

## 3.6 Evergreen Sequoia Maintenance Notes - November 17, 2021

This maintenance update will bring Sequoia up to Evergreen 3.6.5 along with some additional bugfixes. Bugfixes that were previously included in prior maintenance updates will be retained; this document just lists the new fixes.

### Angular Staff Catalog

- Display Enhancements
  - The Age Protection field in the Copy tab now displays the age protection rule name/label instead of the ID number.
    - <https://bugs.launchpad.net/evergreen/+bug/1908614>
  - When Notify by SMS is selected while placing a hold in the angular staff catalog, the SMS number and carrier fields will also be required.
    - <https://bugs.launchpad.net/evergreen/+bug/1933381>
  - When placing a hold for a patron in the angular staff catalog, the patron's preferred name will now be displayed on the Place Hold and Search to Hold screens.
    - <https://bugs.launchpad.net/evergreen/+bug/1924621>
  - The OPAC Visible field can now be selected as a display field in the Holdings View tab of a bibliographic record.
    - <https://bugs.launchpad.net/evergreen/+bug/1917338>
  - If a staff member cancels a large number of holds in a batch in the Holds tab of a bibliographic record, they will now see confirmation that the holds are successfully canceled.
    - <https://bugs.launchpad.net/evergreen/+bug/1911023>

### Circulation

- Enhancements to the Item Status screen:
  - The Total Circs field in the Item Status screen now includes an info button that allows staff to easily see a breakdown of the number of total circulations per year. Any legacy circulations that display in this breakdown will have the label 'Legacy/Not Dated'.
    - <https://bugs.launchpad.net/evergreen/+bug/1743611>
    - <https://bugs.launchpad.net/evergreen/+bug/1942920>
  - Batch Check In Improvements: When checking in multiple items in batch in the Item Status screen, Evergreen will now display print modals for hold and transit slips one at a time, so staff can manage each popup individually before the next

popup appears. For long time users of Evergreen, this behavior is now the same as in the older XUL client.

- <https://bugs.launchpad.net/evergreen/+bug/1742553>
- Pre-cataloged item display: After a pre-cataloged item is moved to a full bibliographic record, the pre-cat title will no longer appear on the Item Status screen. Only the title from the MARC record will be displayed.
  - <https://bugs.launchpad.net/evergreen/+bug/1904754>
- Self-Checkout
  - Audio alerts in the self-checkout interface are now functional again.
    - <https://bugs.launchpad.net/evergreen/+bug/1815968>
- Offline Circulation
  - If a staff member attempts an offline circulation to an expired patron, Evergreen will now display a message that includes the date the blocklist that included the patron's expiration was downloaded. This can help provide additional context about when the account may have expired.
    - <https://bugs.launchpad.net/evergreen/+bug/1752356>
- Curbside Pickup
  - Curbside appointments that are placed later in the day will no longer be pushed to the following day.
    - <https://bugs.launchpad.net/evergreen/+bug/1917396>

## Patrons

- Internet Access Level
  - The value set in the Library Setting "Default level of patrons' internet access" will now be used as the default selection in the Internet Access Level field in the Patron Registration form.
  - <https://bugs.launchpad.net/evergreen/+bug/1802682>
- Cloning Accounts
  - After cloning a patron account, the pending address in the cloned account can now be approved within the patron registration screen, which streamlines the registration process.
  - <https://bugs.launchpad.net/evergreen/+bug/1821804>
- Collections Exempt Display
  - This patch restores the label to the Collections: Exempt field in patron accounts.
  - <https://bugs.launchpad.net/evergreen/+bug/1937299>

## Hold

- Hold Suspension and Activation
  - When placing a hold and suspending it at the same time, an activation date can only be set for a future date. Activation dates in the past can no longer be set.
  - <https://bugs.launchpad.net/evergreen/+bug/1903357>
- Hold Placement - SMS carriers
  - When placing a hold for a patron, the list of SMS carriers is now displayed in alphabetical order.
  - <https://bugs.launchpad.net/evergreen/+bug/1809157>
- Retargeting Enhancement - Change to Pickup Location
  - This patch helps ensure holds are filled as efficiently as possible when the hold pickup location is changed. Evergreen will now continue to target the existing targeted copy if it is still the best item to fill the hold after the pickup location is changed.
  - <https://bugs.launchpad.net/evergreen/+bug/1866667>

## Cataloging

- MARC Batch Import Enhancements
  - Copy Queue to Bucket functionality is now restored when viewing a record queue.
    - <https://bugs.launchpad.net/evergreen/+bug/1928275>
  - Ability to delete queues in MARC Batch import is also restored.
    - <https://bugs.launchpad.net/evergreen/+bug/1934184>
  - Import Selected Records issues are fixed.
    - <https://bugs.launchpad.net/evergreen/+bug/1941764>
- Z39.50 Mark for Overlay Display Enhancement
  - When a bibliographic record is marked for overlay, the text indicating which record is marked in the Cataloging > Import Record from Z39.50 interface will now display both the record ID and TCN for easier identification.
  - <https://bugs.launchpad.net/evergreen/+bug/1731042>
- Pre-cataloged Item Record Management
  - The bibliographic record (ID -1) that Evergreen uses to create pre-cataloged items, can no longer be added to record buckets. This will help prevent this record from being merged. When the record is viewed in the MARC Edit interface, there is also no longer an option to delete this record. Pre Cataloged items can still be transferred to other bib records for processing, etc.
  - <https://bugs.launchpad.net/evergreen/+bug/827356>

## Booking

- Display Enhancement
  - When creating a reservation, the Search by Resource Type combo box will now display a drop down menu of resource types to choose from. Staff no longer need to start typing in a resource name to locate it.
  - <https://bugs.launchpad.net/evergreen/+bug/1916949>

## Course Reserves

- Display Enhancements
  - A library filter has been added to the Course List interface. Users will only be able to see courses that they have permission to view based on the org unit.
    - <https://bugs.launchpad.net/evergreen/+bug/1905068>
  - The circulation modifier now displays on the public catalog's course detail page to provide users with additional information about the course materials.
    - <https://bugs.launchpad.net/evergreen/+bug/1935693>
- Course Creation Enhancement
  - When creating a new course, the Owning Library field will now default to the user's workstation location.
  - <https://bugs.launchpad.net/evergreen/+bug/1917809>

## General Display Enhancements

- Record, Item, and Patron Buckets
  - This patch updates the title of the Load Shared Bucket pop-up box from "Load Shared Bucket Bucket by ID" to "Load Shared Bucket by ID".
  - <https://bugs.launchpad.net/evergreen/+bug/1929839>
- Acquisitions Lineitem Search
  - In the acquisitions lineitem search, the Purchase Order column is now labeled "PO Name".
  - <https://bugs.launchpad.net/evergreen/+bug/1906826>
- Typo fix in Library Setting "Items Out Lost Display"
  - <https://bugs.launchpad.net/evergreen/+bug/1826759>

## Administration

- Permissions Enhancements
  - Evergreen now prevents staff users from logging in to the staff client using an inactive barcode.

- <https://bugs.launchpad.net/evergreen/+bug/1844121>
- The default Circulators permission group has two new permissions: VIEW\_BOOKING\_RESERVATION and VIEW\_BOOKING\_RESERVATION\_ATTR\_MAP. These permissions will allow circulators to view and use the Manage Reservations screen in the Booking module.
  - <https://bugs.launchpad.net/evergreen/+bug/1910891>
- Staff users are now required to have the VIEW\_CREDIT\_CARD\_PROCESSING permission to view the Library Setting history related to credit card processing Library Settings.
  - <https://bugs.launchpad.net/evergreen/+bug/1206589>
- Administration Display Enhancements
  - Carousels
    - Changes to grids in the carousel administration pages can now be saved. The pages affected are the Carousel Types Configuration, Carousels Configuration, and Carousels Visible at Library Configuration.
    - <https://bugs.launchpad.net/evergreen/+bug/1920253>
  - Secondary Screen Display
    - This patch fixes a display issue that prevented several secondary screens in the administration module from loading properly. Staff should no longer encounter display errors when configuring administration features such as hard due dates and Z39/50 server attributes.
    - <https://bugs.launchpad.net/evergreen/+bug/1919483>
- Receipts, Slips, and Print Templates
  - The Mark Item Missing pieces slip will now print to the Receipt context by default if Hatch is installed for printing support.
    - <https://bugs.launchpad.net/evergreen/+bug/1938450>
  - The Holds for Patrons slip can now include the patron username and barcode.
    - <https://bugs.launchpad.net/evergreen/+bug/1926971>
  - This patch updates the seed data for the Checkout slip print template, which provides for improved testing of changes to the print template.
    - <https://bugs.launchpad.net/evergreen/+bug/1901028>

## Bootstrap OPAC Enhancements

The following patches provide enhancements and improvements for the Bootstrap OPAC. If your library is still using the TPAC or a discovery layer, these enhancements will not affect your public catalog.

- Patron self-registration: the patron self-registration screen now has a more responsive design and will have improved display on mobile phones.
  - <https://bugs.launchpad.net/evergreen/+bug/1920273>

- Patron account: the Charges information in the patron account now has an improved display with better alignment of information.
  - <https://bugs.launchpad.net/evergreen/+bug/1928005>
- My Lists: Shared lists now display the list title and description.
  - <https://bugs.launchpad.net/evergreen/+bug/1909584>
- Display enhancements: the bibliographic record display in the Bootstrap OPAC now provides improved display of the Available Copies and Holds information.
  - <https://bugs.launchpad.net/evergreen/+bug/1933125>
- Patron account log in usability enhancement: users can tab between the username and password fields.
  - <https://bugs.launchpad.net/evergreen/+bug/1909144>

## System Enhancements

The following patches provide system enhancements that improve system performance, but are not readily visible in the staff interface:

- Angular should cache workstation/user setting values
  - <https://bugs.launchpad.net/evergreen/+bug/1938729>
- GitHub reference can fail for npm install for AngularJS client
  - <https://bugs.launchpad.net/evergreen/+bug/1937875>
- pingest.pl help typo for duration option
  - <https://bugs.launchpad.net/evergreen/+bug/1924562>
- A/T ApplyPatronPenalty reactor misreads environment
  - <https://bugs.launchpad.net/evergreen/+bug/1859502>
- Holdings Editor does pcrud lookup on any barcode change
  - <https://bugs.launchpad.net/evergreen/+bug/1929136>
- Kpac: replace custom javascript with placeholder attribute
  - <https://bugs.launchpad.net/evergreen/+bug/1834258>
- mod\_headers is not enabled by default
  - <https://bugs.launchpad.net/evergreen/+bug/1944765>
- Too many simultaneous requests when removing users from bucket
  - <https://bugs.launchpad.net/evergreen/+bug/1932358>
- Incorrect typing when encoding some values as JSON
  - <https://bugs.launchpad.net/evergreen/+bug/1923076>
- Authority Records with Long Subfields Fail to Load
  - <https://bugs.launchpad.net/evergreen/+bug/1922567>
- The login box heading is not translatable
  - <https://bugs.launchpad.net/evergreen/+bug/1919497>
- Add some automated tests for 979 ISBNs
  - <https://bugs.launchpad.net/evergreen/+bug/1857060>