



westchester
LIBRARY SYSTEM

Empowering libraries. Empowering communities.

EVERGREEN 3.8 UPGRADE

May 2022

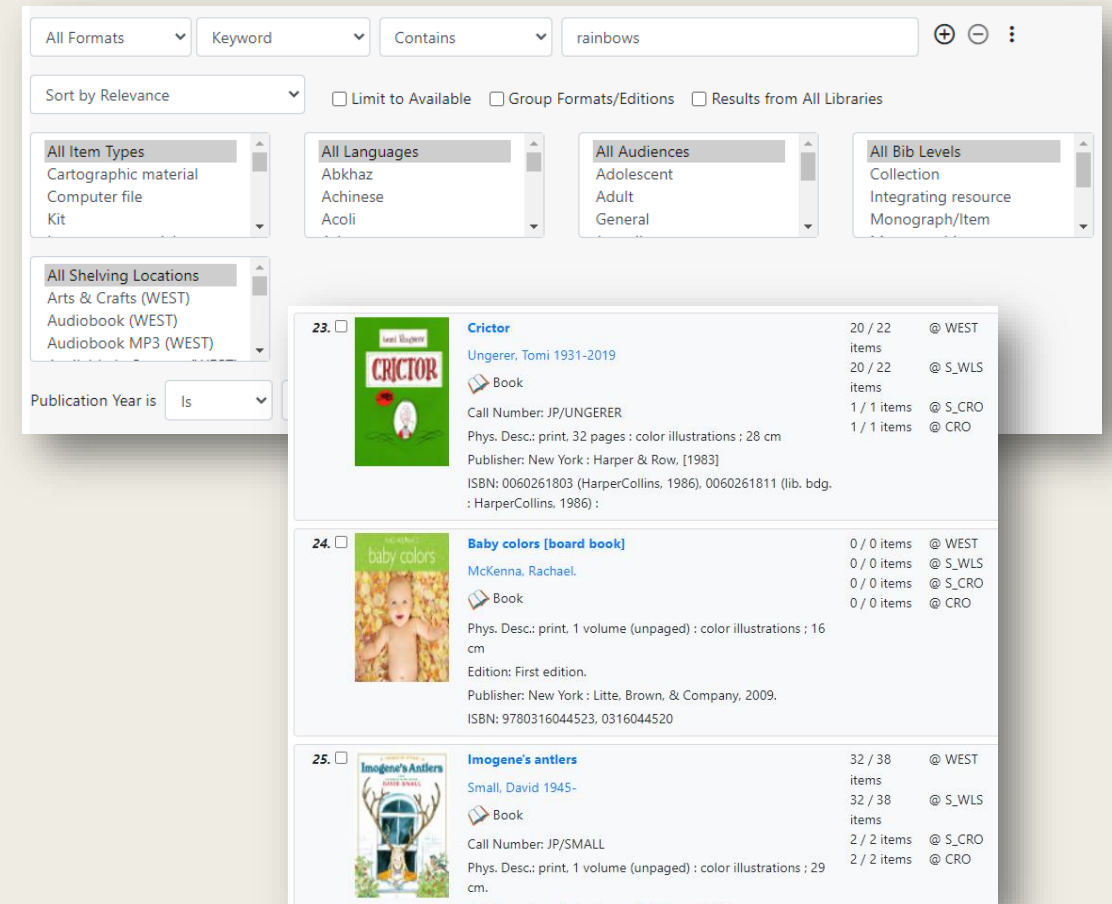
AGENDA

- 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.

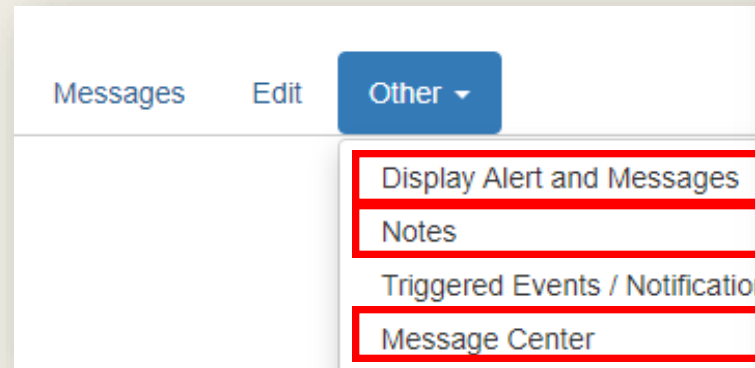
CATALOG SEARCH

- 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



Penalties and Messages

Apply Penalty / Message

Navigation: ⏪ ⏩ Actions Rows 25 Page 1

#	<input type="checkbox"/>	Note	Library	Label	Applied On
1	<input type="checkbox"/>	TEST WLS-AHM	WLS	Alerting Note, no blocks	7/22/2021 12:18 PM
2	<input type="checkbox"/>	This is an Alert Message.	WLS	Alerting Note, no blocks	8/30/2021 3:50 PM

Check Out Items Out (0) Holds (0 / 0) Bills (\$11.00) Messages Edit Other Patron Search

Add New Note

Item left at Briarcliff library Patron Visible 3/3/2022 12:40 PM Created by allisonmidgley

Please pick up your umbrella at the main desk before 3/31/2022. If you have any questions, please contact us at 914-xxx-xxxx. Print Delete

Item left at library Patron Visible 2/22/2022 1:15 PM Created by janie.demo

Please pick up your umbrella before 3/31/2022. Print Delete

Patron Messages Delete Selected

Context Org Unit WLS

[Back](#) [Next](#) [Filter](#)

✓	#	Creation Date/Time	Title	Creating Library	Read Date/Time	Deleted?
<input type="checkbox"/>	1	5/4/20 12:23 PM	Item ready for pickup	WLS	5/4/20 12:34 PM	True
<input type="checkbox"/>	2	3/3/22 12:40 PM	Item left at Briarcliff library	WLS		False

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

The screenshot shows the Evergreen 3.8 interface. At the top, there are navigation links: Check Out, Items Out (2), Holds (0 / 0), Bills (\$31.00), **Notes (6)** (circled in red), Edit, and Other. Below this, there is a 'STOP' sign icon and a section titled 'Alerts' with a yellow background. Under 'Alerts', there is a row with 'WEST' and 'Patron exceeds fine threshold'. A 'Create or Edit Note' dialog box is open, showing options for Note, Alert, and Block, with 'Note' selected. The dialog also shows fields for Penalty Type, Depth, Location, Title, and Note Text.

Notes

Create Note

#	<input type="checkbox"/>	Penalty Name	Staff	Patron Visible?	Title	Note Text	Read Date/Time	Location	...
1	<input type="checkbox"/>	SILENT_NOTE	allisonmidgley	No	This is a	Note, no blocks		WLS	5
2	<input type="checkbox"/>	SILENT_NOTE	allisonmidgley	No	Patron always leav...	Please ask and re...		WLS	3
3	<input type="checkbox"/>	PATRON_EXCEE...						WEST	3
4	<input type="checkbox"/>	ALERT_NOTE	equinox	No	converted Alert Me...	This is an Alert Me...		WEST	2
5	<input type="checkbox"/>	ALERT_NOTE	allisonmidgley	No	This is an Alert Me...	This is an Alert Me...		WLS	6

To add a note

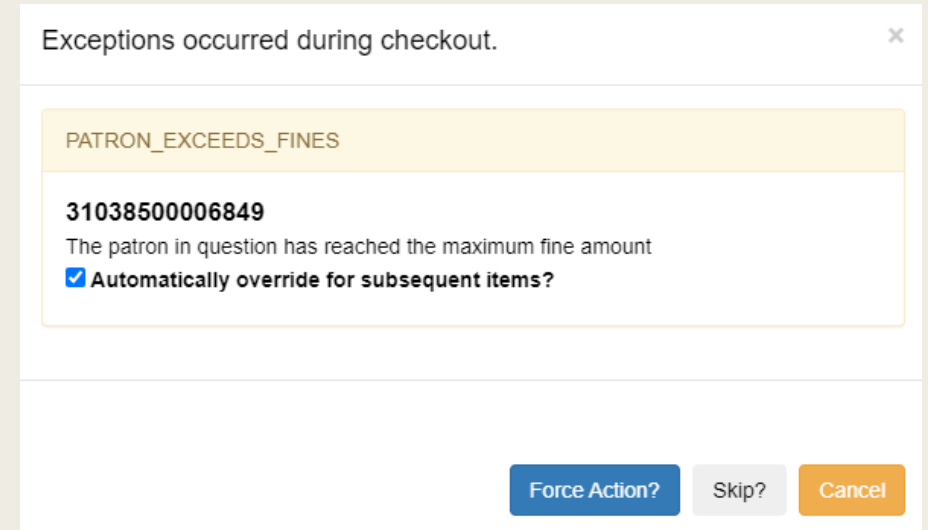
1. Click **Create Note**
2. Use the buttons or dropdown menu to choose a note type
3. Enter a Title and Note text
4. Click OK

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

TRIGGERED EVENT LOGS

Open in a new tab

Separate tabs for Circulations and Holds Events

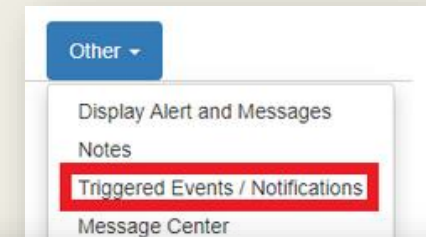
Angular interface allows sorting by column

Patron Triggered Events Log

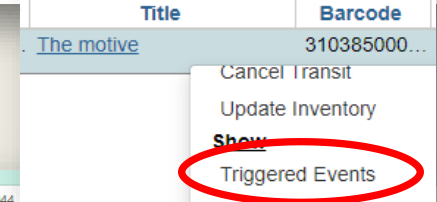
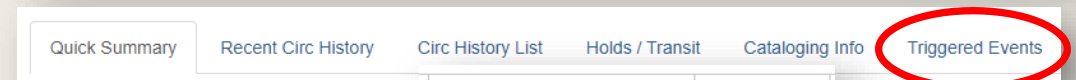
- Patron Record → Other
- Opens in a new browser tab

Item Triggered Events Log locations

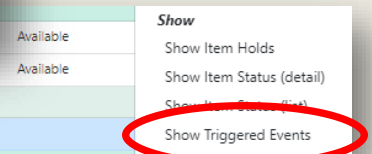
- Item Status → Detail View
- Item Status (List View) → Actions
- Bib Record Holdings View → Actions



A screenshot of the Patron Triggered Events Log table. The table has columns: #, Name, Reactor, Event Run Time, Event State, Context Library, Title, and Author. The first row shows: 1, Email Checkout R..., SendEmail, 03/22/2022, complete, WLS, No good deeds, Lippman, Laura 1... The interface includes tabs for 'Circulations' and 'Holds', a 'Remove Filters' button, and a table with 10 columns and 1 row.



A screenshot of the Item Triggered Events Log table. The table has columns: #, Patron Barcode, Name, Reactor, Event Run Time, Event State, Context Library, Title, and Author. The first row shows: 1, 21038300030470, Email Checkout Receipt, SendEmail, 03/22/2022, complete, WLS, No good deeds, Lippman, Laura 1959-.



CIRCULATION – PULL HOLDS LIST

- Angular Display with sortable columns
- Library/org unit selector
- Manage Actions Menu

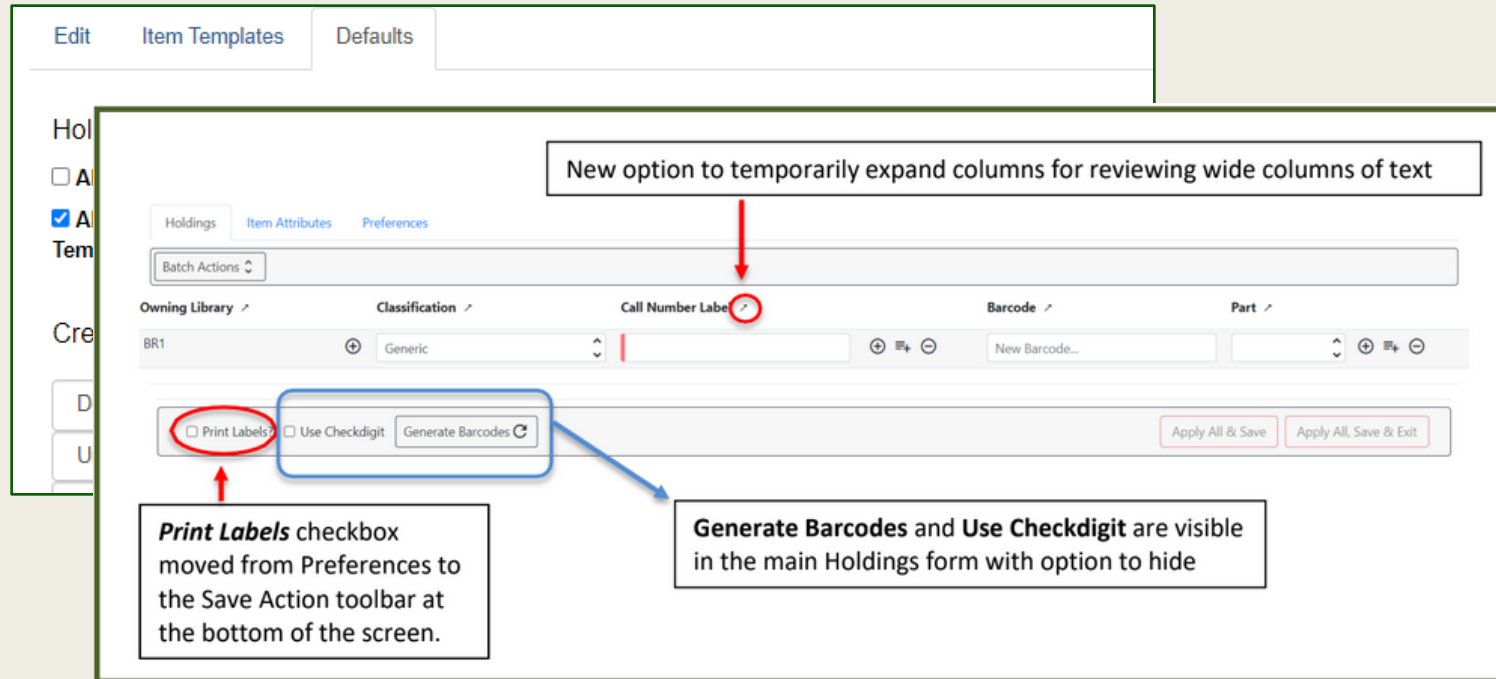
Holdings Count: 13

View Pull List For:

0 selected Rows 10

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

TECH SERVICES – ITEM HOLDINGS EDITOR

The screenshot shows the 'Item Attributes' tab in the 'Holdings Editor'. At the top, a text box states 'Templates are managed directly in the Item Attributes editor' with a red arrow pointing to the 'Templates' dropdown menu. Below this is a table with five columns: Identification, Location, Circulation, Miscellaneous, and Statistics. The 'Owning Library' field in the Location column is highlighted with a blue box and a callout box stating 'Owning Library is managed in the Item Attributes editor'. The 'Price' field in the Miscellaneous column is also highlighted with a blue box and a callout box stating 'Item Attributes batch edit supports changing only items with selected values'. The 'Circulation Modifier' field in the Circulation column is highlighted with a red box and a callout box stating 'Attributes display values as count summaries with option to edit by clicking on a field'. The interface includes buttons for 'Apply', 'Save', 'Import', 'Export', and 'Delete Template'.

Identification	Location	Circulation	Miscellaneous	Statistics
Copy Status Available 2 copies	Shelving Location Fiction (SYS1) 2 copies	Can Circulate Yes 2 copies	Add Item Alerts Item Alerts	Add Item Tags Item Tags
Barcode T1110002228 1 copy T1110002229 1 copy	Circulating Library BR1 2 copies	Is Holdable Yes 2 copies	Price <input checked="" type="checkbox"/> \$0.00 1 copy <input type="checkbox"/> \$19.99 1 copy	Add Item Notes Item Notes
Creation Date 2/21/22 2 copies	Owning Library BR1 : FIC MOR 2 copies	Age Hold Protection <Unset> 2 copies	OPAC Visible Yes 2 copies	Stat Cat Filter Stat Cat Filter...
Active Date 2/21/22 2 copies		Circulation Modifier <Unset> 2 copies	Cost <Unset> 1 copy \$14.95 1 copy	
Creator admin 2 copies				
Last Edit Date				

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

MANAGE ACTIONS MENUS

Actions for Selected Rows

- Link as Conjoined to Marked Bib Record
- Print Labels
- Request Items
- Add**
 - Add Call Numbers
 - Add Call Numbers and Items
 - Add Item Alerts
 - Add Items
 - Add Items To Bucket
 - Add/Manage Item Notes
 - Add/Manage Item Tags
- Booking**
 - Book Item Now
 - Make Items Bookable
 - Manage Reservations
- Delete**
 - Delete Call Numbers and Items
 - Delete Empty Call Numbers
 - Delete Items
- Edit**
 - Edit Call Numbers
 - Edit Call Numbers And Items
 - Edit Item Alerts
 - Edit Items
 - Replace Barcodes
- Mark**
 - Mark Item Damaged
 - Mark Item Missing

Actions for Selected Rows

- Add**
 - Add Item Alerts
 - Add Items To Bucket
 - Add/Manage Item Notes
 - Add/Manage Item Tags
- Edit**
 - Edit Item Alerts
 - Edit Items
- Mark**
 - Mark Item Damaged
 - Mark Item Missing
- Show**
 - Show Item Holds
 - Show Item Status (detail)
 - Show Item Status (list)
 - Show Triggered Events

Grid Menu Configuration

Menu Item	Visible
Link as Conjoined to Marked Bib Record	<input type="checkbox"/>
Print Labels	<input type="checkbox"/>
Request Items	<input type="checkbox"/>
Add	
Add Call Numbers	<input type="checkbox"/>
Add Call Numbers and Items	<input checked="" type="checkbox"/>
Add Item Alerts	<input checked="" type="checkbox"/>
Add Items	<input type="checkbox"/>
Add Items To Bucket	<input checked="" type="checkbox"/>
Add/Manage Item Notes	<input checked="" type="checkbox"/>
Add/Manage Item Tags	<input checked="" type="checkbox"/>
Booking	
Book Item Now	<input type="checkbox"/>
Make Items Bookable	<input type="checkbox"/>
Manage Reservations	<input type="checkbox"/>
Delete	
Delete Call Numbers and Items	<input type="checkbox"/>
Delete Empty Call Numbers	<input type="checkbox"/>
Delete Items	<input type="checkbox"/>
Edit	
Edit Call Numbers	<input type="checkbox"/>
Edit Call Numbers And Items	<input type="checkbox"/>
Edit Item Alerts	<input checked="" type="checkbox"/>

- 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

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](#)

Training@wlsmail.org

THANK YOU