Updates (5/17/2019)

What We Know/Resolutions

These issues are resolved to the best of our knowledge. Should you encounter an exception, please email the helpdesk, including a text description of what you were trying to do when you got the error, the item title and barcode ID, Patron name and barcode ID, relevant details, and a screenshot of the error message you received, preferably by using the Snipping tool.

NEW!

For damaged items or items that need repair, click on **Actions for Selected Items → Mark Item Damaged** to change the status to Damaged, which is non-holdable and not OPAC visible. You can also change the status to Bindery. **Do not check items out to Damaged and Repair cards; these cards will be deleted soon.**

Do not use staff login account - the active directory firstname.lastname "barcode" - to checkout items or place holds. This includes the *Place This Hold for Me* button on the holds screen.

Clear Holds shelf process. Items with the current date should be pulled the day AFTER the current date (ignore the hourly timestamp). Despite the timestamp showing that a hold is expired, wait until the end of the day or the following morning to actually clear it. For example, for the shelf expire time 5/16/2019 12:32 PM, wait until 5/17/2019 to clear the hold.

Enter hold notification phone numbers with 10 digits, *no spaces or dashes*. This assures Evergreen communicates properly with the automatic dialer.

Enter email addresses in all lower case.

With the end of the SirsiDynix contract, fewer book covers appear in the catalog because the source of book covers in the OPAC has been switched from Syndetics to Open Library. The Open Library has less coverage of books and especially media than Syndetics. To see if a given title is indexed in the Open Library, you can try searching https://openlibrary.org/ using the ISBN from the first 020 field to see if there's a hit.

Patron data in Evergreen is limited to 1 month of history to comply with Westchester Library System patron privacy policy (privatization of patron data). **(RESOLVED)**

Hold filling with non-eligible statuses - eg, lost, claims-rtn, missing (RESOLVED)

Permissions issues as we're made aware of them through helpdesk emails - RESOLVED CASE-BY-CASE

What We're Working on/Known Issues

- If a staff member works two different locations, the home library on their account seems to display on that library's cash report even though the staff is at another location
- Hold filling patron library/pickup library/owning library first preference
    - Learning more about use of Retarget Local Holds at Checkin
- Latency issues
- Logins timeout/persistent login setting
- Testing solutions for spine label printing, including eliminated printing of blank labels.
- Consistent Access to Printed Lost Notices
- Purchase Alert reports - by patron library
- Item/holdings templates persistent application
- Permanent ILL workflow (notes to develop workflow: have the bibs and items created by ILL, then once circulated the the pickup library, ILL will remove the item and bib from the database AHM)
- Transit List workflow
- Patron Negative Balances workflow
- Item Alert counts do not decrement
- Adding e-content to catalog

For Evergreen help and issues

The Evergreen IT Wiki page - Searchable SOON!

- On a page or pdf, use Control-F to find your keywords

Check with your TechXpert! Check the known issues!

- For login issues, call the HelpDesk at 914-674-3616.
- For other issues, send **ONE email with RELATED issues** to helpdesk@wlsmail.org.
  For example, 10 permissions errors in one email is ok. “The OPAC is not working, can't edit a note, holds not trapping, patrons getting too many notices” is not ok. Please include

    - a text description of what you were trying to do when you got the error, **ESPECIALLY,**

        - item title and barcode ID
        - Patron name and barcode ID
        - Relevant details

    - a screenshot of the error message you received,
      preferably by using the Snipping tool

Complete What We Know/Resolutions

General

- **Pre-overdue notices sent daily via email and text** (formerly only email). Patrons will get phone calls for available holds and overdue materials. **(RESOLVED)**
- **Selfcheck station integration with Evergreen complete. (RESOLVED)**
- **Text notifications (RESOLVED)**
- **Phone notification began on Friday.** As it's currently set up, only patrons for whom phone is their only notification method will receive calls. Patrons who are set up for email and/or SMS will be notified via those methods. Once we know that i-Tiva is consistently making phone calls, we will revisit patrons getting notification via all three methods, ie. email, SMS, and phone.
- **Auto-renewal** - resolution implemented 4/5/2019
- **Lynda.com login has been updated. Going forward, login is with library card number and PIN** - the last 4 digits of the user's day phone. (RESOLVED)
- **If you need to add a closed DAY OF THE WEEK to your Evergreen calendar,** send an email to the helpdesk.
- **Mobile App is up and running as expected.** If a patron reports an app issue, verify that they are using the *Westchester Library System App*, not the older Westchester Library Catalog or Bookmine app. **(RESOLVED)**
- **WLS Selfchecks work as expected (RESOLVED)**
- **Itiva automated phone system is working** for calling in

Workstation Setup & Login

- **It's important to verify that you've chosen the correct library** when you create an Evergreen workstation and sign in to assure correct routing of items, checkouts, holdings additions, etc.
- **Choose the 3-letter library code, not the S_code** (WLS, not S_WLS) when choosing from dropdown menus - workstations, item holdings, statistical categories, etc.
- **Remove *autofill address* from Chrome settings** to prevent address information from popping up as a suggestion when filling in patron registration fields.
- **Workstation names are case sensitive.** If a staff person tries to log in and doesn't go to the Evergreen Home screen or get a "Workstation already exists" message, it's likely that they entered a different workstation name than the one they set up previously. To avoid this issue, name all workstations using the schema 3-LETTER LIBRARY CODE-lastname, for example, WLS-midgley
- **To set receipts and slips to print to the correct length,** on the Chrome Print preview screen, go to More Settings > Options. Uncheck Headers and footers.
- **Help for receipt and slip templates is here!** Check the Evergreen IT Wiki page for videos about how to update templates and share the file at your location. (After your TechXpert, it's your go-to resource for Evergreen help!).
  Several training dates are scheduled during the next few weeks.
  Register at evanced.westchesterlibraries.org
- **Column Configuration Updates** GO-LIVE Quick Start – Column Configuration includes recommendations and steps for setting up columns and list displays.
  Watch the video (with thanks to Genie at Greenburgh!)

- MARC records and system settings appear to be accessible and editable, but the changes cannot be saved.
- **Staff Who Work at Multiple Libraries** need to set up a workstation for each library. After they log in and set up a workstation the first time,

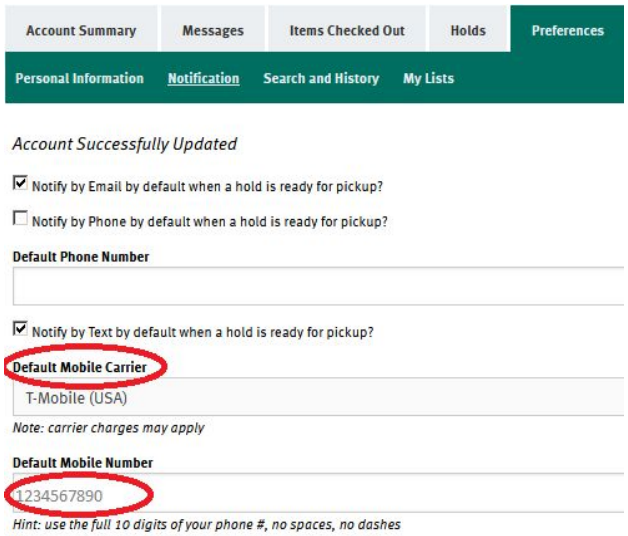
1. At the next library, log in with the first workstation information
2. Go to Administration > Workstation > Registered Workstations
3. Choose the "new" 3-LETTER CODE from the dropdown
4. Enter the "new" workstation name, ABC-lastname
5. Choose it from the Workstations Registered With This Browser dropdown
6. Click Use Now
7. Sign in to the "new" workstation
   Staff must pick the right workstation for their location every time they log in.

- **DO NOT use the staff AD account (lastname.firstname) for transactions** - checkouts, holds, etc. - or edit it in any way to assure that it functions properly for your work. This account is needed for login and working in Evergreen. Use the "regular" account that has a barcode ID number for your own checkouts, holds, etc.

Patrons

- **Patron registration duplicate checking** for phone, email, and name has been verified.
- **To clear a Migrated Blocked Patron alert**, go to a patron's card and then go to "Messages." That is where you will find "Migrated Blocked Patron." Check all alerts that apply. Go to actions > Delete messages.
- **Please reset patron PINs as needed at the library**
  Reset the password (PIN) only when the patron has forgotten his PIN. **The PIN field IS MASKED and IS NOT blank, although it appears to be blank.** DO NOT click *Generate Password.*

1. Go to Search > Search For patron. You can Scan the patron barcode ID *or E*nter last name and first name and click Search. In the results list, double-click the matching record.
2. On the *Edit* tab, verify the Daytime phone. Update if needed.
3. In the Password field, update the PIN to match the last 4 digits of the Daytime phone.
4. Click *Save*.



   For additional help, go to the [Circ Essentials Quick Start Guide]

- **Patrons who want text notifications can choose their mobile carrier and enter the cell number**
  - set their preference in their OPAC account
  - ask library staff to set it up
- **To check out a hold to a patron other than the hold requestor, verify the patron ID and check out the item ON THE REQUESTOR'S CARD.** Best practice is to add an alert on the requestor's record regarding

pickup permission. Reason for this workflow: in Evergreen, it's possible to checkout on a card other than the requestor and have an option to cancel the hold, but in this workflow, the hold is counted as cancelled not FILLED and the library will not get a count for the hold.

- **Blocked Patron - Patron Exceeds Fine workflow**
    1. Pay the bill
    2. Refresh the page to remove the alert display
    3. Check out
- ***Email checkout receipts by default? option* has been added** to Patron Registration and the Patron Edit tab.
- **Phone numbers display in the Daytime and Other phone fields.** (RESOLVED) For NEW registrations, enter the phone number in the Daytime Phone field. This will automatically update the patron PIN to the last 4 digits of the phone number. In line with best practice, please update existing PINs as needed by entering the last 4 digits of the Daytime phone number in the Password field. (As a reminder, do not use the Generate Password button.)
- **The Workflows Phone field was migrated to the Evergreen Other Phone field.** For NEW registrations, enter the phone number in the Daytime Phone field. This will automatically update the patron PIN to the last 4 digits of the phone number. Since we are working with Evergreen to clarify Daytime/Other fields and associated processes, please update existing PINS as needed by entering the last 4 digits of the phone number in the Password field without editing either phone field. (As a reminder, do not use the Generate Password button.)
- **Patron records with valid zipcodes in Westchester were updated** to have the county Westchester. If you see a patron record that you expect should have the county Westchester, verify that the zipcode is entered correctly and update the county field to Westchester.
- Country field is populated with USA.

Checkout

- **At checkout, some alerts are blocking and other alerts are informational.** After resolving overdues, bills, and issues that prevent checkout, refresh the patron record. Remove or archive alerts that no longer apply. After reading informational alerts, press a navigation button, like Checkout, to clear the alert.

Holds

- **Patrons can place more than one hold on a title.** This allows the grouping of editions feature to function properly. Please be aware of possible duplicate holds on the Pull Holds List and Hold Shelf.
- **Replacing pre-migration existing holds - 99.37% of holds migrated or were replaced.**
- **When staff place holds for patrons, the default pickup location is the placing library.** (ISSUE RESOLVED)
- ***When processing the Holds Pull List, mark items missing*** that are not found on the shelf (select each item, right-click or use the Actions menu to select *Mark Item Missing)*. If the item is later found, edit the item status to available.

- ***To capture holds for your patrons on items that you just barcoded***, on the Checkin screen, choose the Checkin Modifiers *Retarget Local Holds* and *Retarget All Statuses*. This will change the item status from Available Soon and capture any local hold before sending it to another library to fill a hold. (RESOLVED)
- **The Holds Pull List can be sorted and printed** if you go to the drop down menu on the far right (where you would adjust columns) and choose "Print Full Grid."
- **Hold expiration dates were not implemented during migration** to give patrons a few extra days to pick up holds; therefore the hold expiration date field is blank. Expiration dates will be applied in the very near future.
- Holds displays are populated except for on order items (titles for which there are no items yet).
- Staff can edit hold pickup locations.

Bills

- **Lost items billing is corrected** (lost bills voided; overdue max bill added) (RESOLVED)
    - For migrated instances, Migrated Blocked Patron Alert must be cleared manually To clear a Migrated Blocked Patron alert, go to patron card and then go to "Messages." That is where you will find "Migrated Blocked Patron." Check all alerts that apply. Go to actions > Delete
    - Going forward, a Blocked Patron Alert will be cleared by the system when an item is returned
- **Bills that migrated have a type of Grocery**

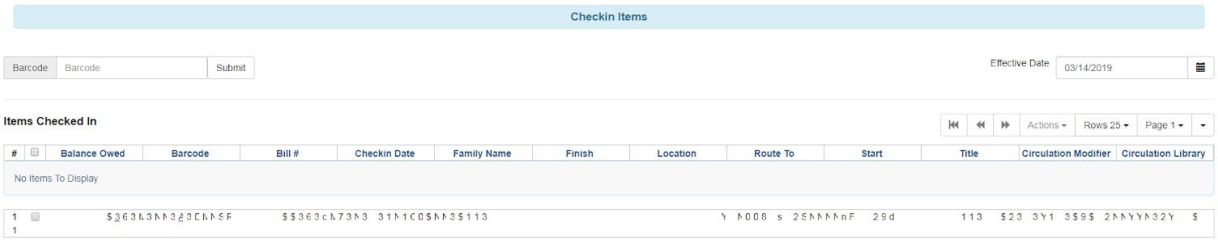
Items

- **When including Item Alerts** at item linking or creating a holdings template, you must assign an Alert Type so Evergreen can create the item as expected.

- Migrated claims returned processed: 1717 circulations left open and marked as checked out **(RESOLVED)**

- **At checkin, there is a bug.** When item that belongs to LibraryA is checked in at LibraryA, it displays a route to LibraryA with a shelving location. After checking in the item a second time, the item goes intransit to another library and the transit slip prints. A logic / timing of events bug was identified and **REPORTED**.

- **In checkin screen, bad characters display. Issues resolved** by correcting the computer's time zone. **(RESOLVED)**



- **Items that are marked missing can be checked in to clear the missing status.** There is a notification that they had been missing and they are automatically set back to recently returned status.
- **Item Alerts display at checkout and checkin and can be managed.**
- **Check in items, especially ILLs, before deleting**. In Evergreen lingo, do not delete copies with open transactions.
- **When adding item price, include decimal and following zeros**. They don't display in the editor, but will display in item and patron records.
- **On the Item Quick Summary, the Due Date is the MOST RECENT due date.** It doesn't mean the item is checked out. Look at the Status to know whether the item is Available, Checked out, Intransit, etc.
- **Public Item Notes display and can be managed** (edited and removed) **(RESOLVED)**
- **When items are checked in, they have a status of Recently Returned** which changes to Available after 1 hour. The Reshelving status is holdable and can circulate.
- **New on the Evergreen IT Wiki page**
    - Home Locations-Shelving Locations Equivalents - Legacy-Evergreen
- **There is a basic spine label template** in each library share drive, eg. ARD > Evergreen > Spine Label Template. Click here to watch a video with the steps to import it to your workstation. Go to the Evergreen IT Wiki page to see the updated Tech Services Quick Start.
- **Items from offline circ that routed to odd locations at checkin will have their intransit statuses changed to Available.** This only affects items from the circ freeze bins. If you have any items remaining from circ freeze bins, please check them in and email any issues to the helpdesk. After April 1, WLS will run a report that targets those items and distribute it to libraries so that they can check shelves and follow up on errant items.
- **Item buckets screen column display changes don't save.** This is a known Evergreen bug.
- **When adding an item, each item needs a statistical category for Monthly and for State reports**. These correspond to SirsiDynix Item Cat1 and Item Cat2. There is a table that shows the equivalences in the GO-LIVE Tech Services Quick Start on the IT Wiki.
- **Legacy circulation (pre-Evergreen) is not available in the Item Summary.** Combined legacy and current circ totals are available through reports, using the data source titled "Total Circulation Count, Including Legacy." After priority migration issues are resolved, WLS will work on reports templates and functionality.
- **When you add items**, you may choose any item attribute that appears in your drop down menus. So, for instance, you can choose any Shelving Location that ends in *(WEST)* or your

library location; the former are shared by every library and the latter are just used at your library.

OPAC/Catalog

- **Diacritics fixes complete**, including character sets (notably hindi, arabic and chinese/japanese) that are not displaying correctly. **(RESOLVED)**
- **The language on the OPAC login page underneath the card number field** that said "Please include leading zeros. Example: 0026626051" was removed. (RESOLVED)
- **Selection boxes, baskets, and multiple copy dropdowns were added to the staff catalog** display so that staff can place multiple holds at one time.(RESOLVED)
- **The OPAC "Forgot your password" link now works for patrons.** The online password reset has requirements (8 characters, etc.) that WLS is working with Equinox to alter. Staff can set PINS to the last 4 digits of phone number.
- **Catalog search box code for library websites** has been sent to directors.
- **Code for website login sent to directors (RESOLVED)**

Updates (4/10/2019)

Updates (4/5/2019)

Tuesday Update (3/26/2013)

Thank you to everyone for continuing to report issues to the Help Desk. The patron and item barcode IDs that you include truly help us to track, test, make changes, and work with Evergreen to resolve issues. Adding screenshots or photos of the screens to your text details makes it even easier for us to have context for resolutions.

In addition to providing highlights and tips at Thursday's Circulation Committee Meeting that library representatives can share with library staff, we'll be releasing a schedule of Evergreen training sessions soon.

Thursday Update (3/21/2019)

Thank you to everyone for continuing to report issues to the Help Desk. The patron and item barcode IDs that you include truly help us to track, test, make changes, and work with Evergreen to resolve issues. Adding screenshots or photos of the screens to your text details makes it even easier for us to have context for resolutions.

Mid-Week Update (3/20/2019)

Here's the latest about Evergreen activities and information.

What We're Working on/Known Issues

- Display for holds for on order items
- Other vs daytime phone fields
- Itiva automated phone system
- Ongoing permissions issues as we're made aware of them through helpdesk emails
- Code for website login will been sent to directors
- Lost book workflow: issue? when a lost book is checked in off a patrons record the cost of the book does not come off. When the lost book cost is removed then another step is needed to unblock the patron too . Then you have to go into patron messages to unblock.
- In the staff catalog, there is currently no way to select items, put them in the basket, and place multiple holds at once.
- Item/holdings templates
- Help for creating spine labels and spine label templates is on its way today!

The IT Wiki is your 24/7 resource for answers to Evergreen questions.

For other Evergreen help and issues,

- **First, check with your TechXpert!**
- For login issues, call the HelpDesk at 914-674-3616.
- For other issues, including permissions errors, email the HelpDesk at helpdesk@wlsmail.org. Please include
    - a screen shot of the error message you received
    - a text description of what you were trying to do when you got the error, including ESPECIALLY, item and/or patron barcode IDs
    - any other relevant screenshots and details

Monday Update (3/18/2019)

What We Know

What We're Working on

- Display for holds for on order items
- Other vs daytime phone fields
- Itiva automated phone system

- Populating the county field
- Ongoing permissions issues as we're made aware of them through helpdesk emails
- Code for website login will been sent to directors
- Basic steps for updating and sharing key receipts and slips
- Basic steps for printing spine labels
- Scheduling training, especially for setting up receipt, label, and holdings templates

Friday Update (3/15/2019

As we all prepare for the weekend, first I want to thank you for making it easier for us to help you over the last 36 hours. You've limited your helpdesk calls to login issues and emailed the helpdesk with other issues. Please help your weekend staff and the WLS weekend staff by making sure that your weekend staff knows that

What we're working on

Holds Migration, including displays, lists, etc.

Patron Registration/Records

- updating the Country Field for existing patrons
- Other Phone = Default Phone field
- For new registrations should use the Daytime Phone field so that the Password/PIN automatically updates

Receipts

- automatically printing to a receipt printer
- managing the length of receipt

Daily Maintenance Quick Start Guide - on the IT wiki soon!

- Printing the Holds Pull List
- Filling Holds
- Clearing the Holds Shelf

Updating Tech Services Help on the IT Wiki

- Item/Holdings Templates Help Guide
- Item Type/Circulation Modifier Equivalents Guide

Thanks again for your cooperation!