



westchester
LIBRARY SYSTEM

Empowering libraries. Empowering communities.

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

EVERGREEN™

Circulation and Patrons

- Check Out Items
- Check In Items
- Search For Patron By Name

Item Search and Cataloging

Search for... Search Catalog

Record Buckets

Reports

- Simple Reports
- Cash Report

Help

- Submit a WLS Help Ticket
- Evergreen Documentation

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

TRADITIONAL CATALOG REMOVED

Laura Lippman

Title: [No good deeds](#) **Edition:**

Author: Lippman, Laura 1959- **Pubdate:** 200

Bib Call #: 813/6 **Record Owner:**

No Good Deeds
Hardback

Start Previous Next End Back to Results (1 / 3) **Patron View** Play

Bookmark and use opac.westchesterlibraries.org

In the Title record, *Patron View* will work for now

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ADVANCED SEARCH CATALOG FEEDBACK OLD CATALOG FAQ & USER GUIDE SIGN IN

by Keyword in Library Catalog Search

Recently Added New York Times Bestsellers Coming Soon! New Kids Books

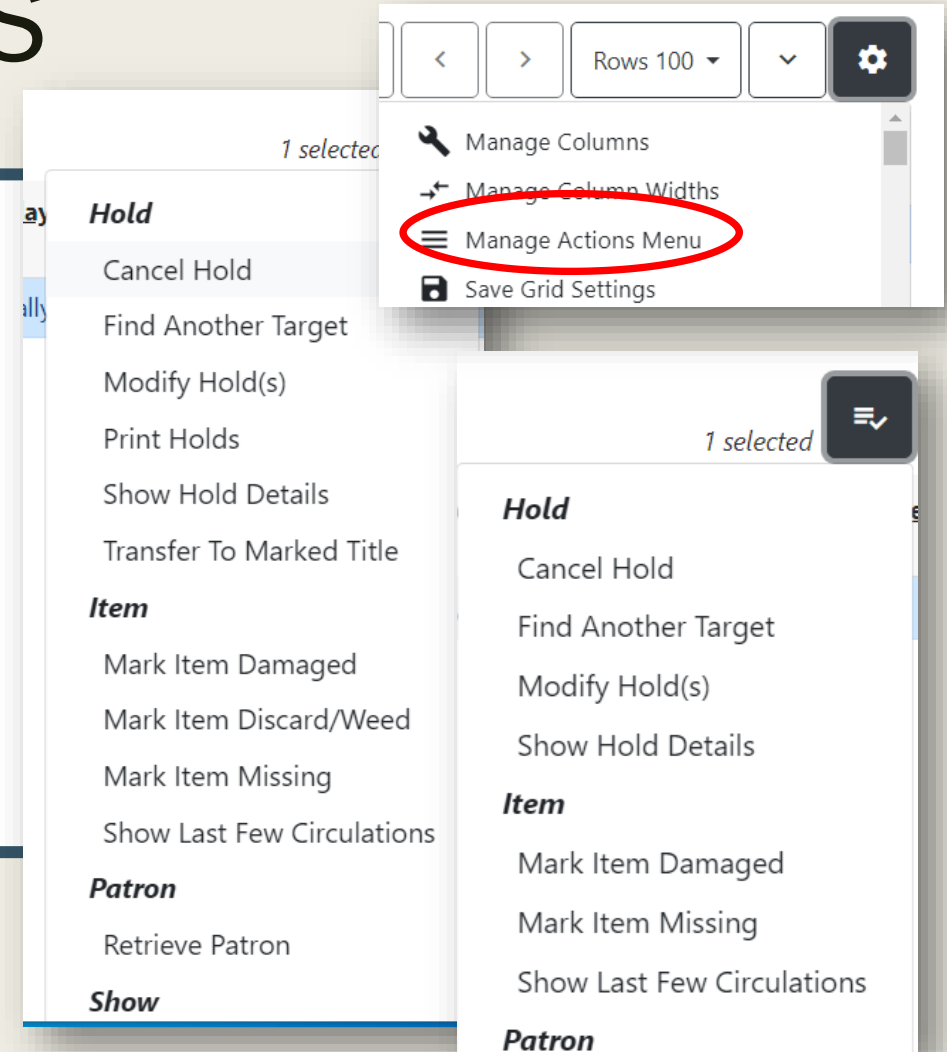
Adult Fiction Nonfiction Movies Young Adult Fiction Adult Fiction eBooks

Recently Added » Adult Fiction Covers Grid

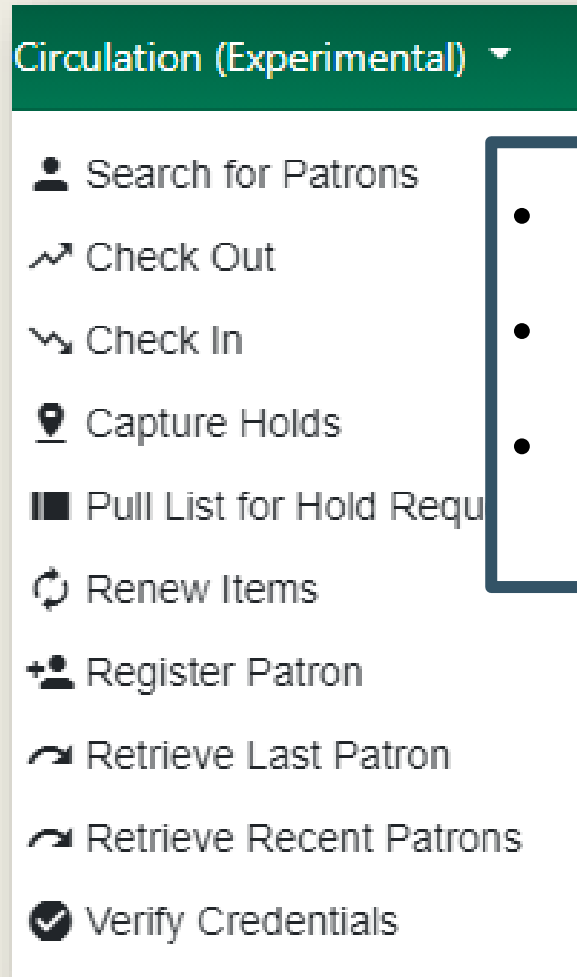
Emilienne BREAKFALL ALLISON BRENNAN SEVEN GIRLS THE HIDDEN LIFE OF ASTER THE BOOK OF ESTHER VANESSA WALTERS THE NIGERWIFE

MANAGE ACTION MENUS

- Remove items to include only what you use
- Available in angular displays, for example
 - Catalog
 - Circulation (Experimental)
 - Simple Reports



CIRCULATION (EXPERIMENTAL)



- Consolidated, rearranged menu options
- In development
- View current OR experimental simultaneously

CIRCULATION (EXPERIMENTAL) – ANGULAR DISPLAYS

Patron: DEMO, ALLISON

DEMO, ALLISON

Profile ADULT
Home Library WLS
Net Access Unfiltered
Date of Birth Nov 6, 1995
Parent/Guardian Demo, Dee
Last Activity 4/10/23
Last Updated 5/1/23
Create Date 10/31/18
Expire Date 6/15/24

Fines Owed \$15.50
Items Out 0
Overdue 0
Long Overdue 0
Claimed 0
Returned 0

Check Out Items Out (0) Holds (0 / 1) Bills (\$15.50) Messages Edit Other Patron Search

Barcode Barcode... Submit Date Options 5/8/23, 5:27 PM

0 selected

#	Title	Due Date/Time	Remaining Renewals
Nothing to Display			

Quick Receipt Done

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

CIRCULATION (EXPERIMENTAL) - BILLS

Check Out Items Out (0) Holds (0 / 1) **Bills (\$15.50)** Messages Edit Other ▾ Patron Search

Total Owed:	\$15.50	Owed for Selected:	\$0.00	Refunds Available:	\$0.00		
Total Billed:	\$20.00	Billed for Selected:	\$0.00	Credit Available:	\$23.10	Pending Payment:	\$0.00
Total Paid/Credited:	\$4.50	Paid/Credited for Selected:	\$0.00	Session Voided:	\$0.00	Pending Change:	\$0.00

Pay Bill

Payment Type: Check Number: Payment Received: Annotate

 0 selected

<input type="checkbox"/>	#	<u>Item Barcode</u>	<u>Title</u>	<u>Start</u>
<input type="checkbox"/>	1	31017151660237	The long way home	1/10/23, 2:11 PM
<input type="checkbox"/>	2			3/14/23, 1:54 PM

 # Receipts 1

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

CIRCULATION (EXPERIMENTAL) - EDIT

☰ Check Out Items Out (0) Holds (0 / 1) Bills (\$15.50) Messages Edit Other ▾

Show: Required Fields Suggested Fields All Fields

Barcode

OPAC/Staff Client User Name

Password

Primary Name Preferred Name

Prefix/Title	<input type="text"/>
First Name	<input type="text" value="ALLISON"/>
Middle Name	<input type="text"/>
Last Name	<input type="text" value="DEMO"/>
Suffix	<input type="text"/>

Name Keywords

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

My Reports My Outputs

Remove Filters New

0 selected

<input type="checkbox"/>	#	Report Name	Date Created	Last Edited	Last Run	Next Run
		Filter	Filter			
<input type="checkbox"/>	1	weeding nonfic 000-499	5/10/23, 1:33 PM	5/10/23, 1:42 PM	5/10/23, 1:42 PM	
<input type="checkbox"/>	2	Weeding 1	5/8/23, 5:56 PM	5/8/23, 5:56 PM		

Edit Simple Report

Report Type: Weeding Report Name: Weeding 1 Save Close

Display Fields Output Order Filters Output Options

Name	Transform	
Owning Library Short (Pol)	Raw Data	↑ ↓
Shelving Location	Raw Data	↑ ↓
Call Number Label	Raw Data	↑ ↓
Author	Raw Data	↑ ↓
Title	Raw Data	↑ ↓
Barcode	Raw Data	↑ ↓

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

The screenshot displays the 'Edit Simple Report' interface with the following sections:

- Report Type:** Weeding (dropdown), Report Name: Weeding 1 (text input), Save (button), Close (button).
- Display Fields:** Common Fields, Date Fields, Field Display Order (table with Name, Transform, and sort arrows).
- Field Sort Order:** Table with Name, Direction, and sort arrows.
- Filters:** Filter Fields and Values (table with Name, Transform, Filter value, Operator).
- Output Options:** Fields Selected for Display (list of fields), Filter Fields and Values (table with Name, Transform, Filter value, Operator).
- Output Options Panel:** Choose your output format(s) (Excel Output, CSV Output, HTML Output, Bar Chart, Line Chart), Recurrence (Recurring Report?), Scheduling (Run Report Now, Schedule Report For Later), Email (Email Address input), Save and Schedule Report (button).

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

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