



New features in Evergreen 3.4



OPAC

Link to item owning library in Items Checked Out

- If the Library Setting “OPAC: Show Owing Lib in Items Out” is set to True, patrons will see a link to the Library Info page of the owning library for items they have checked out on their account.
- This feature may be useful for libraries with multiple locations or those that resource share.

The screenshot shows a library account interface with a green header. The 'Items Checked Out' tab is selected. Below the header, there are two sub-tabs: 'Current Items Checked Out' and 'Check Out History'. The 'Current Items Checked Out' section has a 'Renew Selected Titles' dropdown, a 'Go' button, and a help icon. Below this is a table of items checked out.

<input type="checkbox"/>	Title	Author	Renewals Left	Due Date	Barcode	Call Number	Owning Library
<input type="checkbox"/>	Piano concerto no. 21 in C	Mozart, Wolfgang Amadeus, 1756-1791	2	08/17/2019	CONC44000132	ML 2533 B34 C97	Example Branch 1

Bottom Link 2 | Bottom Link 3 | Bottom Link 4 | Bottom Link 5

Display enhancements to Item Tags

- Item Tags now display a Tag Type Label in addition to the tag value. This allows for a separate CSS class to be used so the Tag Type Label can be styled differently or removed altogether from the display.

Violin concerto in D minor

[Khachaturian, Aram, 1903-1978](#) (Author). [Oistrakh, David Fedorovich, 1908-1974](#) (Added Author). [Vsesoiuznoe radio. Bol'shoi simfonicheskii orkestr](#) (Added Author).

 Musical Sound Recording (Unknown Format)

Electronic resources

[Link text here](#) - Public note here

Available copies

- 20 of 24 copies available at Example Consortium.
- 10 of 12 copies available at Example System 1. ([Show](#))
- 6 of 7 copies available at Example Branch 1. ([Show](#))
- 0 of 0 copies available at Example Sub-library 1.

Current holds

1 current hold with 24 total copies.

 [Place Hold](#)

 [Add to basket](#)

 [Add to my list](#)

 [Print / Email](#)

 [Permalink](#)

 [Disable Highlighting](#)

Location	Call Number / Copy Notes	Barcode	Shelving Location	Status	Due Date
Example Branch 1	ML 2533 B34 C62	CONC4100097	Periodicals	Available	-
	Digital Bookplate: Donation:Jane Smith (BR1)				
Example Branch 1	ML 2533 B34 C62	CONC4200097	Periodicals	Available	-

Carousels



- OPAC Carousels are now a full feature in Evergreen. Multiple carousels that display book jackets and titles can be added to your library's OPAC home page.
- There are 5 stock Carousel Types that can be set up:
 - Newly Cataloged Items
 - Titles appear automatically based on the active date of the title's copies
 - Recently Returned Items
 - Titles appear automatically based on the mostly recently circulated copy's check-in scan date and time
 - Top Circulated Titles
 - Titles appear automatically based on the most circulated copies in the Item Libraries identified in the carousel definition; titles are chosen based on the number of action.circulation rows created during an interval specified in the carousel definition and includes both circulations and renewals
 - Newest Items by Shelving Location
 - Titles appear automatically based on the active date and shelving location of the title's copies
 - Manual
 - Titles are added and managed manually by library staff

Carousels



- There are three new administration interfaces that are used to create and manage carousels and their components:
 - Carousel Types
 - Used to define different types of carousels
 - Server Administration
 - Carousels
 - Used to create and manage specific carousel definitions
 - Local Administration
 - Carousel Library Mapping
 - Used to manage which libraries will display specific carousels, as well as the default display order on a library's public catalog home page
 - Local Administration

Booking Module Enhancements

- The Booking Module has been updated to include:
 - A Manage Reservations screen where you can easily view and manage all reservations at your library
 - Updated and enhanced interfaces for all Booking related screens

The screenshot shows the 'Manage Reservations' interface. At the top, there is a navigation bar with a home icon, search, and dropdown menus for Circulation, Cataloging, Acquisitions, Booking, and Administration. The user is logged in as 'admin @ RIV-ADA-ak'. Below the navigation bar is a light blue header for 'Manage Reservations'. On the left, there is a 'Reservation location' dropdown set to 'RIV-ADA' and checkboxes for '+ Ancestors' and '+ Descendants'. A 'Create New Reservation' button is also present. On the right, there is a 'Filter reservations' section with tabs for 'Filter by patron', 'Filter by resource', and 'Filter by resource type'. The 'Filter by resource' tab is active, showing a 'Resource type' dropdown and a 'Remove filter' button. Below the filters, there is a table of reservations. The table has columns for #, Patron barcode, Patron first name, Patron family name, Start Time, End Time, Request Time, Capture Time, Pickup Time, Billing total, Payment total, Resource Barcode, Note, Resource Type, Reservation length, Request library, Reservation location, and Reservation location timezone. The first row shows a reservation with ID 1, barcode 123456, patron Mary Ayers, start time 3/25/20, end time 3/28/20, request time 3/20/20, resource barcode 3295700..., resource type Environ..., reservation length 3 days, request library Ada Nei..., reservation location Ada Nei..., and reservation location timezone America/...

#	Patron barcode	Patron first name	Patron family name	Start Time	End Time	Request Time	Capture Time	Pickup Time	Billing total	Payment total	Resource Barcode	Note	Resource Type	Reservation length	Request library	Reservation location	Reservation location timezone
1	123456	Mary	Ayers	3/25/20, ...	3/28/20, ...	3/20/20, ...					3295700...		Environ...	3 days	Ada Nei...	Ada Nei...	America/...



Circulation

Bill Details Enhancements

- In the Full Details of a bill, there are now links to view the Library Info page of the Billing Location library and the Item Owning Library.
- This can make it easier for staff at libraries with multiple locations to know which library to contact about billing.

Smith, Sarah II

Profile	Patrons
Home Library	SL1
Net Access	Filtered
Date of Birth	1/13/2010
Parent/Guardian	Martha Smith
Last Activity	3/10/2020
Last Updated	11/11/2019
Create Date	3/29/2019
Expire Date	3/29/2022
Fines Owed	\$8.00
Items Out	1
Overdue	1
Long Overdue	0
Claimed Returned	0
Lost	0
Non-Cataloged	0
Holds	0 / 4
Card	99999303411
Username	ssmith
Day Phone	
Evening Phone	
Other Phone	

Check Out Items Out (1) Holds (0 / 4) Bills (\$8.00) Messages Edit Other ▾

Transaction #511

Billing Location	BR1	Total Billed	\$5.00
Type	circulation	Total Paid/Credited	\$0.00
Start	8/14/2019 11:22 AM	Balance Due	\$5.00
Finish		Renewal?	

Item Summary

Barcode	CONC44000132	Location	Reserves
Status	Checked out	Circulate	true
Holdable	true	OPAC Visible	true
Edited	8/14/2019 11:22 AM	Age Protect	
Owning Library	BR1		

Statement Details

Billing Statement

Type	Description
Billing	Overdue materials System Generated Overdue Fine 8/19/2019 8:59 PM - 1/6/2020 8:59 PM

Enhancements to Item Request

- The Request Items feature now provides an option to honor a user's hold preferences, such as preferred pick up library, when placing a hold through the Request Items interface.
- A new Title Hold option allows users to place a title level hold for each unique title associated with the items selected for request.

The screenshot shows a web application interface with a dark green header. The header contains navigation links: Search, Circulation, Cataloging, Acquisitions, Booking, and Administration. On the right, it displays 'equinox @ BR1-ak' and a menu icon. The main content area is dimmed, showing a 'Scan Item' section with a search box and 'Submit' and 'Choose File' buttons. Below that is an 'Item Status' table with columns for '#', 'Status', 'Alert Message', and 'Barcode'. A row is visible with '# 1', a checked status, an alert message, and barcode 'CONC4300093'. A 'Request Items' dialog box is open in the center. It has a title bar with a close button. Inside, there's a 'User Barcode' field with 'b1beebaf3f2741b676' and a 'System Account, Administrator' label. A checkbox labeled 'Honor user preferences?' is checked. Below this is a 'Hold Type' dropdown menu with options: Copy Hold, Copy Hold, Recall Hold, Force Hold, and Title Hold (highlighted in blue). To the right of the dropdown is a 'Pickup Lib' field with 'BR1'. At the bottom right of the dialog are 'OK' and 'Cancel' buttons. In the background, there are navigation controls (back, forward, search) and a table with columns for 'Status', 'Title', and 'Alerts'. A row is visible with 'Concerto for violin and...' and a 'Manage' button. A 'Print' button is also visible at the bottom right of the page.

Request Items

User Barcode: b1beebaf3f2741b676 System Account, Administrator

Honor user preferences?

Hold Type: Copy Hold (dropdown menu open showing options: Copy Hold, Recall Hold, Force Hold, Title Hold)

Pickup Lib: BR1

OK Cancel

Scan Item

Submit OR Choose File

Item Status

#	Status	Alert Message	Barcode
1	<input checked="" type="checkbox"/>		CONC4300093

Detail View

Navigation: Back, Forward, Search, Actions, Rows 25, Page 1

Status	Title	Alerts
ed	Concerto for violin and...	0 Manage

Print



Mark Item as Discard/Weed

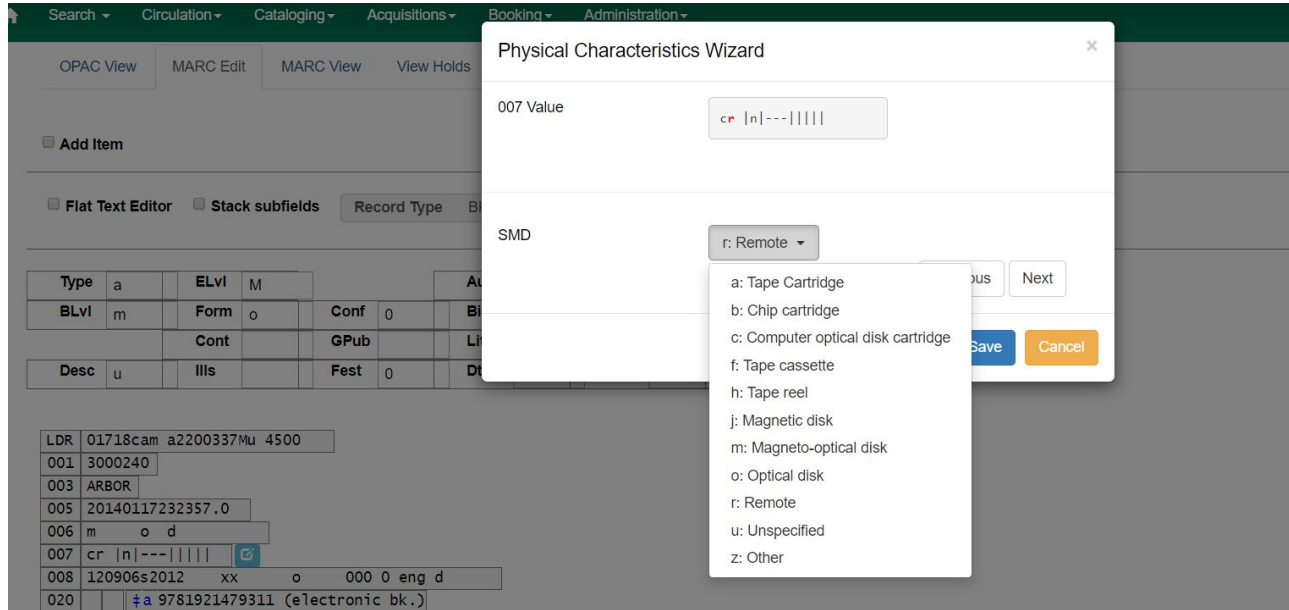
- New feature to Mark Item as Discard/Weed provides an extra step before deleting items from the catalog.
- Allows staff to designate items for deletion without needing cataloging permissions to perform the deletion.
- Item Status is updated to Discard/Weed
- Mark Item as Discard/Weed option available in Item Status screen and Holdings View tab in staff catalog



Cataloging

Physical Characteristics Enhancement

- Drop down menus for all values in the physical characteristics wizard now display the value code and label for easier selection.



The screenshot displays the 'Physical Characteristics Wizard' interface. The wizard is overlaid on a background of a library cataloging system. The wizard has a title bar with a close button (X). Below the title bar, there is a field for '007 Value' containing the text 'cr |n|---| | | | |'. Below this, there is a field for 'SMD' with a dropdown menu currently showing 'r: Remote'. The dropdown menu is open, displaying a list of options with their corresponding value codes: 'a: Tape Cartridge', 'b: Chip cartridge', 'c: Computer optical disk cartridge', 'f: Tape cassette', 'h: Tape reel', 'j: Magnetic disk', 'm: Magneto-optical disk', 'o: Optical disk', 'r: Remote', 'u: Unspecified', and 'z: Other'. The wizard also includes 'Previous' and 'Next' buttons, and a 'Save' button (blue) and a 'Cancel' button (orange) at the bottom right.

Type	a	ELvl	M	At
BLvl	m	Form	o	Conf 0
		Cont		GPub
Desc	u	lls		Fest 0

LDR 01718cam a2200337Mu 4500
001 3000240
003 ARBOR
005 20140117232357.0
006 m o d
007 cr |n|---| | | | |
008 120906s2012 xx o 000 0 eng d
020 a 9781921479311 (eElectronic bk.)

Holdings Editor Enhancements

- Disabled display fields that are set in the Defaults tab of the holdings editor will now be hidden in the main item editor interface.
- In previous versions of the web client disabled fields still displayed, but were not editable.

The screenshot displays the 'Defaults' tab of the Holdings Editor. The 'Defaults' tab is highlighted with a red box. Below it, the 'Display defaults for Working Item tab' section is also highlighted with a red box. The interface is organized into several sections:

- Holdings Detail defaults:**
 - Always display Holdings Detail pane
 - Allow Call Number attributes in Item Templates
- Creation Defaults:**
 - Use Library Setting (dropdown)
 - Unset Default Prefix (dropdown)
 - Unset Default Suffix (dropdown)
 - Auto-generate Barcodes
 - Use checkdigit
 - Print Item Labels on Save & Exit
- Item display:**
 - Activated
 - Created
 - Call Number
- Circulation:**
 - Circulate?
 - Circulation Library
 - Circulation Modifier
 - Circulate as Type
 - Loan Duration
 - Fine Level
 - Shelving Location
 - Holdable?
 - Age-based Hold Protection
 - Floating
- Miscellaneous:**
 - Add/Edit Item Alerts
 - Deposit?
 - Deposit Amount
 - OPAC Visible?
 - Price
 - Quality
 - Reference?
 - Acquisition Cost
 - Status
 - Add/Edit Item Notes
 - Item Notes are Public
- Statistical Categories:**
 - Default Filter Library (dropdown)
 - Edit Statistical Data
 - Add/Edit Item Tags

MARC Batch Import - New Copy Import Options



There are two new options for importing holdings data in Cataloging>MARC Batch Import

- Auto-overlay On-Order Cataloging Items
 - If selected, holdings information in incoming records will overlay copies in the On Order status with the same Owning Library that are located on the matching bib and were created in the cataloging module.
- Use Org Unit Matching in Copy to Determine Best Match
 - When there are multiple matching records with the same match score, based on ISBN for example. Evergreen will first look for existing volumes/copies on the matching records that are owned by the same lib as the incoming holdings. The record with the most copies at the same owning lib will be the final match. If no holdings exist at the same owning lib, then EG will look up and out in the org unit tree to find the closest org unit with the most holdings to be the final matching record.
- Corresponding new permissions:
 - IMPORT_ON_ORDER_CAT_COPY
 - IMPORT_USE_ORG_UNIT_COPIES



Reports



New Reporting Sources Related to Bills and Payments

Two new database tables for aged billings and payments:

- Reporting Source: Aged Billing line item
 - Database table: Money.aged_billing
- Reporting Source: Payments: Aged
 - Database table: Money.aged_payment

Two new database views that aggregate data from active and aged tables:

- Reporting Source: All billing line items
 - Database view: Money.all_billings
- Reporting Source: All payments
 - Database view: Money.all_payments

Administration



New Notification/Action Trigger

A new notification called “Fine Limit Exceeded” is now available in Evergreen

- Optional email notification send when a patron account is blocked due to the PATRON_EXCEEDS_FINES penalty
 - The notice is configured in Local Administration>Notifications/Action Triggers
 - The threshold for the penalty is configured in Local Administration>Group Penalty Thresholds

New Angular Interfaces



The Administration module in Evergreen is gradually being switched over to Angular. These interfaces are now in Angular and will look different than in the previous version. All functionality should remain the same.

- Server Administration>Organizational Units
- Local Administration>Standing Penalties
- Permission groups
- Org unit types
- Local Admin - main menu page
- Address alerts
- Barcode completion
- Group penalty thresholds
- Hold policies
- Item alert suppression
- Item tags
- Non-cataloged Types editor
- Shelving location editor
- Statistical popularity badges



New Permissions

- VIEW_COPY_ALERT - default for Staff
- ADMIN_COPY_ALERT - assigned to Cataloging Administrator
 - Not part of upgrade script-EG admins need to update for their systems
- IMPORT_ON_ORDER_CAT_COPY
- IMPORT_USE_ORG_UNIT_COPIES
- CREATE_PRECAT
 - Required to create precats
 - Form will be disabled if do not have permission
 - Not required to renew precats
 - Permission added to every perm group that has STAFF_LOGIN perm as part of upgrade script