



**westchester**  
LIBRARY SYSTEM

Empowering libraries. Empowering communities.

# EVERGREEN CATALOG DISCOVERY

# START A 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

- 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 library location scope

# ADDITIONAL SEARCH OPTIONS

The screenshot displays a library search interface with the following components:

- Search Modes:** Keyword Search (selected), Numeric Search, MARC Search, Browse, Shelf Browse.
- Search Rows:**
  - Row 1: All Books (dropdown), Subject (dropdown), Contains (dropdown), ecology (text input), +, -, ⋮
  - Row 2: Or (dropdown), Subject (dropdown), Contains (dropdown), environment (text input), +, -
  - Row 3: And (dropdown), Subject (dropdown), Does not con (dropdown), juvenile (text input), +, -
- Sort Order:** Date: Newest to Oldest (dropdown)
- Filters:**
  - Limit to Available
  - Group Formats/Editions
  - Results from All Libraries
- Right Panel:**
  - WEST (text input), Search (green button), Reset (yellow button)
  - Recent Searches (dropdown), Search Templates (dropdown)
  - (0) Basket Actions (dropdown), Catalog Preferences (dropdown)

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

# ENHANCED FILTERS

The screenshot displays a search interface with the following elements:


- Search tabs: Keyword Search (selected), Numeric Search, MARC Search, Browse, Shelf Browse.
- Filter row 1: All Books (dropdown), Subject (dropdown), Contains (dropdown), vegan (text input), +, -, ⋮.
- Filter row 2: Or (dropdown), Subject (dropdown), Contains (dropdown), vegetarian (text input), +, -.
- Filter row 3: And (dropdown), Subject (dropdown), Does not con (dropdown), juvenile (text input), +, -.
- Sort and options: Date: Newest to Oldest (dropdown),  Limit to Available,  Group Formats/Editions,  Results from All Libraries.
- Filter categories (each with a dropdown arrow):
  - 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.
  - All Copy Locations: (empty).

- 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

# PREFERENCES

WEST

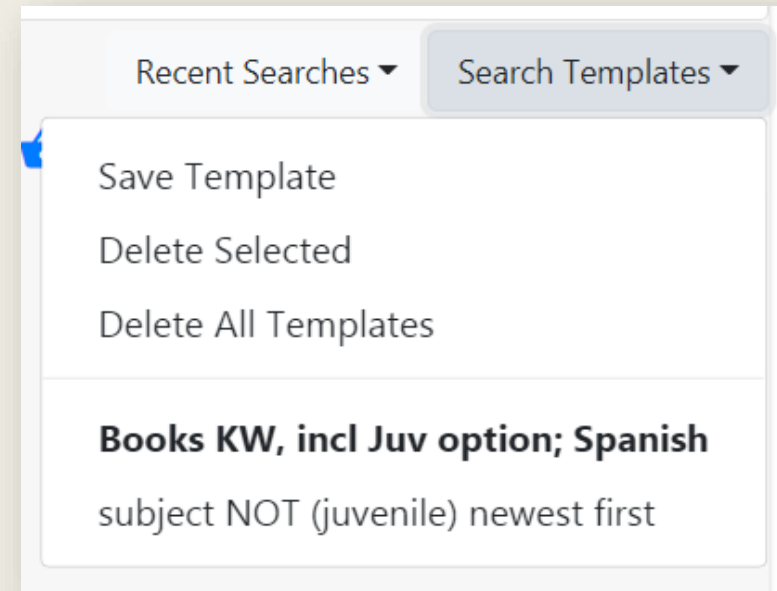
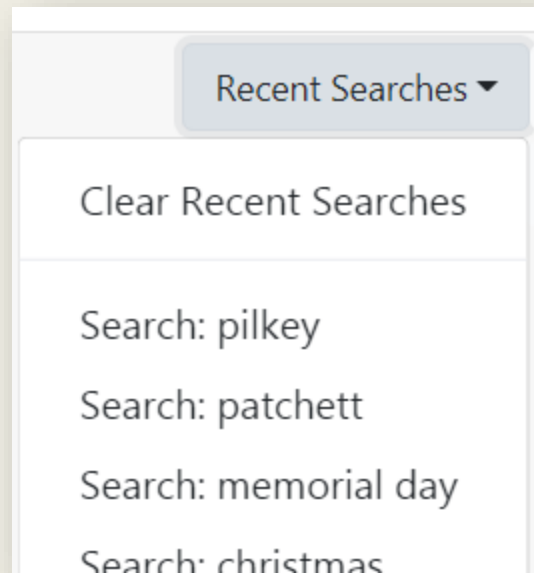
Recent Searches ▾ Search Templates ▾

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

Catalog Preferences		
<b>Default Search Library</b>	<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.
<b>Preferred Library</b>	<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.
<b>Default Search Pane</b>	<input type="text" value="Keyword Search"/> ▾ ▹	Focus this search tab by default when opening new catalog pages.
<b>Search Results Per Page</b>	<input type="text"/>	The number of search results to display per page.
<b>Exclude Electronic Resources</b>	<input type="checkbox"/>	Add the 'Exclude Electronic Resources' checkbox to the main search form.

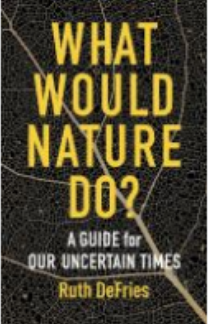
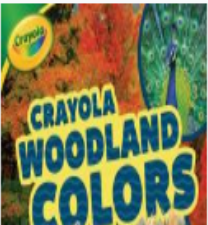
- Catalog Preferences (also at Administration > Workstation) AND search results per page are set and saved in the workstation
- Exclude Electronic resources adds option to exclude eresources that are in the catalog (will later be sticky)

# 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



# RESULTS DISPLAY

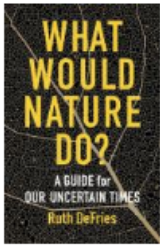
1. <input type="checkbox"/>		<b>What would nature do? : a guide for our uncertain times</b> DeFries, Ruth S. Book Phys. Desc.: print, xi, 250 pages : illustrations ; 23 cm Pub Date: 2021 ISBN: 9780231199421, 0231199422	0 / 1 items @ WEST	TCN: 5176745 Holds: 0	Created 1/12/21 by <a href="#">melissaglazer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

# RECORD SUMMARY

Show Search Form 

Record Summary  Book 

	<b>Title:</b> What would nature do? : a guide for our uncertain times	<b>Edition:</b>	<b>TCN:</b> 5176745	<b>Created By:</b> <a href="#">melissaglazer</a>
	<b>Author:</b> DeFries, Ruth S.	<b>Pubdate:</b> 2021	<b>Database ID:</b> 5176745	<b>Last Edited By:</b> <a href="#">melissaglazer</a>
	<b>Bib Call #:</b> 333.95/16	<b>Record Owner:</b>	<b>Created On:</b> 1/12/21, 6:03 AM	<b>Last Edited On:</b> 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 #, Title Control Number (TCN), Pub Date, Creation Info
- Navigation between titles
- Actions: Place Hold, Add Holdings, etc.



# RECORD DISPLAY TABS

#	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 <a href="#">View</a>   <a href="#">Edit</a>	New Nonfiction	New Book		01/13/2021	<a href="#">Item Hold</a> <a href="#">Call Number Hol</a>	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](http://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*.

## RESOURCES

- [Evergreen Catalog Search Essentials on the IT Wiki](#)
- [Evergreen Help and FAQs](#)
  
- [support@wlsmail.org](mailto:support@wlsmail.org)
- [training@wlsmail.org](mailto:training@wlsmail.org)

