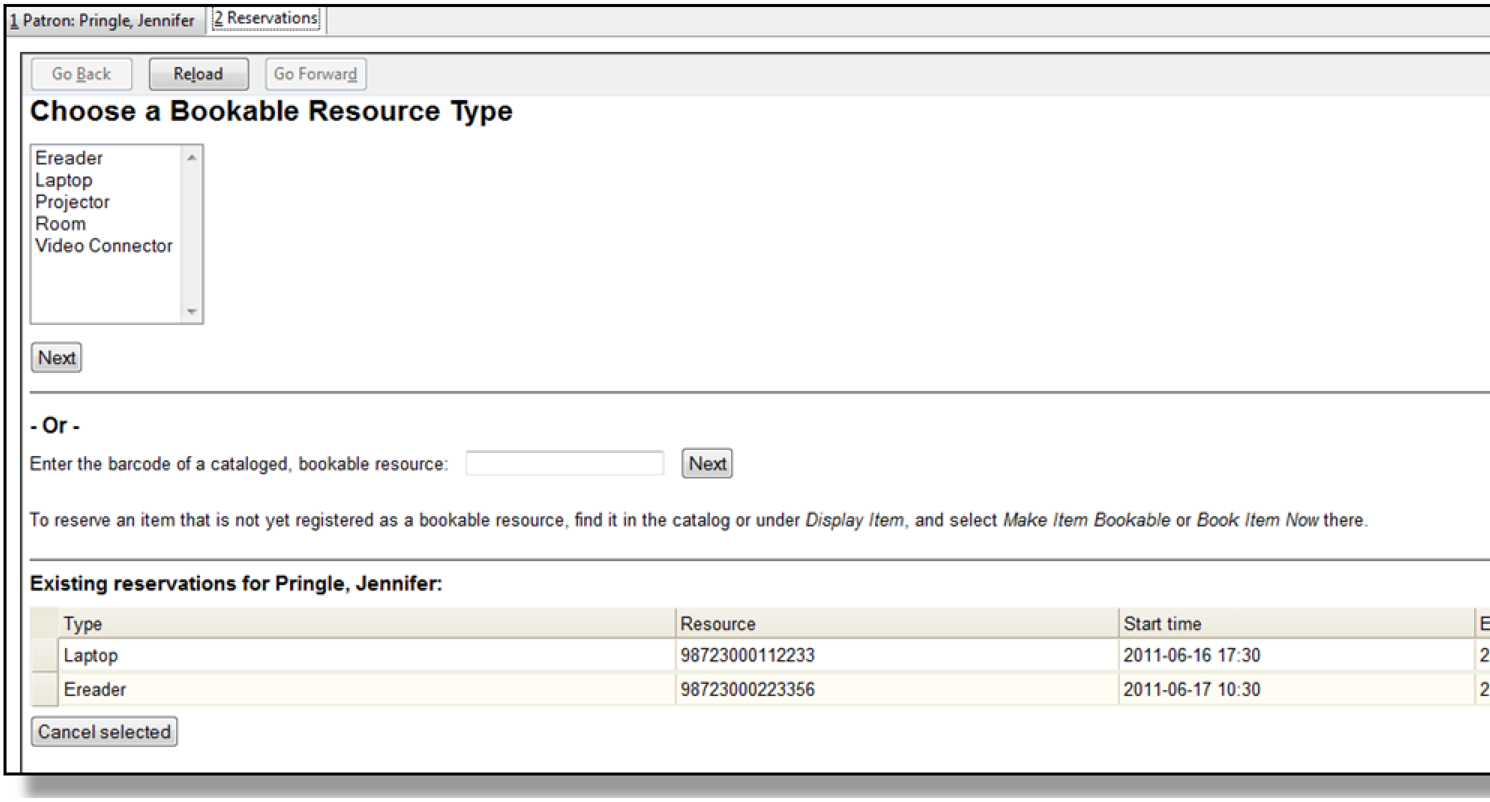
Cancel a reservation from the patron record

1) Retrieve the patron’s record.

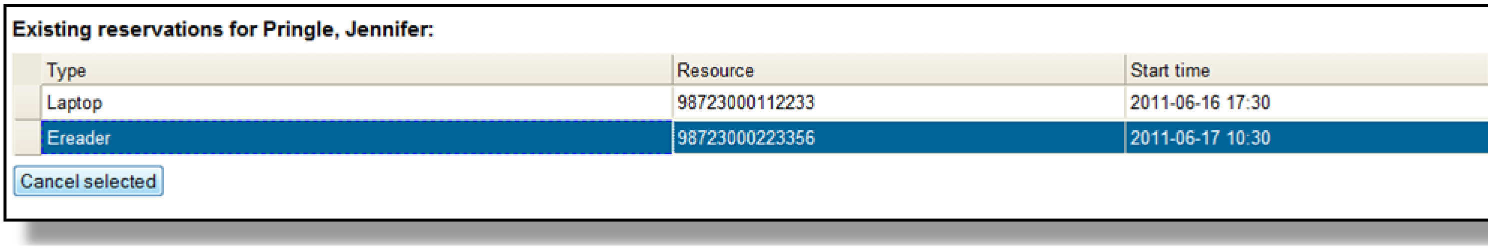
2) Select Other -# Booking -# Create or Cancel Reservations.



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



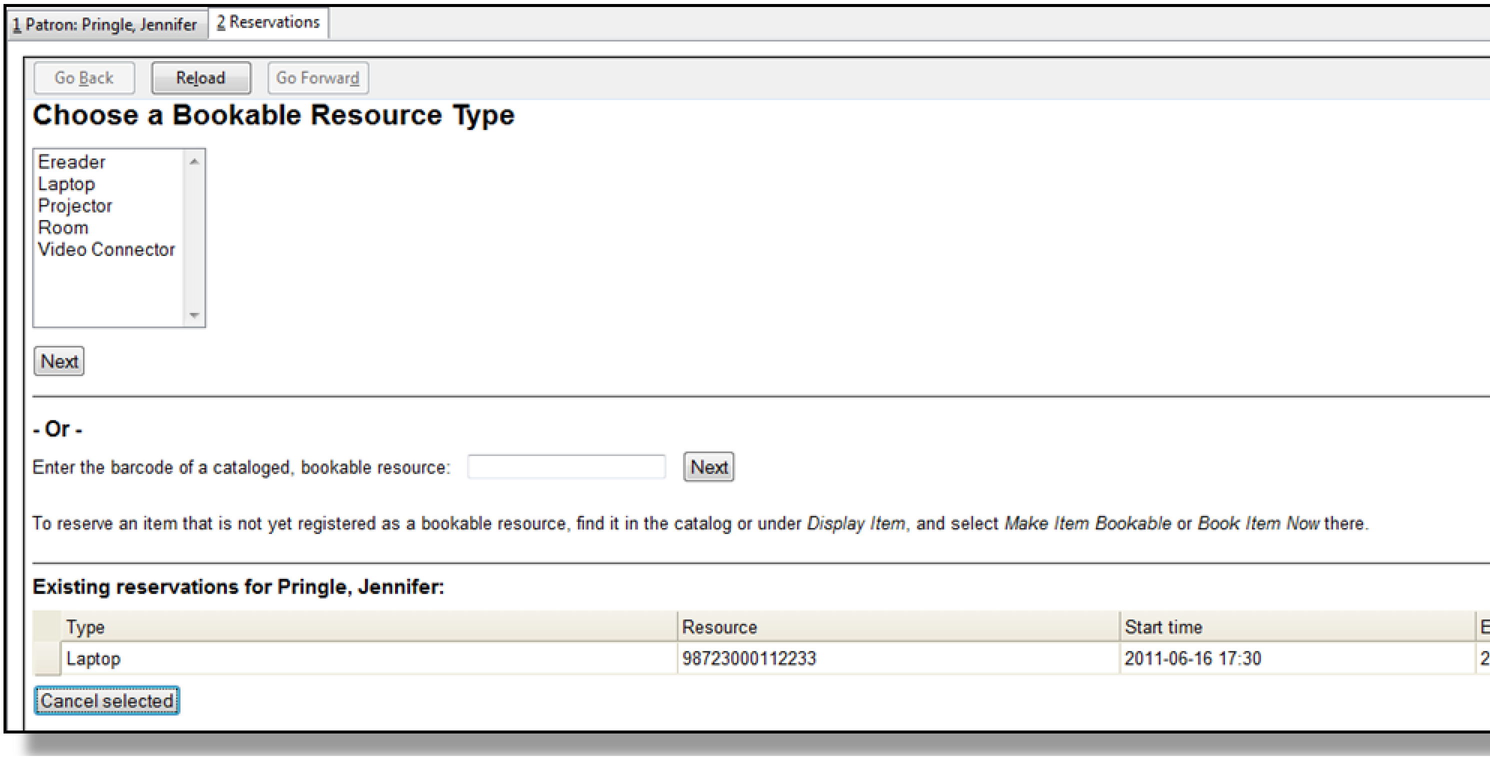
4) Highlight the reservation that you want to cancel. Click Cancel Selected.



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.



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

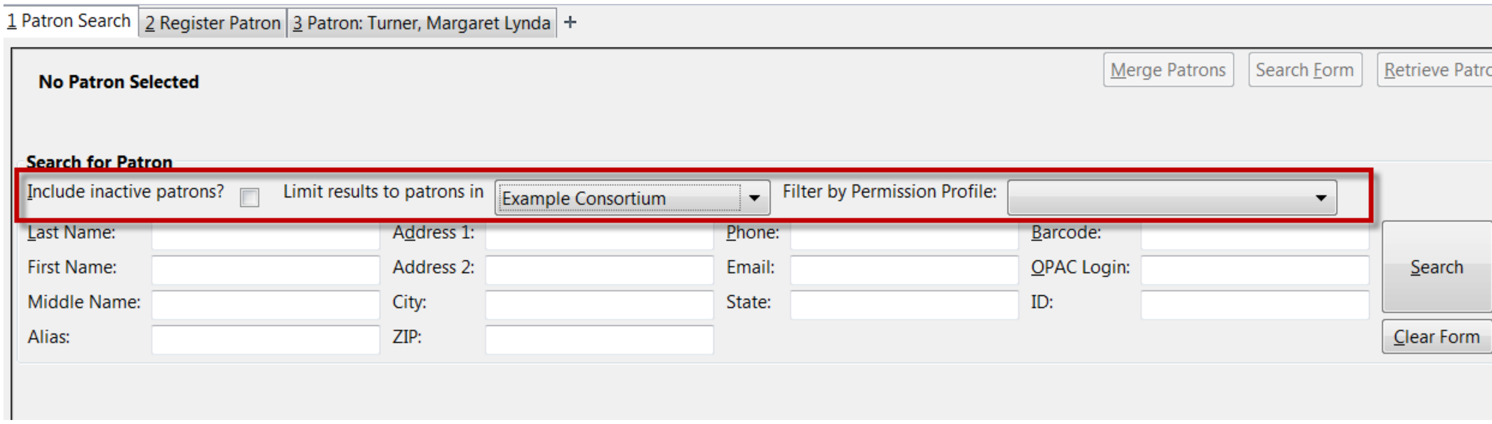
Searching Patrons

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

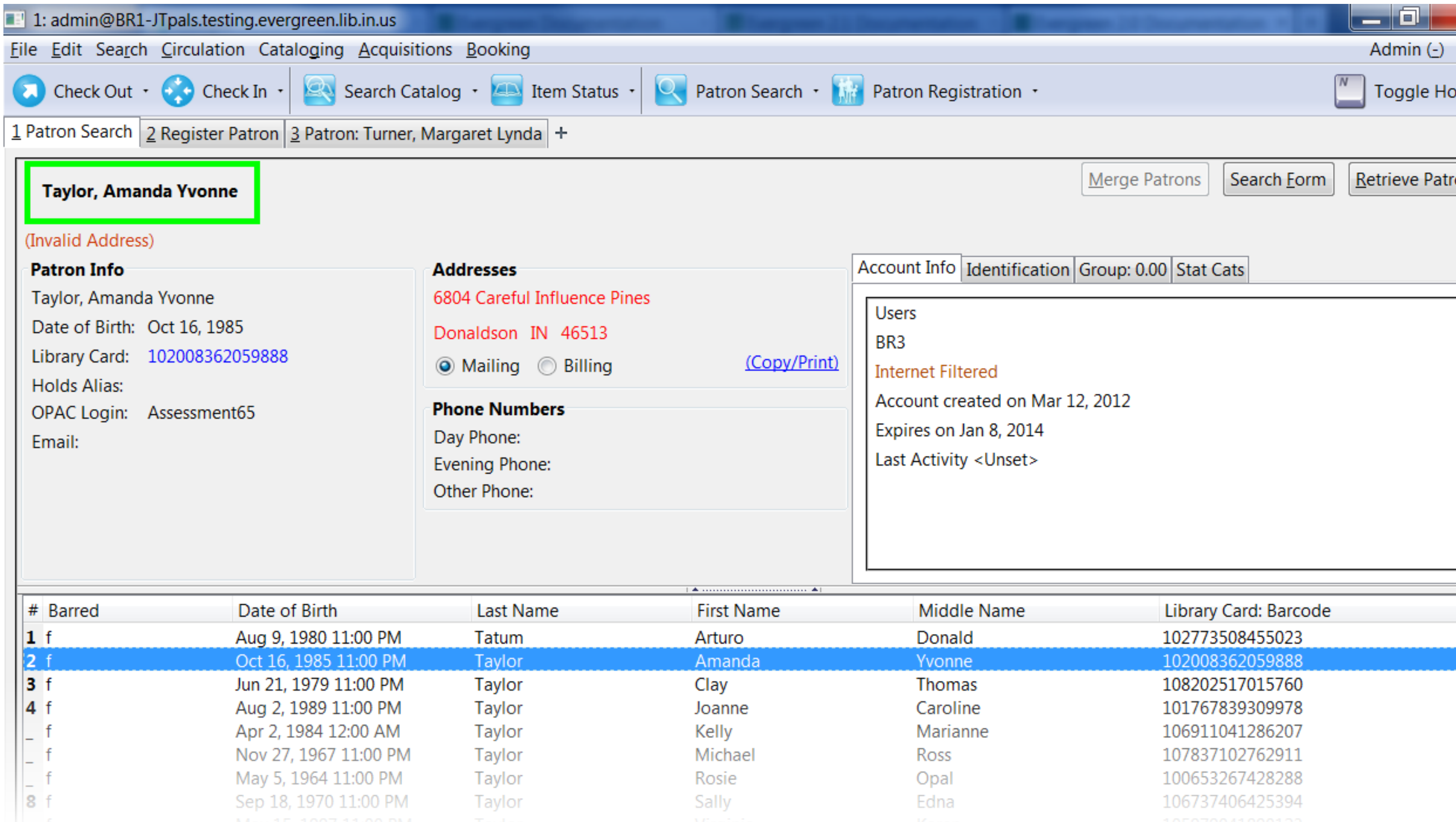
Use the options above the search fields to include patrons marked "inactive" in your search results or to limit results to patrons in a specific library branch or in a specific permission group.



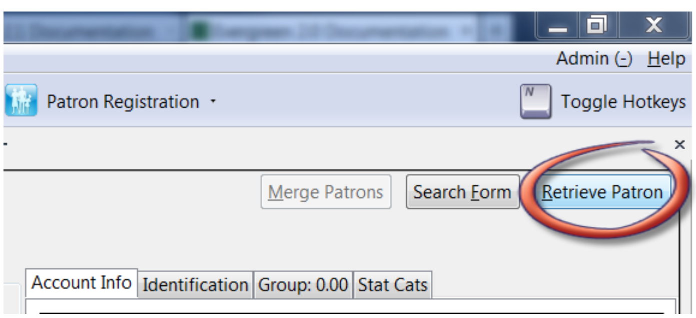
Tips for searching

- 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.



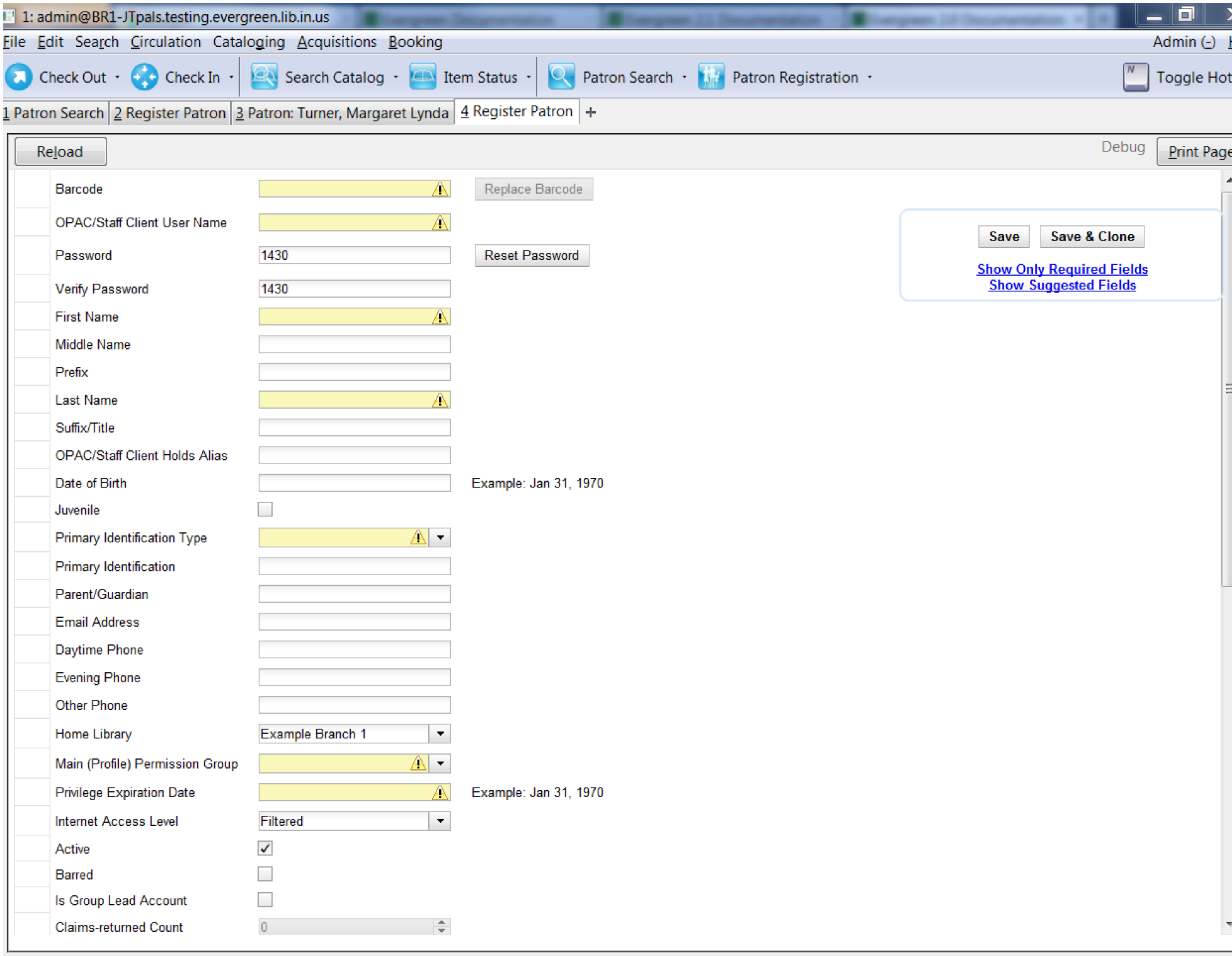
Use the *Retrieve Patron* button to retrieve the patron for circulation or editing.



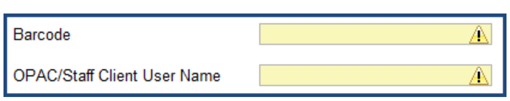
The *Search Form* button may be used to resume searching for patrons.

Registering New Patrons

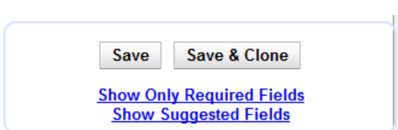
To register a new patron, select *Patron Registration* from the toolbar, *Circulation # Register Patron* from the menu bar, or **shift + F1**. The Patron Registration form will display.



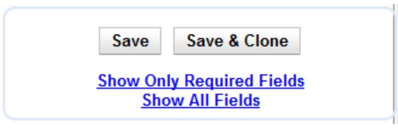
Mandatory fields display in yellow.



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



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*.



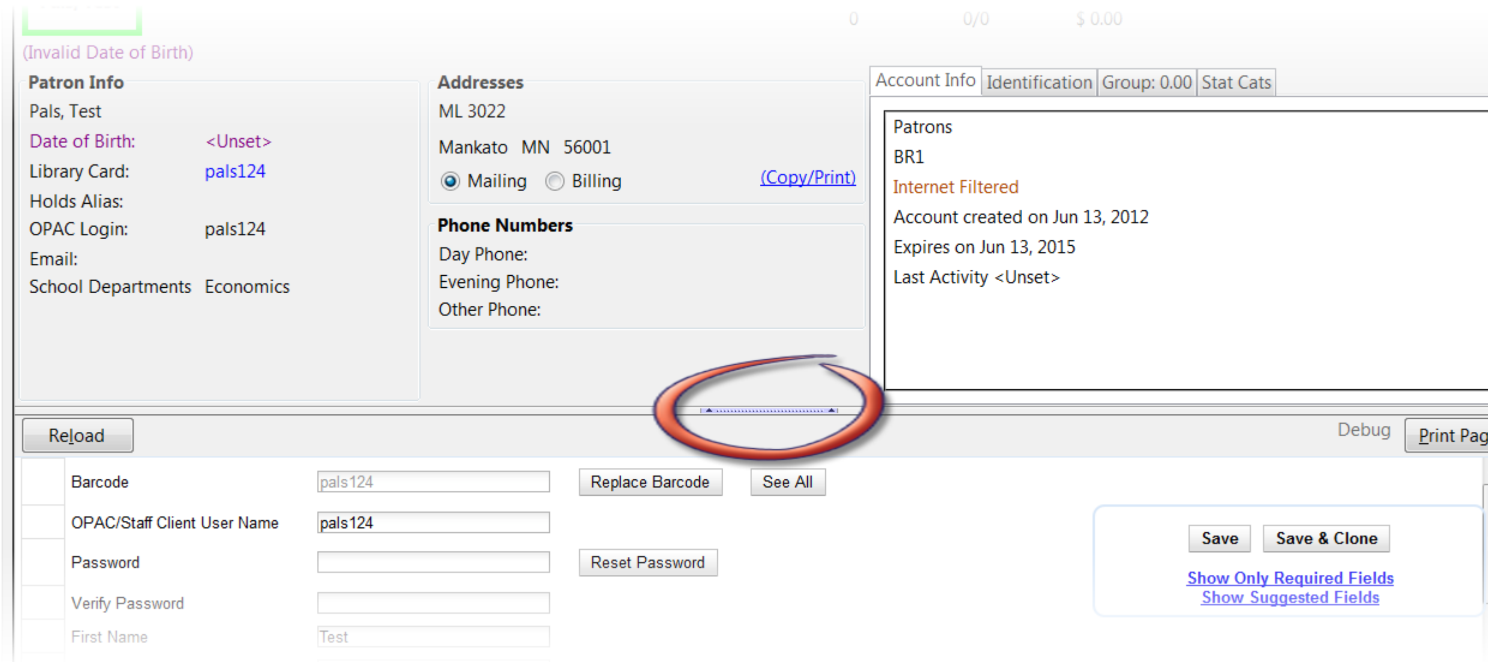
When finished entering the necessary information, select *Save* to save the new patron record or *Save & Clone* to register a patron with the same address. When *Save & Clone* is selected, the address information is copied into the resulting patron registration screen. It is linked to the original patron.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

- 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.

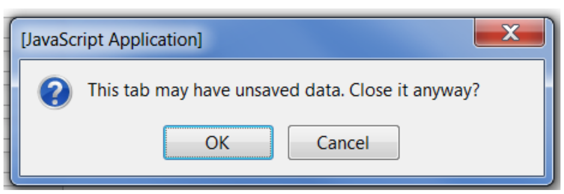
Updating Patron Information

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.



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.



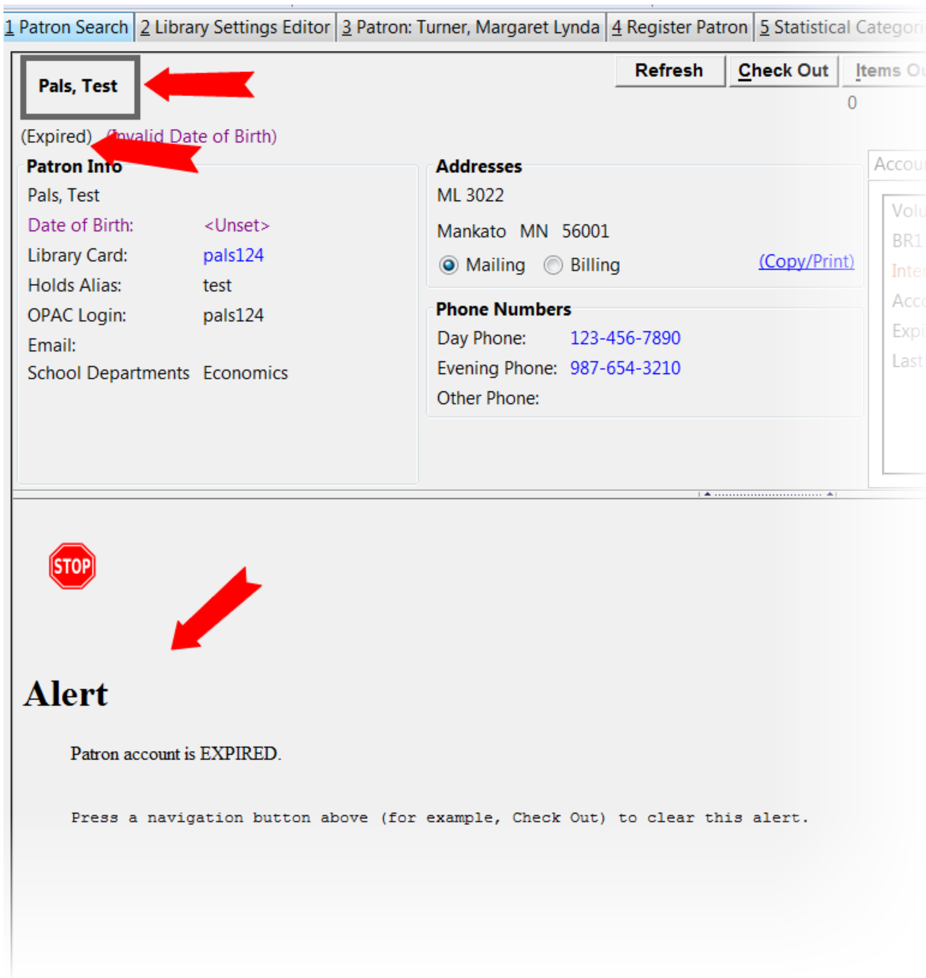
Select *OK* to continue or *Cancel* to return to the editing form.

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

> note
>
> If collapsed, you will need to manually “un-collapse” this pane.

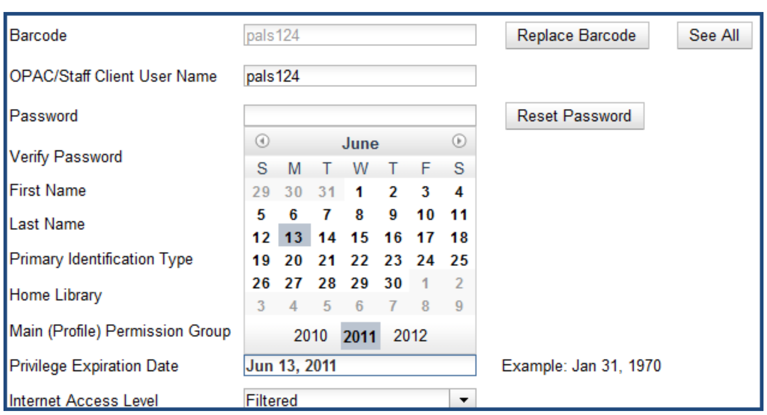
Renewing Library Cards

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 Updating Patron Information.

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.



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.

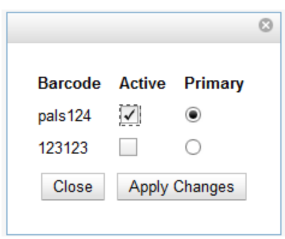
Open the patron record in edit mode as described in the section Updating Patron Information.

Next to the *Barcode* field, select the *Replace Barcode* button.

This will clear the barcode field. Enter a new barcode and *Save* the record. The screen will refresh and the new barcode will display in the patron summary pane.

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

Select the *See All* button next to the *Replace Barcode* button. This will display the current and past barcodes associated with this account.



Check the box(es) for all barcodes that should be "active" for the patron. An "active" barcode may be used for circulation transactions. A patron may have more than one "active" barcode. Only one barcode may be designated "primary." The "primary" barcode displays in the patron's summary information in the *Library Card* field.

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

Resetting Patron's Password

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

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

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

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

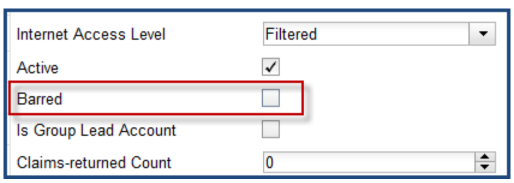
A new number will populate the *Password* and *Verify Password* text boxes. Make note of the new password and *Save* the patron record. The screen will refresh and the new password will be suppressed from view.

Barring a Patron

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

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

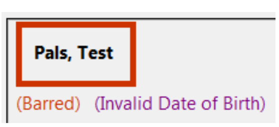
Check the box for *Barred* in the patron account.



Save the user. The screen will refresh.

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

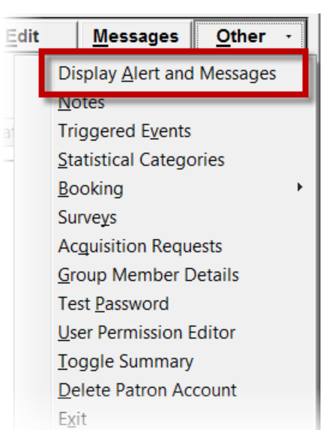
A notice appears when a staff person tries to checkout an item to blocked patrons, but staff may be given permissions to override blocks.

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:

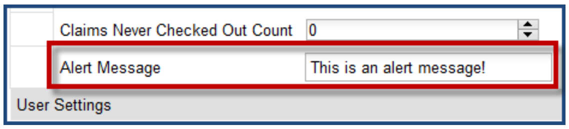
System-generated alerts: Once the cause is resolved (e.g. patron's account has been renewed), the message will disappear automatically.

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.

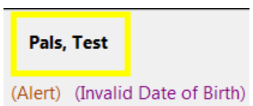
Open the patron record in edit mode as described in the section Updating Patron Information.

Enter the alert text in the Alert Message field.



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.



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.

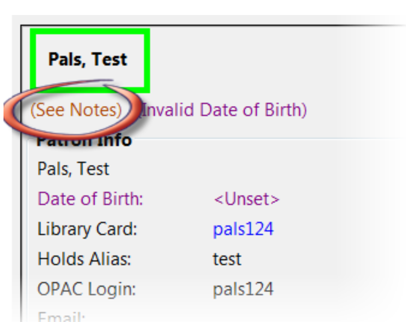
Delete the alert text in the *Alert Message* field.

Save the record.

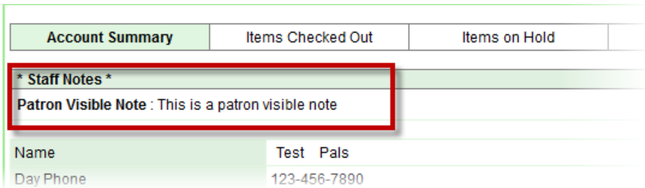
The screen will refresh and the indicators for the alert will be removed from the account.

Patron Notes

When a patron account contains a note, a *See Notes* message appears beneath the patron's name in the patron summary pane.



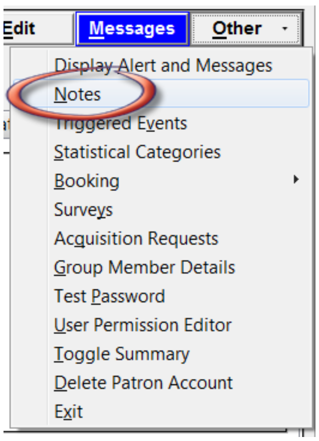
Notes are strictly communicative and may be made visible to the patron via their account on the OPAC. In the JSPAC, these notes display on the account summary screen in the OPAC.



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.

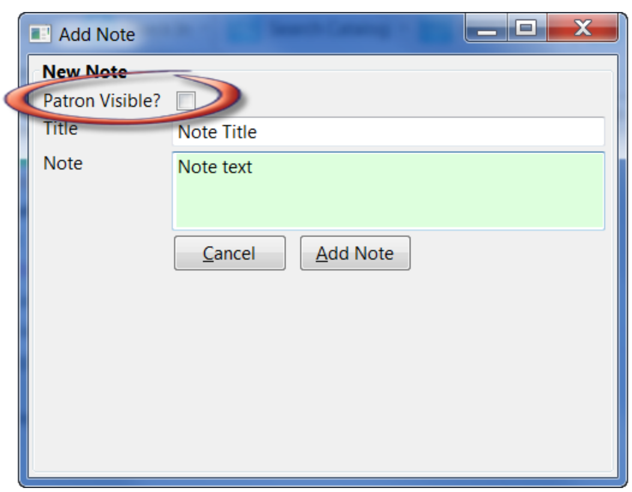
Use the Other menu to navigate to *Notes*.



Select the *Add New Note* button. An *Add Note* window displays.

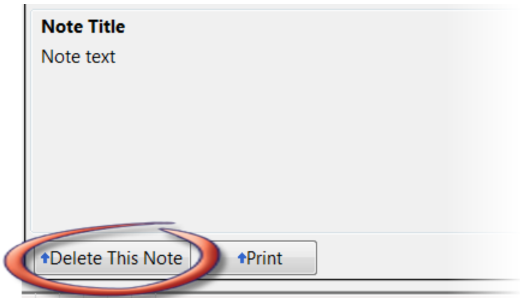
Enter note information.

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.



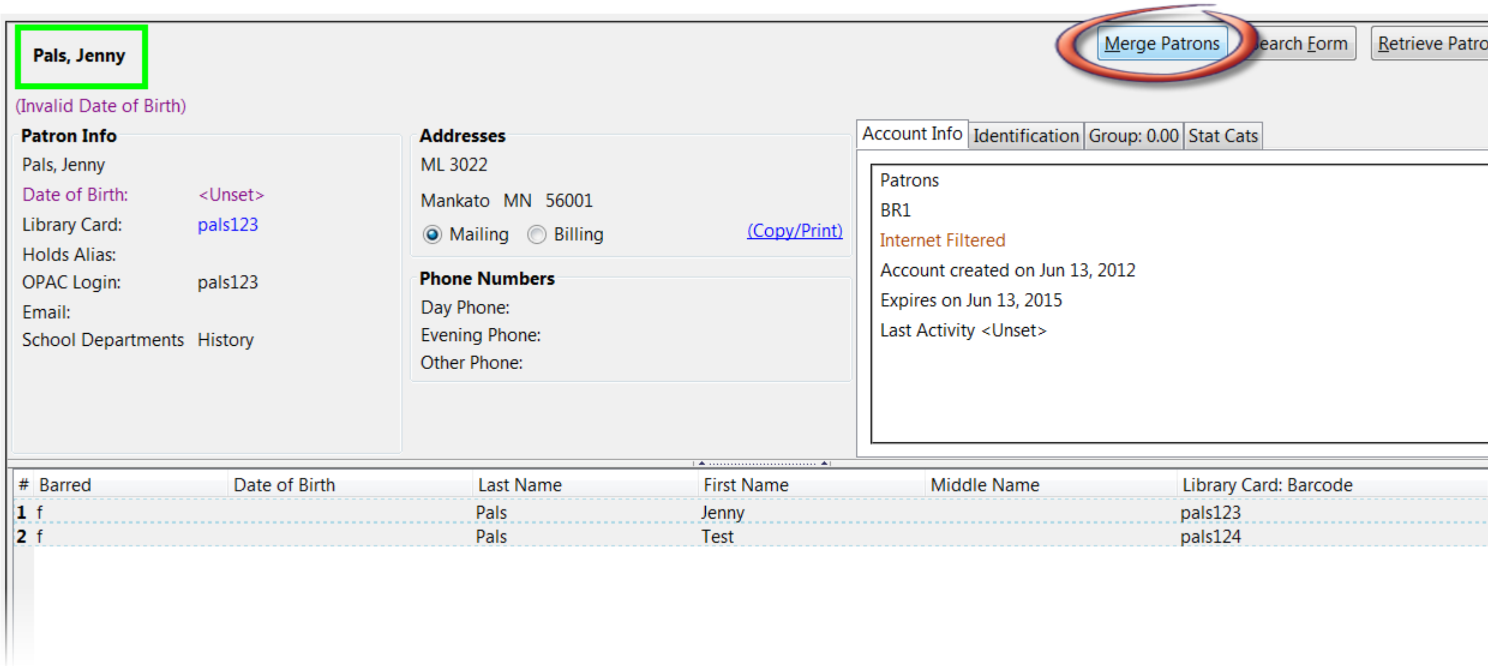
An alert will display. Click *Yes* to delete the note or No to retain the note. A confirmation box will display; click *OK*.

Merging Patron Records

When patron records are erroneously duplicated, they may be merged into one record. As described in the section Searching Patrons, search for the term(s) shared by the two records.

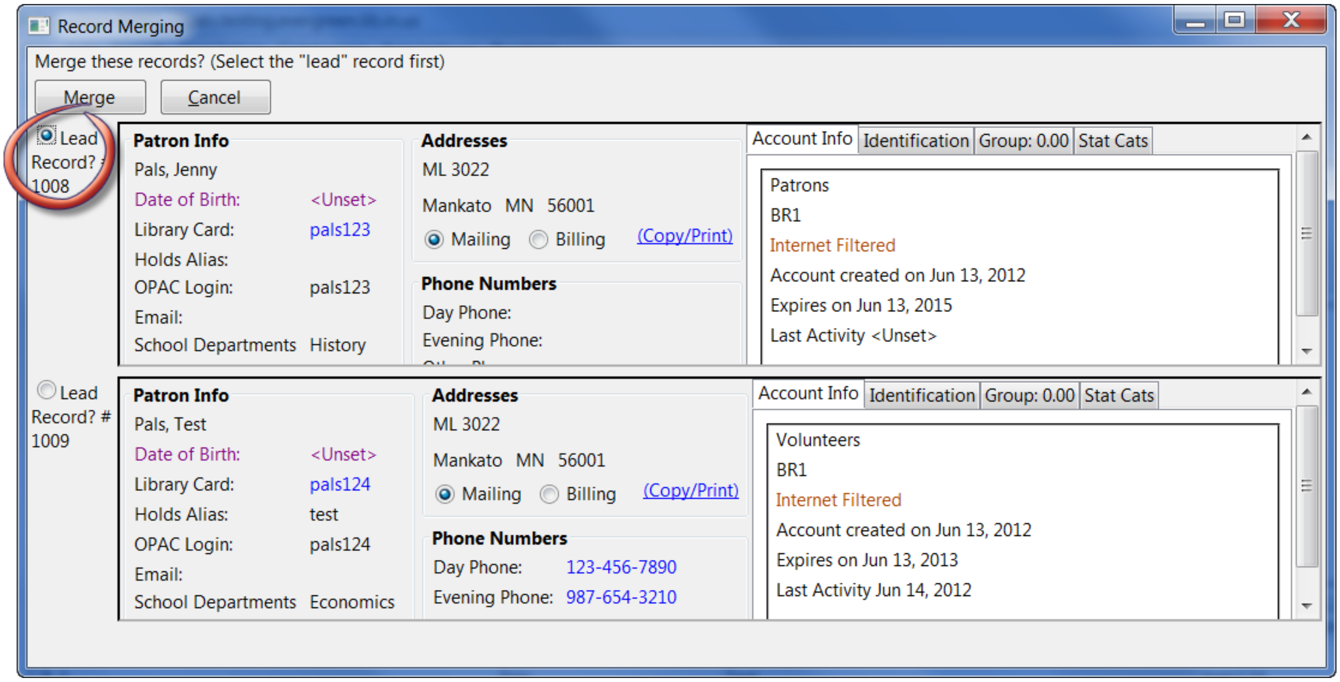
Select the two records to merge by pressing down the CTRL key and clicking each record.

Click the *Merge Patrons* button next to the *Search Form* and *Retrieve Patron* buttons on the top of the screen.



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.

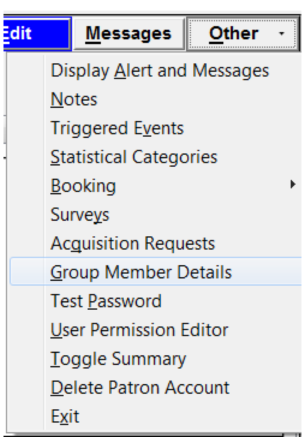


After making your selection, click the *Merge* button. The screen will refresh. Only one of the two patron names will display.

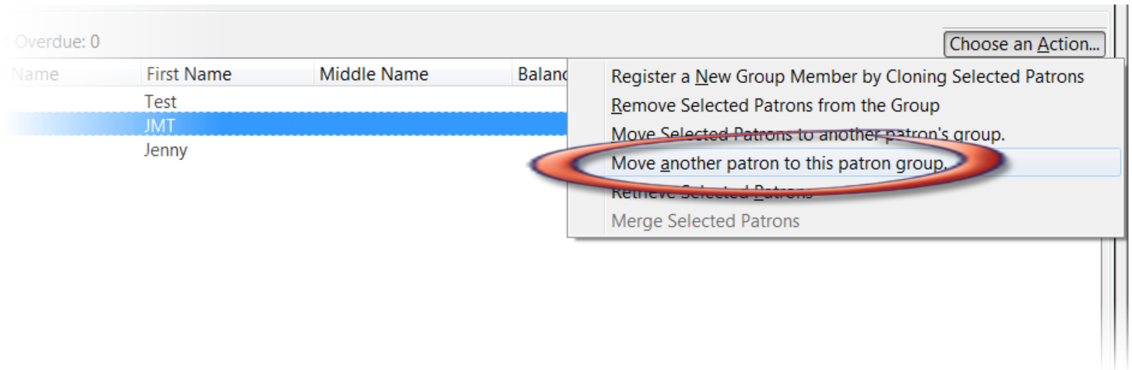
> Once two records have been merged, the notes, bills, holds and outstanding items under the non-lead record are brought to the lead record. Staff-inserted alert messages are not transferred from the non-lead record; lead record alerts are retained.

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*.



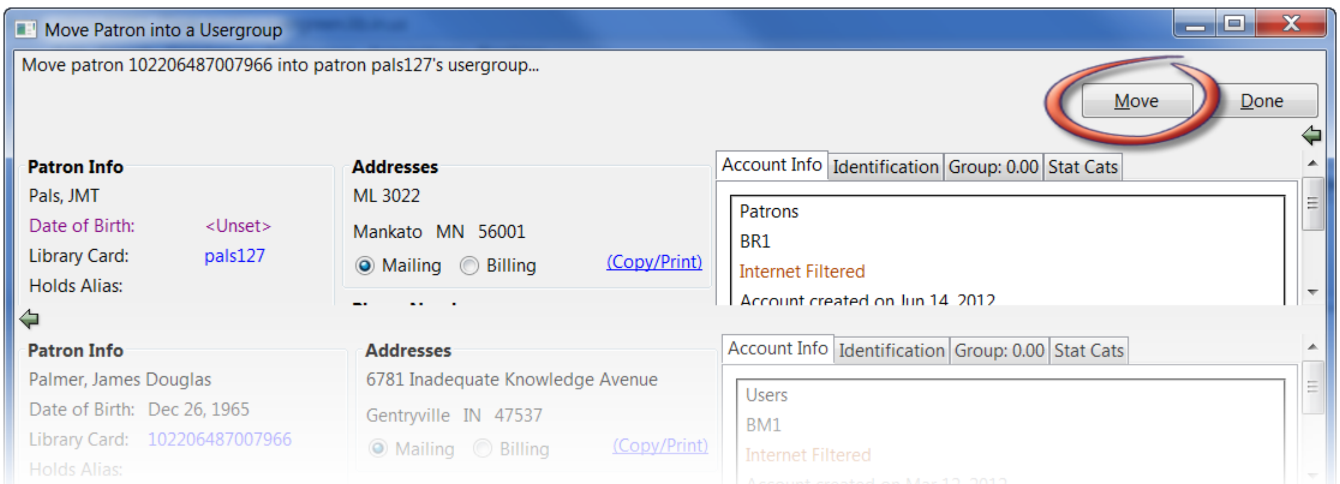
The patron records are displayed as group members. If both patron records are not already displayed on this screen, click *Choose an Action # Move another patron to this patron group*.



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.



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.

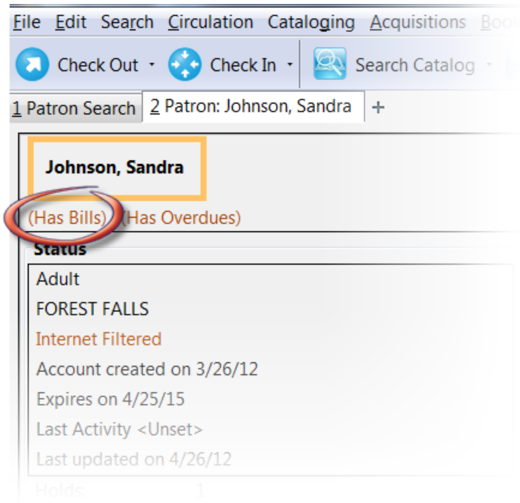
Click *Choose an Action # Merge Selected Patrons*. The merging records window pops up.

Choose the lead record and continue to merge records as described in the above.

> The merged record will still show under group members. Both members point to the same patron record.

Bills and Payments

When a patron account has bills attached to it, a note displays under the patron name in the patron summary panel.



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.

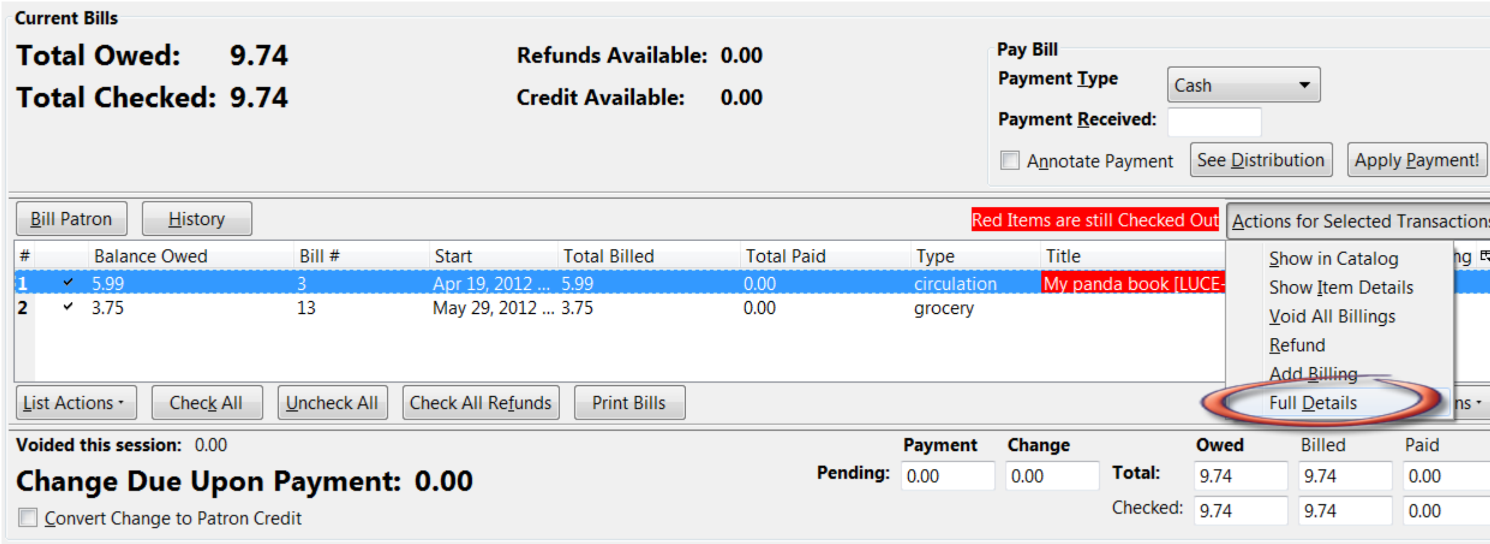
Circulation bills: system-generated (overdue fines, lost item cost, processing fees, etc.).

- 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.

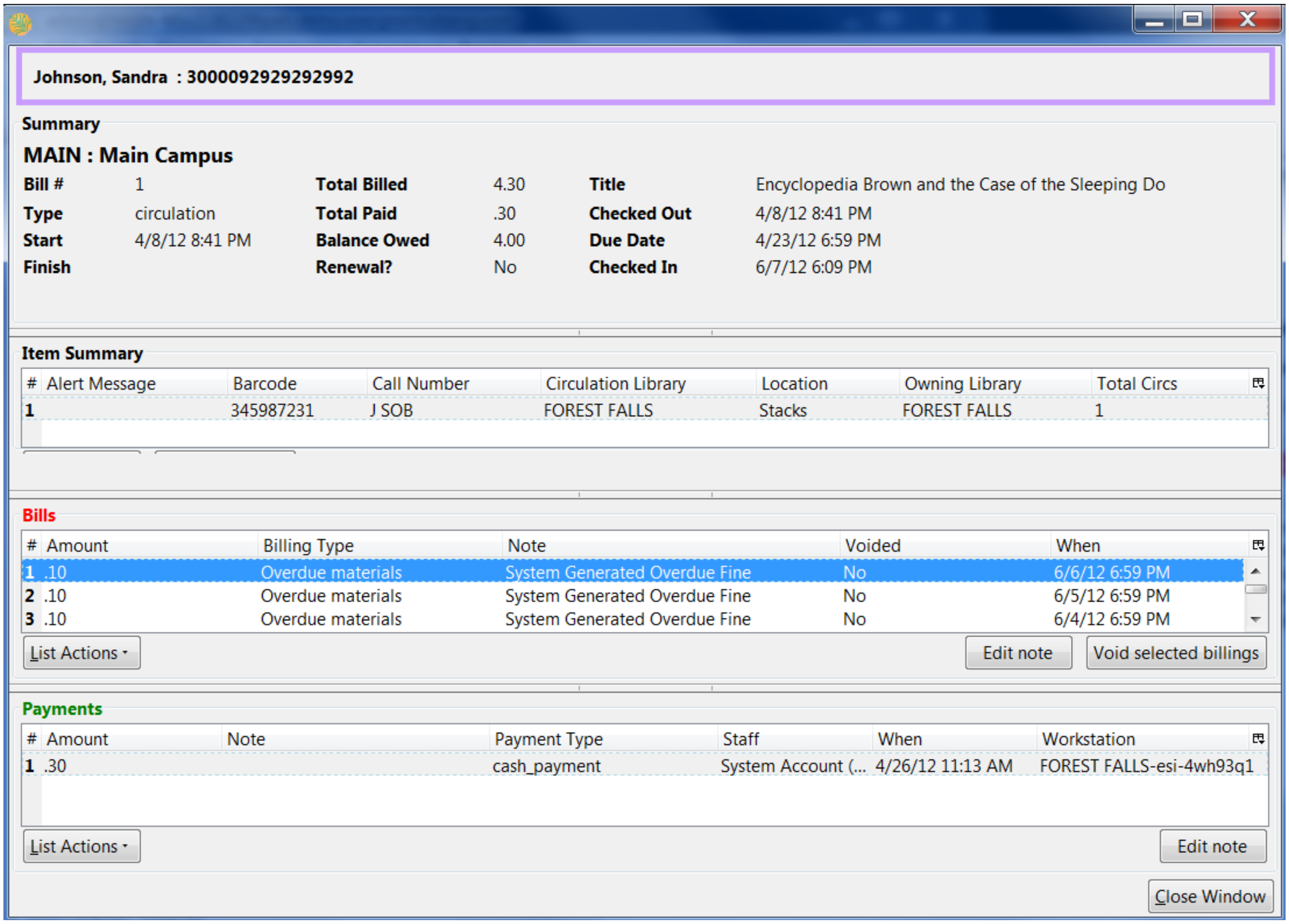
Grocery bills: staff-applied to patron accounts.

- 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.

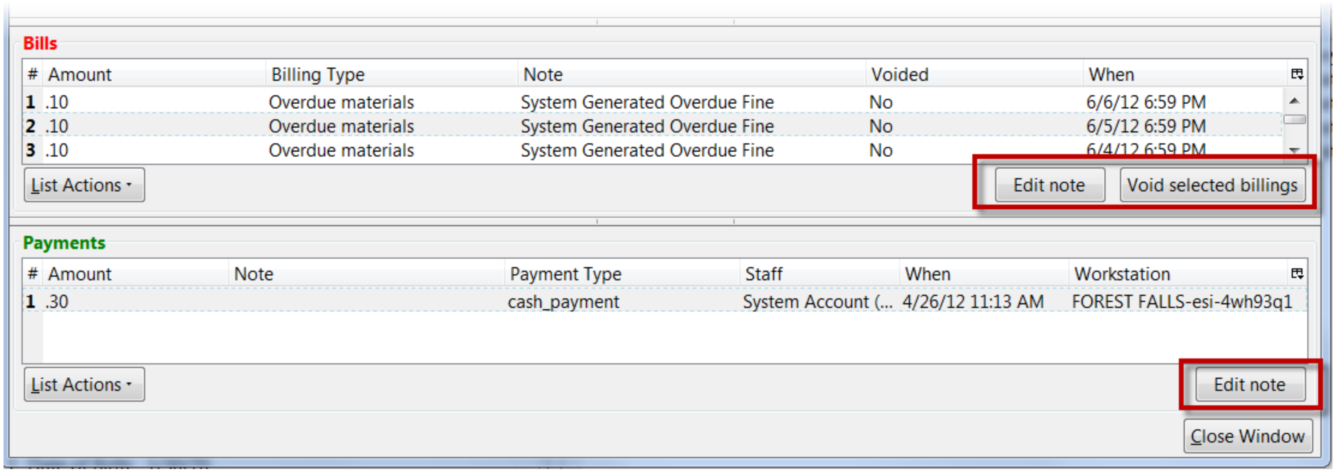
To view more information about a bill, highlight the bill and right-click or use the *Actions for Selected Transactions* menu to select *Full Details*.



A window will display additional information about the bill, including a record of any payments that have been made on the bill.



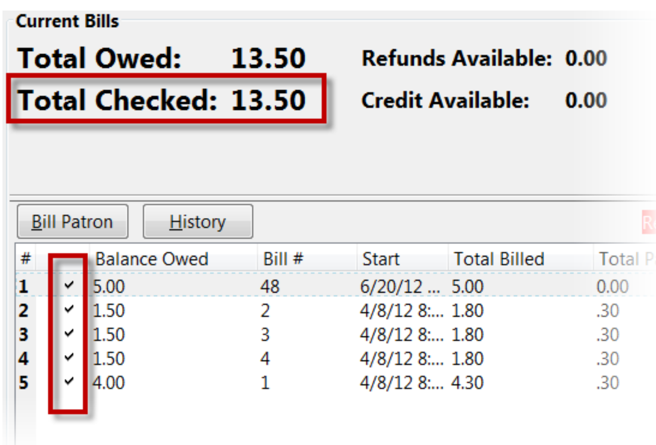
From the *Full Details* screen, portions of the bill may be voided (e.g. an erroneous daily overdue charge) by using the *Void selected billings* button. Notes may be added to payments or line items by using the *Edit note* button.



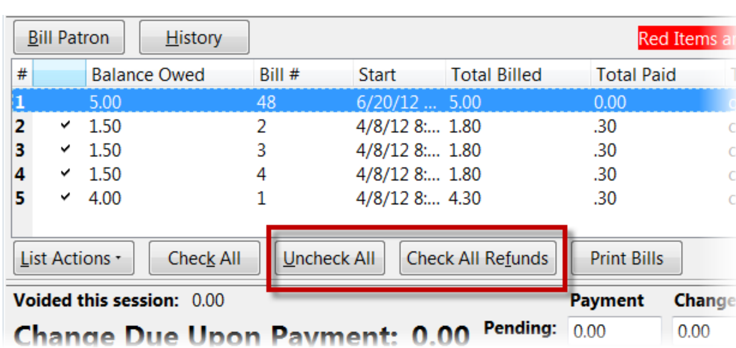
Making Payments

To collect payments, retrieve the patron record. Navigate to the *Bills* screen as described in Bills and Payments.

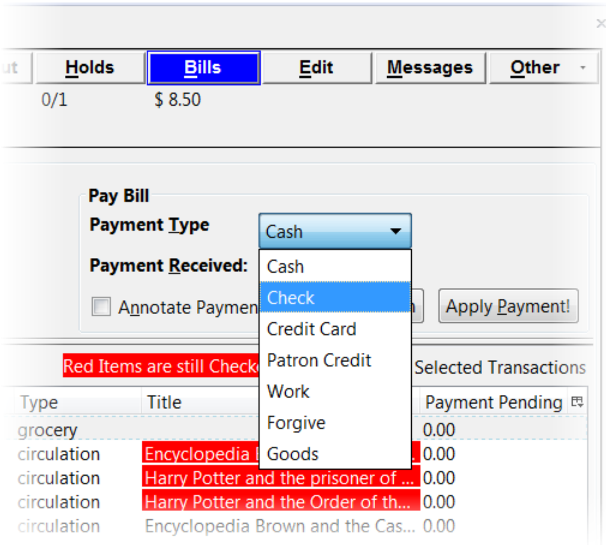
When bills are paid, the money applied starts at the top of the list of bills. To pay specific bills, uncheck the bills that you do not wish to pay at this time. The amount displayed in *Total Checked:* will change to reflect the appropriate amount.



the presence of the *Uncheck All* and *Check All* options below the list of bills.



When you are ready to make a payment, select a payment type from the dropdown menu in the *Pay Bill* portion of the screen.



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*.

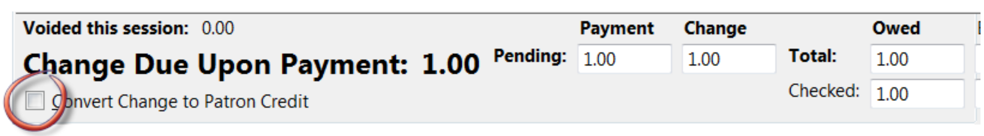
Click *Apply Payment!* to make the payment.

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.



> - 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.

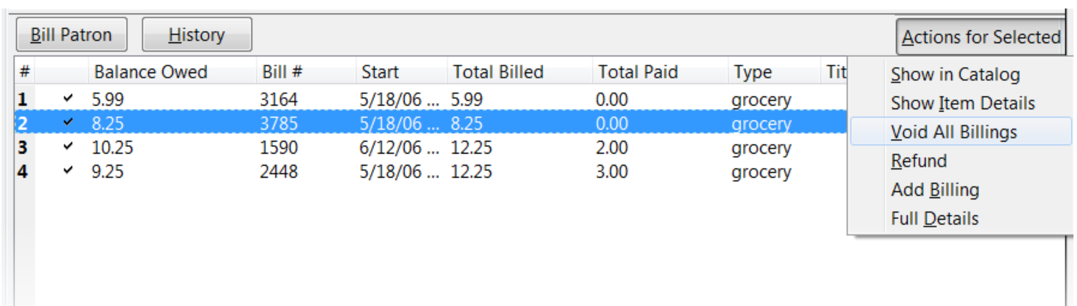
Voiding Bills

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*.



Confirm the action.

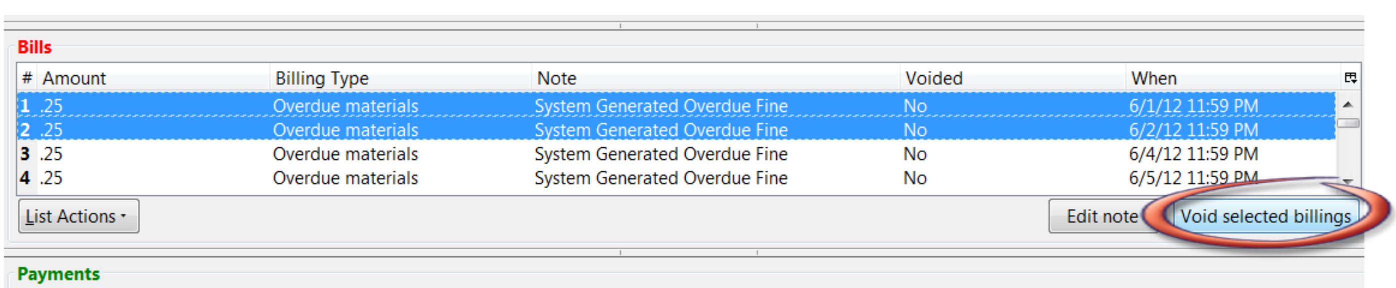
To void a partial amount:

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.



Adding New “Grocery” Bills

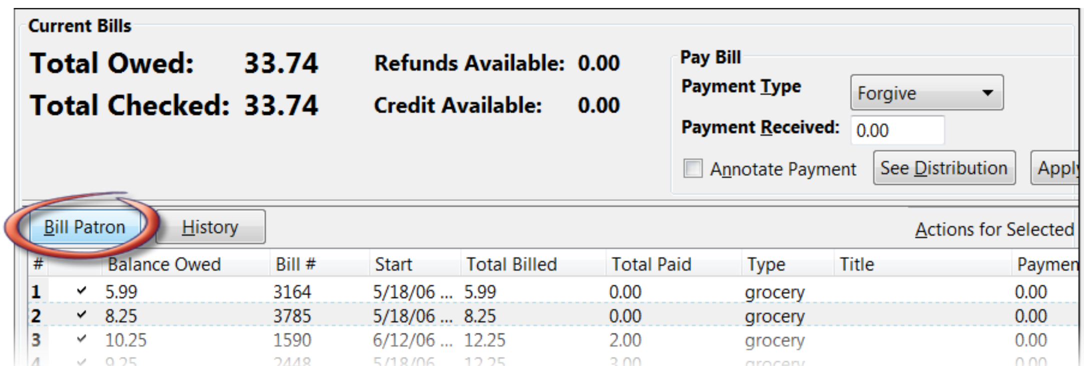
A grocery bill can be added as a new bill or to an existing bill.

To add a as a new bill:

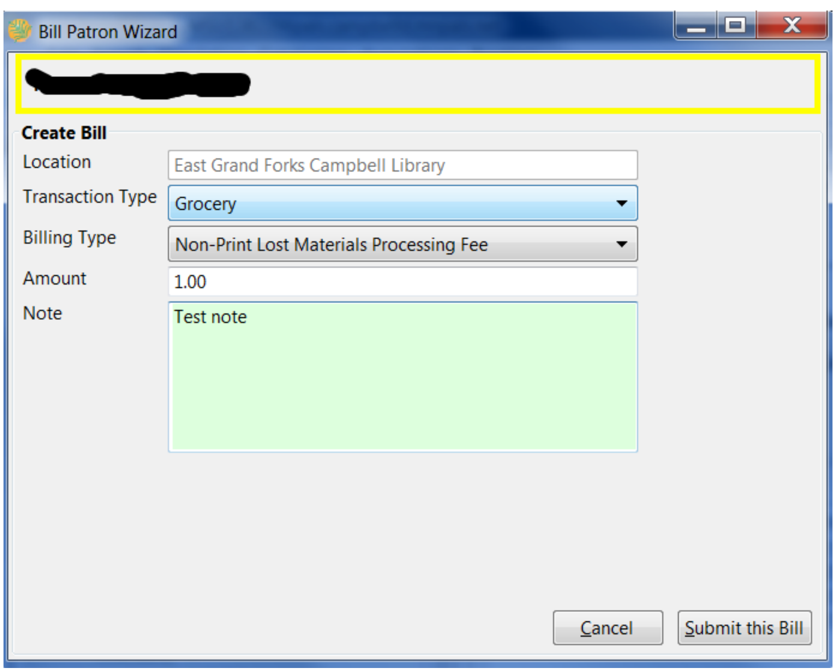
1. Retrieve the patron record.

2. Navigate to the Bills screen.

3. Click the_Bill Patron_ button above the list of current bills.



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.



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.

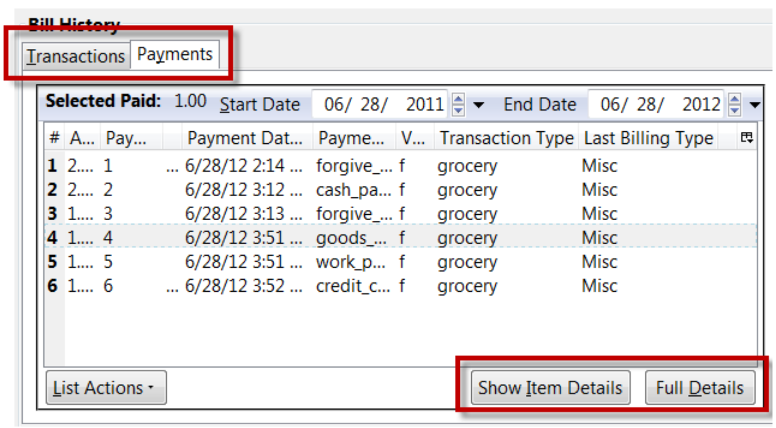
Bill History

To view a patron's bill history:

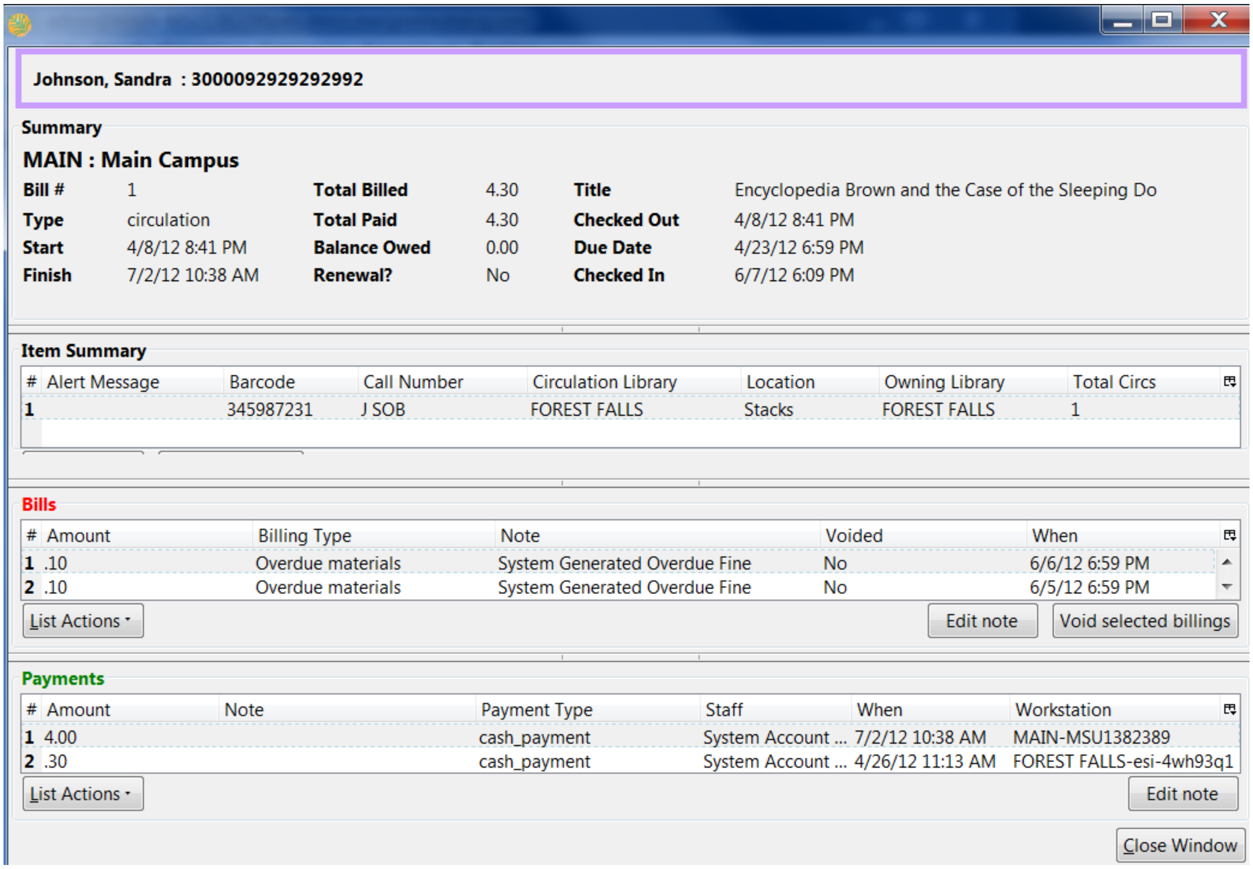
1. Retrieve the patron record.

2. From the *Bills* screen, click *History*.

3. A *Bill History* screen with two tabs will display. One for *Transactions* and one for *Payments*.



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.



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

Table of Contents

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:

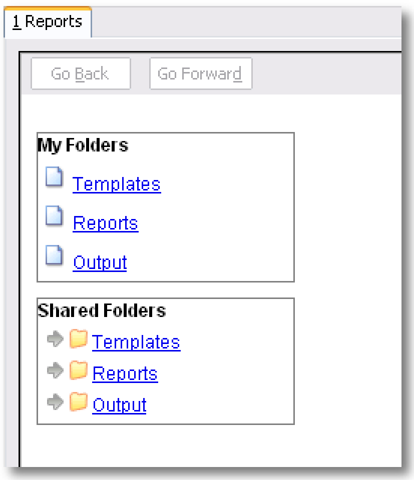
```
kill `ps wax | grep "Clark Kent" | grep -v grep | cut -b1-6`
```

```
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.



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.

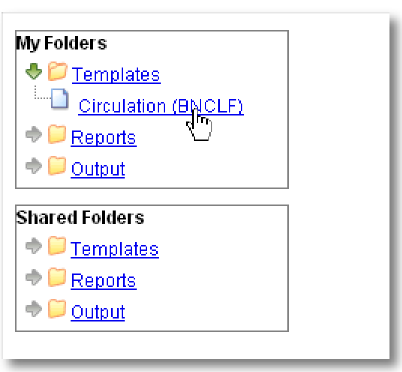
It may take several tries to refine a report to give the output that you want. It can be useful to plan out your report on paper before getting started with the reporting tool. Group together related fields and try to identify the key fields that will help you select the correct source.

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.

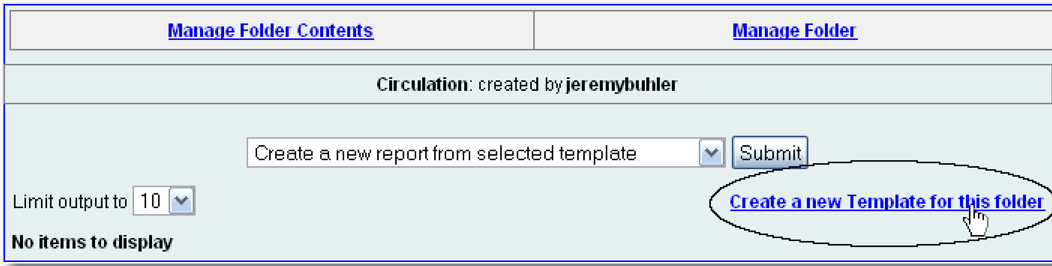
This example illustrates creating a template for circulation statistics. This is an example of the most basic template that you can create. The steps required to create a template are the same every time, but the tables chosen, how the data is transformed and displayed, and the filters used will vary depending on your needs.

Choosing Report Fields

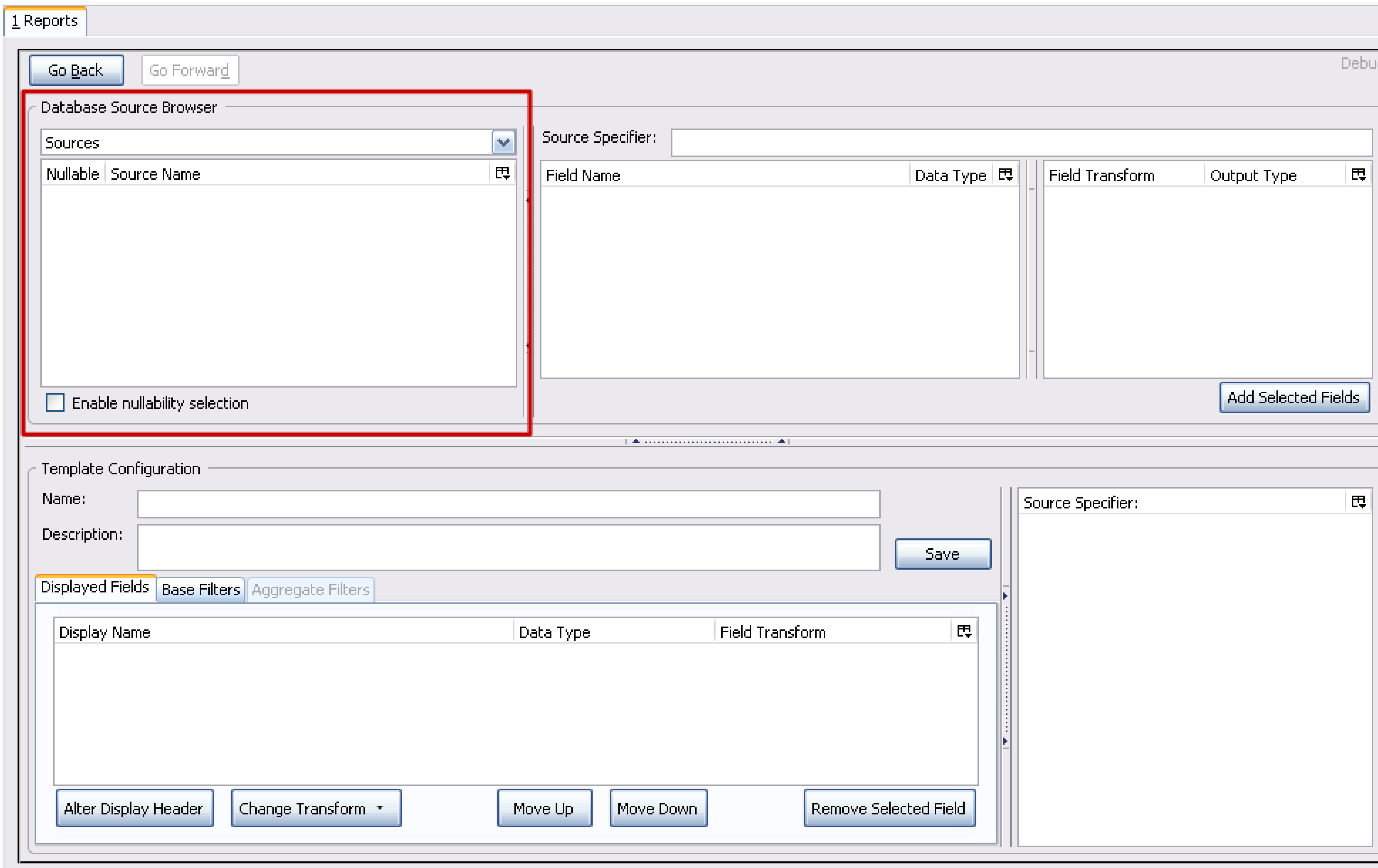
1. Click on the My Folder template folder where you want the template to be saved.



2. Click on Create a new Template for this folder.

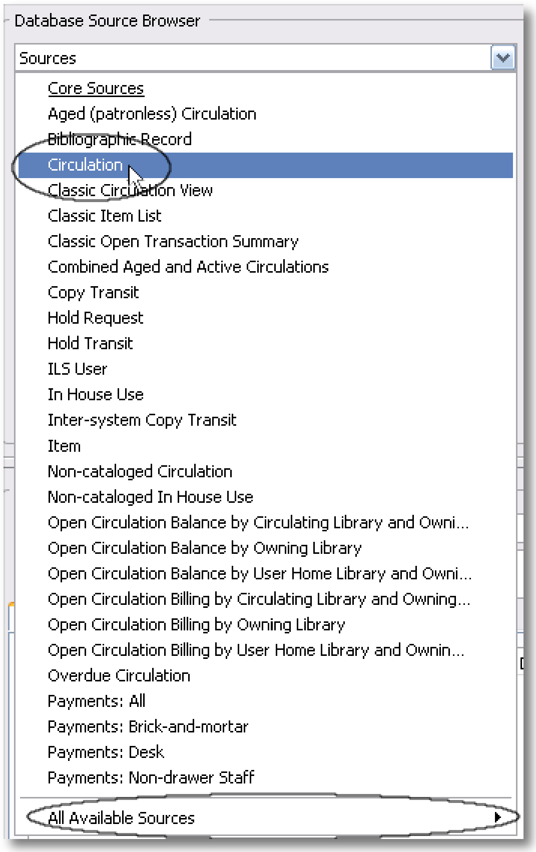


3. You can now see the template creating interface. The upper half of the screen is the *Database Source Browser*. The top left hand pane contains the database *Sources* drop-down list. This is the list of tables available as a starting point for your report. Commonly used sources are *Circulation* (for circ stats and overdue reports), *ILS User* (for patron reports), and *Item* (for reports on a library's holdings).

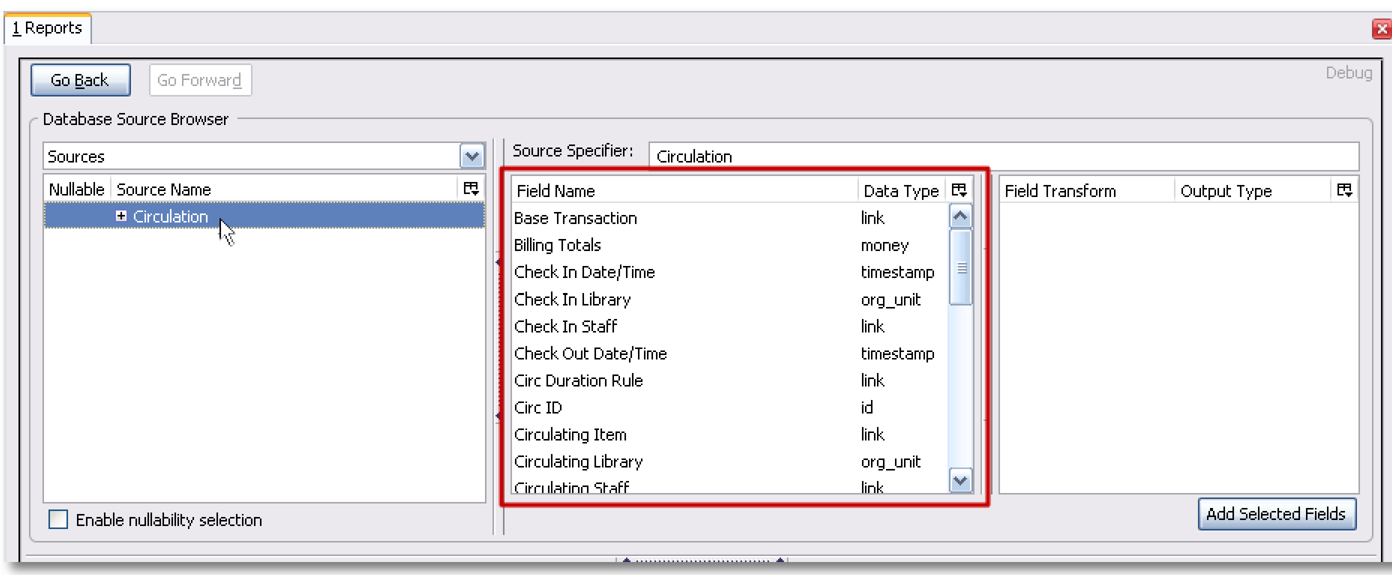


The Enable source nullability checkbox below the sources list is for advanced reporting and should be left unchecked by default.

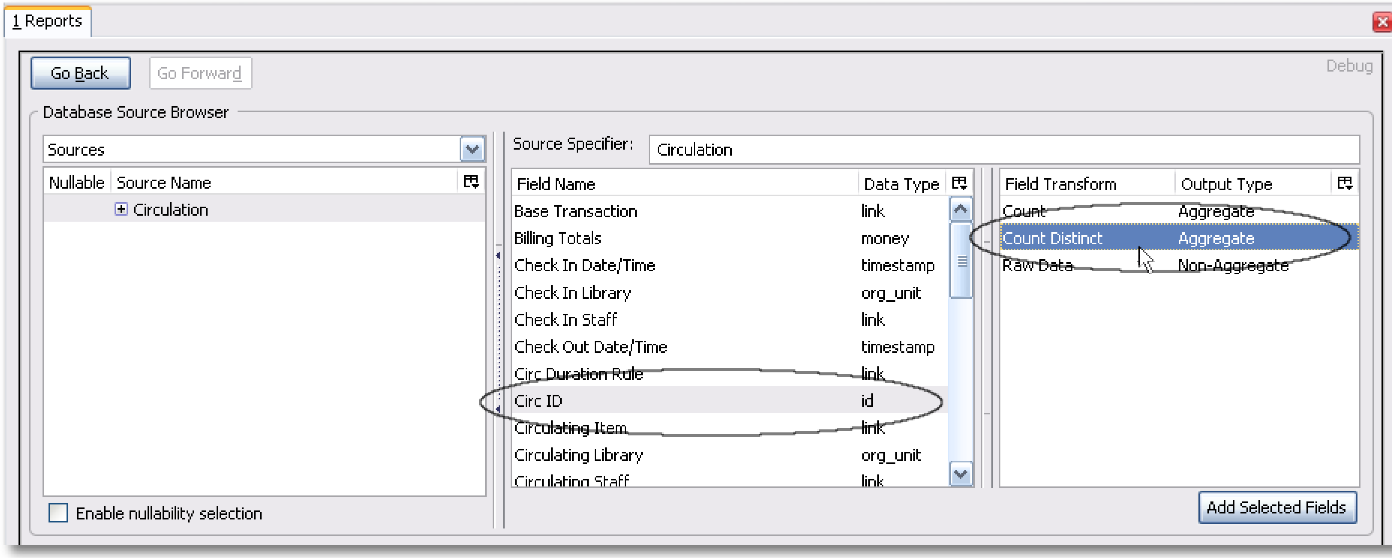
4. Select *Circulation* in the *Sources* dropdown menu. Note that the *Core Sources* for reporting are listed first, however it is possible to access all available sources at the bottom of this dropdown menu. You may only specify one source per template.



5. Click on *Circulation* to retrieve all the field names in the Field Name pane. Note that the *Source* Specifier (above the middle and right panes) shows the path that you took to get to the specific field.

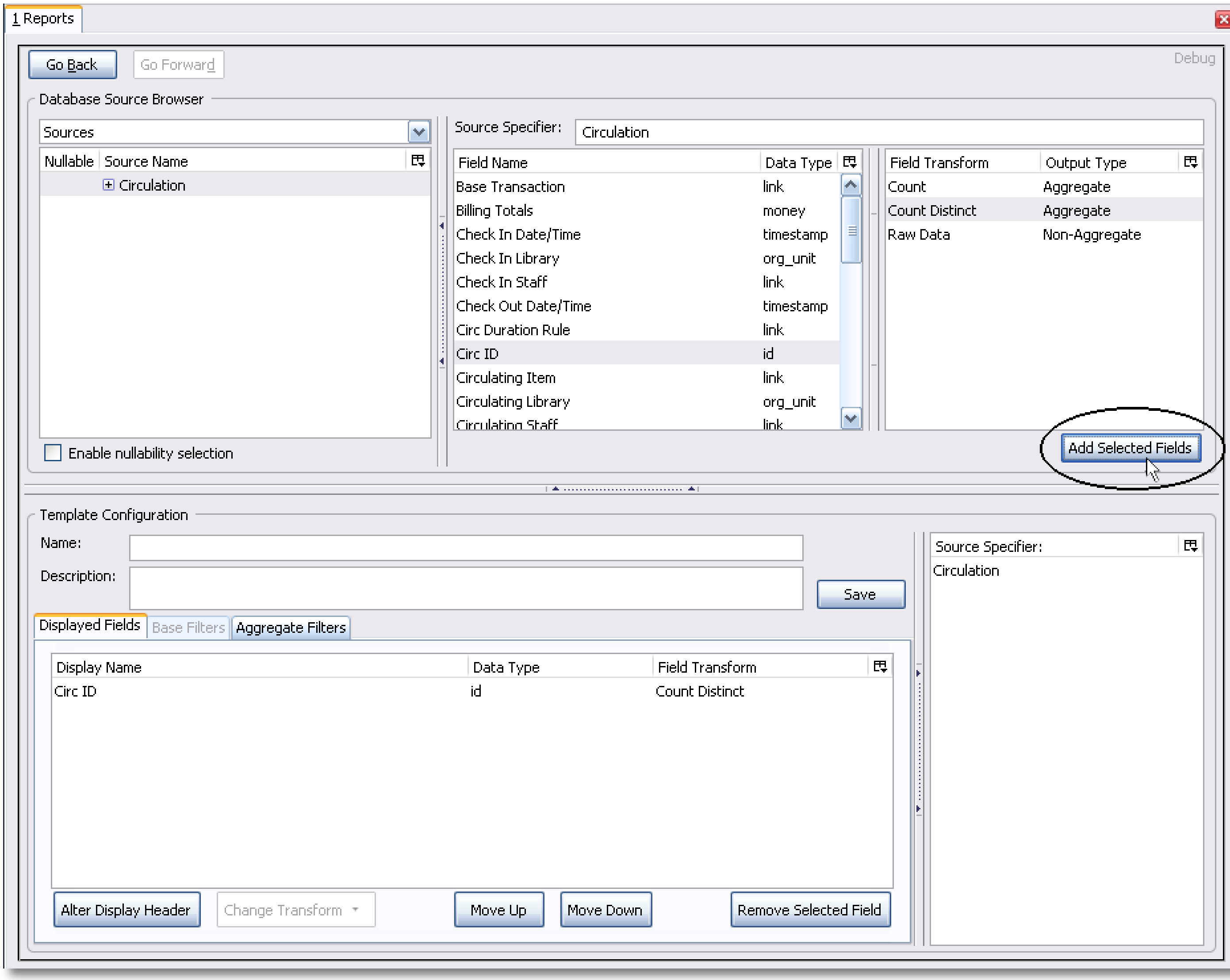


6. Select *Circ ID* in the middle *Field Name* pane, and *Count Distinct* from the right *Field Transform* pane. The *Field Transform* pane is where you choose how to manipulate the data from the selected fields. You are counting the number of circulations.

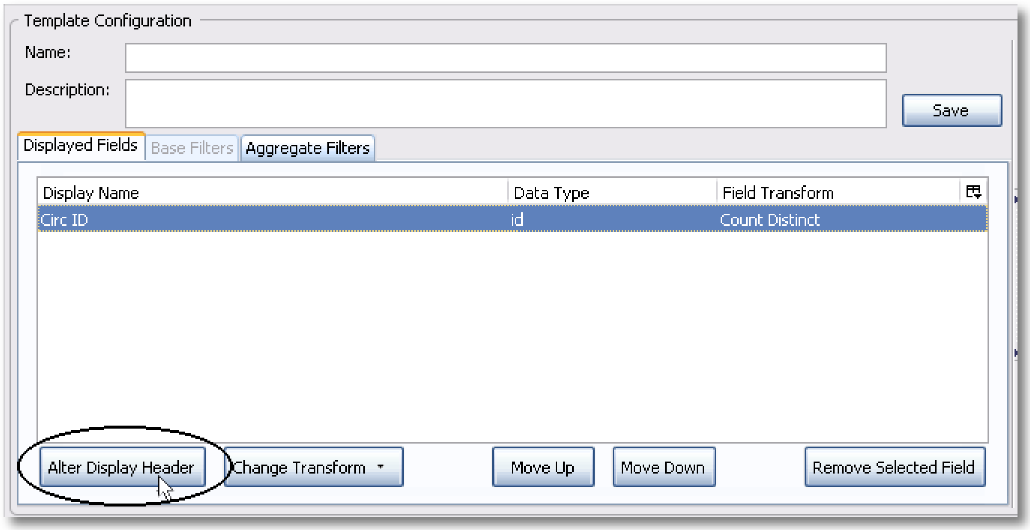


Field Transforms have either an *Aggregate* or *Non-Aggregate* output type. See the section called Field Transforms for more about *Count*, *_Count Distinct*, and other transform options.

7. Click *Add Selected Fields* underneath the *Field Transform* pane to add this field to your report output. Note that *Circ ID* now shows up in the bottom left hand pane under the *Displayed Fields* tab.

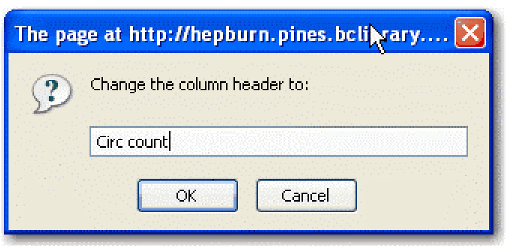


8. *Circ ID* will be the column header in the report output. You can rename default display names to something more meaningful. To do so in this example, select the *Circ ID* row and click *Alter Display Header*.



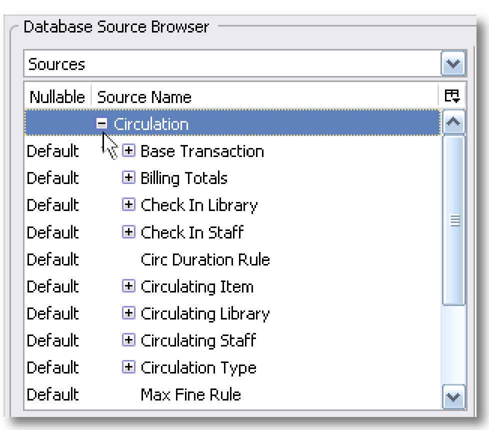
Double-clicking on the displayed field name is a shortcut to altering the display header.

9. Type in the new column header name, for example *Circ count* and click *OK*.

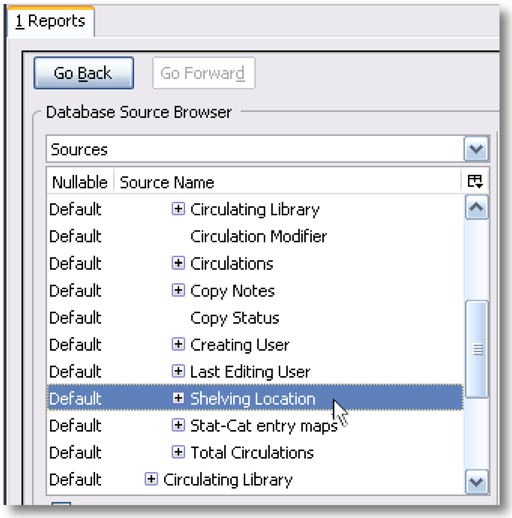


10. Add other data to your report by going back to the *Sources* pane and selecting the desired fields. In this example, we are going to add *Circulating Item -# Shelving Location* to further refine the circulation report.

    In the top left hand *Sources* pane, expand *Circulation*. Depending on your computer you will either click on the + sign or on an arrow to expand the tree.

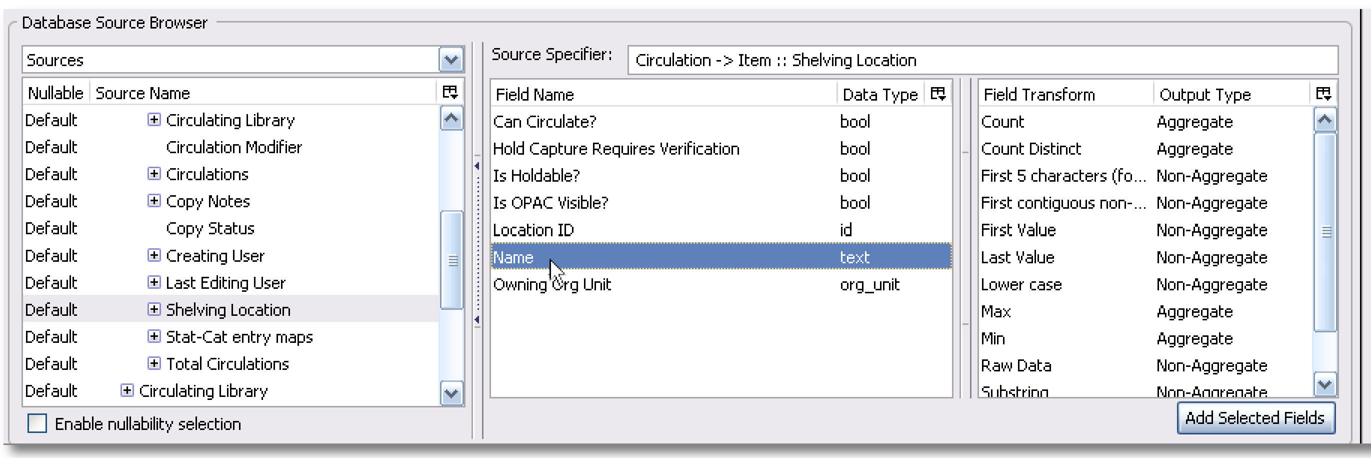


Click on the + or arrow to expand *Circulating Item*. Select *Shelving Location*.

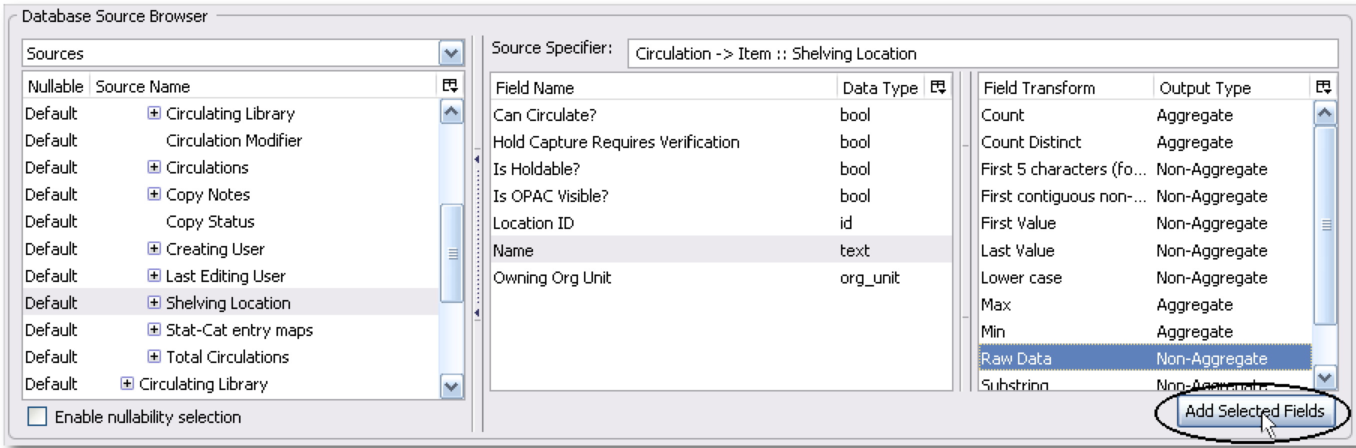


When you are creating a template take the shortest path to the field you need in the left hand Sources pane. Sometimes it is possible to find the same field name further in the file structure, but the shortest path is the most efficient.

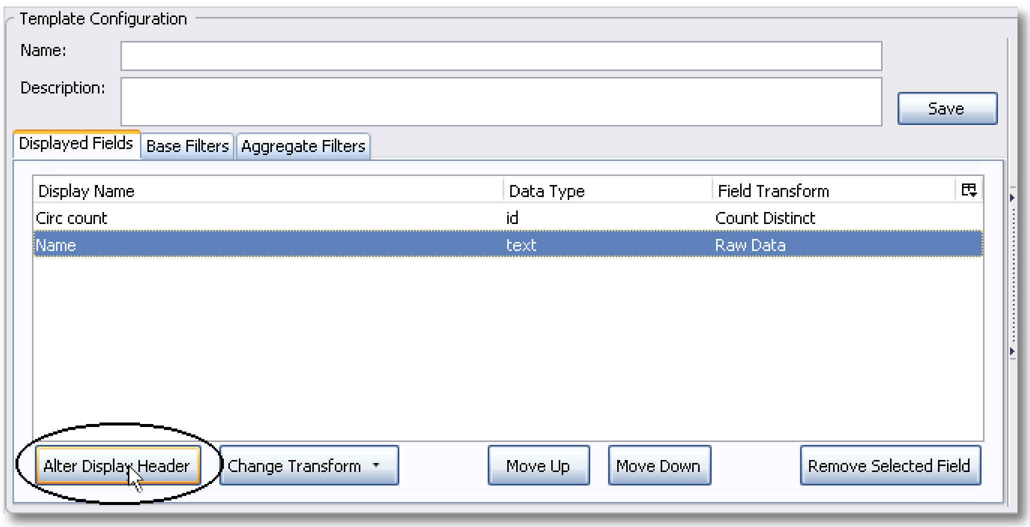
In the Field Name pane select Name.



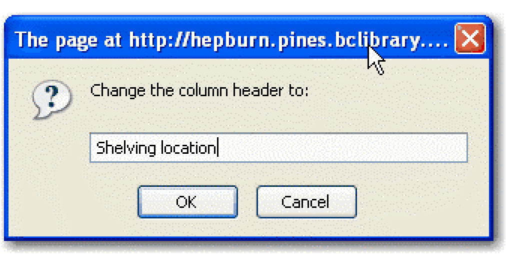
In the upper right *Field Transform* pane, select *Raw Data* and click *Add Selected* Fields. Use *Raw Data* when you do not wish to transform field data in any manner.



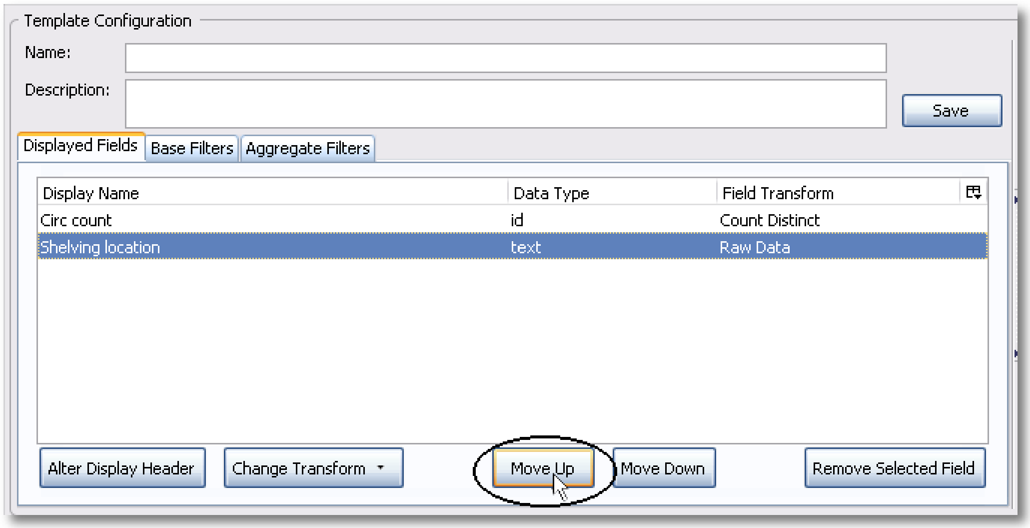
Name will appear in the bottom left pane. Select the Name row and click *Alter Display Header*.



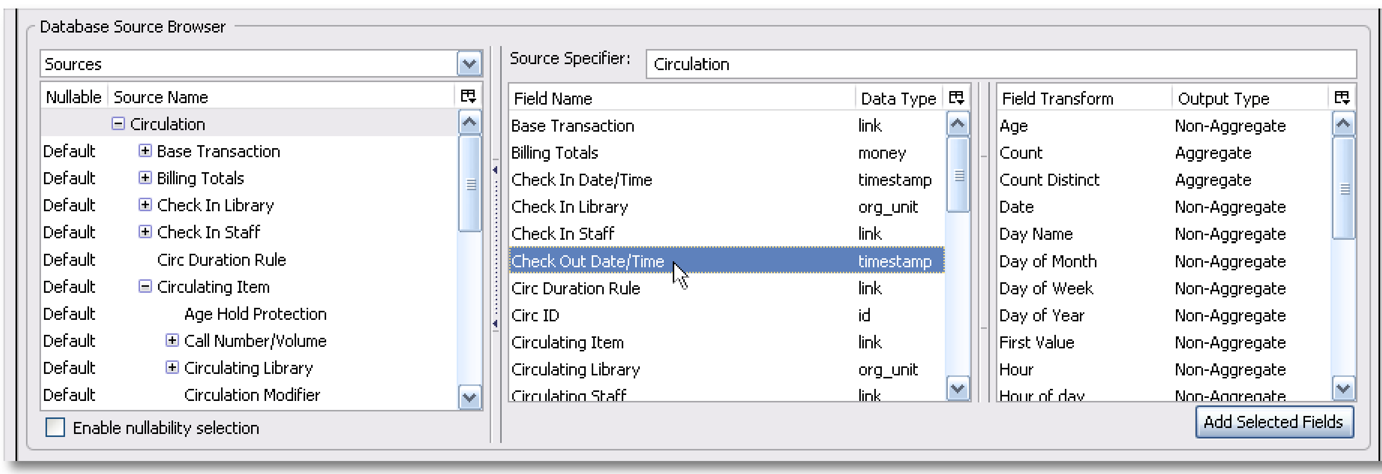
11.Enter a new, more descriptive column header, for example, *Shelving location*. Click *OK*.



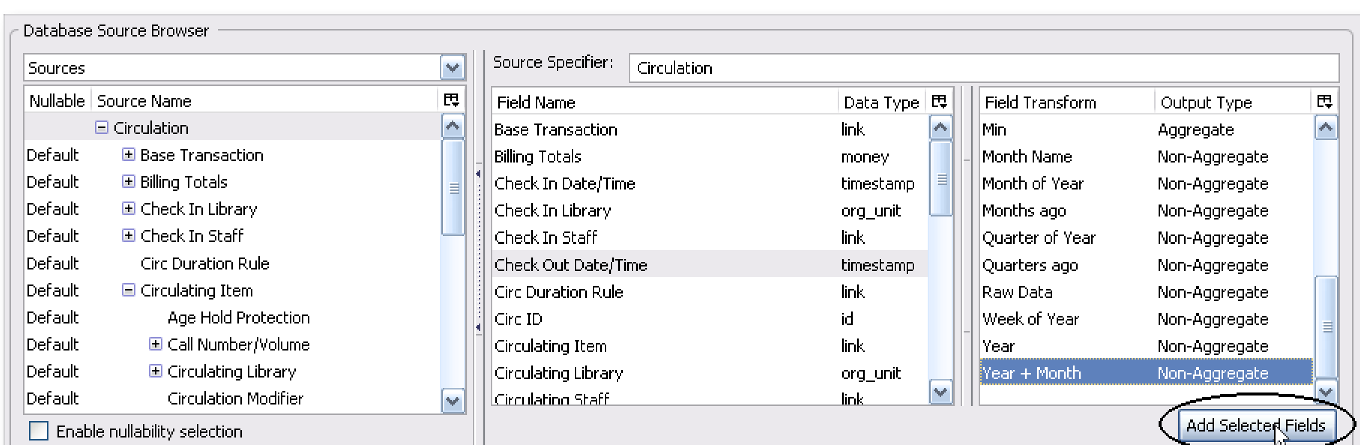
12.Note that the order of rows (top to bottom) will correspond to the order of columns (left to right) on the final report. Select *Shelving location* and click on *Move Up* to move *Shelving location* before *Circ count*.



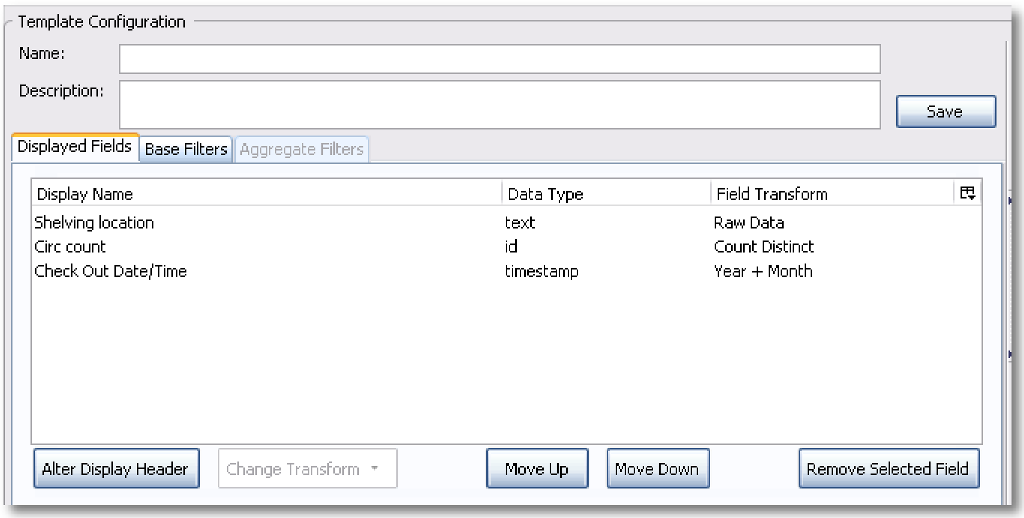
13.Return to the *Sources* pane to add more fields to your template. Under *Sources* click *Circulation*, then select *Check Out Date/Time* from the middle *Field Name* pane.



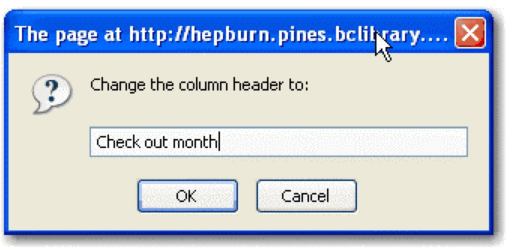
14.Select *Year + Month* in the right hand *Field Transform* pane and click *Add Selected Fields*



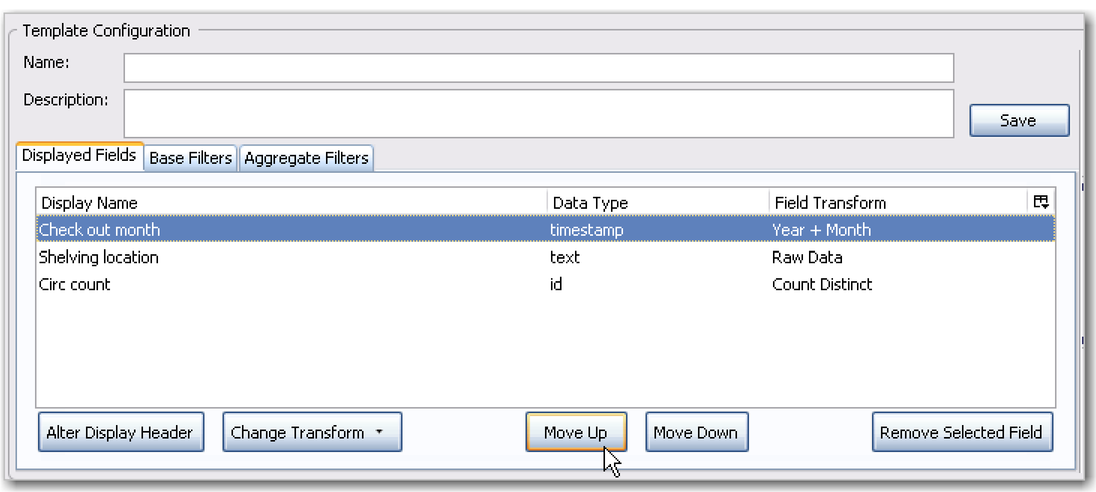
15.*Check Out Date/Time* will appear in the *Displayed Fields* pane. In the report it will appear as a year and month *(YYYY-MM)* corresponding to the selected tranform.



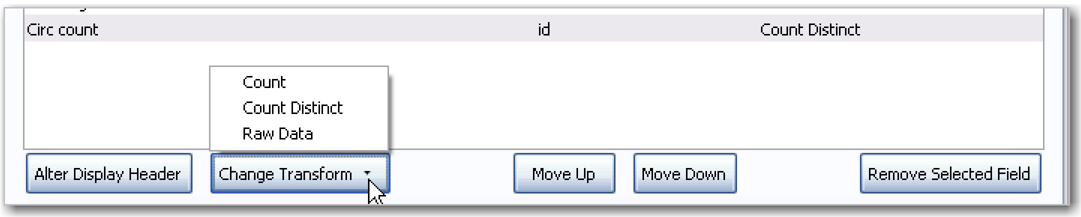
16.Select the *Check Out Date/Time* row. Click *Alter Display Header* and change the column header to *Check out month*.



17.Move *Check out month* to the top of the list using the *Move Up* button, so that it will be the first column in an MS Excel spreadsheet or in a chart. Report output will sort by the first column.



Note the *Change Transform* button in the bottom left hand pane. It has the same function as the upper right *Field Transform* pane for fields that have already been added.



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”.

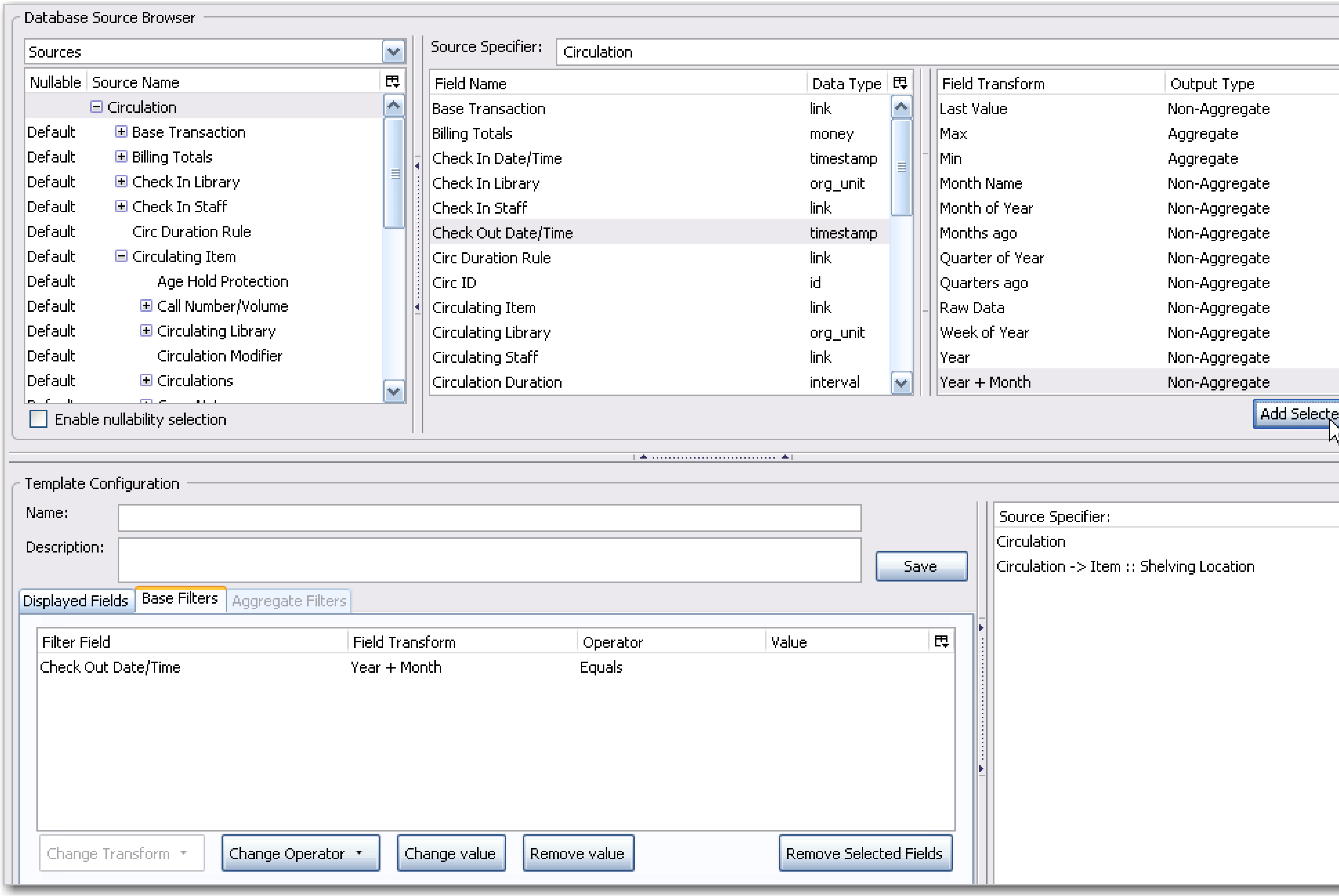
There are many available operators when using filters. Some examples are *Equals*, *In list*, is *NULL*, *Between*, *Greater than* or *equal to*, and so on. *In list* is the most flexible operator, and in this case will allow you flexibility when running a report from this template. For example, it would 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.

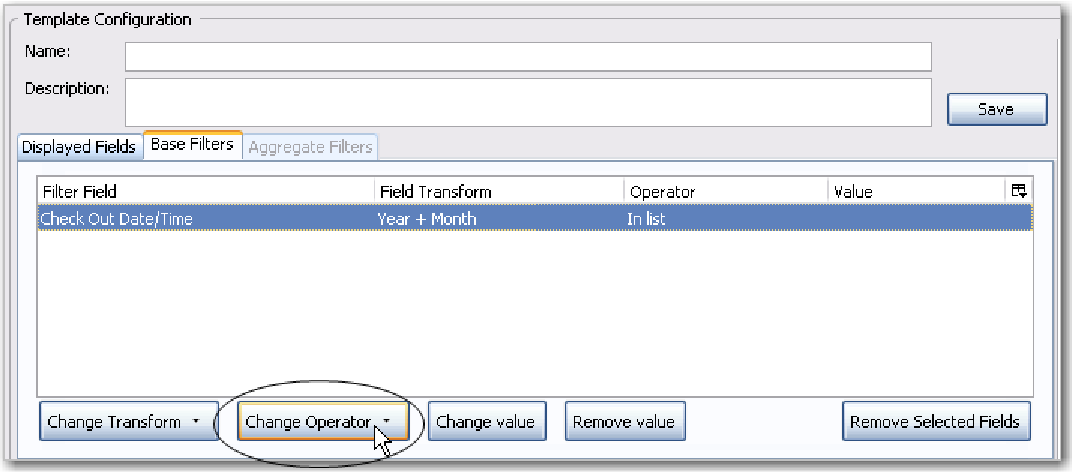
Using Base Filters

1. Select the *Base Filters* tab in the bottom *Template Configuration* pane.

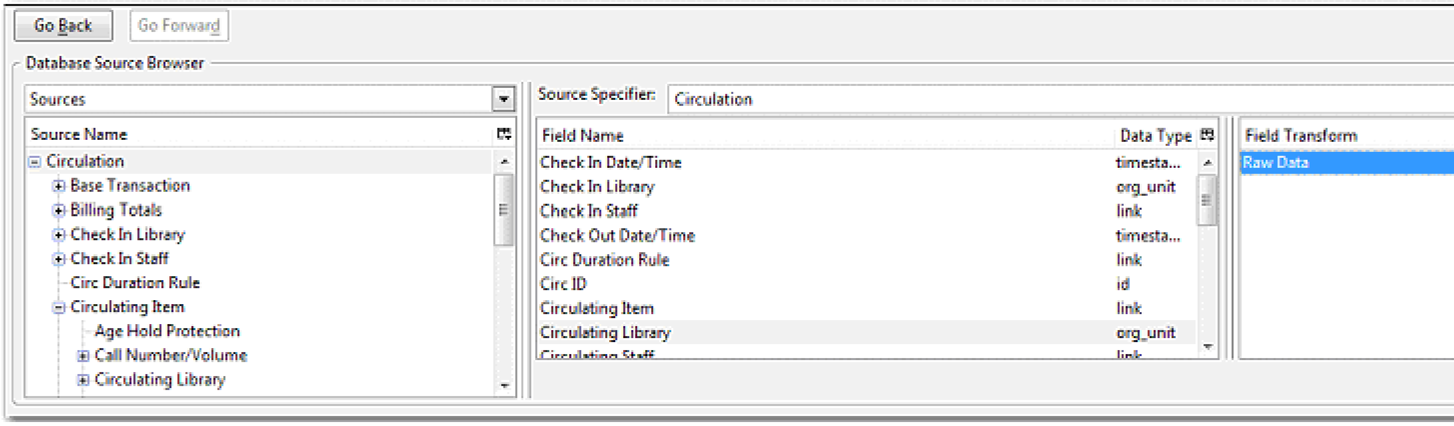
2. For this circulation statistics example, select *Circulation -# Check Out Date/Time -# Year + Month* and click on *Add Selected Fields*. You are going to filter on the time period.



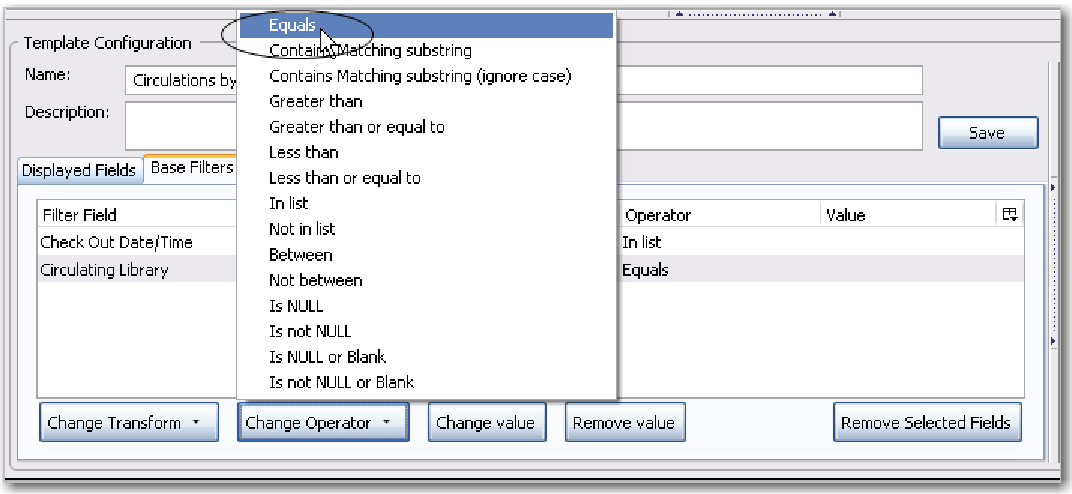
3. Select *Check Out Date/Time*. Click on *Change Operator* and select *In list* from the dropdown menu.



4. To filter on the location of the circulation select *Circulation -# Circulating library -# Raw Data* and click on *Add Selected Fields*.

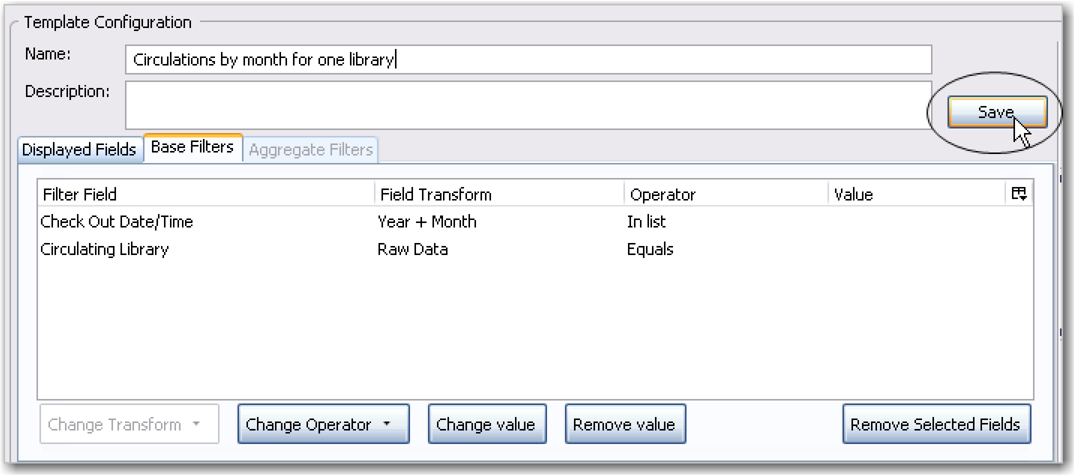


5. Select *Circulating Library* and click on *Change Operator* and select *Equals*. Note that this is a template, so the value for *Equals* will be filled out when you run the report.

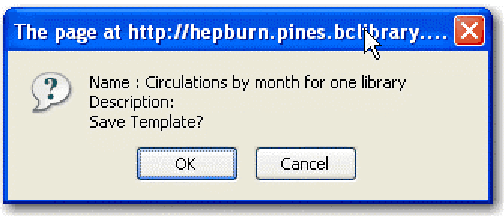


For multi-branch libraries, you would select *Circulating Library* with *In list* as the operator, so you could specify the branch(es) when you run the report. This leaves the template configurable to current requirements. In comparison, sometimes you will want to hardcode true/false values into a template. For example, deleted bibliographic records remain in the database, so perhaps you want to hardcode *deleted=false*, so that deleted records don't show up in the results. You might want to use *deleted=true*, for a template for a report on deleted items in the last month.

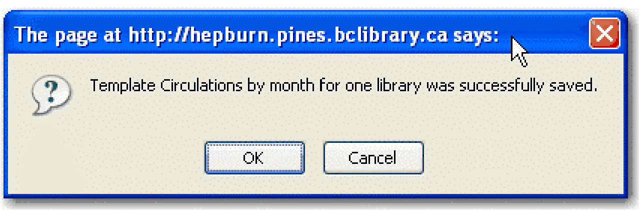
6. Once you have configured your template, you must name and save it. Name this template *Circulations by month for one library*. You can also add a description. In this example, the title is descriptive enough, so a description is not necessary. Click *Save*.



7. Click *OK*.

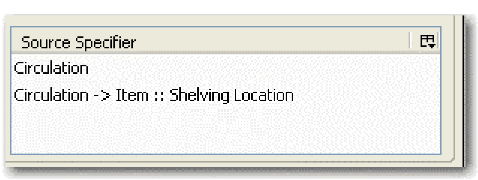


8. You will get a confirmation dialogue box that the template was successfully saved. Click OK.



After saving it is not possible to edit a template. To make changes you will need to clone it and edit the clone

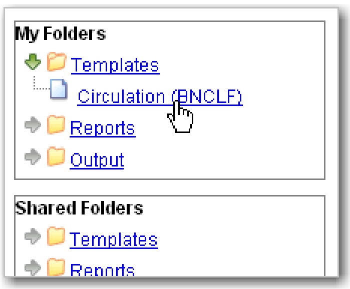
The bottom right hand pane is also a source specifier. By selecting one of these rows you will limit the fields that are visible to the sources you have specified. This may be helpful when reviewing templates with many fields. Use **Ctrl+Click** to select or deselect items.



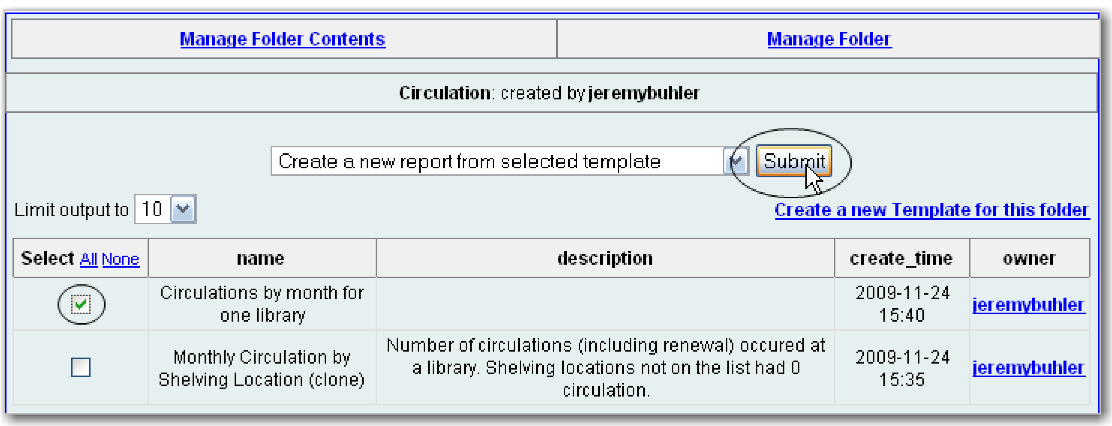
Chapter 62. Generating Reports from Templates

Now you are ready to run the report from the template you have created.

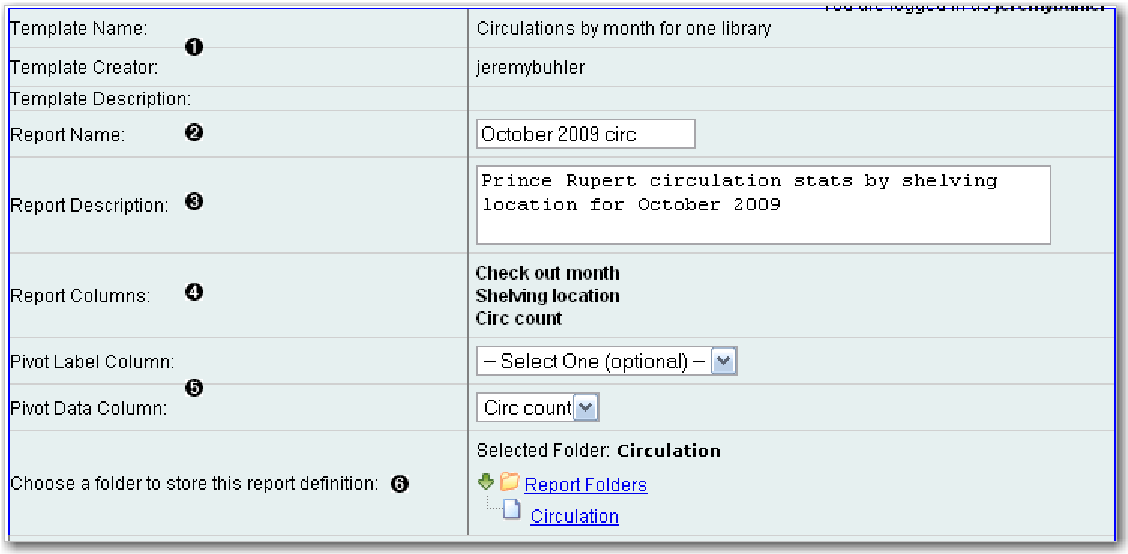
1. In the My Folders section click the arrow next to *Templates* to expand this folder and select *circulation*.



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*.



3. Complete the first part of report settings. Only *Report Name* and *Choose a folder…* are required fields.



1) *Template Name*, *Template Creator*, and *Template Description* are for informational purposes only. They are hard coded when the template is created. At the report definition stage it is not possible to change them.

2) *Report Name* is required. Reports stored in the same folder must have unique names.

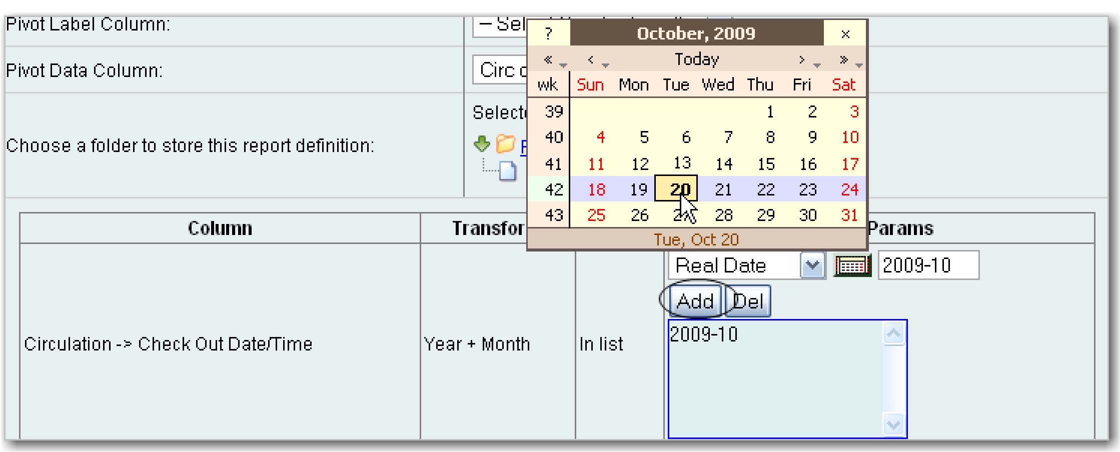
3) *Report Description* is optional but may help distinguish among similar reports.

4) *Report Columns* lists the columns that will appear in the output. This is derived from the template and cannot be changed during report definition.

5) *Pivot Label Column* and *Pivot Data Column* are optional. Pivot tables are a different way to view data. If you currently use pivot tables in MS Excel it is better to select an Excel output and continue using pivot tables in Excel.

6) You must choose a report folder to store this report definition. Only report folders under My Folders are available. Click on the desired folder to select it.

4. Select values for the *Circulation* > *Check Out Date/Time*. Use the calendar widget or manually enter the desired dates, then click Add to include the date on the list. You may add multiple dates.

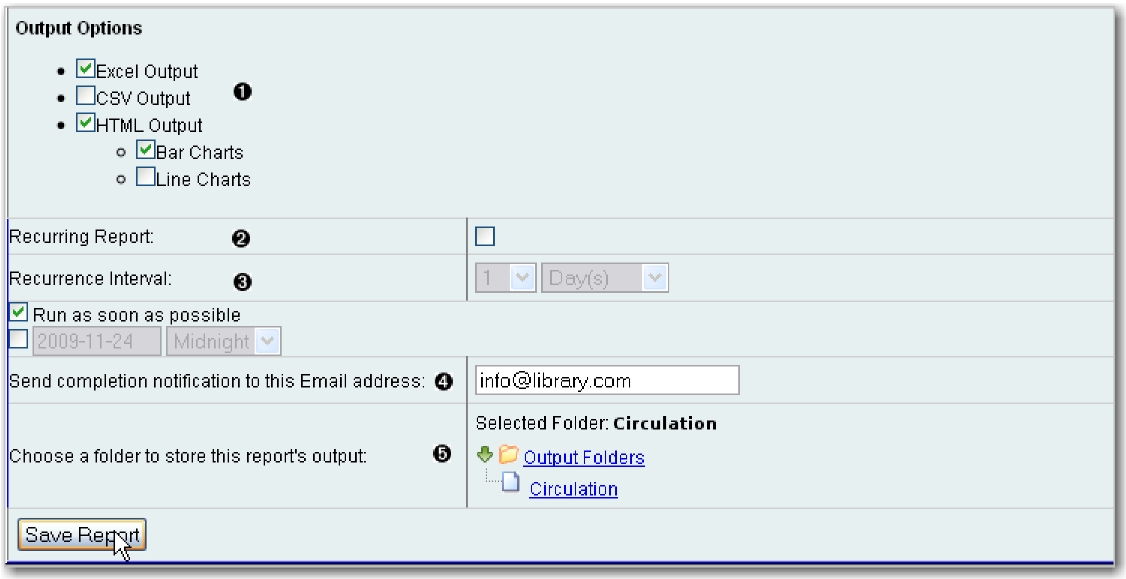


The Transform for this field is Year + Month, so even if you choose a specific date (2009-10-20) it will appear as the corresponding month only (2009-10).

It is possible to select **relative dates**. If you select a relative date 1 month ago you can schedule reports to automatically run each month. If you want to run monthly reports that also show comparative data from one year ago, select a relative date 1 month ago, and 13 months ago.

5. Select a value for the *Circulating Library*.

6. Complete the bottom portion of the report definition interface, then click *Save*.



1) Select one or more output formats. In this example the report output will be available as an Excel spreadsheet, an HTML table (for display in the staff client or browser), and as a bar chart.

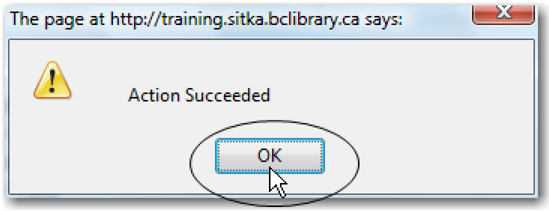
2) If you want the report to be recurring, check the box and select the *Recurrence Interval* as described in Recurring Reports. In this example, as this is a report that will only be run once, the *Recurring Report* box is not checked.

3) Select *Run* as soon as possible for immediate output. It is also possible to set up reports that run automatically at future intervals.

4) It is optional to fill out an email address where a completion notice can be sent. The email will contain a link to password-protected report output (staff login required). If you have an email address in your Local System Administrator account it will automatically appear in the email notification box. However, you can enter a different email address or multiple addresses separated by commas.

7. Select a folder for the report’s output.

8. You will get a confirmation dialogue box that the Action Succeeded. Click *OK*.



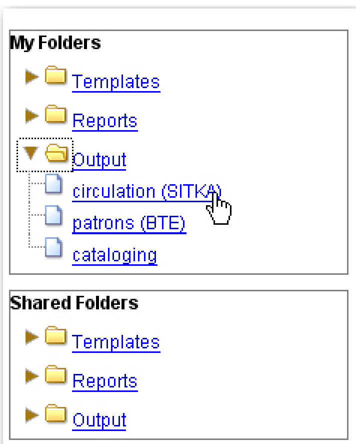
Once saved, reports stay there forever unless you delete them.

Chapter 63. Viewing Report Output

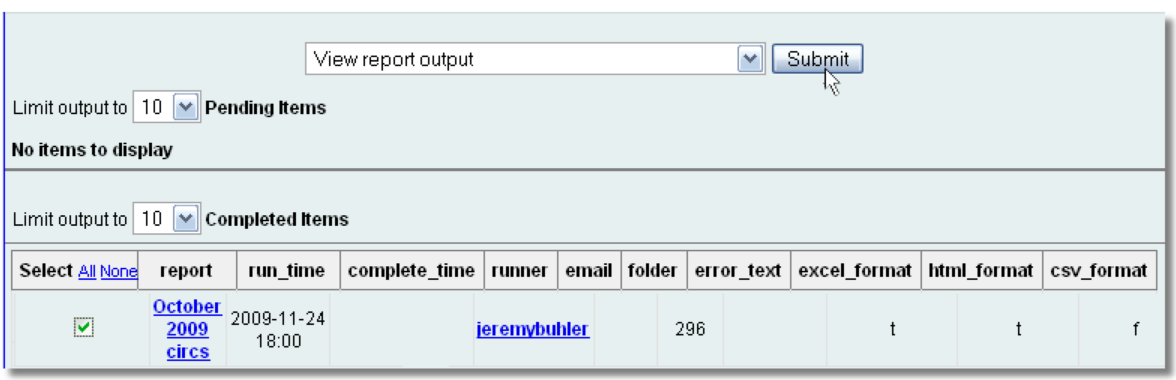
When a report runs Evergreen sends an email with a link to the output to the address defined in the report. Output is also stored in the specified Output folder and will remain there until manually deleted.

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*.



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:

File Edit View Insert Format Tools Data Window Help

Arial 10 B I

A1 fx Check out month

	A	B	C	D	E
1	Check out month	Shelving location	Circ count		
2	2009-10	Adult Fiction	10		
3	2009-10	Adult Fiction - Second Floor	1125		
4	2009-10	Adult Non-Fiction	1188		
5	2009-10	Adult Non-fiction	12		
6	2009-10	Adult Paperbacks - Mystery	1		
7	2009-10	Adult Videos	368		
8	2009-10	Adult Videos - Educational	66		
9	2009-10	Biographies	34		
10	2009-10	CD-ROMs	3		
11	2009-10	CDs	144		
12	2009-10	Children's Videos	232		
13	2009-10	Children's Videos - Education	2		
14	2009-10	Christmas Storage	5		
15	2009-10	DVDs	981		
16	2009-10	JP Basement Storage	56		
17	2009-10	Juvenile Easy Readers	152		
18	2009-10	Juvenile Fiction	476		
19	2009-10	Juvenile Non-Fiction	199		
20	2009-10	Juvenile Picture Books	634		
21	2009-10	Large Print	73		
22	2009-10	Literacy Collection	4		
23	2009-10	Multilingual Collection	32		
24	2009-10	Multilingual Juvenile French	22		

Chapter 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 Creating Folders.

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*.

> note
>
> By default Evergreen only displays the first 10 items in any folder. To view all content, change the Limit output setting from 10 to All.

5. Choose the folder where you want to save the cloned template, then click *Select Folder*. Only template folders created with your account will be visible. If there are no folders to choose from please see Creating Folders.
6. The cloned template opens in the template editor. From here you may modify the template by adding, removing, or editing fields and filters as described in Creating Templates. *Template Name* and *Description* can also be edited. When satisfied with your changes click *Save*.
7. Click *OK* in the resulting confirmation windows.

Once saved it is not possible to edit a template. To make changes, clone a template and change the clone.

Chapter 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 Official Postgres documentation 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> </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>
  <link 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 Viewing Report Output.

To set up a monthly recurring report follow the procedure in Generating Reports from Templates but make the changes described below.

1. Select the Recurring Report check-box and set the recurrence interval to 1 month.
2. Do not select Run ASAP. Instead schedule the report to run early on the first day of the next month. Enter the date in *YYYY-MM-DD* format.
3. Ensure there is an email address to receive completion emails. You will receive an email completion notice each month when the output is ready.
4. Select a folder for the report's output.
5. Click Save Report.
6. You will get a confirmation dialogue box that the Action Succeeded. Click OK.

You will get an email on the 1st of each month with a link to the report output. By clicking this link it will open the output in a web browser. It is still possible to login to the staff client and access the output in Output folder.

How to stop or make changes to an existing recurring report? Sometimes you may wish to stop or make changes to a recurring report, e.g. the recurrence interval, generation date, email address to receive completion email, output format/folder or even filter values (such as the number of days overdue). You will need to delete the current report from the report folder, then use the above procedure to set up a new recurring report with the desired changes. Please note that deleting a report also deletes all output associated with it.

> 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

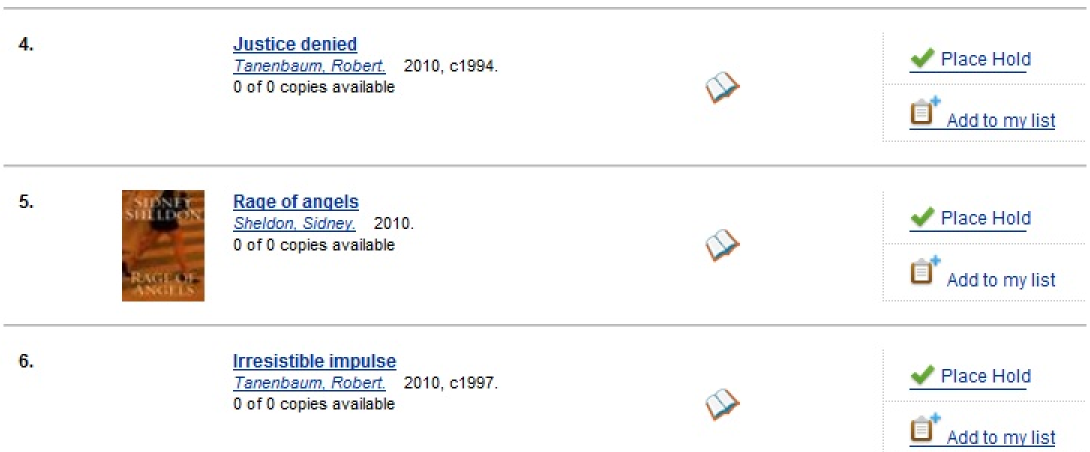
The **My Lists** feature replaces the bookbag feature that was available in versions proior to 2.2. The **My Lists** feature is a part of the Template Toolkit OPAC that is available in version 2.2. This feature enables you to create temporary and permanent lists; create and edit notes for items in lists; 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**.



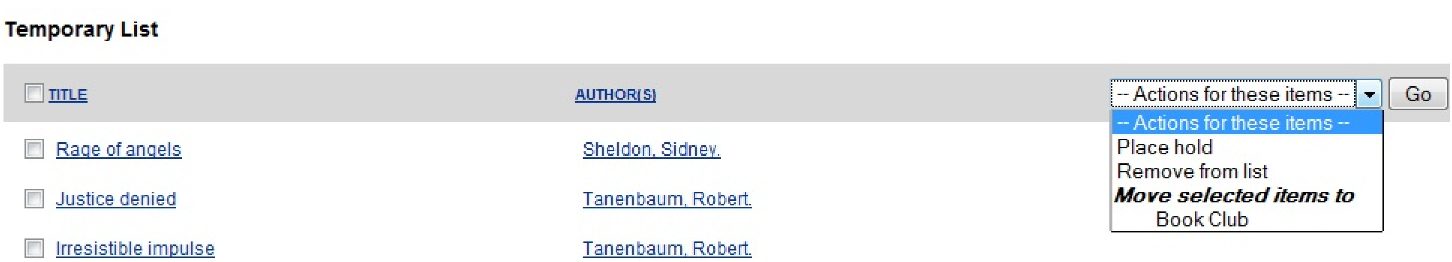
4) Scroll up to the gray row on top of the **Search Results**. Click **View My List**

5) Items are added to a temporary list. Your temporary list appears at the bottom of the screen.

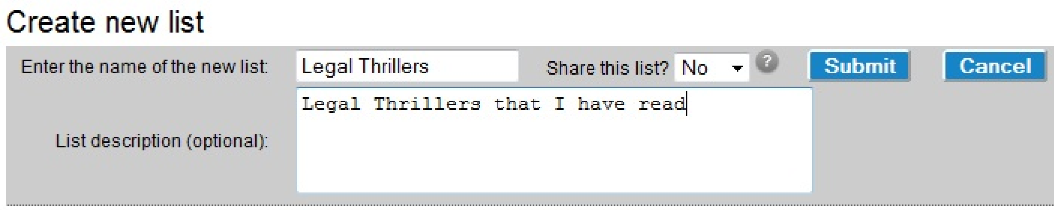
6) The **Actions for these items** menu on the right side of the screen demonstrates the actions that you can apply to this list. You can place holds on items in your temporary list; remove items from the list; or move selected items to a permanent list.

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.



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.



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.

11) Click **Go**.

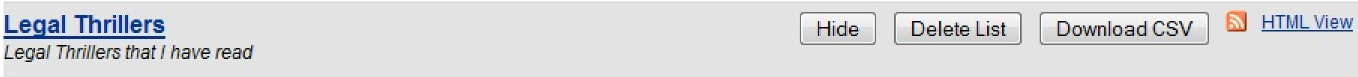
12) Your existing lists appear. Click on a list to view the items in the list. You can sort the items in the permanent list. You can also add, edit, and remove notes.

13) Click **Edit** to add or edit a note.

14). Enter desired notes, and click **Save Notes**.

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**.



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 http://evergreen-ils.org/dokuwiki/doku.php?id=evergreen-admin:customizations:i18n

- polib
- translate-toolkit
- levenshtein
- setuptools
- simplejson
- lxml

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/i18n/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

Current DIG Members

- Hilary Caws-Elwitt, Susquehanna County Library
- Karen Collier, Kent County Public Library
- George Duimovich, NRCan Library
- Sally Fortin, Equinox Software
- Wolf Halton, Lyrasis
- June Rayner, eiNetwork
- Steve Sheppard
- Ben Shum, Bibliomation
- Roni Shwaish, eiNetwork
- Robert Soulliere, Mohawk College
- Tim Spindler, C/W MARS
- Lindsay Stratton, Pioneer Library System
- Yamil Suarez, Berklee College of Music

- Jenny Turner, PALS

Appendix B. Licensing

Appendix C. Admonitions

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