

# Evergreen Maintenance

## Table of Contents

### **Daily**

[Holds Pull List.....1](#)

[Capture Holds.....2](#)

[Clear Expired Holds.....3](#)

[Cash Reports.....3](#)

[Lost Notices.....4](#)

### **Weekly**

[Managing Pending patrons.....4](#)

### **Monthly**

[Transit Lists.....5](#)

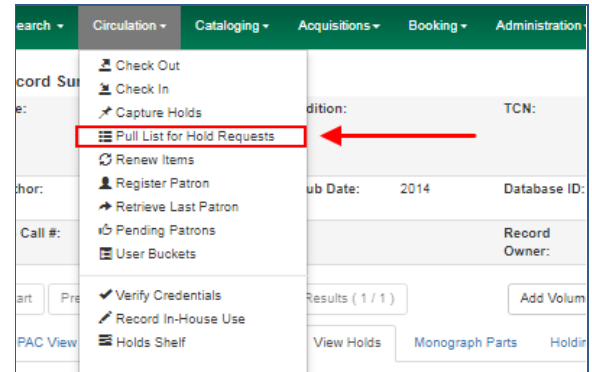
### **Quarterly**

[Closed Dates Editor.....6](#)

## Daily Maintenance

### Holdings Pull List

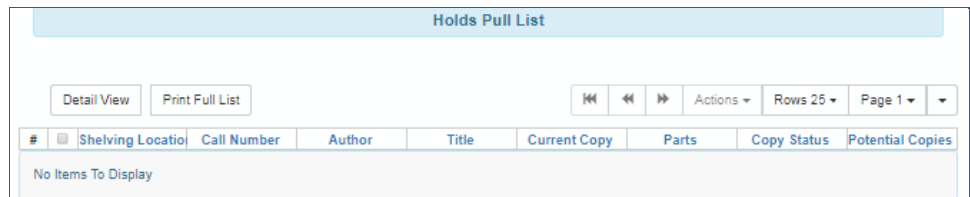
The *Holdings Pull List* is updated constantly. Once an item on the list is no longer available or a hold on the list is captured, the items will disappear from the list. The *Holdings Pull List* should be printed at least once a day. There are usually four statuses a hold may have: *Waiting for Copy*, *Waiting for Capture*, *In Transit* and *Ready for Pickup*.



- *Waiting-for-copy*: all holdable copies are checked out or not available.
- *Waiting-for-capture*: an available copy is assigned to the hold. The item shows up on the *Holdings Pull List* waiting for staff to search the shelf and capture the hold.
- *In Transit*: holds are captured at a non-pickup branch and on the way to the pick-up location.
- *Ready-for-pick-up*: holds are captured and items are on the *Hold Shelf* waiting for patrons to pick up. Once a matching copy is found, the item's barcode number is assigned to the hold and the item is put on the *Holdings Pull List*. Staff can print the *Holdings Pull List* and search for the items on shelves.

### To retrieve the *Holdings Pull List*

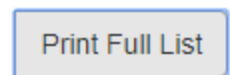
1. Select *Circulation* → *Pull List for Hold Requests*. The *Holdings Pull List* is displayed.



2. You may re-sort it by clicking the column labels, e.g. *Title*. You can also add fields to the display by using the column picker.

### To print the pull list

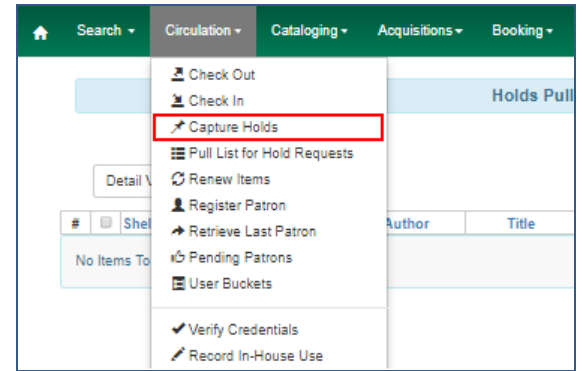
1. Format the printout: go to Administration → Workstation → Print Templates and customize the Holdings Shelf List template. Save locally.
2. On the Holdings Pull List screen, click *Print Full List*



[See also this Holdings Pull List Video](#)

## To Capture Holds

Holds can be captured when a checked-out item is returned (checked in) or an item on the *Holds Pull List* is retrieved and captured. When a hold is captured, the hold slip will print and if the patron has chosen to be notified by email, the email notification will be sent out. The item should be put on the hold shelf.

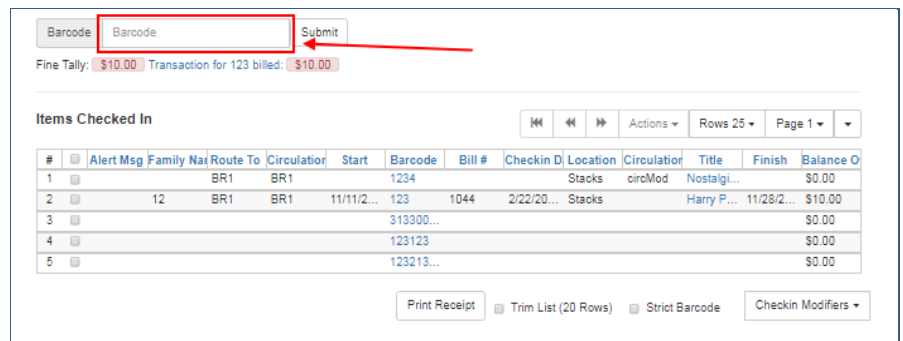


1. To capture a hold, select *Circulation* → *Capture Holds* (or press *Shift-F2*).

2. Scan the barcode and click *Submit*.

3. The hold or transit slip will automatically print if the Auto-Print Hold and Transit Slips Checkin Modifier is selected.

4. To capture items that have a status other than Available, like Missing or Available Soon, set the Checkin Modifiers *Retarget Local Holds* *Retarget All Statuses*. This will update the item status and capture any local hold before sending it to another library to fill a hold. Deselect the Checkin Modifiers after use.



If an item is not found on the shelf, mark it missing.

1. Select each item.
2. Right-click or use the Actions menu to select *Mark Item Missing*

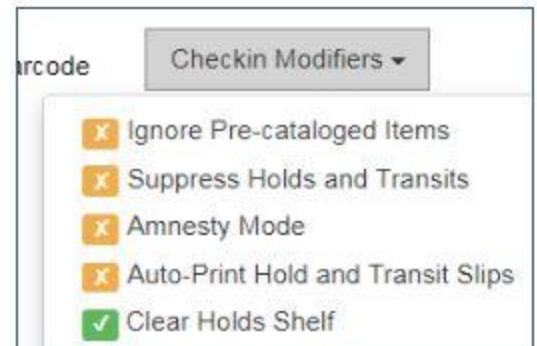
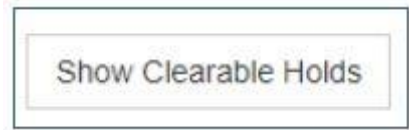
If the item is later found, check in the item and follow the screen prompts.

## Clearing Shelf-Expired Holds

It's important that expired holds are routinely cleared from the holds shelf physically as well as in Evergreen. Holds will expire on the shelf after eight days.

The updated workflow for clearing the holds shelf is:

1. Go to Circulation > Holds Shelf. (Note: you can cancel holds from the Holds Shelf using the Actions drop-down menu.)
2. Click *Show Clearable Holds* to list items to clear, including expired holds and canceled holds.
3. Print the list of "Clearable Holds" and pull the items off the shelf.
  1. format the printout: go to Administration → Workstation → Print Templates and customize the Hold Shelf List template. Save locally.
  2. On the Holds Shelf screen, click *Print Full List*.
4. Then, go to Circulation > Checkin. Set the Checkin Modifier *Clear Holds Shelf*. Scan each item. (**IMPORTANT: Turn off the modifier when you are finished!**)



**NOTE:** After discussing with the Circulation Committee, it is **NOT** advised to use the *Clear These Holds* button, as it can delete the entire list of expired/canceled holds from the list, which may not always be desired.

## Cash Reports

Cash reports are useful for quickly getting information about money that your library has collected from patrons. This can be helpful in a few different scenarios, such as:

- A. Reconciling a cash drawer at the end of the day.
- B. Seeing how popular a specific payment type is (perhaps when evaluating a food-for-fines program).

To use the cash reports,

1. Go to Administration > Local Administration > Cash Reports.
2. Select the time period and library you are interested in. Click *Submit*.

workstation	cash_payment	check_payment	credit_card_payment
RIV-ADA-pryor	1.00	0.00	0.00
RIV-ADA-chance	3.50	0.00	0.00
RIV-ADA-parham	18.00	0.00	0.00
RIV-ADA-sulli	2.00	0.00	0.00
RIV-ADA-townley	1.50	0.00	0.00
RIV-ADA-midgley	34.67	0.00	0.00
RIV-ADA-Lopez	2.50	0.00	0.00
RIV-ADA-bracamonte	3.00	0.00	0.00

*Note: If a staff member works at two different locations, the home library on their account seems to display on that library's cash report even though the staff is at another location.*

## Accessing Lost Notices

Access to print notices is available at <https://egstaff.westchesterlibraries.org/notices/index.html>. You may find it helpful to bookmark the page for easy, daily access.

When you first access the notice link, it will ask for a username and password. Enter your Evergreen sign in (AD credentials).

When the page loads, follow your library link. Dates for which your library has notices appear in descending order. Lost notices are available for 1 month, in keeping with the WLS privacy policy.

**Note:** The Lost Notices Link has been known to act intermittently. If you cannot access the link the first time you open it, wait 30 minutes and try again. If this does not work, email Technology Trainer, Allison Pryor ([apryor@wlsmail.org](mailto:apryor@wlsmail.org)) and she will download and email you the PDFs.

Because Notices expire after a month, you may want to download and save your library's Lost Notices into a folder in your library share drive.

## Weekly Maintenance

### Managing Pending Patrons

1. In the staff client select Circulation → Pending Patrons.
2. Select the patron you would like to review. In this screen you have the option to Load the pending patron information to create a permanent library account.
3. To create a permanent library account for the patron, click on the patron's row, click on the Load Patron button at the top of the screen. This will load the patron self-registration information into the main Patron Registration form. Verify the data entry.

**\*\*Manually update the Password field to match the last 4 digits of the Daytime Phone field.\*\***

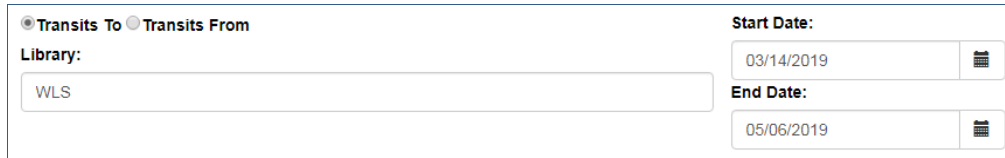
4. Enter Fill in the necessary patron information for your library, and click Save to create the permanent patron account.

*Note: Not every library accepts patron registrations via the pending patrons option. Check with your TechXpert or supervisor before continuing.*

## Monthly Maintenance

### Transit List

The transit list is used to track items that have been in the delivery longer than expected; the process includes canceling transits, marking items missing, and retargeting holds. Best practice is to check the list month.



1. Go to *Administration* → *Local Administration* → *Transit List*. Your library will already be selected.
2. Sort Your List by column header
  - Shelving Location to check shelves
  - Send Date/Time column header to sort the list by oldest transit date to newest.
  - Barcode column header if you would like to sort your library's items first.
3. Print the Transit List using the Print Full Grid option found in the drop-down menu to the right of the page sorter.
4. Check your shelves for any items on the list.

#### For your items

1. If found, select the items and choose *Cancel Transit* to change the transit status. This action prevents patron holds from lingering indefinitely. A confirmation pop-up displays that indicates if there are holds associated with the transit and will re-target those holds. Click *Cancel Transit*. The transits disappear from the list and the copy status changes to "Canceled Transit"
2. If not found, Cancel the transits as above. Then add the items to a bucket. Go to *Cataloging > Item Buckets*. Choose your bucket and edit the status of the items to Missing (permissions may be needed to change the item status).

#### The first time you check your library's Transit List,

1. Set the Start Date to March 14, 2019
2. Set the End Date to six weeks prior to today
3. Configure your columns to display *Title, Author (Localized), Shelving Location, Call Number Label, Barcode, Destination Library, Source Library, Send Date/Time, Last Name, and Patron Barcode*. Remember to Save. (Note: # of available items is not an available column option.)

#### For another library's item

1. If found and meant to fill a hold at your library, go to the patron record to verify the hold. Check the item in to change the hold status for Ready For Pickup

- If not found and meant to fill a hold at your library, open the title link in a new tab  
On the View Holds tab, select the item and go to *Actions>Find a new target*. This will prompt the system to look again for another copy.

## Quarterly Maintenance

### Quarterly Maintenance

### Closed Dates Editor

A closed date will not be used by the system as a due date or a hold pickup date. Within the closed dates editor screen, scheduled closed dates are listed and can be scoped by date.

#	Closing Start	Closing End	Reason for Closing
1	5/25/2020	5/25/2020	Memorial Day
2	7/4/2020	7/4/2020	Independence Day
3	9/7/2020	9/7/2020	Labor Day
4	10/12/2020	10/12/2020	Columbus Day
5	11/11/2020	11/11/2020	Veterans' Day
6	11/26/2020	11/26/2020	Thanksgiving
7	12/25/2020	12/25/2020	Christmas
8	1/1/2021	1/1/2021	New Year's Day

For information on updating your library's Closed Dates Editor, please see the [Local Administration Essentials](#) guide.