



# EVERGREEN 3.12

## PREVIEW

May 2024 Upgrade

# AGENDA



General Fixes and Improvements



Catalog



Circulation



Acquisitions



Q & A

# GENERAL

- **Grid** is a unit of display in Evergreen. It looks like a table, and it's everywhere.
- **Accessibility** means ensuring that users of varying physical and cognitive abilities can interact successfully with software. It's governed by federal law in the US, Canada, and the EU.
- Angular (\*-ized, \*-ization) refers to the language of new(er) web client interfaces. The community has been working on converting interfaces from older types of Javascript (Dojo, AngularJS) to Angular.
- Org Unit is a library location (Consortium, System, Branch, Sub-Branch)
- 115 bugfixes & features

# GENERAL – Sign in and out

- Patron and staff login forms now include a button to **reveal the password input**.
- Use keyboard shortcut **Alt-Shift-Q** for staff to quickly logout

Sign In

Username

Password

Workstation

Sign In

Username

Password

Workstation

Log out?

Are you sure you want to log out?

# GENERAL - Accessibility

- Screen reader text alternatives for all icons and images in the staff interface
- Improved color contrast for links, buttons, and form inputs
- Angular navbar keyboard navigation
  - **Tab** key - move between the top-level menu items
  - **Enter, Space, down arrow** – open/close (toggle) a top-level submenu
  - **Esc** - close a top-level menu
  - **Shift-tab** from the first submenu item back to the top level
  - **Tab, Shift-tab, up/down arrow keys** - in the submenu, move up and down
- Gear icon for the grid settings menu






# GENERAL – Grids

- Print Selected Rows In All Grids

Holdings Count: 25

View Pull List For: CRO    Pickup Library:    Clear    Shelving Locations:    Clear


Print Full List

0 selected    Rows 100  

| <input type="checkbox"/> | # | <a href="#">Shelving Location</a> | <a href="#">CN Full label</a> | <a href="#">Author</a> | <a href="#">Title</a>                 | <a href="#">Current Item</a>   | <a href="#">Pickup Library</a> | <a href="#">Potential Items</a> | <a href="#">Request Date</a> |
|--------------------------|---|-----------------------------------|-------------------------------|------------------------|---------------------------------------|--------------------------------|--------------------------------|---------------------------------|------------------------------|
| <input type="checkbox"/> | 1 | Fiction                           | FICTION/GAIMAN                | Gaiman, Neil.          | <a href="#">Neverwhere</a>            | <a href="#">31006100275965</a> | GLKR                           | 19                              | 3/26/24, 9:02 AM             |
| <input type="checkbox"/> | 2 | Fiction                           | FICTION/VACHSS                | Vachss, Andrew H.      | <a href="#">Sacrifice</a>             | <a href="#">31006100044338</a> | GRE                            | 4                               | 3/26/24, 12:48 PM            |
| <input type="checkbox"/> | 3 | Fiction                           | FICTION/WALLA...              | Wallance, Gregory.     | <a href="#">Two men before t...</a>   | <a href="#">31006150939627</a> | SCA                            | 1                               | 3/26/24, 12:28 PM            |
| <input type="checkbox"/> | 4 | Juvenile Biography                | J B DARROW                    | Driemen, J. E. (Jo...  | <a href="#">Clarence Darrow</a>       | <a href="#">31006100149608</a> | MTP                            | 1                               | 3/26/24, 2:37 PM             |
| <input type="checkbox"/> | 5 | Juvenile Graphic ...              | J GRAPHIC/WINI...             | Winick, Judd           | <a href="#">Hilo 10 Rise of th...</a> | <a href="#">31006151997665</a> | HAS                            | 31                              | 3/26/24, 3:39 PM             |
| <input type="checkbox"/> | 6 | Juvenile Holiday                  | JP HOLIDAY/NEW...             | Newman, Tracy 1...     | <a href="#">Passover is comin...</a>  | <a href="#">31006151521697</a> | HAR                            | 4                               | 3/25/24, 9:35 AM             |
| <input type="checkbox"/> | 7 | Juvenile Nonfiction               | J 005.133 S                   | Setford, Steve         | <a href="#">Coding in Scratch...</a>  | <a href="#">31006151776226</a> | RYE                            | 3                               | 3/26/24, 1:14 PM             |

# CATALOG – Staff View

- Key MARC fields
- Summary
- Hold information

Record Summary  CD Audiobook ^

|  |                             |                                    |  |
|--|-----------------------------|------------------------------------|--|
| <b>Title:</b> <a href="#">Persuasion</a>     | <b>Edition:</b> Unabridged. | <b>TCN:</b> 3826871                | <b>Created By:</b> <a href="#">equinox</a>     |
| <b>Author:</b> <a href="#">Austen, Jane.</a> | <b>Pubdate:</b> uuuu        | <b>Database ID:</b> 3826871        | <b>Last Edited By:</b> <a href="#">equinox</a> |
| <b>Bib Call #:</b> Fic                       | <b>Record Owner:</b>        | <b>Created On:</b> 3/3/19, 9:46 AM | <b>Last Edited On:</b> 3/3/19, 9:46 AM         |

[Start](#) [Previous](#) [Next](#) [End](#) [Back to Results \(5 / 328\)](#)

[Patron View](#) [Place Hold](#) [Add Holdings](#) [Serials ▾](#) [Mark For... ▾](#) [Other Actions ▾](#)

[Set Default View](#)

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[Staff View](#) [Item Table](#) [MARC Edit](#) [MARC View](#) [Record Notes](#) [View Holds](#) [Monograph Parts](#) [Holdings View](#) [Conjoined Items](#) [Shelf Browse](#)

|  |  |   |
|--|--|---|
| <p><b>Title:</b> <a href="#">Persuasion</a></p> <p><b>Author:</b> <a href="#">Austen, Jane.</a></p> <p><b>Performer:</b> Read by Greta Scacchi.</p> <p><b>Edition:</b> Unabridged.</p> <p><b>Publisher:</b> [United States] : Audiogo, 2011.</p> <p><b>Type of Resource:</b> sound recording-nonmusical</p> <p><b>Physical Description:</b> sound disc<br/>8 audio discs (495 min.) : digital ; 4 3/4 in.</p> <p><b>ISBN:</b> <a href="#">9781602838826</a> :</p> <p><b>UPC:</b> <a href="#">9781602838826</a></p> | <p><b>Summary:</b> Anne Elliot passes up an opportunity for happiness when she declines a match in marriage in hopes of bettering her position. Beauty fades as seven years pass, when her former love returns a wealthier man. Anne finds herself slighted and all traces of their former intimacy gone. Mishaps and mischief mount as the pair tempt fate in this comic story of love.</p> <p><b>General Note:</b> Compact discs.<br/>01/11/2011</p> | <p><b>Hold and Copy Counts:</b> 0 hold requests<br/>1 of 1 copies available at WEST.</p> <p><b>Subject:</b> <a href="#">Audiobooks on CD</a></p> <p><b>Formats and Editions:</b> <a href="#">Book 29</a><br/><a href="#">Cassette audiobook 1</a><br/><a href="#">CD Audiobook 4</a><br/><a href="#">DVD 3</a><br/><a href="#">Large Print Book 2</a><br/><a href="#">English 37</a><br/><a href="#">Spanish 1</a><br/><a href="#">View all Formats and Editions 39</a></p> |
|--|--|---|

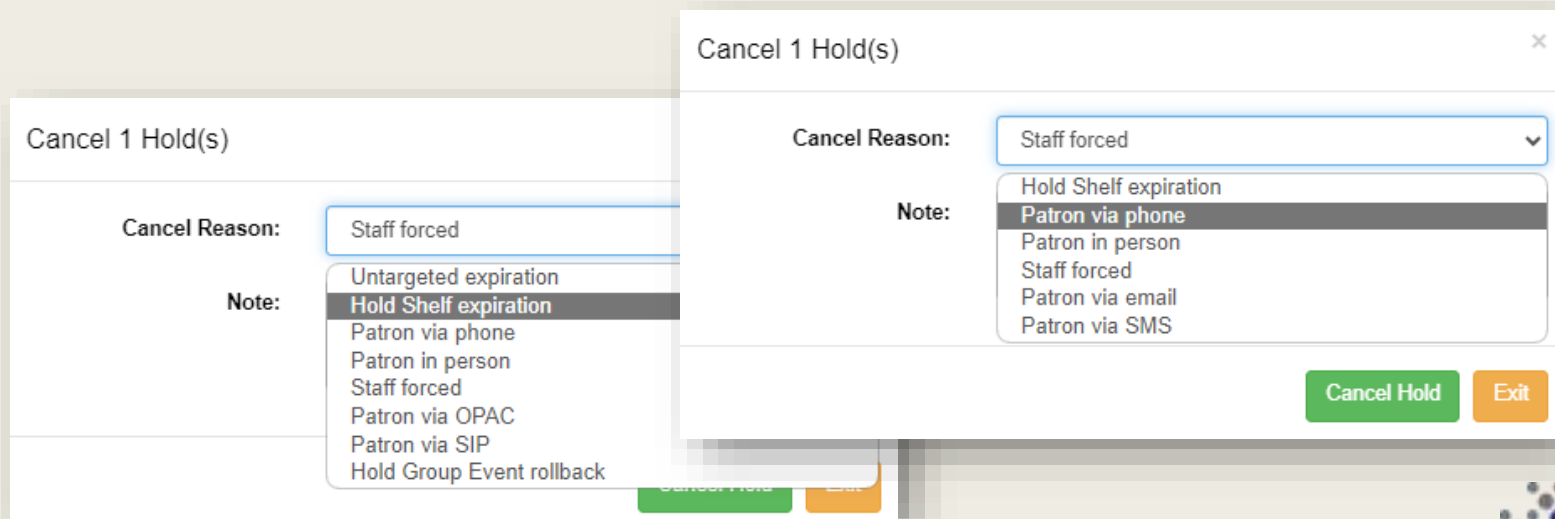
# CATALOG – View Holds Grid

- Add patron home library code as a column to the View Holds grid in the staff catalog record details page
- "Clear Added Content Cache" item in the Other Actions menu in the staff catalog record page



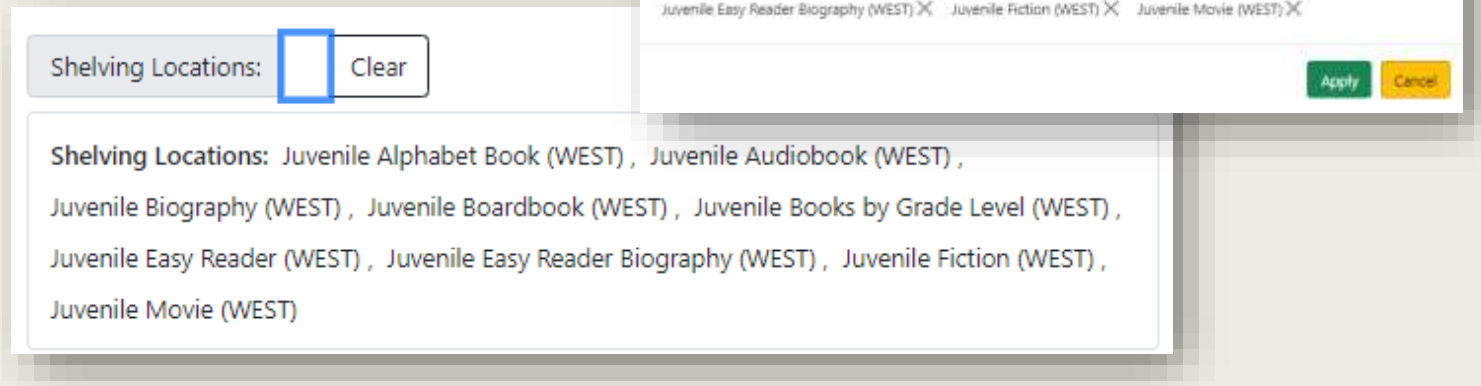
# CIRCULATION – Checkout Screens

- Patron Edit – Ability to clear the default pickup location
- Cancel Hold popup window lists only hold cancel reasons that can be manually applied, excluding the ones that can only be automatically applied.



# CIRCULATION – Holds Pull List

- Two new filters to split the list into sections for multiple staff work
- filter by Shelving Locations
- filter by Pickup Library
- settings are sticky in a workstation
- Print Full List and Download CSV actions respect the new filters



The image shows a screenshot of a software interface for filtering a holds pull list. At the top, there is a dialog box titled "Filter by Shelving Locations or Groups". Inside this dialog, the "Shelving Locations" option is selected with a radio button. Below the radio buttons, there is a search input field labeled "Shelving Locations" and a "Remove All" button. A list of selected filters is displayed below, each with an "X" icon to remove it: "Juvenile Alphabet Book (WEST)", "Juvenile Audiobook (WEST)", "Juvenile Biography (WEST)", "Juvenile Boardbook (WEST)", "Juvenile Books by Grade Level (WEST)", "Juvenile Easy Reader (WEST)", "Juvenile Easy Reader Biography (WEST)", "Juvenile Fiction (WEST)", and "Juvenile Movie (WEST)". At the bottom right of the dialog are "Apply" and "Cancel" buttons.

Below the dialog box, there is a summary box with the text: "Shelving Locations: Juvenile Alphabet Book (WEST), Juvenile Audiobook (WEST), Juvenile Biography (WEST), Juvenile Boardbook (WEST), Juvenile Books by Grade Level (WEST), Juvenile Easy Reader (WEST), Juvenile Easy Reader Biography (WEST), Juvenile Fiction (WEST), Juvenile Movie (WEST)". To the left of this summary box, there is a "Shelving Locations:" label, a small square icon, and a "Clear" button.

# CIRCULATION – Holds

- Publication year added to Holds Pull List
- Faster hold filling

If “Holdable” and “Available” item status flags are both true, a copy within that status is eligible to fill a hold

# ITEM MAINTENANCE – Item Alerts

- Staff can set a default item alert type
- Set in the Preferences tab of the Holdings Editor
- Batch edit for Item Alerts
  - Alerts are grouped together for editing if they are mostly identical
  - Adds Manage Alerts button to Item Alerts dialog during alert display

The screenshot shows two sections of a web interface. The top section, 'Holdings Preferences', has a 'Preferences' tab highlighted with a red circle. Below it are several checkboxes for display preferences, including 'Hide Call Number Classification Column', 'Hide Call Number Prefix Column', 'Hide Call Number Suffix Column', 'Hide Generate Barcodes', 'Hide Use Checkdigit', 'Hide Item Number', 'Hide Item Part', and 'Unified Holdings, Item Attributes Display, and Item'. The bottom section, 'Item Attribute Settings', has a dropdown menu for 'Default Item Alert Type' with 'Normal checkin' selected, also highlighted with a red circle.

The screenshot shows a dialog box titled 'Managing alerts for item'. It contains a dropdown menu with 'Normal checkin' selected, a text input field for 'New Alert Note...', and a 'Temporary?' checkbox. There is an 'Add New' button. At the bottom, there are 'Close' and 'Apply Changes' buttons.

# AQUISITIONS

- Fiscal years & calendars
- New report sources for invoice details
- Lindsay will work with libraries that use acquisitions to update them about changes and improvements

Try out Evergreen 3.12 on the test server at  
[wls-test.sequoia.evergreencatalog.com/eg/staff/login](http://wls-test.sequoia.evergreencatalog.com/eg/staff/login)

## RESOURCES

- [Evergreen 3.12 Upgrade Preview Recording](#)  
Sign in with your AD/Evergreen username and password, with the username format [firstname.lastname@westchesterlibraries.org](#)
- [3.12 Release Notes](#)

THANK YOU

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