westchester
LIBRARY SYSTEM

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EVERGREEN 3.6 PREVIEW

May 2021 Upgrade

AGENDA

- Staff Catalog
- Hopeless Holds
- Batch Barcode ID Entry
- Report Output Subtotal Options
- Additional Features

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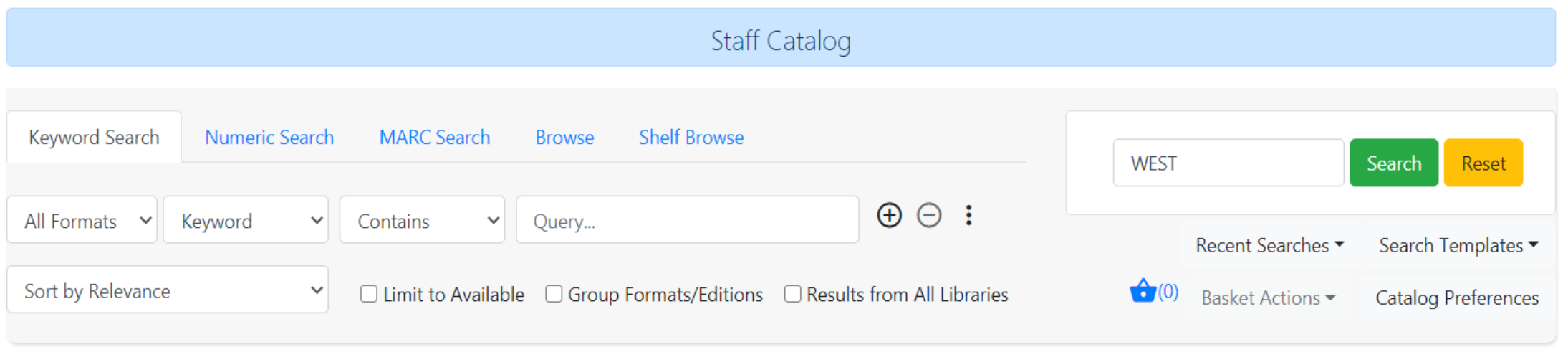
STAFF CATALOG – SIMPLE SEARCH



- Default will be the new catalog; start searches from *Search* > *Search the Catalog* or *Cataloging* > *Search the Catalog* or the home screen search box
- Find the Search the Catalog (Traditional) option in Cataloging menu
- 5 search tabs: Keyword, Numeric, MARC Search, Browse, Shelf Browse (by call number)
- Reset clears the search, but NOT location scope

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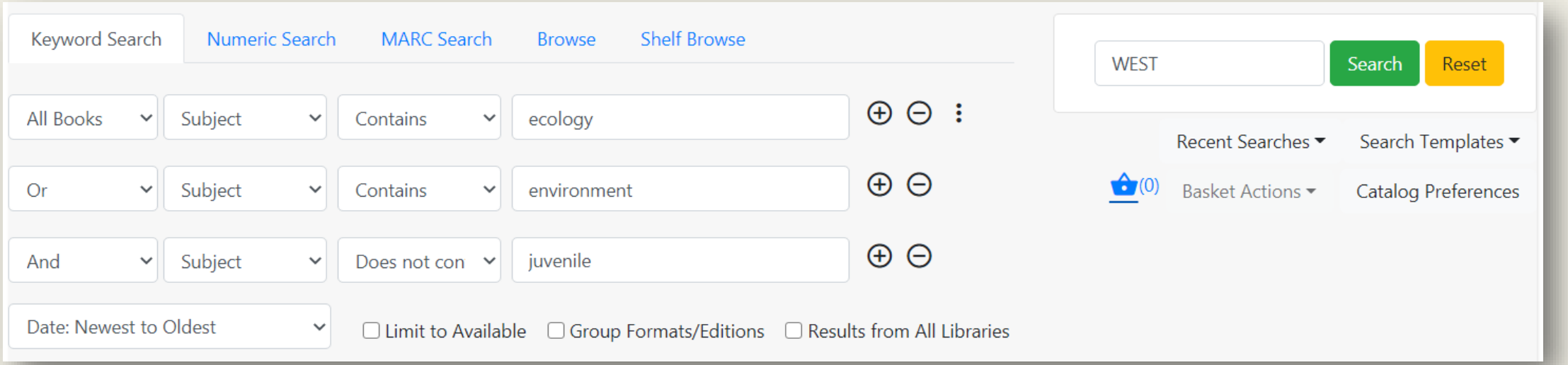
STAFF CATALOG



- Single search row
- Search rows can be added
- Sort Order can be set as part of the search

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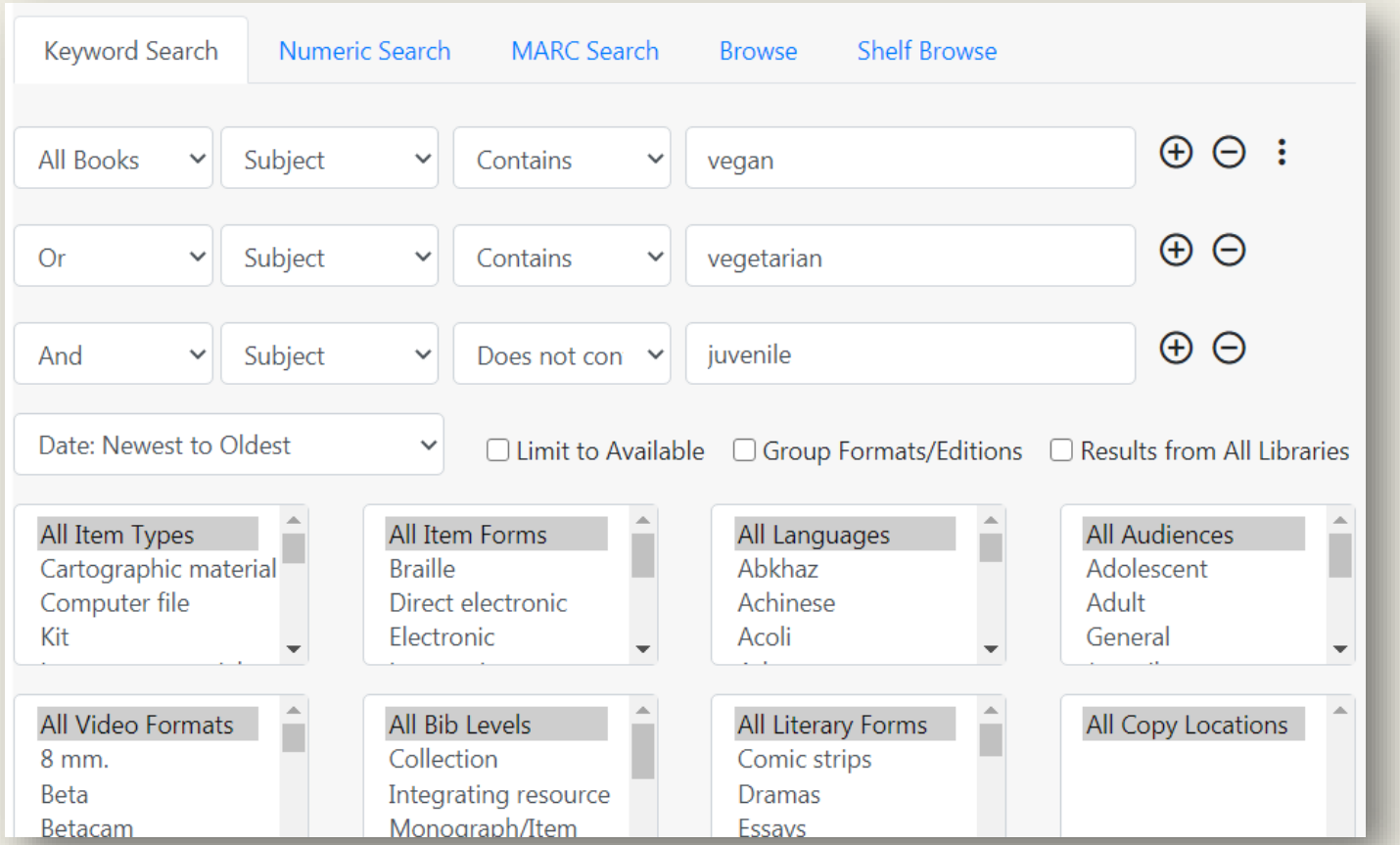
STAFF CATALOG – FILTERS



- Use the 3-dot icon to open the filters that were previously Advanced Search
- Best practice is to scope by library to view and filter by Copy (Shelving) Locations

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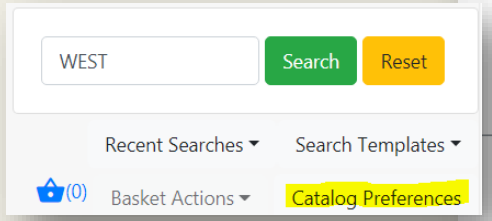
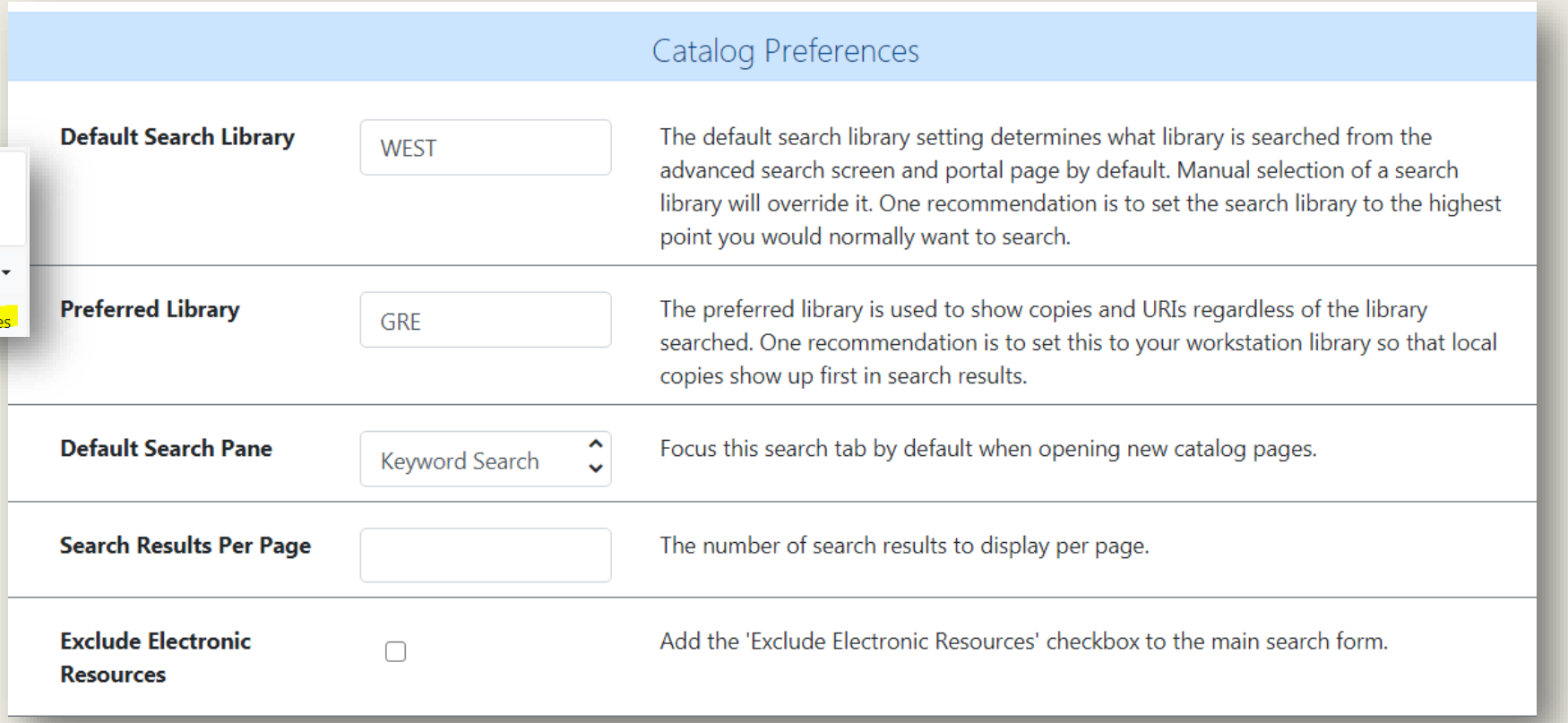
STAFF CATALOG – PREFERENCES





- Catalog Preferences (also at Administration > Workstation) AND search results per page are set and saved in the workstation
- Exclude Electronic resources adds option to exclude eresources that are in the catalog (will later be sticky)

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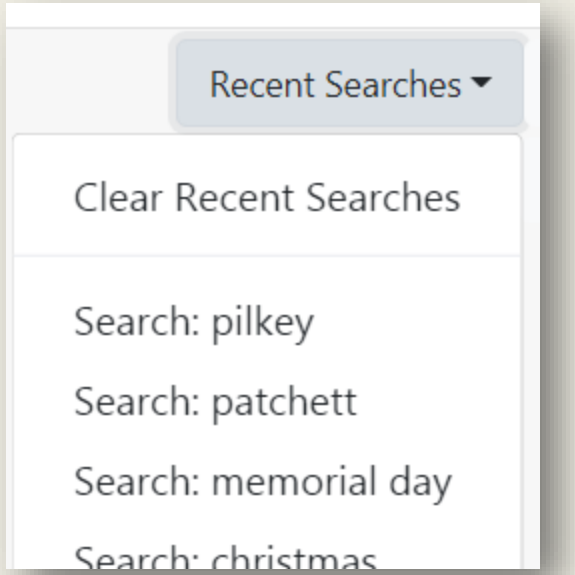
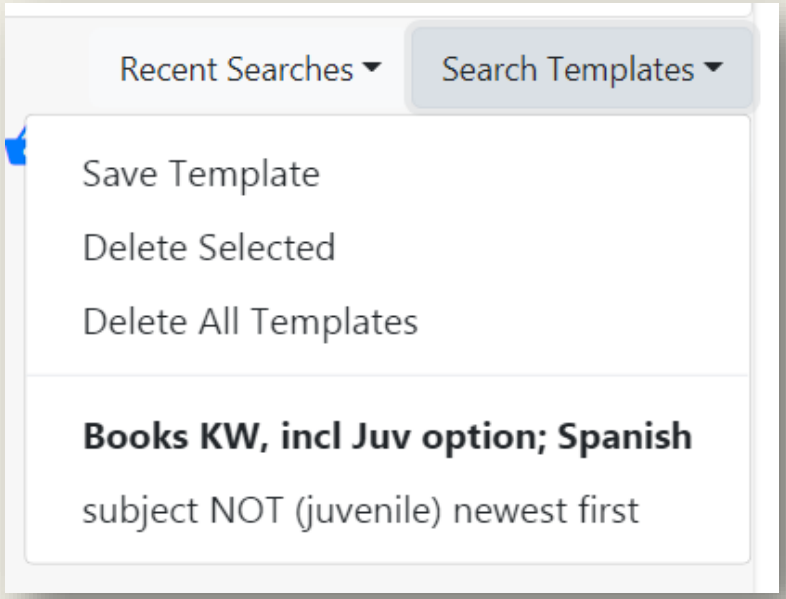
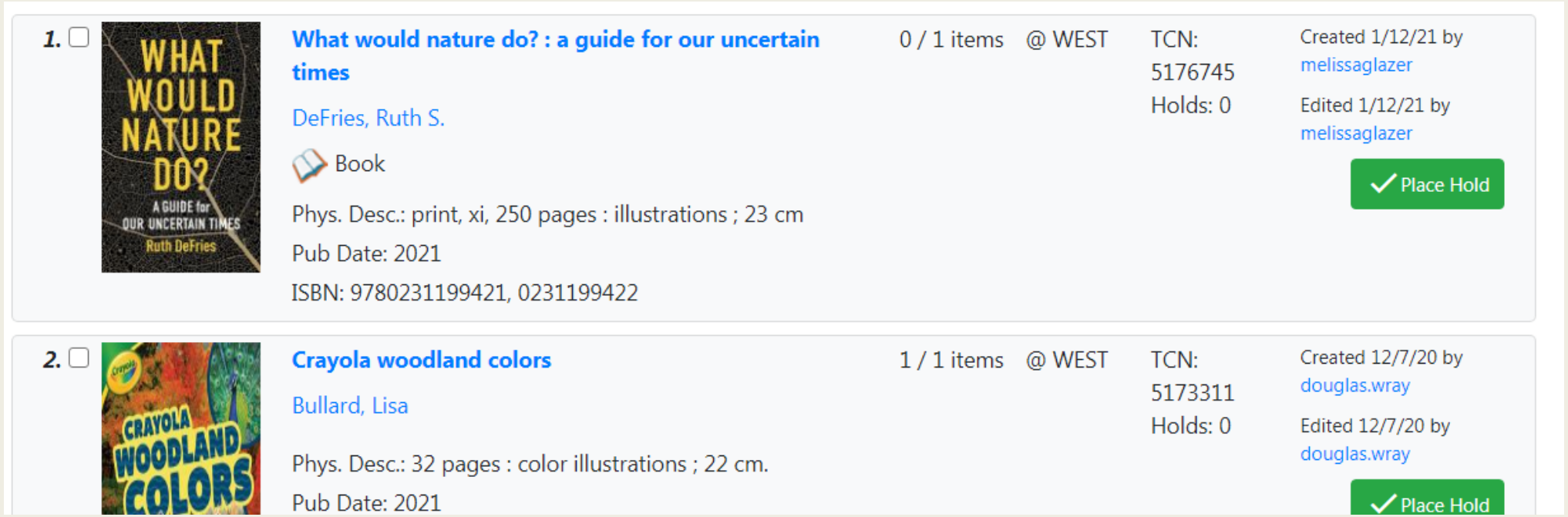
STAFF CATALOG – RECENT SEARCH & TEMPLATES





- Recent searches
  - Cleared at log out or if manually cleared
  - WLS will configure the number of searches that displays
- Search Templates
  - Set up a search and then save it as a template
  - Can be used in any of the tabbed search types
  - Sort Order can be saved in Search Templates
  - Saved to workstation
  - Templates are easily applied or deleted

STAFF CATALOG – RESULTS DISPLAY



- Results display includes Title, available/holdings/holds counts, brief MARC information, bib record created info, place hold button
- When the search is scoped to a library location, available/holdings counts also display for that location

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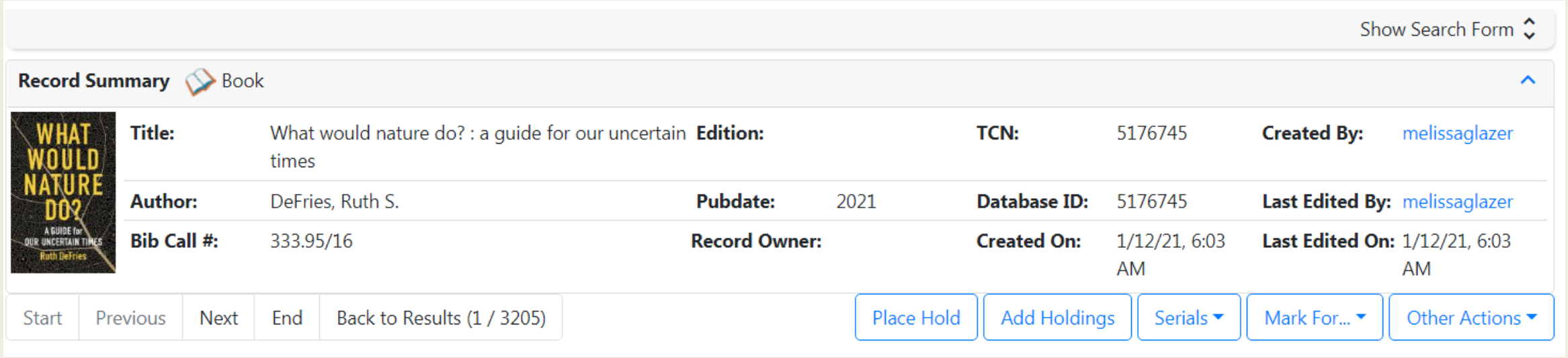
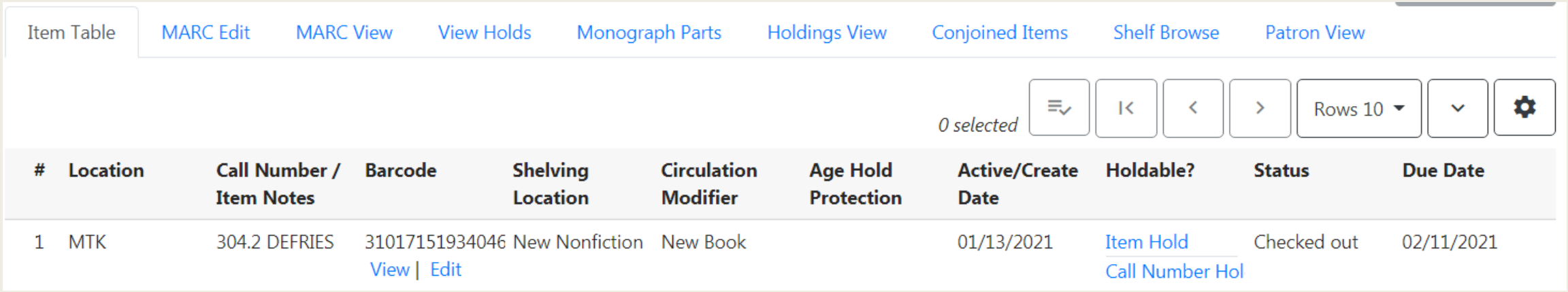
STAFF CATALOG – RECORD SUMMARY



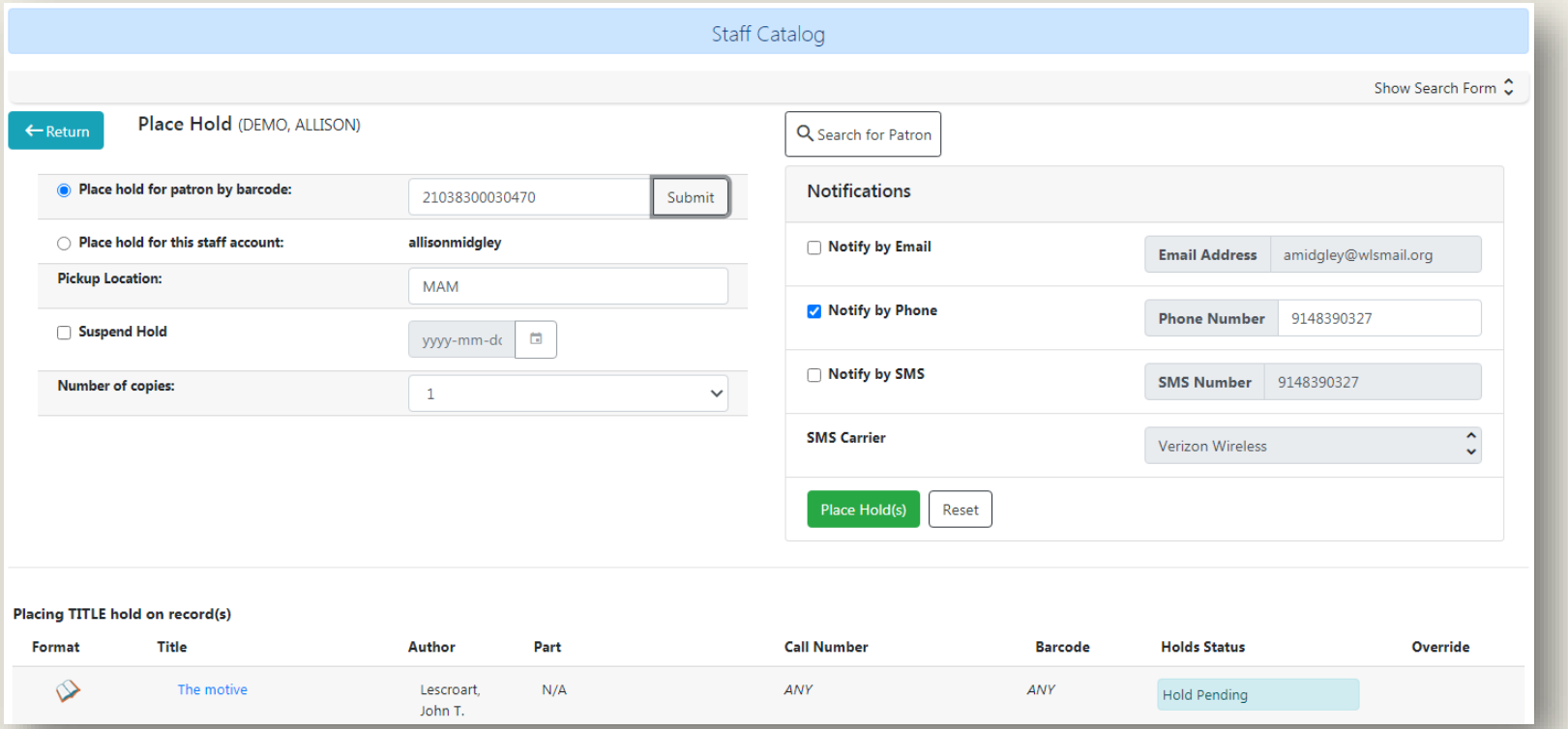
- Expand/collapse sections
- Search pane on every screen
- Record Summary
  Title, Author, Bib Call #, TCN, Pub Date, Creation Info
- Navigation between titles
- Actions: Place Hold, Add Holdings, etc.

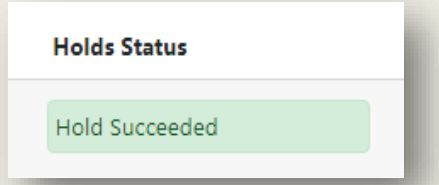
STAFF CATALOG – RECORD SUMMARY



- Item table - holdings information
- MARC view
- View holds
- Holdings view (good entry for cataloging work)
- Shelf Browse (scoped to the search location)
- Patron View
  - A snapshot of the former OPAC View
  - Open a tab with catalog.westchesterlibraries.org for Summary & More added content like Read Alikes and series

NEW HOLD REQUEST SCREEN





- Library card entry fills out the form defaults
- The Hold status is *Hold Pending* while information is being entered.
- When the Place Hold button is selected, the hold status changes to *Hold Succeeded*.

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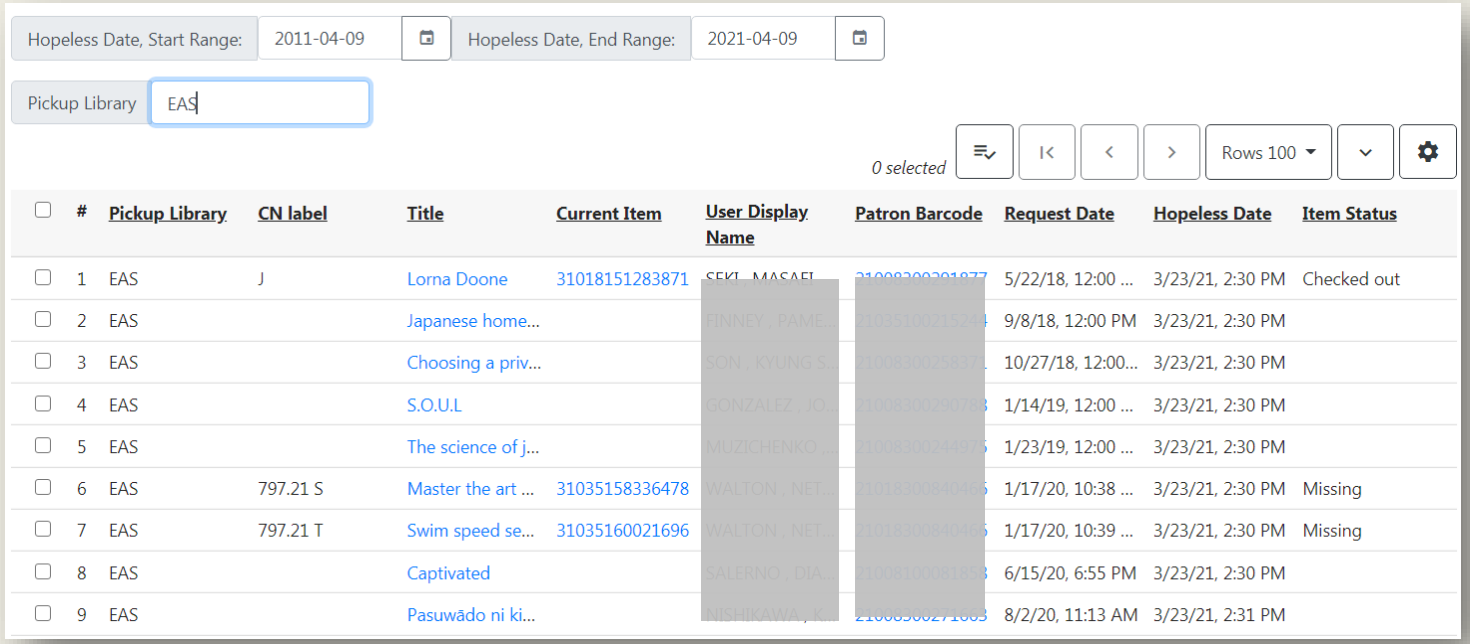
HOPELESS HOLDS

- New interface for following up on holds that have not been filled - are "hopeless"
- Adds a hopeless date field (set at system level) on requests when
  - the potential items list for the hold is empty (a title record has no items added)
  - all potential items have a copy status that has been designated as Hopeless Prone, such as Missing, Damaged, Lost, etc
- Go to *Administration > Local Administration > Hopeless Holds* – **Set up grid columns** and follow up to remove/transfer holds, contact patrons, delete items/titles.



#	Pickup Library	CN label	Title	Current Item	User Display Name	Patron Barcode	Request Date	Hopeless Date	Item Status
1	EAS	J	Lorna Doone	31018151283871	[redacted]	[redacted]	5/22/18, 12:00 ...	3/23/21, 2:30 PM	Checked out
2	EAS		Japanese home...				9/8/18, 12:00 PM	3/23/21, 2:30 PM	
3	EAS		Choosing a priv...				10/27/18, 12:00...	3/23/21, 2:30 PM	
4	EAS		S.O.U.L				1/14/19, 12:00 ...	3/23/21, 2:30 PM	
5	EAS		The science of j...				1/23/19, 12:00 ...	3/23/21, 2:30 PM	
6	EAS	797.21 S	Master the art ...	31035158336478			1/17/20, 10:38 ...	3/23/21, 2:30 PM	Missing
7	EAS	797.21 T	Swim speed se...	31035160021696			1/17/20, 10:39 ...	3/23/21, 2:30 PM	Missing
8	EAS		Captivated				6/15/20, 6:55 PM	3/23/21, 2:30 PM	
9	EAS		Pasuwādo ni ki...				8/2/20, 11:13 AM	3/23/21, 2:31 PM	

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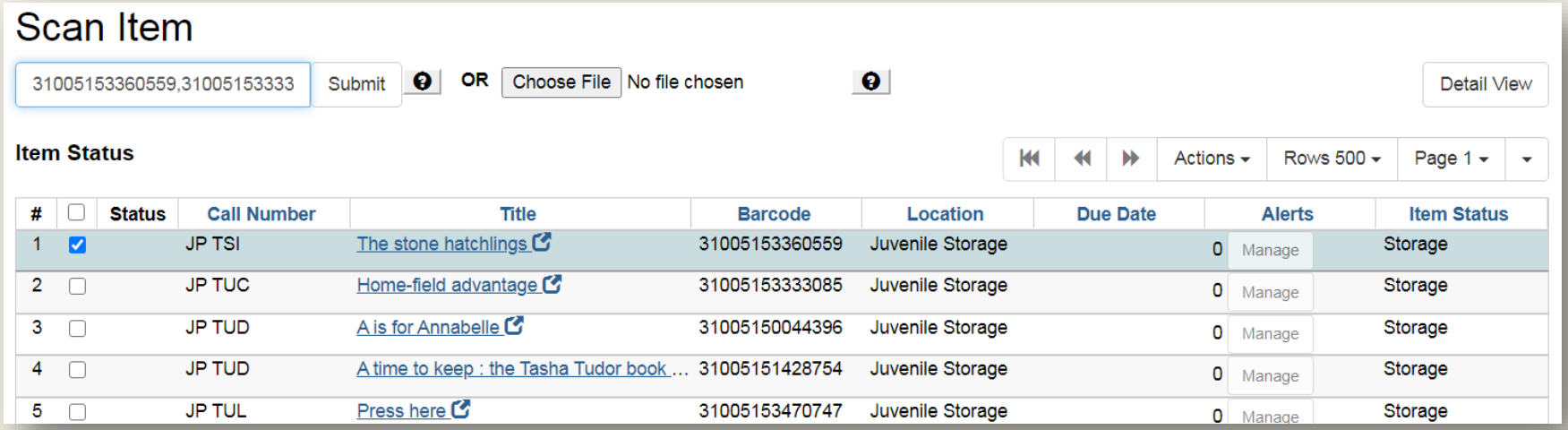
BATCH ITEM ENTRY

- Item Status input box allows pasting a list of barcodes in csv format, that is, separated with commas, as well as a single barcode



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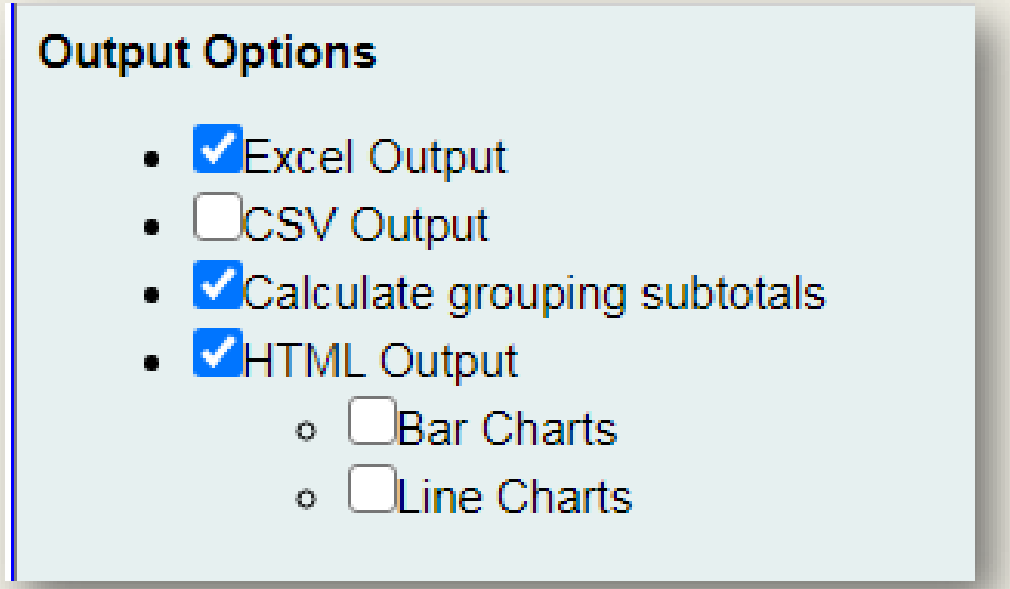
REPORT SUBTOTAL OUTPUT OPTIONS

- Reports now allow grouping of subtotals and grand totals
- In Output Options, check the Calculate grouping subtotals checkbox
- Results display an unlabeled row or column with subtotals for each grouping and an unlabeled grand total row or column



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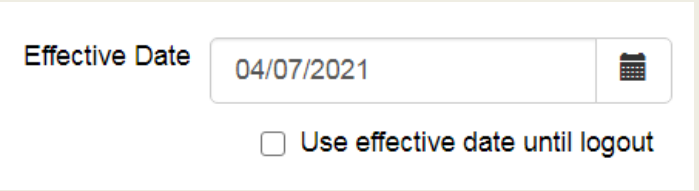
ADDITIONAL FEATURES AND FIXES

- Enhanced Public Catalog Printing and Email
- The library's address, email, phone, and website link are added to the OPAC patron account preferences page
- Add the contents of a basket to a shared bucket
- Warning if the user attempts to delete a bib record that has active holds on it
- Option to make effective date of checkin sticky
- Acquisitions Search and Providers Angular Interfaces
- Future Implementations
  - Preloaded Audio Icon and Search Format (requires cataloging edits)
  - Course Reserves Module (requires configuration)



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Try out Evergreen 3.6 on the test server at
wls-test.sequoia.evergreencatalog.com/eg/staff/login
or in our current version, see the new catalog at
Cataloging>Staff Catalog (Experimental)

RESOURCES

- Evergreen 3.6 Upgrade Preview Recording (4/21/2021)
  Sign in with your AD/Evergreen username and password, with the username format **firstname.lastname@westchesterlibraries.org**
- Evergreen Community 3.6 Upgrade Documentation
- Equinox EDU SpotLight on Evergreen 3.6 FAQs

THANK YOU

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