Using Evergreen's Acquisitions Module

Documentation Interest Group

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Table of Contents

List of Tables

Part I. Introduction

Table of Contents

Chapter 1. About This Documentation

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

This guide to Evergreen is intended to meet the needs of library workers who use Evergreen's Acquisitions module. It is organized into Parts, Chapters, and Sections addressing key aspects of the software.

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

Chapter 2. About Evergreen

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

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

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

• Stable, even under extreme load.

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

• Flexible, to accommodate the varied needs of libraries.

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

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

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

Part II. Logging into Evergreen

Table of Contents

Chapter 3. Registering a Workstation

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

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

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

2. Create a unique workstation name.

3. Click Register

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

Chapter 4. Basic Login,

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

2. Enter your Username and Password.

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

Chapter 5. Logging Out

To log out of the client:

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

2. Select Log Out

> Exiting all browser windows will automatically log you out of the web client. If you only close the tab where the web client is loaded, you will remain logged in.

Part III. Best Practices for Using the Browser

Table of Contents

Chapter 6. Pop-up Blockers

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

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

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

Chapter 7. Setting Browser Defaults for Web Client

To ensure that staff can easily get to the web client portal page on login without additional steps, you can set the browser's home page to default to the web client.

Setting the Web Client as the Home Page in Chrome

1. In the top-right corner of your browser, click the Chrome menu.

2. Select Settings.

3. In the On startup section, select Open a specific page or set of pages.

4. Click the Set Pages link.

5. Add https://localhost/eg/staff/ to the Enter URL box and click OK.

Setting the Web Client as the Home Page in Firefox

1. In the top-right corner of your browser, click the menu button.

2. Click Options.

3. In the When Firefox starts: dropdown menu, select Show my home page.

4. In the Home Page box, add https://localhost/eg/staff/ and click OK.

Turning off print headers and footers in Firefox

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

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

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

2. Click the Page Setup… button.

3. Go to the Margins & Header/Footer tab.

4. Make sure that all dropdown menus are set to --blank--.

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

1. In the Firefox address bar, type about:config.

2. If a warning appears, click I accept the risk.

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

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

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

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

Turning off print headers and footers in Chrome

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

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

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

2. Click More Settings.

3. Uncheck Headers and Footers.

Chapter 8. Tab Buttons and Keyboard Shortcuts

Now that the client will be loaded in a web browser, users can use browser-based tab controls and keyboard shortcuts to help with navigation. Below are some tips for browser navigation that can be used in Chrome and Firefox on Windows PCs.

- Use CTRL-T or click the browser's new tab button to open a new tab.

- Use CTRL-W or click the x in the tab to close the tab.

- Undo closing a tab by hitting CTRL-Shift-T.

- To open a link from the web client in a new tab, CTRL-click the link or right-click the link and select Open Link in New Tab. Using this method, you can also open options from the web client's dropdown menus in a new tab

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

Setting New Tab Behavior

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

Part IV. Configuring Evergreen for your workstation

Table of Contents

Chapter 9. Setting search defaults

- Go to Administration → Workstation.

- Use the dropdown menu to select an appropriate Default Search Library. The default search library setting determines what library is searched from the advanced search screen and portal page by default. You can override this setting when you are actually searching by selecting a different library. One recommendation is to set the search library to the highest point you would normally want to search.

- Use the dropdown menu to select an appropriate Preferred Library. The preferred library is used to show copies and electronic resource URIs regardless of the library searched. One recommendation is to set this to your home library so that local copies show up first in search results.

- Use the dropdown menu to select an appropriate Advanced Search Default Pane. Advanced search has secondary panes for Numeric and MARC Expert searching. You can change which one is loaded by default when opening a new catalog window here.

Chapter 10. Turning off sounds

- Go to Administration → Workstation.

- Click the checkbox labeled Disable Sounds?

Part V. Acquisitions

Table of Contents

Chapter 11. Initial Configuration

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)

- 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

- Providers

More details can be found in the Staff Client System Administration manual.

Chapter 12. Acquisitions 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 → Download marc info and import into Evergreen

No → 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 → Evergreen will automatically upload purchase order to provider

No → 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

Part VI. Selection Lists and Purchase Orders

Table of Contents

Chapter 13. 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.
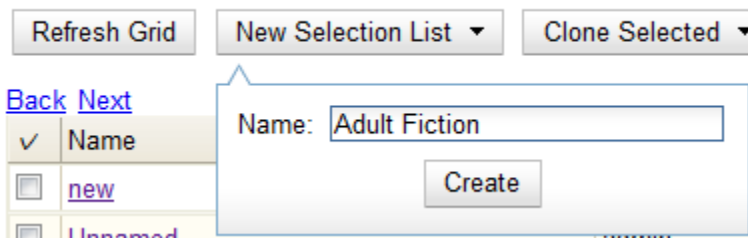
Add items to a selection list

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.
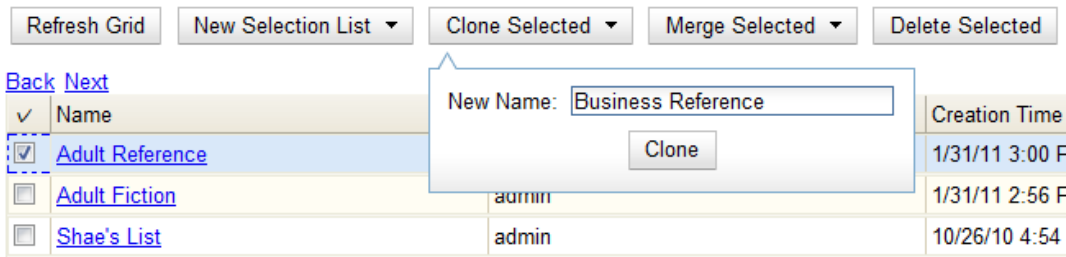
Merge selection lists

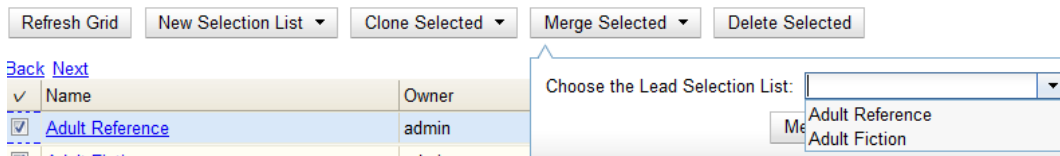You can merge two or more selection lists into one selection list.

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.

Chapter 14. Purchase Orders

Purchase Orders allow you to keep track of orders and, if EDI is enabled, communicate with your provider. To view purchase orders, click Acquisitions → Purchase Orders.

Naming your purchase order

You can give your purchase order a name.

When creating a purchase order or editing an existing purchase order, the purchase order name must be unique for the ordering agency. Evergreen will display a warning dialog to users, if they attempt to create or edit purchase order names that match the names of already existing purchase orders at the same ordering agency. The Duplicate Purchase Order Name Warning Dialog includes a link that will open the matching purchase order in a new tab.

Purchase Order Names are case sensitive.

Duplicate PO Name Detection When Creating a New Purchase Order

When a duplicate purchase order name is detected during the creation of a new purchase order, the user may:

• Click View PO to view the purchase order with the matching name. The purchase order will open in a new tab.

• Click Cancel to cancel the creation of the new purchase order.

• Within the Name (optional) field, enter a different, unique name for the new purchase order.

If the purchase order name is unique for the ordering agency, the user will continue filling in the remaining fields and click Save.

If the purchase order name is not unique for the ordering agency, the Save button will remain grayed out to the user until the purchase order is given a unique name.

Duplicate PO Name Detection When Editing the Name of an Existing Purchase Order

To change the name of an existing purchase order:

1. Within the purchase order, the Name of the purchase order is a link (located at the top left-hand side of the purchase order). Click the PO Name.

2. A new window will open, where users can rename the purchase order.

3. Enter the new purchase order name.

4. Click OK.
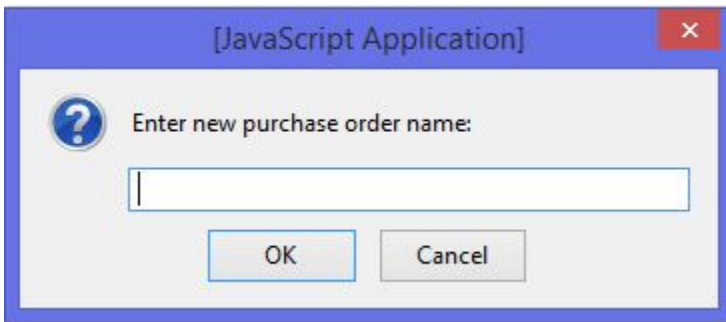
If the new purchase order name is unique for the ordering agency, the purchase order will be updated to reflect the new name. If the purchase order name is not unique for the ordering agency, the purchase order will not be updated with the new name. Instead, the user will see the Duplicate Purchase Order Name Warning Dialog within the purchase order.

When a duplicate purchase order name is detected during the renaming of an existing purchase order, the user may:

• Click View PO to view the purchase order with the matching name. The purchase order will open in a new tab.

• Repeat the steps to change the name of an existing purchase order and make the name unique.

Activating your purchase order

When the appropriate criteria have been met the Activate Order button will appear and you can proceed with the following:

1. Click the button Activate Order.

2. When you activate the order the bibliographic records and copies will be imported into the catalogue using the Vandelay interface, if not previously imported. See How to Load Bibliographic Records and Items into the Catalogue for instructions on using the Vandelay interface.

3. The funds associated with the purchases will be encumbered.

After you click Activate Order, you will be presented with the record import interface for records that are not already in the catalog. Once you complete entering in the parameters for the record import interface, the progress screen will appear. As of Evergreen 2.9, this progress screen consists of a progress bar in the foreground, and a tally of the following in the background of the bottom-left corner:

- Lineitems processed

- Vandelay Records processed

- Bib Records Merged/Imported

- ACQ Copies Processed

- Debits Encumbered

- Real Copies Processed

Activate Purchase Order without loading items

It is possible to activate a purchase order without loading items. Once the purchase order has been activated without loading items, it is not possible to load the items. This feature should only be used in situations where the copies have already been added to the catalogue, such as:

- Cleaning up pre-acquisitions backlog

- Direct purchases that have already been catalogued

To use this feature, click the Activate Without Loading Items button.

Activate Purchase Order with Zero Copies

By default, a purchase order cannot be activated if a line item on the purchase order has zero copies. To activate a purchase order with line items that have zero copies, check the box Allow activation with zero-copy lineitems.

Line item statuses

The purchase orders interface keeps track of various statuses that your line items might be in. This section lists some of the statuses you might see when looking at purchase orders.

Canceled and Delayed Items

In the purchase order interface, you can easily differentiate between canceled and delayed items. Each label begins with Canceled or Delayed. To view the list, click Administration → Acquisitions Administration → Cancel Reasons.

The cancel/delay reason label is displayed as the line item status in the list of line items or as the copy status in the list of copies.

A delayed line item can now be canceled. You can mark a line item as delayed, and if later, the order cannot be filled, you can change the line item's status to canceled. When delayed line items are canceled, the encumbrances are deleted.

Cancel/delay reasons now appear on the worksheet and the printable purchase order.

> **note** When all the copies of a line item are canceled through the Acquisitions interface, the parent lineitem is also canceled. The cancel reason will be calculated based on the settings of:
>
> 1. The cancel reason for the last copy to be canceled copy if the cancel reason's Keep Debits setting is true.
>
> 2. The cancel reason for any other copy on the line item if the cancel reason's Keep Debits setting is true.
>
> 3. The cancel reason for the last copy to be canceled if no copies on the line item have a cancel reason where Keep Debits is true.

Paid PO Line Items

Purchase Order line items are marked as "Paid" in red text when all non-cancelled copies on the line item have been invoiced.

Chapter 15. 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.

New Brief Record

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

Save Record

Chapter 16. MARC Federated Search

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

1. Click Acquisitions → MARC Federated Search.

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

Search Sources

- ☑ Evergreen Catalog
- ☐ OCLC
- ☑ Library of Congress
- ☐ ‡biblios.net

Search Fields

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

Submit   Clear Form

3. A list of results will appear. Click the "Copies" link to add copy information to the line item. See 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.

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

Chapter 17. Line Items

Return to Line Item

This feature enables you to return to a specific line item on a selection list, purchase order, or invoice after you have navigated away from the page that contained the line item. This feature is especially useful when you must identify a line item in a long list. After working with a line item, you can return to your place in the search results or the list of line items.

To use this feature, select a line item, and then, depending on the location of the line item, click Return or Return to search. Evergreen will take you back to the specific line item in your search and highlight the line item with a colored box.

For example, you retrieve a selection list, find a line item to examine, and click the Copies link. After editing the copies, you click Return. Evergreen takes you back to your selection list and highlights the line item that you viewed.

This feature is available in General Search Results, Purchase Orders, and Selection Lists, whenever any of the following links are available:

• Selection List

• Purchase Order

• Copies

• Notes

• Worksheet

This feature is available in Invoices whenever any of the following links are available:

- Title

- Selection List

- Purchase Order

Display a Count of Existing Copies on Selection List and Purchase Order Lineitems

When displaying Acquisitions lineitems within the Selection List and Purchase Order interfaces, Evergreen displays a count of existing catalog copies on the lineitem. The count of existing catalog copies refers to the number of copies owned at the ordering agency and / or the ordering agency's child organization units.

The counts display for lineitems that have a direct link to a catalog record. Generally, this includes lineitems created as "on order" based on an existing catalog record and lineitems where "Load Bibs and Items" has been applied.

The count of existing copies does not include copies that are in either a Lost or a Missing status.

The existing copy count displays in the link "bar" located below the Order Identifier within the lineitem.

If no existing copies are found, a "0" (zero) will display in plain text.

If the existing copy count is greater than zero, then the count will display in bold and red on the lineitem.

The user may also hover over the existing copy count to view the accompanying tooltip.
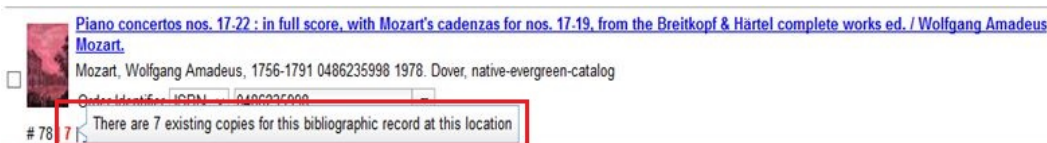
Part VII. Load MARC Order Records

Table of Contents

Chapter 18. Introduction

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. You can both create and activate purchase orders in one step from this interface. You can also load bibs and items into the catalog.

Leveraging the match sets available in the cataloging MARC batch Import interface, you can also utilize record matching mechanisms to prevent the creation of duplicate records.

For detailed instructions on record matching and importing, see the cataloging manual.

Chapter 19. Basic Upload Options

1. Click Acquisitions → Load MARC Order Records.

2. If you want to upload the MARC records to a new purchase order, then check Create Purchase Order.

3. If you want to activate the purchase order at the time of creation, then check Activate Purchase Order.

4. Enter the name of the Provider. The text will auto-complete.

5. Select an org unit from the drop down menu. The context org unit is the org unit responsible for placing and managing the order. It defines what org unit settings (eg copy locations) are in scope, what fiscal year to use, who is allowed to view/modify the PO, where the items should be delivered and the EDI SAN. In the case of a multi-branch system uploading records for multiple branches, choosing the system is probably best. Single branch libraries or branches responsible for their own orders should probably select the branch.

6. If you want to upload the records to a selection list, you can select a list from the drop down menu, or type in the name of the selection list that you want to create.

7. Select a Fiscal Year from the dropdown menu that matches the fiscal year of the funds that will be used for the order. If no fiscal year is selected, the system will use the organizational unit's default fiscal year stored in the database. If not fiscal year is set, the system will default to the current calendar year.

Open in New Window

Upload

Create Purchase Order	☑
Activate Purchase Order	☐
Provider	[ ]
Context Org Unit	CONS ▾
Add to Selection List	[▾]
Fiscal Year	2018 ▾

Upload to Queue	[▾]	Or create a new queue	[ ]
Record Match Set	[▾]		
Merge Profile	[▾]		
Import Non-Matching Records	☐	Record Source	[▾]
Merge On Exact Match (901c)	☐		
Merge On Single Match	☐		
Merge On Best Match	☐		
Best/Single Match Minimum Quality Ratio	0.0	New Record Quality / Quality of Best Match	
Insufficient Quality Fall-Through Profile	[▾]		
Load Items for Imported Records	☐		

File to Upload: Choose File | No file chosen   Upload

Chapter 20. Record Matching Options

Use the options below the horizontal rule for the system to check for matching records before importing an order record.

1. Create a queue to which you can upload your records, or add you records to an existing queue

2. Select a Record Match Set from the drop-down menu.

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

4. Select a Record Source from the drop-down menu.

5. If you want to automatically import records on upload, select one or more of the following options.

   a. Import Non-Matching Records - import any records that don't have a match in the system.

   b. Merge on Exact Match (901c) - use only for records that will match on the 901c field.

   c. Merge on Single Match - import records that only have one match in the system.

   d. Merge on Best Match - If more than one match is found in the catalog for a given record, Evergreen will attempt to perform the best match as defined by the match score.

6. To only import records that have a quality equal to or greater than the existing record, enter a Best/Single Match Minimum Quality Ratio. Divide the incoming record quality score, as determined by the match set's quality metrics, by the record quality score of the best match that exists in the catalog. 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, such as 1.1. If you want to bypass all quality restraints, enter a 0 (zero) in this field.

7. Select an Insufficient Quality Fall-Through Profile if desired. This field enables you to indicate that if the inbound record does 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.

8. If your order records contain holdings information, by default, Evergreen will load them as acquisitions copies. (Note: These can be overlayed with real copies during the MARC batch importing process.) Or you can select Load Items for Imported Records to load them as live copies that display in the catalog.

Upload

Create Purchase Order	☑
Activate Purchase Order	☐
Provider	
Context Org Unit	CONS ▾
Add to Selection List	▾
Fiscal Year	2018 ▾

Upload to Queue	▾	Or create a new queue	
Record Match Set	▾		
Merge Profile	▾		
Import Non-Matching Records	☐	Record Source	▾
Merge On Exact Match (901c)	☐		
Merge On Single Match	☐		
Merge On Best Match	☐		
Best/Single Match Minimum Quality Ratio	0.0	New Record Quality / Quality of Best Match	
Insufficient Quality Fall-Through Profile	▾		
Load Items for Imported Records	☐		

File to Upload: Choose File No file chosen   Upload

Chapter 21. Default Upload Settings

You can set default upload values by modifying the following settings in Administration → Local Administration → Library Settings Editor:

• Upload Activate PO

• Upload Create PO

• Upload Default Insufficient Quality Fall-Thru Profile

• Upload Default Match Set

• Upload Default Merge Profile

• Upload Upload Default Min. Quality Ratio

• Upload Default Provider

• Upload Import Non Matching by Default

• Upload Load Items for Imported Records by Default

• Upload Merge on Best Match by Default

• Upload Merge on Exact Match by Default

• Upload Merge on Single Match by Default

Chapter 22. Sticky Settings

If the above default settings are not implemented, the selections/values used in the following fields will be sticky and will automatically populate the fields the next time the Load MARC Order Records screen is pulled up:

- Create Purchase Order

- Activate Purchase Order

- Context Org Unit

- Record Match Set

- Merge Profile

- Import Non-Matching Records

- Merge on Exact Match (901c)

- Merge on Single Match

- Merge on Best Match

- Best/Single Match Minimum Quality Ratio

- Insufficient Quality Fall-Through Profile

- Load Items for Imported Records

Chapter 23. Use Cases for MARC Order Upload form

You can add items to a selection list or purchase order and ignore the record matching 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 import 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 import queue, or upload the records to an existing queue.

7. Select a Record Match Set.

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

Upload

Create Purchase Order	☐
Activate Purchase Order	☐
Provider	APhony
Context Org Unit	MAR ▾
Add to Selection List	Popular Fiction - 2013 ▾
Fiscal Year	2013 ▾

Upload to Queue	▾ Or create a new queue Popular Fiction - 2013
Record Match Set	isbn ▾
Merge Profile	▾
Import Non-Matching Records	☐ Record Source ▾
Merge On Exact Match (901c)	☐
Merge On Single Match	☐
Merge On Best Match	☐
Best/Single Match Minimum Quality Ratio	0.0 New Record Quality / Quality of Best Match
Insufficient Quality Fall-Through Profile	▾
Load Items for Imported Records	☐

File to Upload: P:\Testing\Acquisitions\Vandelay\5098334.mrc [Browse...] [Upload]

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

Lineitems Processed	7
Vandelay Records Processed	7
Bib Records Merged/Imported	0
ACQ Copies Processed	0
Debits Encumbered	0
Real Copies Processed	0

Upload Complete!

View Selection List

View Import Queue

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

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

12. The batch import 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 import queue, or upload the records to an existing queue.

7. Select a Record Match Set.

8. Select Merge Profile → Match-Only Merge.

9. Check the boxes adjacent to Import Non-Matching Records and 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.

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

Permissions to use this Feature

IMPORT_MARC - Using batch importer to create new bib records requires 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" import error

IMPORT_ACQ_LINEITEM_BIB_RECORD_UPLOAD - This allows interfaces leveraging the batch importer, 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. Invoices

Table of Contents

Chapter 24. Introduction

You can create invoices for purchase orders, individual line items, and blanket purchases. You can also link existing invoices to purchase order.

You can invoice items before you receive the items if desired. You can also reopen closed invoices, and you can print all invoices.

Chapter 25. Creating invoices and adding line items

You can add specific line items to an invoice from the PO or acquisitions search results screen. You can also search for relevant line items from within the invoice interface. In addition, you can add all line items from an entire Purchase order to an invoice or you can create a blanket invoice for items that are not attached to a purchase order.

Creating a blanket invoice

You can create a blanket invoice for purchases that are not attached to a purchase order.

1. Click Acquisitions → Create invoice.

2. Enter the invoice information in the top half of the screen.

3. To add charges for materials not attached to a purchase order, click Add Charge… This functionality may also be used to add shipping, tax, and other fees.

4. Select a charge type from the drop-down menu.

> New charge types can be added via Administration → Acquisitions Administration → Invoice Item Types.

5. Select a fund from the drop-down menu.

6. Enter a Title/Description of the resource.

7. Enter the amount that you were billed.

8. Enter the amount that you paid.

9. Save the invoice.

Adding line items from a Purchase Order or search results screen to an invoice

You can create an invoice or add line items to an invoice directly from a Purchase Order or an acquisitions search results screen.

1. Place a checkmark in the box for selected line items from the Purchase Order' or acquisitions search results page.

2. If you are creating a new invoice, click Actions → Create Invoice From Selected Line Items. Enter the invoice information in the top half of the screen.

3. If you are adding the line items to an existing invoice, click Actions → Link Selected Line Items to Invoice. Enter the Invoice # and Provider and then click the Link button.

4. Evergreen automatically enters the number of items that was ordered in the # Invoiced and # Paid fields. Adjust these quantities as needed.

5. Enter the amount that the organization was billed. This entry will automatically propagate to the Paid field.

6. You have the option to add charge types if applicable. Charge types are additional charges that can be selected from the drop-down menu. Common charge types include taxes and handling fees.

7. You have four options for saving an invoice.

   - Click Save to save the changes you have made while staying in the current invoice.

   - Click Save & Clear to save the changes you have made and to replace the current invoice with a new invoice so that you can continue invoicing items.

   - Click Prorate to save the invoice and prorate any additional charges, such as taxes, across funds, if multiple funds have been used to pay the invoice.

> Prorating will only be applied to charge types that have the Prorate? flag set to true. This setting can be adjusted via Administration → Acquisitions Administration → Invoice Item Types.

   - Click Close. Choose this option when you have completed the invoice. This option will also save any changes that have been made. Funds will be disencumbered when the invoice is closed.

8. You can re-open a closed invoice by clicking the link, Re-open invoice. This link appears at the bottom of a closed invoice.

Search for line items from an invoice

You can open an invoice, search for line items from the invoice, and add your search results to a new or existing invoice. This feature is especially useful when you want to populate an invoice with line items from multiple purchase orders.

In this example, we'll add line items to a new invoice:

1. Click Acquisitions → Create Invoice.

2. An invoice summary appears at the top of the invoice and includes the number of line items on the invoice and the expected cost of the items. This number will change as we add line items to the invoice.

3. Enter the invoice details (optional). If you do not enter the invoice details, then Evergreen will populate the Provider and Receiver fields with information from the line items.

If you do not want to display the details, click Hide Details.

4. Click the Search tab to add line items to an invoice.

5. Select your search criteria from the drop-down menu.

6. On the right side of the screen, Limit to Invoiceable Items is checked by default. Invoiceable items are those that are on order, have not been cancelled, and have not yet been invoiced. Evergreen also filters out items that have already been added to an invoice. Finally, if this box is checked, and if your entered the invoice details at the top of the screen, then Evergreen will filter your search for items that have the same provider as the one that you entered. If you have not entered the invoice details, then Evergreen removes this limit.

7. Sort by title (optional). By default, results are listed by line item number. Check this box to sort by ascending title.

8. Building the results list progressively (optional). By default, new search results will replace previous results on the screen. Check this box for the search results list to build with each subsequent search. This option is useful for libraries that might search for line items by scanning an ISBN. Several ISBNs can be scanned and then the entire result set can be selected and moved to the invoice in a batch.

9. Click Search.

10 Use the Next button to page through results, or select a line item(s), and click Add Selected Items to Invoice. .The rows that you selected are highlighted, and the invoice summary at the top of the screen updates.

Invoice

Lineitems: 2

Expected Cost: 40.99

[Show Details] **ABCD1234**

Invoice	Search

Search for [line items ▾] matching [all ▾] of the following terms:

[PO - Purchase Order ID ▾]   [is ▾]

[Add Search Term]

[Search] [Add Selected Items to Invoice] Next

- -

☐ **A Thousand Splendid Suns**, by Khaled Hosseini (9781594483851)
   1 Ordered, 0 Received, 0 Invoiced, 0 Claimed, 0 Cancelled
   Estimated $10.99, Encumbered $10.99, Paid $0.00
   # 55 ⌘ 4 8/23/12   ❖ Popular Fiction

☐ **The Alchemist**, by Paul Coelho (9780061122415)
   2 Ordered, 0 Received, 0 Invoiced, 0 Claimed, 0 Cancelled
   Estimated $30.00, Encumbered $30.00, Paid $0.00
   # 50 ⌘ 4 8/23/12   ❖ Popular Fiction

11 Click the Invoice tab to see the updated invoice.

12 Evergreen automatically enters the number of items that was ordered in the # Invoiced and # Paid fields. Adjust these quantities as needed.

13 Enter the amount that the organization was billed. This entry will automatically propagate to the Paid field. The Per Copy field calculates the cost of each copy by dividing the amount that was billed by the number of copies for which the library paid.

Create an invoice for a purchase order

You can create an invoice for all of the line items on a purchase order. With the exception of fields with drop-down menus, no limitations on the data that you enter exist.

1. Open a purchase order.

2. Click Create Invoice.

3. Enter a Vendor Invoice ID. This number may be listed on the paper invoice sent from your vendor.

4. Choose a Receive Method from the drop-down menu. The system will default to Paper.

5. The Provider is generated from the purchase order and is entered by default.

6. Enter a note (optional).

7. Select a payment method from the drop-down menu (optional).

8. The Invoice Date is entered by default as the date that you create the invoice. You can change the date by clicking in the field. A calendar drops down.

9. Enter an Invoice Type (optional).

10 The Shipper defaults to the provider that was entered in the purchase order.

11 Enter a Payment Authorization (optional).

12 The Receiver defaults to the branch at which your workstation is registered. You can change the receiver by selecting an org unit from the drop-down menu.

> The bibliographic line items are listed in the next section of the invoice. Along with the title and author of the line items is a summary of copies ordered, received, invoiced, claimed,

and cancelled. You can also view the amounts estimated, encumbered, and paid for each line item. Finally, each line item has a line item ID and links to the selection list (if used) and the purchase order.

13Evergreen automatically enters the number of items that was ordered in the # Invoiced and # Paid fields. Adjust these quantities as needed.

14Enter the amount that the organization was billed. This entry will automatically propagate to the Paid field. The Per Copy field calculates the cost of each copy by dividing the amount that was billed by the number of copies for which the library paid.

15You have the option to add charge types if applicable. Charge types are additional charges that can be selected from the drop-down menu. Common charge types include taxes and handling fees.

16You have four options for saving an invoice.

- Click Save to save the changes you have made while staying in the current invoice.

- Click Save & Clear to save the changes you have made and to replace the current invoice with a new invoice so that you can continue invoicing items.

- Click Prorate to save the invoice and prorate any additional charges, such as taxes, across funds, if multiple funds have been used to pay the invoice.

> Prorating will only be applied to charge types that have the Prorate? flag set to true. This setting can be adjusted via Administration → Acquisitions Administration → Invoice Item Types.

- Click Close. Choose this option when you have completed the invoice. This option will also save any changes that have been made. Funds will be disencumbered when the invoice is closed.

17You can re-open a closed invoice by clicking the link, Re-open invoice. This link appears at the bottom of a closed invoice.

Link an existing invoice to a purchase order

You can use the link invoice feature to link an existing invoice to a purchase order. For example, an invoice is received for a shipment with items on purchase order #1 and purchase order #2. When the invoice arrives, purchase order #1 is retrieved, and the invoice is created. To receive the items on purchase order #2, simply link the invoice to the purchase order. You do not need to recreate it.

1. Open a purchase order.

2. Click Link Invoice.

3. Enter the Invoice # and the Provider of the invoice to which you wish to link.

4. Click Link.

Encumbered $0.00   Invoicing   View Invoices (1)   Create Invoice   Link Invoice ▼

Total Spent $40.00   Cancel   Cancel order ▼   Choose invoice

                                                                   Invoice # 09090
--ns--   ▼   Provider Ingram

                                                                              Link

Chapter 26. Electronic Invoicing

Evergreen can receive electronic invoices from providers. To access an electronic invoice, you must:

1. Configure EDI for your provider.

2. Evergreen will receive invoices electronically from the provider.

3. Click Acquisitions → Open Invoices to view a list of open invoices, or use the General Search to retrieve invoices. Click a hyperlinked invoice number to view the invoice.

Acquisitions Search

Refresh Grid	Print Selected Invoices

Back Next

✓	#	Vendor Invoice ID	Receiver	Provider	Shipper	Complete	Invoice Date
☐	1	ABCD1234	BR1	BT	BT	False	8/23/12 12:00 AM

Chapter 27. View an invoice

You can view an invoice in one of four ways: view open invoices; view invoices on a purchase order; view invoices by searching specific invoice fields; view invoices attached to a line item.

1. To view open invoices, click Acquisitions → Open invoices. This opens the Acquisitions Search screen. The default fields search for open invoices. Click Search.

2. To view invoices on a purchase order, open a purchase order and click the View Invoices link. The number in parentheses indicates the number of invoices that are attached to the purchase order.

3. To view invoices by searching specific invoice fields, see the section on searching the acquisitions module.

4. To view invoices for a line item, see the section on line item invoices.

Chapter 28. 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.

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

8) Click Receive Selected Copies.

Acquisitions Invoice Receiving

Invoice #ABCD1234

[Use List Mode]

Receive Selected Copies

One Good Turn, by Atkinson, Kate (9780552772440)
2 Ordered, 0 Received, 2 Invoiced, 0 Claimed, 0 Cancelled
Estimated $10.00, Encumbered $0.00, Paid $10.00
36 ⌘ 10 11/2/11
Number of copies to receive: 1

When Will There Be Good News?, by Atkinson, Kate (9780552772457)
2 Ordered, 0 Received, 2 Invoiced, 0 Claimed, 0 Cancelled
Estimated $10.00, Encumbered $0.00, Paid $10.00
35 ⌘ 10 11/2/11
Number of copies to receive: 1

Started Early, Took My Dog, by Atkinson, Kate (9780385608022)
2 Ordered, 0 Received, 2 Invoiced, 0 Claimed, 0 Cancelled
Estimated $10.00, Encumbered $0.00, Paid $10.00
34 ⌘ 10 11/2/11
Number of copies to receive: 1

Receive Selected Copies

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

Receive Specific Copies (Numeric Mode)

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

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

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

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

4) Click Receive Selected Copies.

Acquisitions Invoice Receiving

Invoice #ABCD1234

[Use Numeric Mode]

Receive Selected Copies

☑ Select All	Owning Branch	Shelving Location	Collection Code	Fund	Circ Modifier	Callnumber	Barcode
One Good Turn, by Atkinson, Kate (9780552772440) 2 Ordered, 1 Received, 2 Invoiced, 0 Claimed, 0 Cancelled Estimated $10.00, Encumbered $0.00, Paid $10.00 # 36 ✖ 10 11/2/11							
☑	BR1	Stacks		Book	PF	on order	ACQ31
When Will There Be Good News?, by Atkinson, Kate (9780552772457) 2 Ordered, 1 Received, 2 Invoiced, 0 Claimed, 0 Cancelled Estimated $10.00, Encumbered $0.00, Paid $10.00 # 35 ✖ 10 11/2/11							
☐	BR1	Stacks		Book	PF	on order	ACQ29
Started Early, Took My Dog, by Atkinson, Kate (9780385608022) 2 Ordered, 1 Received, 2 Invoiced, 0 Claimed, 0 Cancelled Estimated $10.00, Encumbered $0.00, Paid $10.00 # 34 ✖ 10 11/2/11							
☐	BR1	Stacks		Book	PF	on order	ACQ27

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

5) When all copies on an invoice have been received, a message confirms that no copies remain to be received.

6) The purchase order records that all items have been received.

Items	Notes	Actions	Status
Copies(2)	Notes(0)	-- Actions --	received
Copies(2)	Notes(0)	-- Actions --	received
Copies(2)	Notes(0)	-- Actions --	received

Part IX. Managing patron purchase requests

Table of Contents

Chapter 29. Introduction

Patron Requests can be used to track purchase suggestions from patrons in Evergreen. This feature allows purchase requests to be placed on selection lists to integrate with the Acquisitions module. Patron Requests can be accessed through the Acquisitions module under Acquisitions → Patron Requests and through patron accounts under Other → Acquisition Patron Requests. Requests can be placed and managed through both interfaces.

Chapter 30. Place a Patron Request

1. Go to Acquisitions → Patron Requests. This interface is scoped by Patron Home Library and will default to the library your workstation is registered to.

   a. Requests can also be placed directly through a patron account, in which case the interface will scope to the patron ID.

2. Click Create Request and a modal with the patron request form will appear.

3. Create the request by filling out the following information:

   a. User Barcode (required): enter the barcode of the user that is placing the request

   b. User ID: this field will populate automatically when the User Barcode is entered

   c. Request Date/Time: this field will populate automatically

   d. Need Before Date/Time: if applicable, set the date and time after which the patron is no longer interested in receiving this title

   e. Place Hold?: check this box to place a hold on this title for this patron. Holds are placed when the bib and item record are created in the catalog as part of the acquisitions process.

   f. Pickup Library: pickup library for the hold. This field will default to the patron's home library is the pickup library is not selected in the patron account.

   g. Notify by Email When Hold is Ready and Notify by Phone When Hold is Ready: preferences set in patron account will be used or can be set manually here.

   h. Request Type (required): type of material requested

   i. ISxN

   j. UPC

   k. Title

   l. Volume

   m. Author

   n. Publisher

   o. Publication Location

   p. Publication Date

   q. Article Title: option available if Request Type is "Articles"

    r. Article Pages: option available if Request Type is "Articles"

    s. Mentioned In

    t. Other Info

4. Click Save at the bottom of the form.

Chapter 31. Actions for Requests

After placing a Patron Request, a variety of actions can be taken by selecting the request, or right-clicking, and selecting Actions within either Acquisitions → Patron Requests or through the patron account under Other → Acquisition Patron Requests:

- Edit Request - make changes to the request via the original request form. Edits can be made when the status of a request is New.

- View Request - view a read-only version of the request form

- Retrieve Patron - retrieve the account of the patron who placed the request

- Add Request to Selection List - add the request to a new or existing Selection List in the Acquisitions module. The bibliographic information in the request will generate the MARC order record. From the selection list, the request will be processed through the acquisitions module and the status of the request itself will be updated accordingly.

- View Selection List - view the Selection List a request has been added to (this option will be active only if the request is on a selection list)

- Set Hold on Requests - allows you to indicate that a hold should be placed on the requested title, without needing to go in and edit the request. You can set a hold as long as the status of the request is New or Pending.

- Set No Hold on Requests - allows you to indicate that a hold should not be placed on the requested title, without needing to go in and edit the request individually.

- Cancel Requests - cancel the request and select a cancellation reason

Chapter 32. Administration

Request Status

Patron Requests will use the following statuses:

- New - This is the initial state for a newly created acquisition request. This is the only state from which a request is editable.

- Pending - This is the state after a request is added to a selection list.

- Ordered, Hold Not Placed - This is the state when an associated purchase order has been created and the request's Place Hold flag is false.

- Ordered, Hold Placed - This is the state when the request's Place Hold flag is true, an associated purchase order has been created, and the bibliographic record and item for the request have been created in the catalog as part of the acquisitions process..

- Received - This is the state when the line item on the linked purchase order has been marked as received.

- Fulfilled - This is the state when an associated hold request has been fulfilled.

- Canceled - This is the state when the acquisition request has been canceled.

Notifications/Action Triggers

The following email notifications are included with Evergreen, but are disabled by default. The notices can be enabled through the Notifications/Action Triggers interface under Administration → Local Administration. The existing notices could also be modified to place a message in the Patron Message Center. Any enabled notifications related to holds placed on requests will also be sent to patrons.

- Email Notice: Acquisition Request created

- Email Notice: Acquisition Request Rejected

- Email Notice: Patron Acquisition Request marked On-Order

- Email Notice: Patron Acquisition Request marked Cancelled

- Email Notice: Patron Acquisition Request marked Received

Permissions

This feature includes one new permission and makes use of several existing permissions. The following permissions are required to manage patron requests:

- CLEAR_PURCHASE_REQUEST

  - A new permission that allows users to clear completed requests

  - This permission has been added to the stock Acquisitions permission group

  - user_request.update will still be required with this sort of action

  - The stock permission mappings for the Acquisitions group will be changed to include this permission

- CREATE_PICKLIST

  - Will allow the staff user to create a selection list.

- VIEW_USER

  - Permission depth will apply to requests. If a user tries to view a patron request that is beyond the scope of their permissions, a permission denied message will appear with a prompt to log in with different credentials.

- STAFF_LOGIN

- user_request.create

- user_request.view

- user_request.update

  - This is checked when updating a request or canceling a request

- user_request.delete

Chapter 33. Placing purchase requests from a patron record

Patrons may wish to suggest titles for your Library to purchase. You can track these requests within Evergreen, whether or not you are using the acquisitions module for other purposes. This section describes how you can record these requests within a patron's record.

1. Retrieve the patron's record.

2. Select Other -→ Acquisition Patron Requests. This takes you to the Aquisition Patron Requests Screen. CTRL+click or scrollwheel click to open this in a new browser tab.

3. The Acquisition Patron Requests Screen will show any other requests that this patron has made. You may sort the requests by clicking on the column headers.

4. To show canceled requests, click the Show Canceled Requests checkbox.

5. To add the request, click the Create Request button.

> You will need the CREATE_PURCHASE_REQUEST permission to add a request.

6. The request type field is required. Every other field is optional, although it is recommended that you enter as much information about the request as possible.

7. The Pickup Library and User ID fields will be filled in automatically.

8. Request Date/Time and User Barcode will be automatically recorded when the request is saved.

9. Notify by Email When Hold is Ready and Notify by Phone When Hold is Ready will pull in preferences from the patron account if left blank, or can be set manually here.

10 You have the option to automatically place a hold for the patron if your library decides to purchase the item. If you'd like Evergreen to generate this hold, check the Place Hold box.

11 When you have finished entering information about the request, click the Save button.

Part X. Using the Public Access Catalog

Table of Contents

Chapter 34. Basic Search

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

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

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

You can select to search by:

- Keyword: finds the terms you enter anywhere in the entire record for an item, including title, author, subject, and other information.

- Title: finds the terms you enter in the title of an item.

- Journal Title: finds the terms you enter in the title of a serial bib record.

- Author: finds the terms you enter in the author of an item.

- Subject: finds the terms you enter in the subject of an item. Subjects are categories assigned to items according to a system such as the Library of Congress Subject Headings.

- Series: finds the terms you enter in the title of a multi-part series.

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

Formats

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

- All Books

- All Music

- Audiocassette music recording

- Blu-ray

- Braille

- Cassette audiobook

- CD Audiobook

- CD Music recording

- DVD

- E-audio

- E-book

- E-video

- Equipment, games, toys

- Kit

- Large Print Book

- Map

- Microform

- Music Score

- Phonograph music recording

- Phonograph spoken recording

- Picture

- Serials and magazines

- Software and video games

- VHS

Libraries

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

Chapter 35. Advanced Search

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

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

Sort Results

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

Search Library

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

Limit to Available

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

Exclude Electronic Resources

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

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

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

Search Filter

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

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

Search Filter Enhancements

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

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

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

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

Numeric Search

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

Expert Search

If you are familiar with MARC cataloging, you may search by MARC tag in the Expert Search option on the left of the screen. Enter the three-digit tag number, the subfield if relevant, and the value or

text that corresponds to the tag. For example, to search by publisher name, enter **260 b Random House**. To search several tags simultaneously, use the Add Row option. Click Submit to run the search.

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

Chapter 36. Boolean operators

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

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

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

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

Table 36.1. Boolean symbolic operators

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

Chapter 37. Search Tips

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

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

• Don't worry about white space, exact punctuation, or capitalization.

  1. White spaces before or after a word are ignored. So, a search for **[golden compass]** gives the same results as a search for **[golden compass]**.

  2. A double dash or a colon between words is reduced to a blank space. So, a title search for golden:compass or golden — compass is equivalent to golden compass.

  3. Punctuation marks occurring within a word are removed; the exception is _. So, a title search for gol_den com_pass gives no result.

  4. Diacritical marks and solitary **&** or **|** characters located anywhere in the search term are removed. Words or letters linked together by **.** (dot) are joined together without the dot. So, a search for go|l|den & comp.ass is equivalent to golden compass.

  5. Upper and lower case letters are equivalent. So, Golden Compass is the same as golden compass.

• Enter your search words in any order. So, a search for compass golden gives the same results as a search for golden compass. Adding more search words gives fewer but more specific results.

  • This is also true for author searches. Both David Suzuki and Suzuki, David will return results for the same author.

• Use specific search terms. Evergreen will search for the words you specify, not the meanings, so choose search terms that are likely to appear in an item description. For example, the search luxury hotels will produce more relevant results than nice places to stay.

• Search for an exact phrase using double-quotes. For example "golden compass".

  • The order of words is important for an exact phrase search. golden compass is different than compass golden.

  • White space, punctuation and capitalization are removed from exact phrases as described above. So a phrase retains its search terms and its relative order, but not special characters and not case.

- Two phrases are joined by and, so a search for "golden compass" "dark materials" is equivalent to golden compass and dark materials.

- Truncation Words may be right-hand truncated using an asterisk. Use a single asterisk * to truncate any number of characters. (example: environment* agency)

Chapter 38. Search Methodology

Stemming

A search for dogs will also return hits with the word dog and a search for parenting will return results with the words parent and parental. This is because the search uses stemming to help return the most relevant results. That is, words are reduced to their stem (or root word) before the search is performed.

The stemming algorithm relies on common English language patterns - like verbs ending in ing - to find the stems. This is more efficient than looking up each search term in a dictionary and usually produces desirable results. However, it also means the search will sometimes reduce a word to an incorrect stem and cause unexpected results. To prevent a word or phrase from stemming, put it in double-quotes to force an exact search. For example, a search for **parenting** will also return results for **parental**, but a search for **"parenting"** will not.

Understanding how stemming works can help you to create more relevant searches, but it is usually best not to anticipate how a search term will be stemmed. For example, searching for **gold compass** does not return the same results as **golden compass**, because **-en** is not a regular suffix in English, and therefore the stemming algorithm does not recognize gold as a stem of golden.

Order of Results

By default, the results are listed in order of relevance, similar to a search engine like Google. The relevance is determined using a number of factors, including how often and where the search terms appear in the item description, and whether the search terms are part of the title, subject, author, or series. The results which best match your search are returned first rather than results appearing in alphabetical or chronological order.

In the Advanced Search screen, you may select to order the search results by relevance, title, author, or publication date before you start the search. You can also re-order your search results using the Sort Results dropdown list on the search result screen.

Chapter 39. Search Results

The search results are a list of relevant works from the catalogue. If there are many results, they are divided into several pages. At the top of the list, you can see the total number of results and go back and forth between the pages by clicking the links that say Previous or Next on top or bottom of the list. You can also click on the adjacent results page number listed. These page number links allow you to skip to that results page, if your search results needed multiple pages to display. Here is an example:

Brief information about the title, such as author, edition, publication date, etc. is displayed under each title. The icons beside the brief information indicate formats such as books, audio books, video recordings, and other formats. If you hover your mouse over the icon, a text explanation will show up in a small pop-up box.

Clicking a title goes to the title details. Clicking an author searches all works by the author. If you want to place a hold on the title, click Place Hold beside the format icons.

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

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

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

Facets: Subjects, Authors, and Series

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

Search Results Results 1 - 10

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

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

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

Availability

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

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

Viewing a record

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

Violin concerto
Penderecki, Krzysztof, 1933- (Author).

🎵 Musical Sound Recording (Unknown Format)

Electronic resources

Link text here - Public note here

✔ Place Hold
📋 Add to my list
📋 Print / Email
🔗 Permalink

Available copies

- 26 copies at Example Consortium.

Current holds

1 current hold with 31 total copies.

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

Next 10 »

➕ Show more copies

Record details

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

Content descriptions

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

Search for related items by subject

Subject: Concertos (Violin)

Search for related items by series

- Columbia Masterworks

Chapter 40. Details

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

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

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

The Record Details view shows how many copies are at the library or libraries you have selected, and whether they are available or checked out. It also displays the Call number and Copy Location for locating the item on the shelves. Clicking on Text beside the call number will allow you to send the item's call number by text message, if desired. Clicking the location library link will reveal information about owning library, such as address and open hours.

Below the local details you can open up various tabs to display more information. You can select Reviews and More to see the book's summaries and reviews, if available. You can select Shelf Browser to view items appearing near the current item on the library shelves. Often this is a good way to browse for similar items. You can select MARC Record to display the record in MARC format. If your library offers the service, clicking on Awards, Reviews, and Suggested Reads will reveal that additional information.

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

Placing Holds

Holds can be placed on either title results or search results page. If the item is available, it will be pulled from the shelf and held for you. If all copies at your local library are checked out, you will be placed on a waiting list and you will be notified when items become available.

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

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

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

Place Hold

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

Pickup location: Example Branch 1

Notify when hold is ready for pickup?

☑ Yes, by Email

Email Address: jane@yahoo.com

☑ Yes, by Phone

Phone Number: 617-123-4567

Submit   Cancel

Permalink

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

SMS Call Number

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

Location	Call Number / Copy Notes	Barcode
Example Branch 1	780 B92 (Text)	CONC40000628
Example Branch 1	780 B92 (Text)	CONC41000628
Example Branch 1	ML 2533 B34 C92 (Text)	CONC40000128
Example Branch 1	ML 2533 B34 C92 (Text)	CONC41000128
Example Branch 1	ML 2533 B34 C92 (Text)	CONC42000128
Example Branch 1	ML 2533 B34 C92 (Text)	CONC43000128

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

Going back

Report errors in this documentation using Launchpad.

When you are viewing a specific record, you can always go back to your title list by clicking the link Search Results on the top right or left bottom of the page.

Subject: Concertos (Violin)

Search for related items by series

- Columbia Masterworks

AWARDS, REVIEWS, & SUGGESTED READS

SHELF BROWSER

MARC RECORD

◄ **Search Results**   Showing Item 1 of 25   **Next ►**

You can start a new search at any time by entering new search terms in the search box at the top of the page, or by selecting the Another Search or Advanced Search links in the left-hand sidebar.

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- Jenny Turner, PALS

Appendix B. Admonitions

- Note

- warning

- caution

- tip

Appendix C. Licensing

Index

S

T

V

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