



westchester
LIBRARY SYSTEM

Empowering libraries. Empowering communities.

EVERGREEN 3.6

PREVIEW

May 2021 Upgrade

AGENDA

■ Staff Catalog

■ Hopeless Holds

■ Batch Barcode ID Entry

■ Report Output Subtotal Options

■ Additional Features

STAFF CATALOG – SIMPLE SEARCH

Staff Catalog

Keyword Search Numeric Search MARC Search Browse Shelf Browse

All Formats Keyword Contains Query... + - ⋮

Sort by Relevance Limit to Available Group Formats/Editions Results from All Libraries

WEST Search Reset

Recent Searches Search Templates

(0) Basket Actions Catalog Preferences

- 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

STAFF CATALOG

Keyword Search Numeric Search MARC Search Browse Shelf Browse

All Books Subject Contains ecology ⊕ ⊖ ⋮


Or Subject Contains environment ⊕ ⊖

And Subject Does not con juvenile ⊕ ⊖

Date: Newest to Oldest Limit to Available Group Formats/Editions Results from All Libraries

WEST Search Reset

Recent Searches Search Templates

 Basket Actions Catalog Preferences

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

STAFF CATALOG – FILTERS


The screenshot displays the search interface for the Staff Catalog. At the top, there are navigation tabs: "Keyword Search" (selected), "Numeric Search", "MARC Search", "Browse", and "Shelf Browse". Below the tabs, there are three search rows. The first row has "All Books" (dropdown), "Subject" (dropdown), "Contains" (dropdown), and a text input field containing "vegan", followed by expand (+) and collapse (-) icons and a three-dot menu icon. The second row has "Or" (dropdown), "Subject" (dropdown), "Contains" (dropdown), and a text input field containing "vegetarian", followed by expand and collapse icons. The third row has "And" (dropdown), "Subject" (dropdown), "Does not con" (dropdown), and a text input field containing "juvenile", followed by expand and collapse icons. Below the search rows, there is a "Date: Newest to Oldest" dropdown menu and three checkboxes: "Limit to Available", "Group Formats/Editions", and "Results from All Libraries". At the bottom, there are eight filter categories, each with a list of options: "All Item Types" (Cartographic material, Computer file, Kit), "All Item Forms" (Braille, Direct electronic, Electronic), "All Languages" (Abkhaz, Achinese, Acoli), "All Audiences" (Adolescent, Adult, General), "All Video Formats" (8 mm., Beta, Betacam), "All Bib Levels" (Collection, Integrating resource, Monograph/Item), "All Literary Forms" (Comic strips, Dramas, Essays), and "All Copy Locations".

- 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

STAFF CATALOG – PREFERENCES

WEST

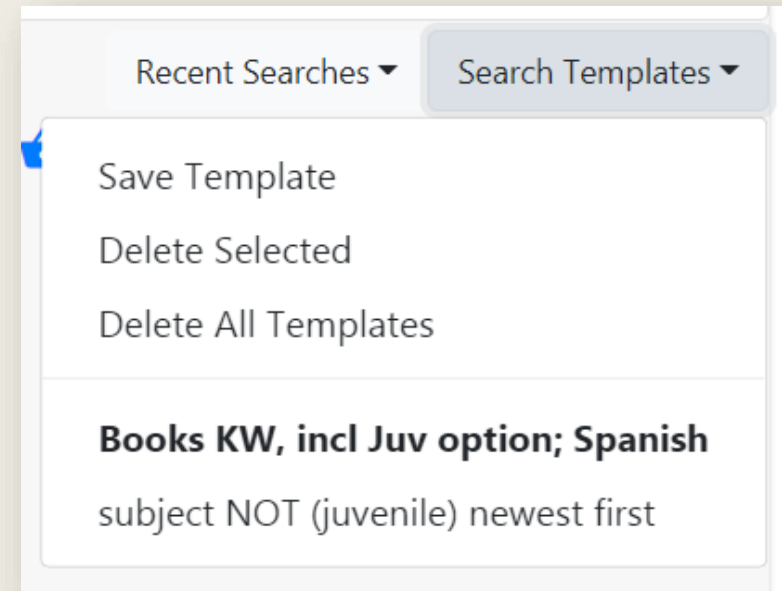
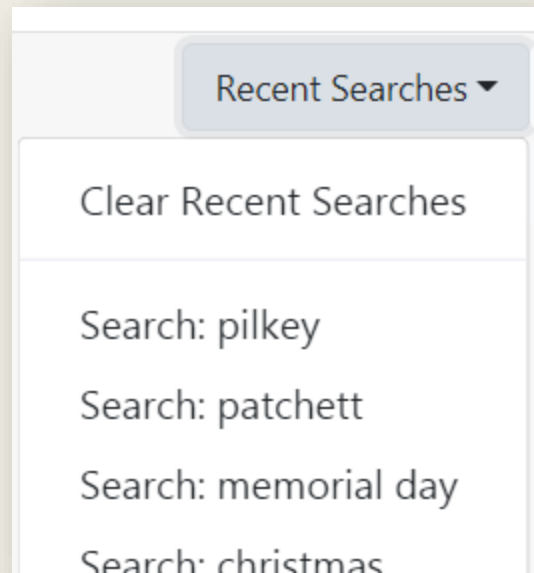
Recent Searches ▾ Search Templates ▾

 (0) Basket Actions ▾ **Catalog Preferences**

Catalog Preferences		
Default Search Library	<input type="text" value="WEST"/>	The default search library setting determines what library is searched from the advanced search screen and portal page by default. Manual selection of a search library will override it. One recommendation is to set the search library to the highest point you would normally want to search.
Preferred Library	<input type="text" value="GRE"/>	The preferred library is used to show copies and URIs regardless of the library searched. One recommendation is to set this to your workstation library so that local copies show up first in search results.
Default Search Pane	<input type="text" value="Keyword Search"/> ▾ ▹	Focus this search tab by default when opening new catalog pages.
Search Results Per Page	<input type="text"/>	The number of search results to display per page.
Exclude Electronic Resources	<input type="checkbox"/>	Add the 'Exclude Electronic Resources' checkbox to the main search form.

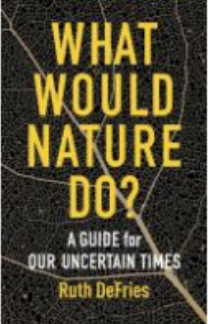
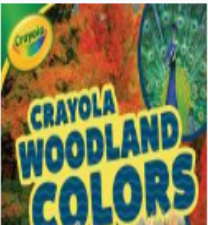
- Catalog Preferences (also at Administration > Workstation) AND search results per page are set and saved in the workstation
- Exclude Electronic resources adds option to exclude eresources that are in the catalog (will later be sticky)

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

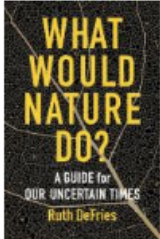
1. <input type="checkbox"/>		What would nature do? : a guide for our uncertain times DeFries, Ruth S. Book Phys. Desc.: print, xi, 250 pages : illustrations ; 23 cm Pub Date: 2021 ISBN: 9780231199421, 0231199422	0 / 1 items @ WEST	TCN: 5176745 Holds: 0	Created 1/12/21 by melissaglazer Edited 1/12/21 by melissaglazer	<input checked="" type="checkbox"/> Place Hold
2. <input type="checkbox"/>		Crayola woodland colors Bullard, Lisa Phys. Desc.: 32 pages : color illustrations ; 22 cm. Pub Date: 2021	1 / 1 items @ WEST	TCN: 5173311 Holds: 0	Created 12/7/20 by douglas.wray Edited 12/7/20 by douglas.wray	<input checked="" type="checkbox"/> Place Hold

- 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

STAFF CATALOG – RECORD SUMMARY

Show Search Form 

Record Summary  Book 



Title:	What would nature do? : a guide for our uncertain times	Edition:		TCN:	5176745	Created By:	melissaglazer
Author:	DeFries, Ruth S.	Pubdate:	2021	Database ID:	5176745	Last Edited By:	melissaglazer
Bib Call #:	333.95/16	Record Owner:		Created On:	1/12/21, 6:03 AM	Last Edited On:	1/12/21, 6:03 AM

Start Previous Next End Back to Results (1 / 3205) [Place Hold](#) [Add Holdings](#) [Serials ▼](#) [Mark For... ▼](#) [Other Actions ▼](#)

- 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

#	Location	Call Number / Item Notes	Barcode	Shelving Location	Circulation Modifier	Age Hold Protection	Active/Create Date	Holdable?	Status	Due Date
1	MTK	304.2 DEFRIES	31017151934046 View Edit	New Nonfiction	New Book		01/13/2021	Item Hold Call Number Hol	Checked out	02/11/2021

- 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

Staff Catalog Show Search Form

[← Return](#) Place Hold (DEMO, ALLISON)

Place hold for patron by barcode:

Place hold for this staff account:

Pickup Location:

Suspend Hold

Number of copies:

Notifications

Notify by Email

Notify by Phone

Notify by SMS

SMS Carrier

Placing TITLE hold on record(s)

Format	Title	Author	Part	Call Number	Barcode	Holds Status	Override
	The motive	Lescroart, John T.	N/A	ANY	ANY	Hold Pending	



Holds Status

Hold Succeeded






- 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*.

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.

Hopeless Date, Start Range: 2011-04-09  Hopeless Date, End Range: 2021-04-09 

Pickup Library:



0 selected    Rows 100  

<input type="checkbox"/>	#	Pickup Library	CN label	Title	Current Item	User Display Name	Patron Barcode	Request Date	Hopeless Date	Item Status
<input type="checkbox"/>	1	EAS	J	Lorna Doone	31018151283871	SEKI, MASAEI	21008300201877	5/22/18, 12:00 ...	3/23/21, 2:30 PM	Checked out
<input type="checkbox"/>	2	EAS		Japanese home...		FINNEY, PAME	21035100215244	9/8/18, 12:00 PM	3/23/21, 2:30 PM	
<input type="checkbox"/>	3	EAS		Choosing a priv...		SON, KYUNG S	21008300258121	10/27/18, 12:00...	3/23/21, 2:30 PM	
<input type="checkbox"/>	4	EAS		S.O.U.L		GONZALEZ, JO	21008300290788	1/14/19, 12:00 ...	3/23/21, 2:30 PM	
<input type="checkbox"/>	5	EAS		The science of j...		MUZICHENKO, J	21008300244915	1/23/19, 12:00 ...	3/23/21, 2:30 PM	
<input type="checkbox"/>	6	EAS	797.21 S	Master the art ...	31035158336478	WALTON, NET	21018300840465	1/17/20, 10:38 ...	3/23/21, 2:30 PM	Missing
<input type="checkbox"/>	7	EAS	797.21 T	Swim speed se...	31035160021696	WALTON, NET	21018300840465	1/17/20, 10:39 ...	3/23/21, 2:30 PM	Missing
<input type="checkbox"/>	8	EAS		Captivated		SALERNO, DIA	21008100018188	6/15/20, 6:55 PM	3/23/21, 2:30 PM	
<input type="checkbox"/>	9	EAS		Pasuwádo ni ki...		NISHIKAWA, K	21008300271005	8/2/20, 11:13 AM	3/23/21, 2:31 PM	

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

Scan Item

31005153360559,31005153333 Submit  OR Choose File No file chosen  Detail View

Item Status ⏪ ⏩ Actions Rows 500 Page 1

#	<input type="checkbox"/>	Status	Call Number	Title	Barcode	Location	Due Date	Alerts	Item Status
1	<input checked="" type="checkbox"/>		JP TSI	The stone hatchlings	31005153360559	Juvenile Storage		0 Manage	Storage
2	<input type="checkbox"/>		JP TUC	Home-field advantage	31005153333085	Juvenile Storage		0 Manage	Storage
3	<input type="checkbox"/>		JP TUD	A is for Annabelle	31005150044396	Juvenile Storage		0 Manage	Storage
4	<input type="checkbox"/>		JP TUD	A time to keep : the Tasha Tudor book...	31005151428754	Juvenile Storage		0 Manage	Storage
5	<input type="checkbox"/>		JP TUL	Press here	31005153470747	Juvenile Storage		0 Manage	Storage

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

Output Options

- Excel Output
- CSV Output
- Calculate grouping subtotals
- HTML Output
 - Bar Charts
 - Line Charts

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)

Effective Date 

Use effective date until logout

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](#)

Training@wlsmail.org

THANK YOU