



New features in Evergreen 3.3

OPAC



New UPC search option in Advanced Search

[Search the Catalog](#)

[Basic Search](#)

[Browse the Catalog](#)



-- Basket Actions --

Go

ADVANCED SEARCH

NUMERIC SEARCH

EXPERT SEARCH

Numeric Search

Field: Identifier

Search Library:

Search



View booking reservations in OPAC account

- New tab in My Account in OPAC shows patrons upcoming and current booking reservations
- Note: this interfaces pulls its timezone from the Library Settings Editor
 - LS: Library time zone
 - Value needs to be tz database timezone name:
https://en.wikipedia.org/wiki/List_of_tz_database_time_zones
- Note: implementing this feature requires a modification to the OPAC template. Please contact Equinox Support to have this change made.

Cataloging

MARC Batch Import/Export - Interface Updates

- This interface has been enhanced
 - The existing functionality still exists, but there are two new features:
 - Import Templates!
 - Allow you to create templates for various import scenarios
 - Recent Imports Tab
 - Allows users to see active and recent import sessions from same workstation or logged in user account
 - Active sessions show real-time progress information for imports
 - Can leave import screen and return later to check on import progress

MARC Batch Import - Import Templates

[Export](#)[Import](#)[Inspect Queue](#)[Record Display Attributes](#)[Merge / Overlay Profiles](#)[Record Match Sets](#)[Holdings Import Profiles](#)[Recent Imports](#)

MARC File Upload

Apply/Create Form Template	Brodart Import w/Holdings	Save As New Template	Mark Template as Default	Delete Template
Record Type	Bibliographic Records	Select a Record Source	oclc	
Select or Create a Queue	Select or Create a Queue...	Limit Matches to Bucket	Buckets...	
Record Match Set	Match Set...	Import Non-Matching Records	<input checked="" type="checkbox"/>	
Holdings Import Profile	Evergreen 852 export format	Merge On Exact Match (901c)	<input type="checkbox"/>	
Merge Profile	Full Overlay	Merge On Single Match	<input checked="" type="checkbox"/>	
Insufficient Quality Fall-Through Profile	Fall-Through Merge Profile...	Merge On Best Match	<input checked="" type="checkbox"/>	
Best/Single Match Minimum Quality Ratio	0	Auto-overlay In-process Acquisitions Copies	<input type="checkbox"/>	
Optional Session Name:	Session Name...	Remove MARC Field Groups	No Groups Configured	
File to Upload:	Choose File No file chosen			
Upload				

MARC Batch Import - Recent Imports

Home Search Circulation Cataloging Acquisitions Booking Administration equinox @ BR1-eoli-ak

Export **Import** Inspect Queue Record Display Attributes Merge / Overlay Profiles Record Match Sets Holdings Import Profiles **Recent Imports**

MARC File Upload

Apply/Create Form Template	Apply or Create Form Template...	Save As New Template	Mark Template as Default	Delete Template
Record Type	Bibliographic Records	Select a Record Source	oclc	
Select or Create a Queue	Select or Create a Queue...	Limit Matches to Bucket	Buckets...	
Record Match Set	Match Set...	Import Non-Matching Records	<input type="checkbox"/>	
Holdings Import Profile	Holdings Import Profile...	Merge On Exact Match (901c)	<input type="checkbox"/>	
Merge Profile	Merge Profile...	Merge On Single Match	<input type="checkbox"/>	
Insufficient Quality Fall-Through Profile	Fall-Through Merge Profile...	Merge On Best Match	<input type="checkbox"/>	
Best/Single Match Minimum Quality Ratio	0	Auto-overlay In-process Acquisitions Copies	<input type="checkbox"/>	
Optional Session Name:	Session Name...	Remove MARC Field Groups	No Groups Configured	
File to Upload:	Choose File No file chosen			

Upload

MARC Batch Import - Recent Imports

[Export](#)[Import](#)[Inspect Queue](#)[Record Display Attributes](#)[Merge / Overlay Profiles](#)[Record Match Sets](#)[Holdings Import Profiles](#)

Show Sessions Since:

2019-04-13



4/13/19, 6:56 PM : **April 2019 Upload**



100%

[Queue 20190413-2](#) Importing... Complete



4/13/19, 6:52 PM : **5cae8f8dad64595b9489f629b9ff93f9**

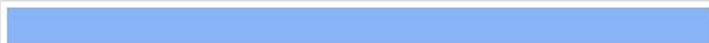


100%

[Queue 20190413-2](#) Importing... Complete



4/13/19, 6:50 PM : **ba8bf050cb68a8d254638e9846060479**



100%

[Queue 20190413](#) Importing... Complete



Spine Label Printing - Print to Full Sheets

- There is now an option to print spine labels to a full sheet

Print Item Labels

Template Apply Printer Save Delete Import Export Default

Call Number Template Call Numbers Settings Label Template

***All settings will be saved with templates**

Print Feed Option

Continuous: Sheet:

Starting Position on Label Grid

Row: Column:

Label Set Configuration

Spine Label: Pocket Label:

Number of Labels in Set:

Column 1 Column 2

Page Settings

Page Margins

Top: Left:

Print Grid Size

Rows: Columns:

Gap Between Rows

Label Preview

REF BR1	CONC4100080
ML	ML 2533 B34 C45
2533	Chopin, Frédéric
B34	The piano concertos
C45	
REFERENC	



Circulation



Parent/Guardian Field

- There is a new, dedicated field for parent or guardian name in the patron registration form
 - Editable in Edit tab in patron account
 - Parent/Guardian displays in patron summary on left-hand side of screen
 - Parent/Guardian is searchable in patron search interface
-
- New Library Setting “Juvenile account requires parent/guardian”
 - Makes Parent/Guardian a required field when the Juvenile flag is active in patron account



Parent/Guardian Field

- Dedicate

Date of Birth

2010-01-13



Juvenile



Parent/Guardian

Joan Smith

Primary Identification Type

Other



Primary Identification

Secondary Identification Type



Secondary Identification



Account Use Privacy Waiver

- Patrons can authorize other people to use their account
- Patron opt-in via My Account in OPAC or can be set by library staff in patron account in the staff interface

- Feature is turned on via Library Setting “Allow others to use patron account (privacy waiver)”

Account Use Privacy Waiver - OPAC

- My Account ->
- Search and History Preferences

Keep history of holds?	<input type="checkbox"/>
Skip warning when adding to temporary book list?	<input type="checkbox"/>

Name:

Place Holds

Pick Up Holds

Check Out Items

View Borrowing History

Allow others to use my account

Account Use Privacy Waiver - Staff View

Jones, Cora

Other Phone

ID1 (Drivers
License)

ID2

Email

Allow others to use my account

Leah Jones

- Pick up holds
- Check out items

MAILING (copy/print)

9202 Tight Subject Highway
Kingdom city, MO 65262

Check Out

Items Out (0)

Holds (0 / 0)

Bills (\$0.00)

Messages

Edit

Other ▾