Column Configuration Essentials Guide
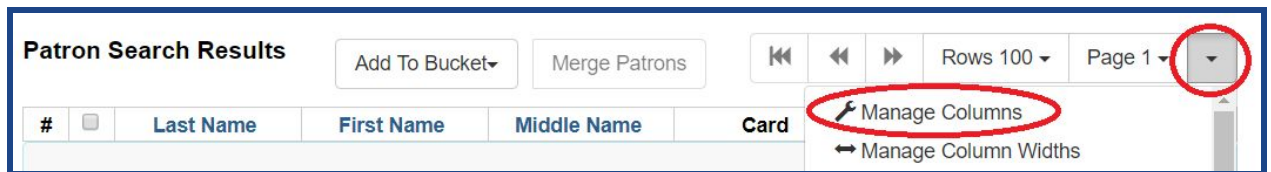
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Evergreen Column Configuration

Columns in lists are configurable in each registered workstation.

For workstation setup and best practice, most often used lists with recommended column choices and order are in priority order, starting on page 2.
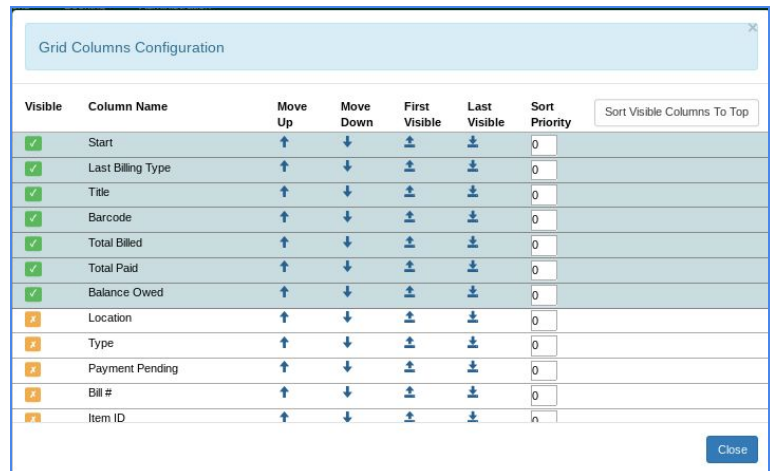
To customize columns,

1. Click the dropdown arrow to the right of "page 1".

2. Open Manage Columns.

3. Click *Sort Visible Columns To Top*.

4. Choose columns.

    a. Click a **green** checkmark to display a column

    b. Click an **orange** X to hide a column

    c. Sort Visible Columns to top as needed

5. Use the **blue** arrows to move the columns up (to the left of the list) or down (to the right) until they are in the suggested order.

6. When finished, *Close*

7. From the dropdown, click Save Columns.

[Click here for a helpful Change Columns in a List video](#) Thanks to Greenburgh's Genie Contrata!

Search

Search for Patrons

Home Library, Last Name, First Name, Card, Daytime Phone, Privilege Expiration Date

Search for Items by Barcode

Owning Library, Title, Barcode, Call Number, Location, Due Date, Item Status, Status Changed Time

Patron Record

Check Out

Title, Author, Call Number, Barcode, Owning Library, Checkout Date, Due Date, Remaining Renewals

Items Out

Owning Library, Item Status, Title, Author, Call Number, Barcode, Checkout Date, Due Date,

Holds

Request Date, Pick Up Library, Title, Barcode, Status, Queue Position

Bills

Billing Location, Last Billing Type, Title, Total Billed, Balance Owed, Note
*If the library always provides a receipt for payments, check *Receipt on Payment*

Convert Change to Patron Credit ☑ Receipt On Payment # Items 1

Bills: History
Transactions
Bill#, Last Billing Timestamp, Start, Last Billing Type, Title, Total Billed, Balance Owed, Last Billing Note

Payments
Payment ID, Payment Time, Last Billing Type, Title, Payment Type, Amount

Circulation

Checkin

Checkin Date, Family Name, Title, Barcode, Due Date, Location, Route To
>*To automatically print hold and Transit Slips, click "Checkin Modifiers" and select
>"Auto-Print Hold and Transit Slips".

Capture Holds

Title, Author, Call Number, Barcode, Family Name, First Name, Route To, Shelf Expire Date/Time

Pull List for Hold Requests

Shelving Location, Title, Author, Call Number, Current Item, Staff Hold, Request Date

Renew Items

Title, Author, Call Number, Barcode, Family Name, First Name, Due Date, Remaining Renewals

Pending Patrons

Create Date, Home Library, First Name, Last Name, Street 1, City, Post code, Email, Daytime Phone

User Buckets

Last Name, First Name, Barcode, Main (Profile) Permission Group, Home Library, Privilege Expiration Date, User Credit Balance

Holds Shelf

User Display Name, Title, Author, Current Item, Status, Available Date, Shelf Expire Time, Notifications Phone Number

Item Status

Title, Barcode, Owning Library, Item Status, Status Changed Time, Edited By

Cataloging

Record Buckets

Record ID, ISBN, Author (normalized), Title, Publication Year (normalized), TCN Source, Deleted?

Item Buckets

Circulating Library, Title, Call Number, Barcode, Location, Circ. Modifier, Copy Status, Last Edit Date/Time

OPAC

Record Summary: View Holds

Pickup Library, Last Name, First Name, Patron Barcode, Status, Transit Source, Shelf Expire Time, Que Position

Record Summary: Holdings View

Owning Library, Call Number, Barcode, Location,Circulation Modifier, Alerts, Status