EVERGREEN 3.8 UPGRADE

May 2022

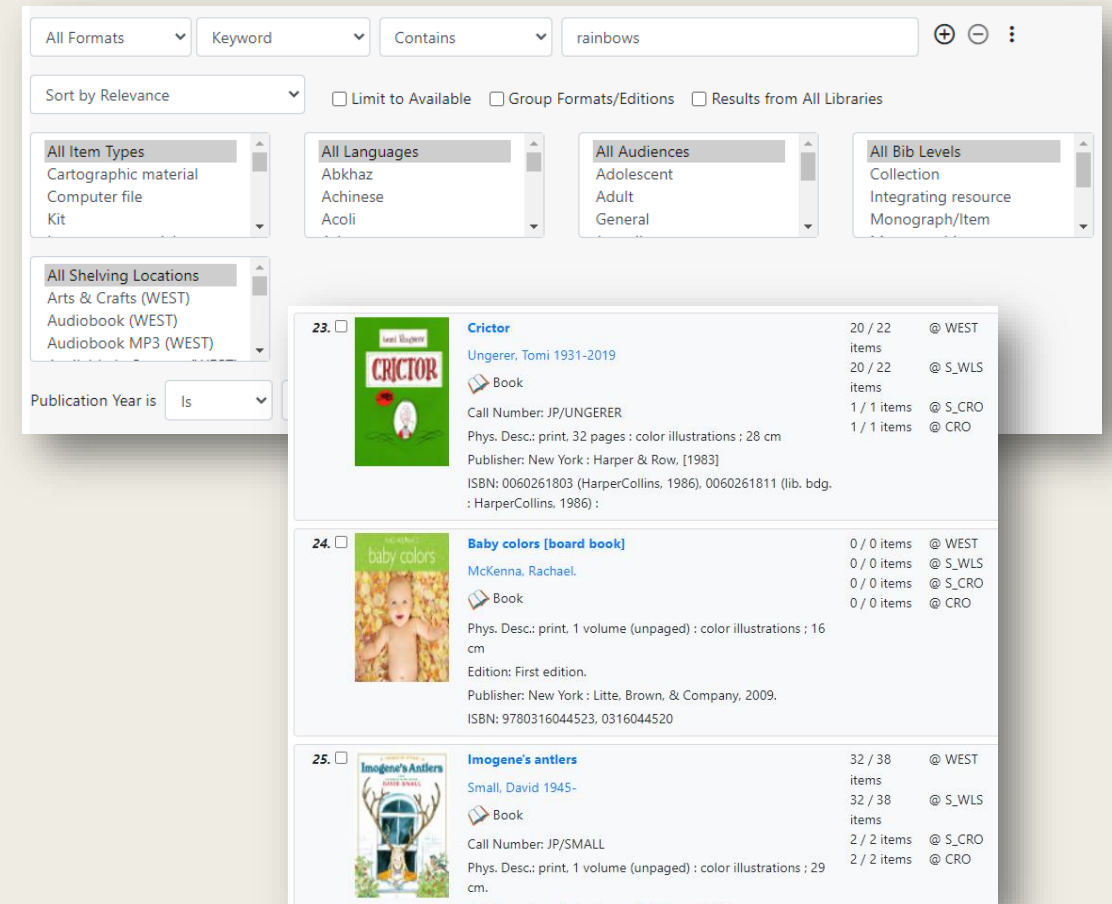# AGENDA

Catalog Search

Circulation

Triggered Event Logs

Holds Pull List

Item Holdings Editor

Additional Features

Please note that on the test server features related to system notification and communication are not enabled and will not complete as expected.

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LIBRARY SYSTEM
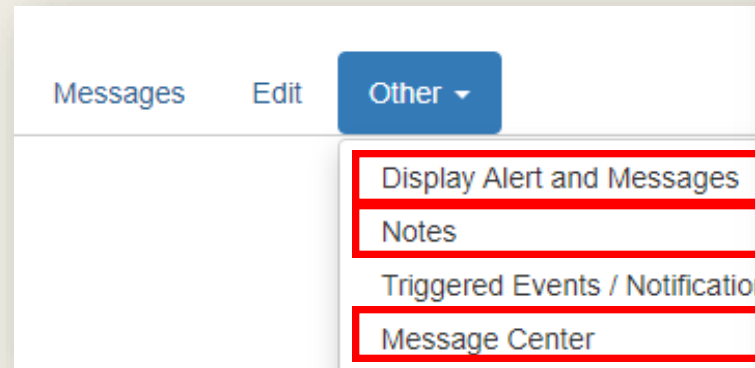Empowering libraries. Empowering communities.

CATALOG SEARCH

- Seldom-used search filters have been removed from the display

- Search excludes empty title records when searching with a shelving location filter or Limit to Available filter
[This feature will be fully functional with the completion of a current database project to identify and eliminate empty title records.]

CIRCULATION – CONSOLIDATED PATRON NOTES

Evergreen 3.6 Notes, Messages, and Display Alerts, Message Center interfaces

CIRCULATION – CONSOLIDATED PATRON NOTES

In Evergreen 3.8, Patron notes, Messages, Alert messages, and Standing Penalties have been folded into one **Notes** interface.

Notes designated as public display in

- Other > Messages
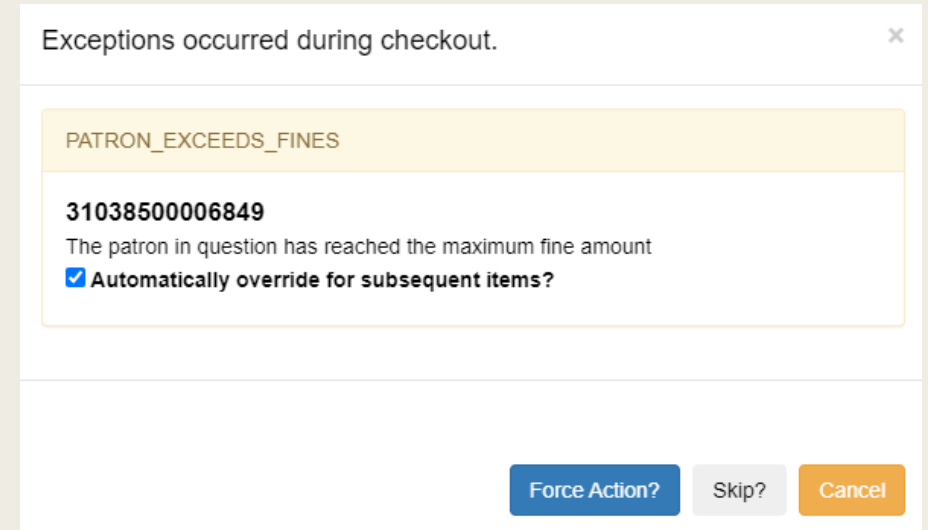- patron catalog in My Account > Message Center

To add a note
1. Click **Create Note**
2. Use the buttons or dropdown menu to choose a note type
3. Enter a Title and Note text
4. Click OK

Note, no blocks displays only in **Notes**

CIRCULATION – OVERRIDES

Batch Overrides are enabled to minimize the number of times staff need to click through an exception

- In **Patron Check Out, Patron Items Out**, and **Circulation > Renew Items**
- Evergreen will "remember" the designated override during a single patron session
- Three possible actions for batch overrides
  - **Force Action** applies the action for all remaining items in the batch
  - **Skip** does not apply the action for all remaining items
  - **Cancel** aborts all remaining items in the batch

Exceptions occurred during checkout.

PATRON_EXCEEDS_FINES

31038500006849
The patron in question has reached the maximum fine amount
☑ Automatically override for subsequent items?

Force Action?   Skip?   Cancel

Remember! Read all pop-ups carefully to be sure you want to override each exception

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TRIGGERED EVENT LOGS

Open in a new tab

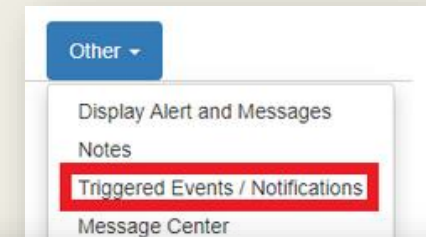Separate tabs for Circulations and Holds Events

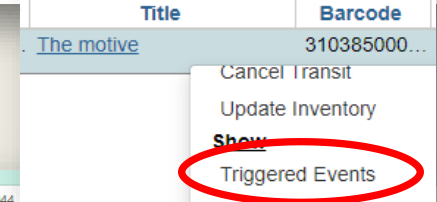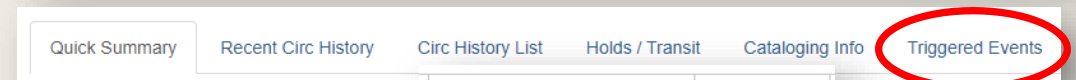Angular interface allows sorting by column

Patron Triggered Events Log
- **Patron Record → Other**
- Opens in a new browser tab
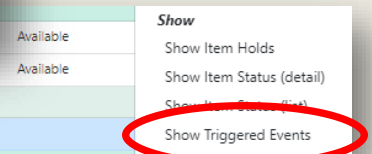
Item Triggered Events Log locations
- **Item Status → Detail View**
- **Item Status (List View) → Actions**
- **Bib Record Holdings View → Actions**

CIRCULATION – PULL HOLDS LIST

- Angular Display with sortable columns

- Library/org unit selector

- Manage Actions Menu

Holds Count: 13
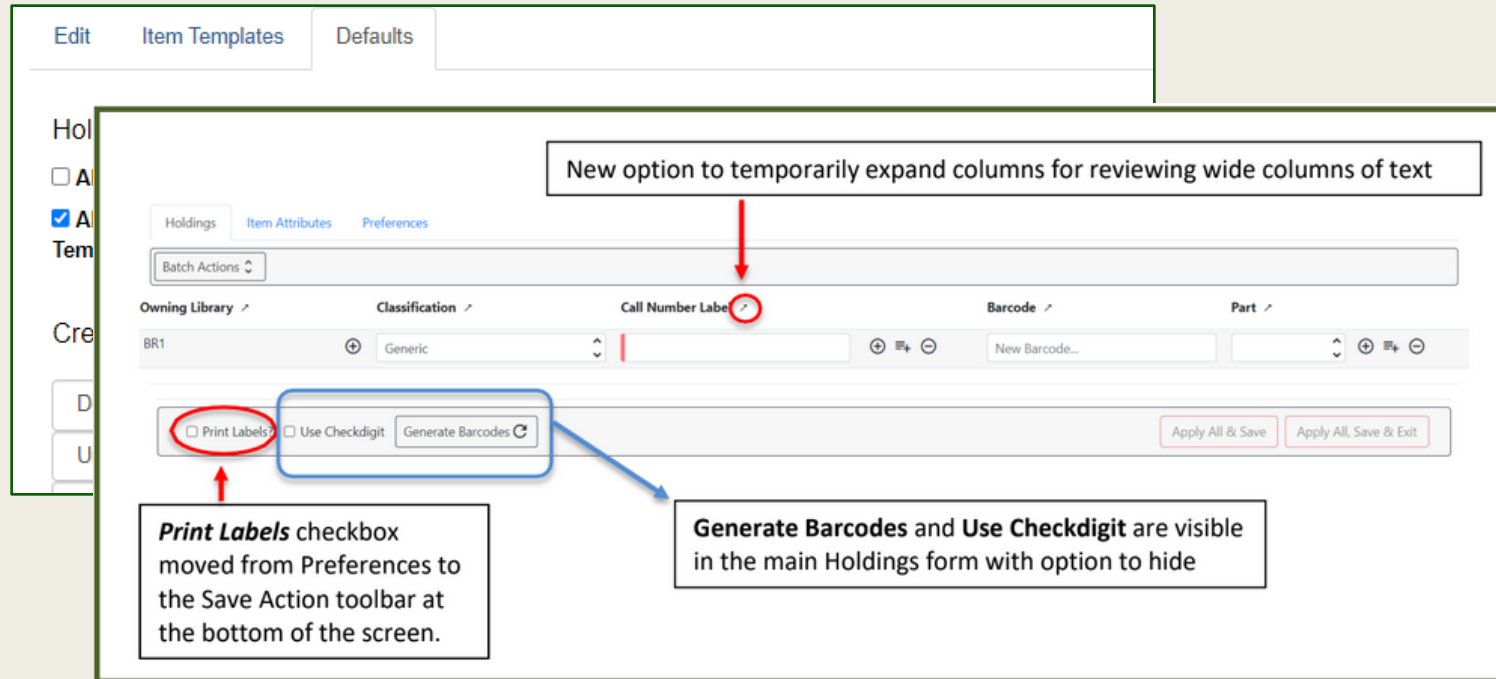
View Pull List For: [DOB]

[Print Full List]

0 selected

[≡✓] [|<] [<] [>] [Rows 10 ▾] [▾] [⚙]

☐	#	Shelving Location ↑	CN Full label	Author	Title	Current Item	Pickup Library	Request Date
☐	1	Biography	B EGER	Eger, Edith Eva	The choice : embrace …	31007151403753	MTP	2/23/22, 3:49 PM
☐	2	Fiction	NYKANEN	Nykänen, Harri	Holy ceremony	31007151332887	WNR	2/24/22, 7:47 AM
☐	3	Juvenile Fiction	J LONDON	London, Jack 1876-19…	White Fang	31007150031555	KAT	2/22/22, 7:17 PM
☐	4	Juvenile Fiction	J WELLS	Wells, Rosemary.	On the Blue Comet	31007151051867	MTK	2/23/22, 1:57 PM
☐	5	Juvenile Fiction	J FANTASY TOLKIEN	Tolkien, J. R. R. (John …	The lord of the rings	31007150188389	SCA	2/23/22, 10:52 PM
☐	6	Juvenile New Book	J WATSON	Watson, Renee	Ways to grow love	31007151419148	YRK	2/23/22, 10:22 PM
☐	7	Juvenile Picture Book	JP WERNER	Watson, Jane Werner …	Smokey the bear	31007100021714	YCR	2/23/22, 1:59 PM
☐	8	Large Print	LP PATTERSON	Patterson, James 1947-	Lost	31007151379987	IRV	2/23/22, 7:15 PM
☐	9	Movie	DVD WRINKLES		Wrinkles	31007151174990	RYE	2/16/22, 6:42 PM
☐	10	Music	CD JEWEL	Jewel 1974-	Greatest hits	31007151113568	LAR	2/23/22, 7:20 PM

TECH SERVICES – ITEM HOLDINGS EDITOR

Important Configuration Note: Previous defaults are not retained and will have to be applied by staff as needed in the new interface

- Recommend taking a screenshot of defaults before upgrade
- For consistent call number sorting, set the Preferences Default Classification option to Dewey.

■ Print Labels checkbox moved from Preferences to the save actions toolbar

■ New Options

   – Tabbed Holdings and Item Attributes

   – hide various Holdings interface columns for extra horizontal space

   – temporarily expand columns for reviewing wide columns of text

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TECH SERVICES – ITEM HOLDINGS EDITOR

- New Item Attributes Display
- Templates can be managed in the Holdings Editor

MANAGE ACTIONS MENUS

- Simplifies menu displays by allowing users to control which actions display in the context menu for a grid

- Available in
  - Pull Hold List
  - Title record > Holdings View

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ADDITIONAL FEATURES

Circulation Patron record > **Edit** includes
- Send a password reset email
- Send Test Email
- Sent Test Text

Reports
- Item Circulation Counts include Year To Date and Lifetime Circulation
- Dewey Call Number Blocks and Ranges Templates for Tens, Hundreds
- Call Number > Dewey Classification
- WLS will develop shared templates

Acquisitions
- Angular Interfaces
- Options for Price and Acquisitions Cost

Try out Evergreen 3.8 on the test server at
wls-test.sequoia.evergreencatalog.com/eg/staff/login

RESOURCES

- **Evergreen 3.8 Upgrade Preview Highlight Video** (5/17/2022)
  Sign in with your AD/Evergreen username and password, with the
  username format **firstname.lastname@westchesterlibraries.org**
- **Evergreen Community 3.8 Documentation**
- **Equinox EDU SpotLight on Evergreen 3.8**

THANK YOU

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