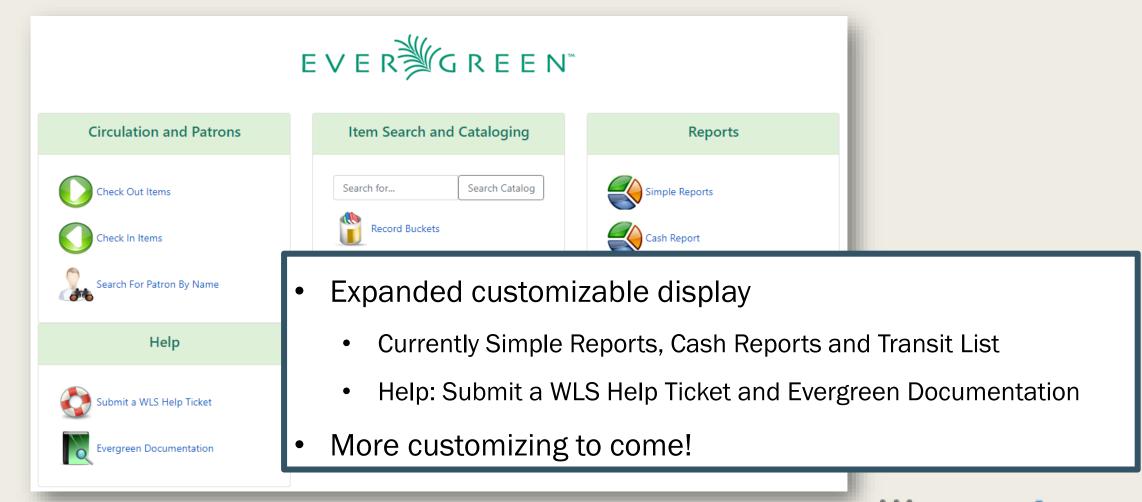# EVERGREEN 3.10 UPGRADE

May 2023

AGENDA

- Staff Portal

- Search the Catalog (Traditional) ends

- Manage Action Menus

- Circulation (Experimental)

- Simple Reports

- Multi-language Notice Support

- Acquisitions Enhancements

Please note that the test server does not have features related to system notification and communication enabled so they will not complete as expected
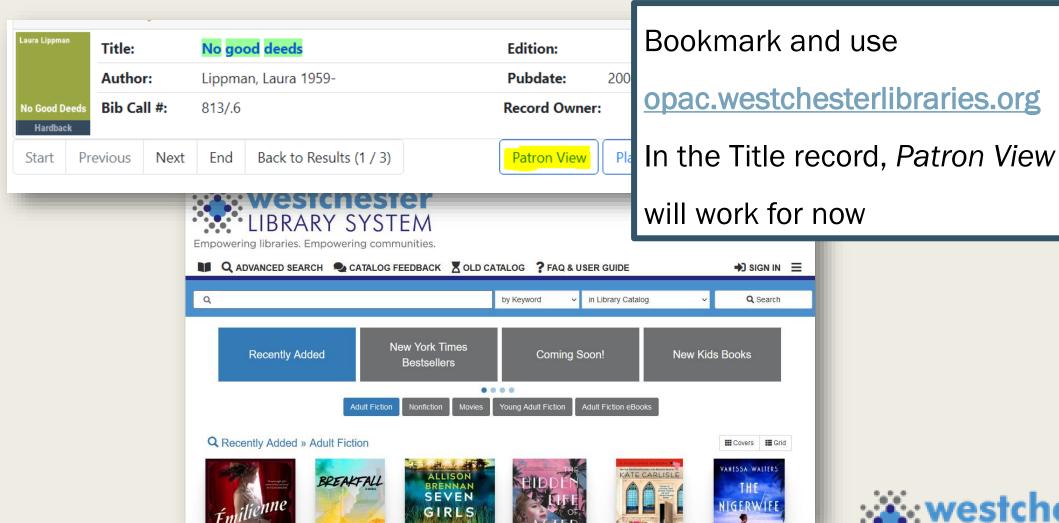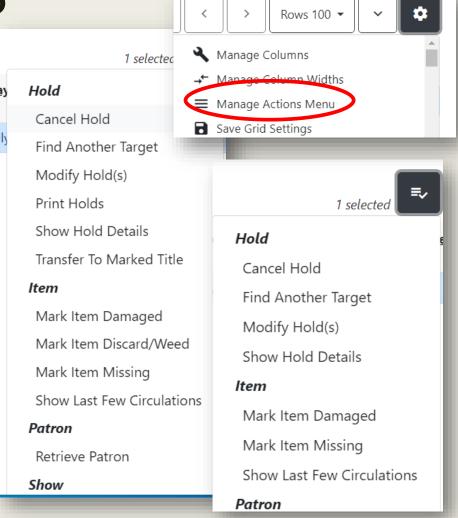
STAFF PORTAL

E V E R G R E E N™

Circulation and Patrons

▶ Check Out Items

◀ Check In Items

Search For Patron By Name

Help

Submit a WLS Help Ticket

Evergreen Documentation

Item Search and Cataloging

Search for... | Search Catalog

Record Buckets

Reports

Simple Reports

Cash Report

- Expanded customizable display
  - Currently Simple Reports, Cash Reports and Transit List
  - Help: Submit a WLS Help Ticket and Evergreen Documentation
- More customizing to come!

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TRADITIONAL CATALOG REMOVED

Bookmark and use

opac.westchesterlibraries.org

In the Title record, *Patron View*

will work for now

MANAGE ACTION MENUS

- Remove items to include only what you use

- Available in angular displays, for example
  - Catalog
  - Circulation (Experimental)
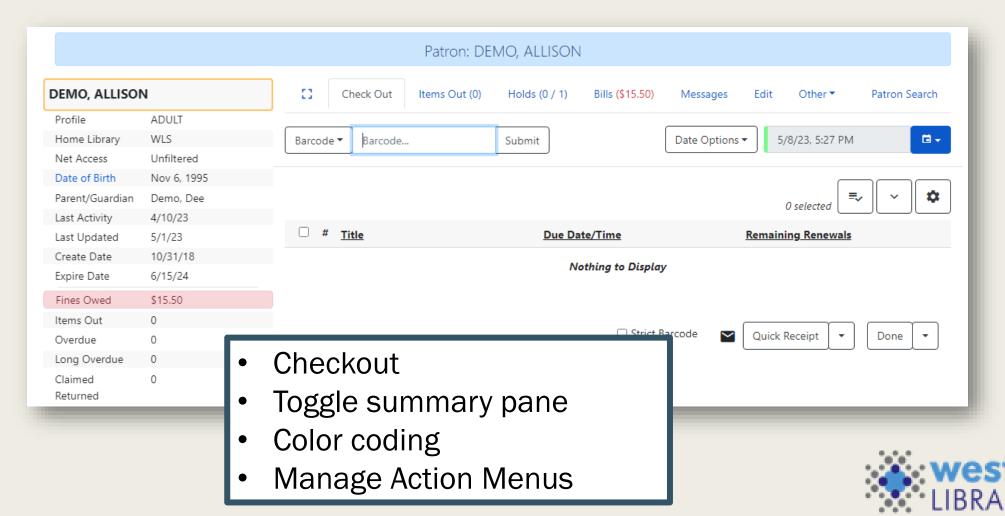 - Simple Reports

CIRCULATION (EXPERIMENTAL)

Circulation (Experimental) ▼

- Search for Patrons
- Check Out
- Check In
- Capture Holds
- Pull List for Hold Requ...
- Renew Items
- Register Patron
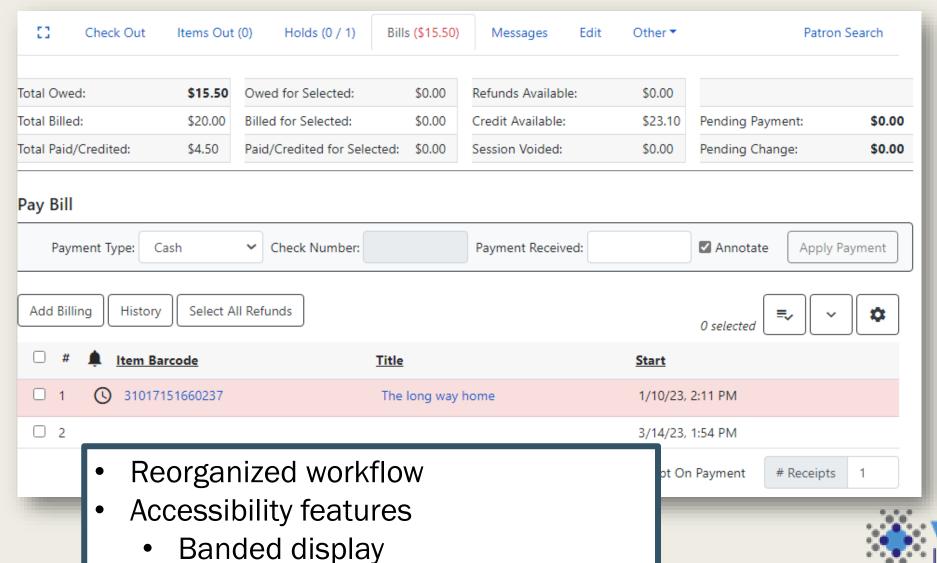- Retrieve Last Patron
- Retrieve Recent Patrons
- Verify Credentials

- Consolidated, rearranged menu options

- In development

- View current OR experimental simultaneously

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CIRCULATION (EXPERIMENTAL) – ANGULAR DISPLAYS

- Checkout
- Toggle summary pane
- Color coding
- Manage Action Menus

CIRCULATION (EXPERIMENTAL) - BILLS

- Reorganized workflow
- Accessibility features
  - Banded display
  - Color coding

8

CIRCULATION (EXPERIMENTAL) - EDIT
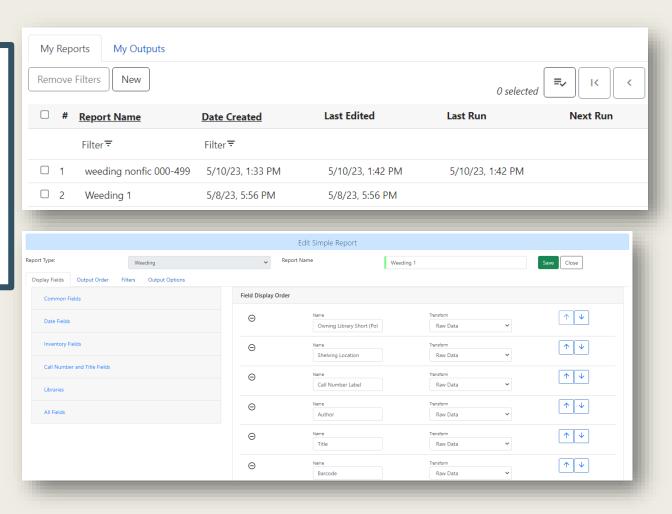

Accessibility features
- Banded display
- Color coding

SIMPLE REPORTS

Build templates instead of cloning
Ideal for common reports
- Weeding
- Shelflists
- Simple circulation
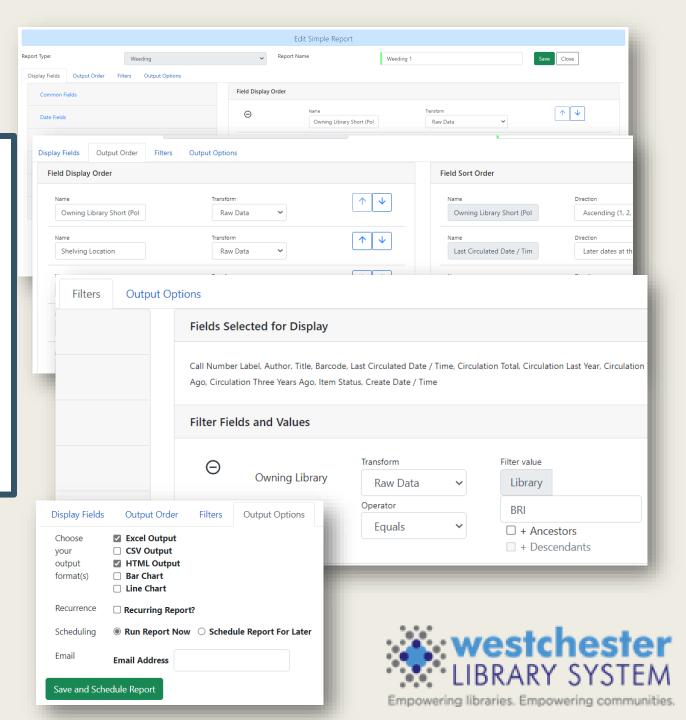
The Reporter will still be available

SIMPLE REPORTS

1. Name the report
2. Choose a report type and fields
3. Choose the output order
4. Choose and set up filters: field, operator, transform
5. Set up output options
6. Save and Schedule Report or Save the template without running it

Acquisitions Enhancements

- Angularization of Acquisitions Interfaces
  - Purchase Orders
  - Selections Lists
  - Line Item Details
  - MARC Order Records
- Additional functionality to sort and filter Purchase Orders and Selection Lists
- Optional functionality to receive vendor orders by boxed package

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Try out Evergreen 3.10 on the test server at
wls-test.sequoia.evergreencatalog.com/eg/staff/login

RESOURCES

- [Evergreen 3.10 Upgrade Preview Highlight Video](#)
  Sign in with your AD/Evergreen username and password, with the username format **firstname.lastname@westchesterlibraries.org**
- [Evergreen Community 3.10 Release Notes](#)

Questions?
Submit a [helpdesk ticket](#) or
email [support@wlsmail.org](#)

THANK YOU