

Tech Services Essentials Guide

Navigation

Many tech services tasks are initiated from

- A title, found through Search>Search the catalog
- From an item, found through Circulation>Item Status
- From a list of items, scanned into the Item Status screen or found in a report and uploaded to the Item Status screen.

In any list of items, select one or more items to see a list of available actions by right-clicking on the list or using the Actions menu.

For most Tech Services functions, you must have permissions granted before performing Tech Services functions. If you get an error that blocks you from doing what you need to do, send an email with a text version of the permission error, a text description of what you were trying to do, the patron and/or item ID, and a screenshot of the error to the WLS helpdesk.

Evergreen Holdings Records

Every record consists of **three** parts

- Title/Bibliographic Record
- Call number/Volume Record
- Item/Copy Record

The screenshot shows two sections of a library record. The top section, titled "Title/Bibliographic Record", includes fields for Title (Handscrabble road), Author (Haddam, Jane 1951-), Edition (2006), TCN (3183030), Database ID (3183030), and Record Owner. The bottom section, titled "Call Number/Volume Record", shows a table with columns for Owning Library, Classification, Call Number Label, Barcode, Item #, and Part. The data row shows WLS, Dewey (DDC), MYSTERY HADDAM, 3103850006047, 1, and an empty part field.

The screenshot shows the "Item/Copy Record" section with a grid of fields. The fields are organized into columns: Identification (Copy Status, Barcode), Location (Shelving Location, Circulating Library, Owning Library), Circulation (Can Circulate, Is Holdable, Circulation Modifier), Miscellaneous (Add Item Alerts, Price, OPAC Visible, Is Reference), and Statistics (Add Item Tags, Add Item Notes, Stat Cat Filter, Leased Materials (WEST), Migration (WEST)). Each field contains specific data for the item, such as "Available Soon" for Copy Status and "Interlibrary Loan (WLS)" for Shelving Location.

Link (Add) a new item

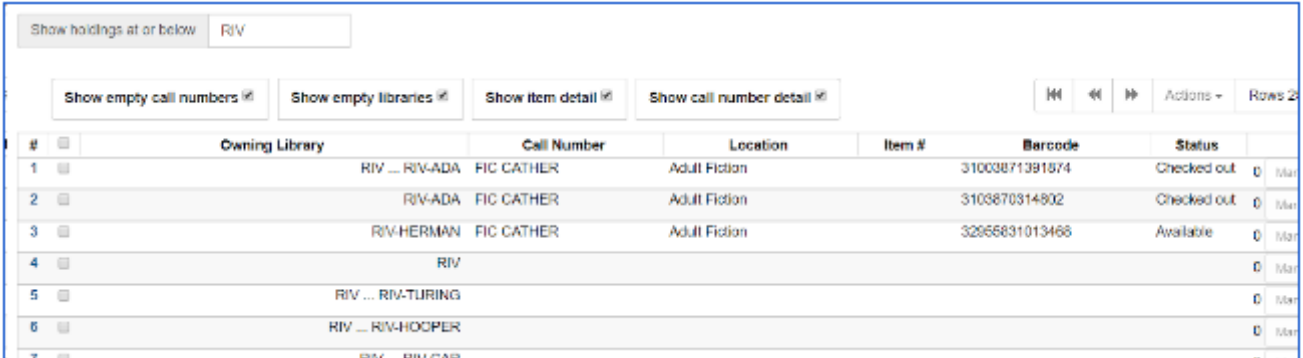
Linking new books to your library's collection is a multi-step process. With the Evergreen 3.8 upgrade, the linking workflow is very much the same, however, the Holdings Editor display *has* changed.

- Locate the BIB Record
- Add Holdings
- Apply Template and Stat Cats
- Save and Exit
- Print Spine Labels
- Scan new items with checkin modifiers applied

Locate the BIB Record

Go to Cataloging>Search Catalog.

- Make sure that the Search Library filter is set to the consortium level (WEST) to that you are searching all libraries in the system.
- Search for the ISBN and click Search. If no matches are found, search by title and author.
- Examine the search results to find an existing record in the catalog.
 - Check for matching ISBNs and format (large print, book, audiobook, DVD)



The screenshot shows the Holdings Editor interface. At the top, there is a dropdown menu for "Show holdings at or below" set to "R/V". Below this are four checkboxes: "Show empty call numbers" (checked), "Show empty libraries" (checked), "Show item detail" (checked), and "Show call number detail" (checked). To the right are navigation icons and "Actions" and "Rows 2" buttons. The main table has the following data:

#	Owning Library	Call Number	Location	Item #	Barcode	Status	
1	RIV ... RIV-ADA	FIC CATHER	Adult Fiction		31003871391574	Checked out	0 Mar
2	RIV-ADA	FIC CATHER	Adult Fiction		3103870314802	Checked out	0 Mar
3	RIV-HERMAN	FIC CATHER	Adult Fiction		32955831013468	Available	0 Mar
4	RIV						0 Mar
5	RIV ... RIV-TJURING						0 Mar
6	RIV ... RIV-HOOPER						0 Mar
7	RIV ... RIV-CAR						0 Mar

When you locate the bibliographic record that matches the item you are adding:

- Open the Holdings View tab. Verify that:
 - Show holdings at or below is set to WEST. If not, select it from the dropdown menu.
 - *Show empty call numbers, Show empty libraries, Show item detail, and Show call number detail* are checked.

- Select the library to which you would like to add a copy and open the Actions menu. Select Add Call Numbers and Items.
 - If you are adding the first volume at your library, right-click under the Owning Library column and select Add Call Numbers and Items.

Catalog Holdings View

Alternative to the OPAC view, the Holdings view displays more items at once. Rows can be selected and actions taken to add, edit, delete, and otherwise maintain call numbers and items.

#	Location/Barcode	Circ Library	Call Number	Barcode	Shelving Location	Circulation Modifier	Hold...	Owning Library	Status	Copies
1	WEST									27
2	ASSOC_LIBS									0
3	S_WLS									27
4	S_ARD									1
5	ARD									1
6	FICTION LESCROAR		FICTION LES...	3100015071...	Fiction	Book	Yes	ARD	Available	1
7										

Add Holdings

The Holdings Editor is now divided into three separate tabs; Holdings, Item Attributes, and Preferences.

Recommended! Before working in the Holdings and Item Attributes Tabs, set your preferences in the Preferences Tab to customize your display and remove unnecessary attribute fields.

In the Holdings tab:

Enter the call number level information:

1. Classification (Dewey)
2. Call Number (do not use prefix or suffix)
3. Scan or type in the new barcode
4. “Apply All & Save” before moving on to the next tab.

Apply Template and Stat Cats

In the Item Attributes tab apply a template or manually edit fields as needed:

Identification	Location	Circulation	Miscellaneous	Statistics
Copy Status Available Soon 1 copy	Shelving Location Interlibrary Loan (WLS) 1 copy	Can Circulate Yes 1 copy	Add Item Alerts Item Alerts	Add Item Tags Item Tags
Barcode 31038500006047 1 copy	Circulating Library WLS 1 copy	Is Holdable Yes 1 copy	Price \$25.00 1 copy	Add Item Notes Item Notes
	Owning Library WLS : MYSTERY HADDAM 1 copy	Circulation Modifier Book 1 copy	OPAC Visible Yes 1 copy	Stat Cat Filter WEST
			Is Reference No 1 copy	Leased Materials (WEST) <Unset> 1 copy
				Migration (WEST) <Unset> 1 copy

Scroll down to the Item Attributes Editor, apply a template or manually edit the fields as needed:

- Copy Status (*Each [item status](#) is configured to determine functionality: especially whether it is visible in the OPAC, Holdable, and Available.*)
- Barcode
- Shelving Location (*[Evergreen Shelving Locations](#) are shared between WLS libraries for consistency in reporting.*)
- Circulation Library
- Owning Library

- Can Circulate?
- Holdable?
- Circulation Modifier (A Circulation Modifier ([CircMod](#)) is assigned to an item so that the system knows how to circulate the item – the lending period and format)).
- Item Alerts (Add an item alert that will display each time the item is circulated (e.g., Check for all discs on a DVD set)).
- Price (Include decimal and following zeros. They don't display in the editor, but will display in item and patron records) *Items will not be saved if the price is left out.
- Reference?
- OPAC Visible?
- Item Tags (Used to enter item tags for the item (e.g., Donated by Jane Smith)).
- Item Notes (Add Or manage notes about the item for internal/reporting purposes or make public to be viewed in the catalog OPAC view)
- Statistical Categories (Set the Statistical Categories dropdown to WEST so that you have the same choices as all other libraries. See grid below).
 - Set the Statistical Categories dropdown to WEST so that you have the same choices as all other libraries
 - To match each kind of item, select
 - one statistical category for Monthly Reports and
 - one statistical category for State Reports
 - NOTE: There is not a State Reports statistical category option for Young Adult materials. According to the NYS Annual Report Statistics template, Y.A. is considered to be Adult Materials. Check with your library to see how they have entered those statistics in the past.
- 9. Click Save & Exit.
- 10. Refresh the Holdings View screen to see the newly created item.


Holdings Display Preferences

Default settings help to further customize templates used for linking new items. Selected Fields Will be Hidden from the Item Attributes Form.

Holdings Preferences

Holdings Preferences

Changes are saved automatically.

Holdings Display Preferences	
<input type="checkbox"/>	Hide Call Number Classification Column
<input checked="" type="checkbox"/>	Hide Call Number Prefix Column
<input checked="" type="checkbox"/>	Hide Call Number Suffix Column
<input checked="" type="checkbox"/>	Hide Generate Barcodes
<input checked="" type="checkbox"/>	Hide Use Checkdigit
<input type="checkbox"/>	Hide Item Number
<input type="checkbox"/>	Hide Item Part
<input checked="" type="checkbox"/>	Unified Holdings and Item Attributes Display  This will combine the Holdings and Attributes tab, making for a more concise display

Holdings Creation Defaults	
Default Classification	Dewey (DDC)
Default Prefix	<None>
Default Suffix	<None>

Selecting "Unified Holdings and Item attribute Display" will combine the Holdings and Attributes tabs into one, similar to the original display pre 3.8 upgrade.


Make sure the following are *NOT* selected:

- Hide Call Number Classification Column
- Hide Item Number
- Hide Item Part

Item Attribute Settings

Item Attributes Behavior

Change Circ Lib When Owning Lib Changes

WEST Default Stat Cat Library Filter 

Hide Item Attributes

Selected Fields Will be **Hidden** from the Item Attributes Form.

Identification	Location	Circulation	Miscellaneous	Statistics
<input type="checkbox"/> Status	<input type="checkbox"/> Location	<input type="checkbox"/> Circulate	<input type="checkbox"/> Item Alerts	<input type="checkbox"/> Add Item Tags
<input type="checkbox"/> Barcode	<input type="checkbox"/> Circulating Library	<input type="checkbox"/> Holdable	<input checked="" type="checkbox"/> Deposit	<input type="checkbox"/> Add Item Notes
<input checked="" type="checkbox"/> Creation Date	<input type="checkbox"/> Owning Library	<input checked="" type="checkbox"/> Aged-Based Hold Protection	<input checked="" type="checkbox"/> Deposit Amount	<input type="checkbox"/> Stat Cat Filter
<input checked="" type="checkbox"/> Activation Date	<input checked="" type="checkbox"/> Copy Number	<input checked="" type="checkbox"/> Floating	<input type="checkbox"/> Price	<input type="checkbox"/> Statistical Categories
<input checked="" type="checkbox"/> Creator		<input checked="" type="checkbox"/> Loan Duration	<input type="checkbox"/> OPAC Visible	
<input checked="" type="checkbox"/> Last Edit Date		<input checked="" type="checkbox"/> Fine Level	<input type="checkbox"/> Reference	
<input checked="" type="checkbox"/> Last Editor		<input checked="" type="checkbox"/> Circulate As Type	<input checked="" type="checkbox"/> Cost	
		<input type="checkbox"/> Circulation Modifier	<input checked="" type="checkbox"/> Quality	

Selecting the following fields will Hide them from the Item Attributes Form:

- Creation Date and Activation Date
- Creator
- Last Edit Date and Last Editor
- Copy Number
- Age-based Hold protection
- Floating
- Loan Duration
- Fine Level
- Circulate as Type
- Deposit and Deposit Amount
- Cost Quality

Spine Label Printing

Labels can be printed with local settings or with settings imported from a template file. There is a basic spine label template in each library share drive with a left-justified and a center-justified label.

[Spine_Label_Printing_Instructions_v._7/24/19_\(printable\)](#)

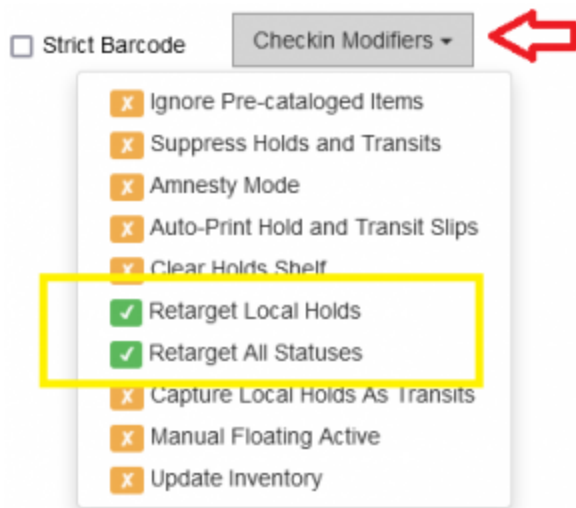
[Watch a video about how to import a label template file](#) with label settings from your library share to your workstation.

Make your linked items Available

When staff is done linking an item, the best practice and final step of the process is to check in the items with the *Retarget Local Holds* and *Retarget All Statuses* checkin modifiers applied.

Scanning the item with these checkin modifiers will change the status from Available Soon to Available in the catalog and will ensure that the item fills your patrons' holds first.

When you are done checking the items in, be sure to deselect the modifiers.



Item Status

The Item Status interface is a powerful tool that can give you a lot of information about specific items in your catalog. The Item Status interface is used for checking the status of one or more items, viewing past circulations, managing item alert messages, marking items missing or damaged, etc. Item Status can be accessed by either the Circulation or Cataloging drop-down menus.

There are four ways to access the item status interface:

1. Through the Search menu
 - Click Search → Search for Copies by Barcode.
 - Scan your barcode.
2. Through the Circulation menu
 - Click Circulation → Item Status.
 - Scan your barcode.
3. From the Cataloging menu
 - Click Cataloging → Item Status.
 - Scan your barcode.
4. From the OPAC view
 - Click Search → Search the Catalog.
 - Find a bibliographic record that you are interested in.
 - Make sure you are on the OPAC View tab of that record.
 - Locate the BARCODE column in the holdings session.
 - Click view next to the barcode of the item you're interested in.

Scan Item

Submit OR No file selected. Scan multiple barcodes separated by commas, or batch upload from a file.


Item Status Rows 25 Page 1

#	<input type="checkbox"/>	Status	Owning Library	Title	Barcode	Location	Item Status	Due Date	Date Last Edited	Deleted?
1	<input type="checkbox"/>		WLS	Hardscrabble road	3103850000604...	Interlibrary Loan	Available Soon	3/9/2022	5/24/2022 1:02 ...	No

Adding the Item Status COLUMN to the display of columns will help determine if the copy is available and allowed to be edited.


The Detail View interface of Item Status will display the Quick Summary tab as a default. Here you will be able to view when the item was created, where the item belongs, where it has been, and how often it has circulated.

Scan Item

Submit  OR Browse... No file selected.

Record Summary (MARC)

Title:	Hardscrabble road	Edition:		TCN:	3183030	Created By:	equinox
Author:	Haddam, Jane 1951-	Pub Date:	2006	Database ID:	3183030	Last Edited By:	equinox
Bib Call #:	813/.54	Record Owner:		Last Edited On:	3/3/2019 1:55 AM		

Barcode	31038500006047	Circ Library	WLS	Call # Prefix		Status	Available Soon
Price	25.00	Owning Library	WLS	Call #	MYSTERY HADDAM	Due Date	3/9/2022
Acquisition Cost		Shelving Location	Interlibrary Loan	Call # Suffix		Checkout Date	2/16/2022 9:57 AM
ISBN	{*9780312989125 (pbk. : 2007)*,0312353731}	Loan Duration	Normal	Renewal Type		Checkout Workstation	WLS-WLS-pryor
Date Created	1/16/2013 7:00 PM	Fine Level	Normal	Total Circs 	269	Duration Rule	21_days_1_renew_0_autorenew
Date Active	3/5/2019 10:41 AM	Reference	false	Total Circs - Current Year	2	Recurring Fine Rule	50_cents_per_day_0_grace
Status Changed	5/24/2022 1:02 PM	OPAC Visible	true	Total Circs - Prev Year	181	Max Fine Rule	5_dollars
Item ID	2214538	Holdable	true	In-House Uses	0	Checkin Time	2/16/2022 9:57 AM
Circulate	true	Renewal Workstation		Remaining Renewals	1	Checkin Scan Time	2/16/2022 9:57 AM
Floating		Circ Modifier	Book	Age-based Hold Protection		Checkin Workstation	WLS-WLS-pryor

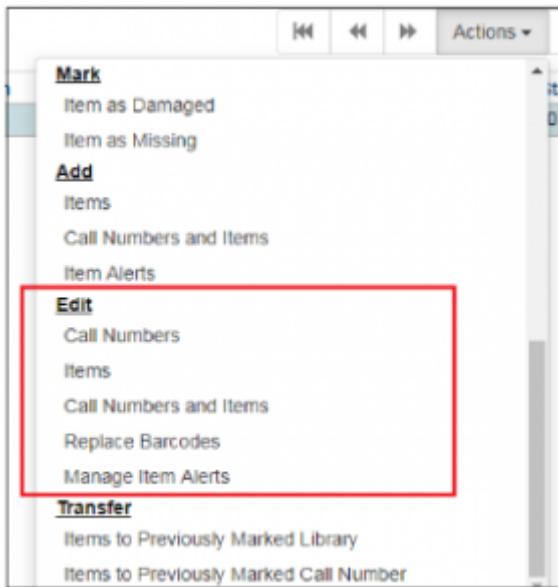
Edit Items

To Edit One Item

When editing an item, begin by scanning the item into Item Status.

1. Go to *Circulation > Item Status*.
2. Scan the item.
3. Select the Item and right-click or select the Actions dropdown menu.
4. Scroll to Edit and select from the following options:
 1. Call Numbers (*Edit an item's call number.*)
 2. Items (*Edit any item attributes within a template; status, shelving location, statistical category.*)
 3. Call Numbers and Items (*Edit an item attribute and call number.*)

4. Replace Barcodes (*Prompts you to replace an item's barcode.*)
5. Manage Item Alerts (*Edit existing Item Alerts.*)
6. Be sure to click Save and Exit.



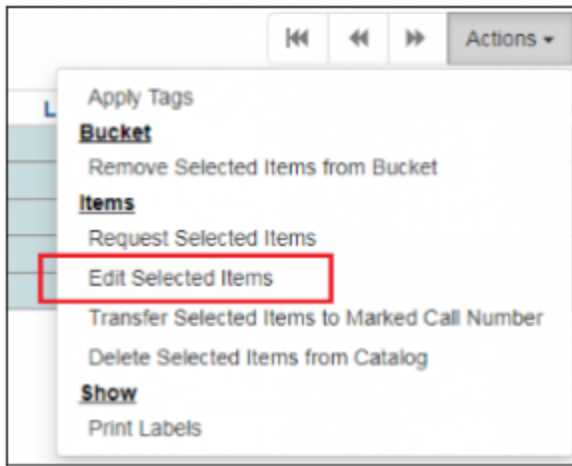
To Edit Multiple Items

- Go to *Circulation > Item Status*.
- Scan items to be edited.
- Select all items.
- Right-click, or in the Actions dropdown, select Add Items to Bucket.
- Name it "Items to be Edited"
- Go to Cataloging > Item Buckets
- Click the Bucket dropdown and select your bucket. The items will load in a list.
- Select some or all of the items.
- Right-click, or in the Actions dropdown, select Edit Selected Items.

Multiple Item barcodes can also be loaded in batch from a file in Item Status only.

1. Run a weeding report to generate an Excel file.
2. Select up to 500 barcode IDs and copy
3. Paste the barcodes into Notepad and save the .txt file.
4. Go to Circulation > Scan Item

5. Click *Choose file* and browse to the file. Depending on the number of items, it may take a while to load. When it's finished, items will display in a list.
6. Proceed with editing as above.



Update an Item's Status

For damaged items or items that need repair, click on Actions for Selected Items > Mark Item Damaged to change the status to Damaged, which is non-holdable and not OPAC visible. You can also change the status to Bindery if the books are being sent outside of the library to be repaired. Do not check items out to Damaged and Repair cards; these users will be deleted soon.

When a missing item (it will have a Missing status) is found, it can be checked in to change its status. An item that has a Bindery, Cataloging, or Damaged status needs to be changed back to Available before it goes back on the shelf. Every change of status, including those associated with circulation like Checked out, is an edit of the record and changes the item's Status Date Changed.

1. Go to *Circulation > Item Status*
2. Scan the item.
3. In the list, right-click the row and select *Edit Item*. The Holdings Editor opens in a new tab.
4. In the Status dropdown, choose *Available*.
5. Click *Save & Exit*.

Transfer Call Numbers and Items

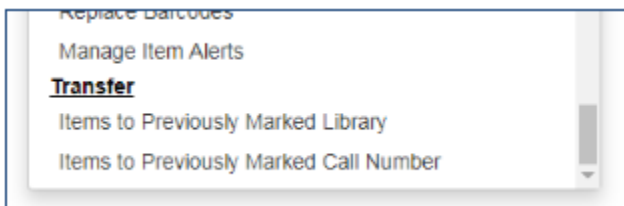
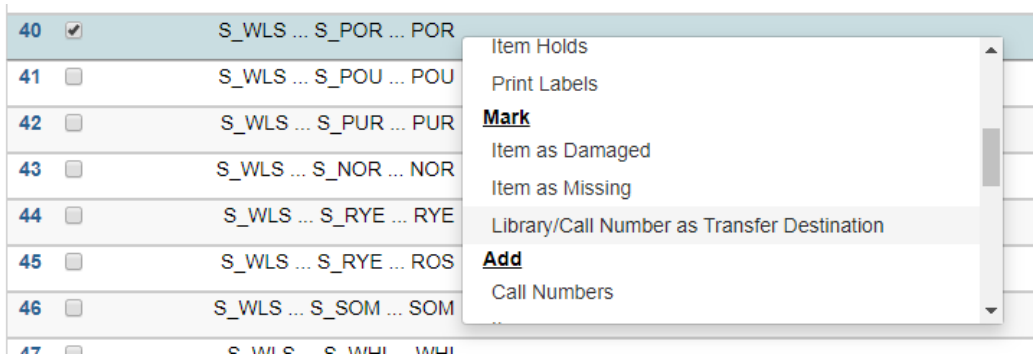
Should staff need to transfer call numbers or items, the best practice is to

- transfer a call number and item from one title record to another
- transfer an item from one call number to another

Locate the bibliographic records that match the item that you need to transfer.

****If the two records are different editions of the same title, use the Holdings View navigation to move between the two records easily.****

- Open the Holdings View tab.
- Verify that Show holdings at or below are set to WEST.
- Select the library and call number to which you would like to transfer the item.
 - ****The library or call number may be “empty” and have no items attached.****
- Right-click, or click Actions, and select **Mark > Library/Call Number As Transfer Destination**.
- Navigate to the source item - the one that you want to transfer.
- Right-click, or click Actions, and select either **Transfer > Items to Previously Marked Library OR Items to Previously Marked Call Number**
- The item will be moved from one record to another.



Delete Items

Checked out and Lost items should not be deleted. They are still checked out and linked to a patron record. If the items are returned, they will not be updated on the patron record, changed from Checked out or Lost to returned, and the fines won't be updated. If the fine is forgiven or otherwise removed from the patron record, then the item can be deleted.

That is one reason that it's very important to add the Copy Status column to whatever grid you are using to delete items. It will allow you to view which items are Checked out, Lost, or in another location that will cause problems if you delete them. If you try to delete one of these items, you will get an alert to confirm and force the action. When you see this message, it's very important that you do not delete the item. Investigate thoroughly and, if it's appropriate, do what's needed to remove the item from the patron record and then delete. If it's not appropriate to remove the item from the patron record, then do not delete it.

To Delete a single item

1. Go to Circulation > Item Status.
2. Scan the item.
3. In the Detail View, in the Actions dropdown menu, select Delete Items from Catalog.

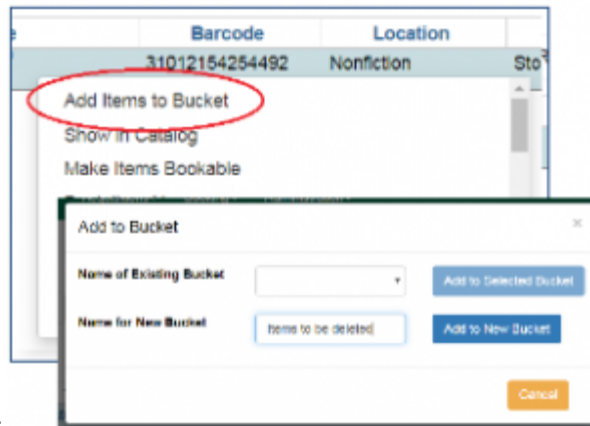
OR

In the Holdings View, in the Actions dropdown menu, select Delete Items.

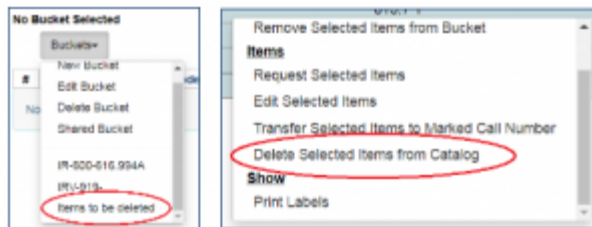
If an item has a status that Evergreen sees as unusual, like Checked out or Lost, an alert/override similar to "Copy in bad status for deletion" will display. The item should not be deleted. This alert should only be overridden in the case of "Lost and Paid" items.

To Delete multiple items

1. Go to Circulation > Item status.
2. Scan items to be deleted.*
3. Select all items.
4. Right-click, or in the Actions dropdown, select Add Items to Bucket.
5. Name it "Items to be Deleted"



6. Go to Cataloging > Item Buckets
7. Click the Bucket dropdown and select your bucket.
The items will load in a list.
8. Select some or all of the items.
9. Right-click, or in the Actions dropdown, select Delete Selected Items from



Catalog.

*Item barcodes can also be loaded in batch from a file.

1. Run a weeding report to generate an Excel file.
2. Select up to 500 barcode IDs and copy
3. Paste the barcodes into Notepad and save the .txt file.
4. Go to Circulation > Scan Item
5. Click *Choose file* and browse to the file.
Depending on the number of items, it may take a while to load. When it's finished, items will display in a list.
6. Proceed with deleting as above.