

Evergreen

Technical Services



Tech. Services

Technical Services pertains to the linking, editing, deletion and general maintenance of items linked to your library's collection as part of the catalog.

Common Tech Services workflows include:

- Creating and Linking to Records
- Maintaining Items and Records
- Creating and Maintaining Holdings Templates
- Understanding System Policies pertaining to the ILS
- Using Item and Record Buckets
- Using Item Status
- Running Reports
- Weeding and Maintaining Library Collections

Common Tech. Services Terms

- **ILS:** Integrated Library Systems. An umbrella term used to encompass the Evergreen Staff Client, The OPAC, The Mobile App, and the Data Dashboard.
- **OPAC:** Online Public Access Catalog. Also referred to as the Public or Patron Catalog.
- **Staff Client:** The Evergreen software used by staff.
- **Bibliographic Record:** The first "layer" of a record. Also referred to as a Title or BIB Record.
- **Volume Record:** The second "layer" of a record. Also referred to as Call Number Record.
- **Copy/Item Record:** The third "layer" of a record. The individual copies linked to the first two record layers.
- **Holdings:** Individual barcodes linked to the copy/item records. Also referred to as items or copies.
- **Templates:** Commonly used during the linking process, templates are tools that can be customized and shared with colleagues that will allow you to quickly assign item attributes, ensuring that everyone at your library is using the same information.
- **Link:** Add an item to the catalog.
- **Checkin Modifiers:** Settings that effect how items are checked in.
- **Circulation Modifiers:** Item Types or iTypes – allow you to group resources together by material type and can be used in the creation of circulation and holds policies.
- **Pre-Cat:** Pre-cataloged item. This occurs when items are mis-scanned at checkout and Evergreen prompts staff to create "on-the-fly" records for a quick checkout. These need to be deleted form the catalog on a regular basis.
- **TCN:** Title Control Number
- **Stat Cats:** Statistical Categories. Used for collecting circulation data for State and Monthly reports.

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.

Shelving Locations

Evergreen Shelving Locations are shared between WLS libraries for consistency in reporting. Each shelving location has several characteristics that can be set up as true (yes) or false (no).

Three of the most important ones are:

- Circulates? – the item can be checked out to a patron.
- OPAC visible? – patrons can see the item in the OPAC (the item displays in the staff catalog whether this is set to true or false.
- Holdable? – a hold can be placed on the item.

View the [IT Wiki](#) to see the full table of Shelving Locations available in Evergreen.

Shelving

Locations

Note: This is **not** the complete list of available Shelving Locations.

View the [IT Wiki](#) to see the full table of Shelving Locations available in Evergreen.



Name	Can Circulate?	Is Holdable?	Is OPAC Visible?
Arts & Crafts	t	t	t
Audiobook	t	t	t
Available In Storage	t	t	t
Bestseller	t	t	t
Biography	t	t	t
Business & Finance	t	t	t
Circulation Desk	t	t	t
Classic Literature	t	t	t
Computers	t	t	t
Cookery	t	t	t
Criterion DVD	t	t	t
Electronic Book Reader	t	t	t
Express Item	t	t	t

Item

Statuses

Each item status is configured to determine functionality, especially whether an item is:

- Visible in the OPAC (patron catalog).
- Holdable.
- Available.

*Items highlighted in **RED** cannot be deleted or edited by staff.

Item Status	OPAC Visible	Holdable	Available	Restricts Deletion
Available	TRUE	TRUE	TRUE	FALSE
Available Soon	TRUE	TRUE	FALSE	FALSE
Bindery	FALSE	FALSE	FALSE	FALSE
Canceled Transit	TRUE	TRUE	FALSE	FALSE
Cataloging	FALSE	FALSE	FALSE	FALSE
Checked out*	TRUE	TRUE	FALSE	TRUE
Damaged	FALSE	FALSE	FALSE	FALSE
Discard/Weed	FALSE	FALSE	FALSE	FALSE
ILL	FALSE	TRUE	TRUE	FALSE
In Transit*	TRUE	TRUE	FALSE	TRUE
Long Overdue*	FALSE	FALSE	FALSE	TRUE
Lost*	FALSE	FALSE	FALSE	TRUE
Lost and Paid	FALSE	FALSE	FALSE	FALSE
Missing	FALSE	FALSE	FALSE	FALSE
On holds shelf*	TRUE	TRUE	FALSE	TRUE
On order	TRUE	TRUE	FALSE	FALSE
On reservation shelf	FALSE	FALSE	FALSE	FALSE
Recently Returned	TRUE	TRUE	TRUE	FALSE
Storage	FALSE	FALSE	FALSE	FALSE

Circulation Modifiers

For WLS libraries, materials are circulated according to rules set for the **checkout** library.

These rules are primarily based on: **Checkout Library, Item Circulation Modifier, and Patron Profile.**

The rules define:

- Whether the type of material can circulate or not.
- The type of patron who can or cannot borrow the type of material (**patron profile**).
- For how long an item can be borrowed (**loan duration**).
- If an item can be renewed, how many renewals are allowed, and if those renewals include autorenewals (**loan duration**).
- Overdue fine rate per day (**recurring fines**).
- The maximum number of fines that can be accrued (**max fines**).

Circulation Modifiers

Note: This is **not** the complete list of available Circ. Mods.

View the [IT Wiki](#) to see the full table of Shelving Locations available in Evergreen.



Circ Modifier	Items Out Limit	Loan Duration Rule	Recurring Fine Rule	Max Fine Rule	Holdable?
14 Day Express		14_days_0_renew_0_autorenew	no_fine	no_fine	No
21 Day Express		21_days_0_renew_0_autorenew	no_fine	no_fine	No
7 Day Express	3	7_days_0_renew_0_autorenew	no_fine	no_fine	No
AV Equipment		21_days_0_renew_0_autorenew	no_fine	no_fine	No
Bluray		7_days_1_renew_1_autorenew	no_fine	no_fine	
Book		21_days_1_renew_1_autorenew	no_fine	no_fine	
Cassette		21_days_1_renew_1_autorenew	no_fine	no_fine	
CD		21_days_1_renew_1_autorenew	no_fine	no_fine	
CD Audiobook		21_days_1_renew_1_autorenew	no_fine	no_fine	
DVD		7_days_1_renew_1_autorenew	no_fine	no_fine	
Flashdrive		14_days_1_renew_1_autorenew	no_fine	no_fine	
Game Console		7_days_1_renew_1_autorenew	no_fine	no_fine	
Holiday		14_days_0_renew_0_autorenew	no_fine	no_fine	
Instrument		21_days_1_renew_1_autorenew	no_fine	no_fine	No
Kit		21_days_1_renew_1_autorenew	no_fine	no_fine	
Laptop	2	2_hours_0_renew_0_autorenew	no_fine	no_fine	No

Holdings Records

Every record consists of **three** parts:

1. Title/Bibliographic Record
2. Call number/Volume Record
3. Item/Copy Record

Record Summary Book

Title/Bibliographic Record

	Title: Handscrabble road	Edition:	TCN: 3183030	Created By: aquinox
	Author: Haddam, Jane 1951-	Pubdate: 2006	Database ID: 3183030	Last Edited By: aquinox
	Bib Call #: B13/.54	Record Owner:	Created On: 3/3/19, 1:55 AM	Last Edited On: 3/3/19, 1:55 AM

Holdings Item Attributes Preferences

Call Number/Volume Record

Batch Actions

Owning Library	Classification	Call Number Label	Barcode	Item #	Part
WLS	Dewey (DDC)	MYSTERY HADDAM	31038500006047	1	

Holdings Item Attributes Preferences

Item/Copy Record

Templates: Book [Apply] [Save] [Import] [Export] [Delete Template]

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



Link (Add) a New Item

Linking new books to your library's collection is a multi-step process.

1. Locate the BIB Record.
2. Add Holdings.
3. Apply Template and Item Attributes.
4. Apply Statistical Categories.
5. Save and Exit.
6. Print Spine Labels.
7. Scan new items with checkin modifiers applied.

Locate the BIB Record

Go to **Cataloging > Search Catalog**.

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

1. Locate the BIB Record

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**.

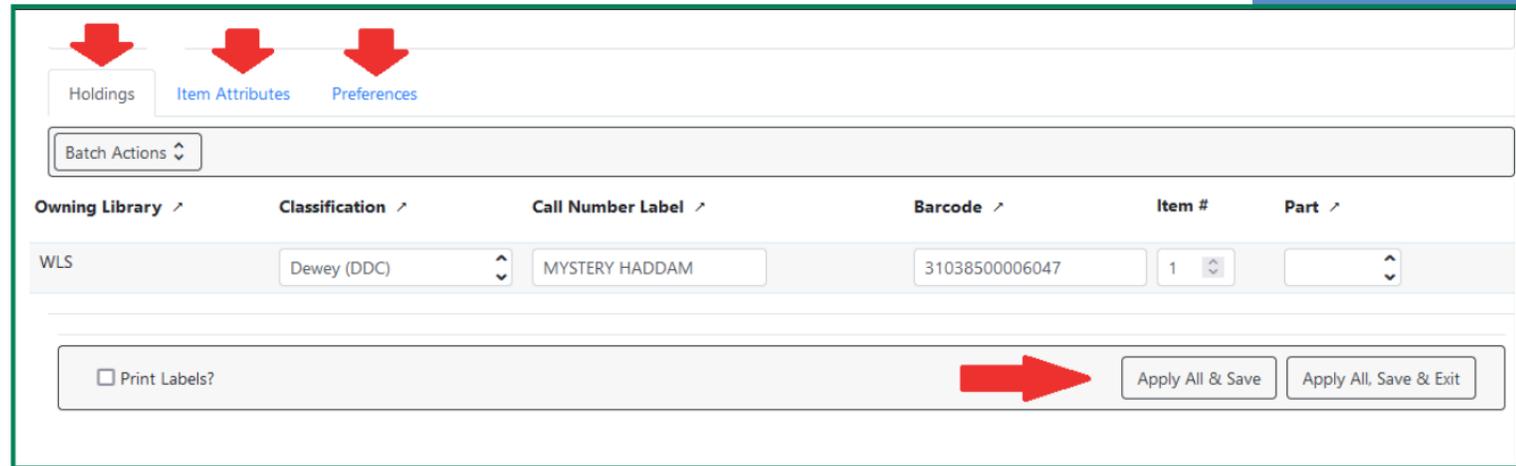
2. Add Holdings

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

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:

1. Enter the call number level information:
2. Classification (Dewey)
3. Call Number (do not use prefix or suffix)
4. Scan or type in the new barcode
5. "Apply All & Save" before moving on to the next tab.



The screenshot shows the Holdings Editor interface. At the top, there are three tabs: 'Holdings', 'Item Attributes', and 'Preferences'. Red arrows point to each of these tabs. Below the tabs is a 'Batch Actions' dropdown menu. The main area contains a table with columns: 'Owning Library', 'Classification', 'Call Number Label', 'Barcode', 'Item #', and 'Part'. The table has one row with the following values: 'WLS', 'Dewey (DDC)', 'MYSTERY HADDAM', '31038500006047', '1', and an empty field. Below the table is a 'Print Labels?' checkbox and two buttons: 'Apply All & Save' and 'Apply All, Save & Exit'. A red arrow points to the 'Apply All & Save' button.

3. Apply Template and Item Attributes

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

The screenshot displays the 'Item Attributes Editor' interface. At the top, there are three tabs: 'Holdings', 'Item Attributes', and 'Preferences'. Below the tabs, a 'Templates:' dropdown menu is set to 'Book'. To the right of the dropdown are buttons for 'Apply', 'Save', 'Import', 'Export', and a red 'Delete Template' button. The main area is divided into five columns, each with a yellow header: 'Identification', 'Location', 'Circulation', 'Miscellaneous', and 'Statistics'. Each column contains several attribute cards, each with a green dot icon and a title. The 'Identification' column includes 'Copy Status' (Available Soon, 1 copy) and 'Barcode' (31038500006047, 1 copy). The 'Location' column includes 'Shelving Location' (Interlibrary Loan (WLS), 1 copy), 'Circulating Library' (WLS, 1 copy), and 'Owning Library' (WLS : MYSTERY HADDAM, 1 copy). The 'Circulation' column includes 'Can Circulate' (Yes, 1 copy), 'Is Holdable' (Yes, 1 copy), and 'Circulation Modifier' (Book, 1 copy). The 'Miscellaneous' column includes 'Add Item Alerts' (Item Alerts button), 'Price' (\$25.00, 1 copy), 'OPAC Visible' (Yes, 1 copy), and 'Is Reference' (No, 1 copy). The 'Statistics' column includes 'Add Item Tags' (Item Tags button), 'Add Item Notes' (Item Notes button), 'Stat Cat Filter' (WEST), 'Leased Materials (WEST)' (<Unset>, 1 copy), and 'Migration (WEST)' (<Unset>, 1 copy).

Item Attributes

- **Copy Status:** (Each item status is configured to determine functionality: especially whether it is visible in the OPAC, Holdable, and Available).
- **Shelving Location:** (Evergreen Shelving Locations are shared between WLS libraries for consistency in reporting.)
- **Circulation Library:** (Circulation Library will typically match owning library, except in case where there are branch libraries. Sometimes, copies are linked at the main libraries, but are intended to circulate out of the branch libraries.)
- **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?**
- **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.

4. Apply Statistical Categories

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.

Statistical Categories

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.

Stat Cat Filter	
WEST ←	
Leased Materials (WEST)	
<Unset>	1 copy
Monthly Report - Adult Materials (WEST)	
<Unset>	1 copy
Monthly Report - Central Library Funds (WEST)	
<Unset>	1 copy
Monthly Report - Juvenile Materials (WEST)	
<Unset>	1 copy
Monthly Report - Mixed Audience Materials (WEST)	
Realia	1 copy
Monthly Report - Young Adult Materials (WEST)	
<Unset>	1 copy
State Report - Adult Materials (WEST)	
Adult Media	1 copy
State Report - Juvenile Materials (WEST)	
<Unset>	1 copy
State Report - Mixed Audience Materials (WEST)	
<Unset>	

5. Click Save & Exit

Refresh the **Holdings View** screen to see the newly created item.

6. Print Spine Labels

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.

The screenshot displays the 'Print Item Labels' interface. At the top, there is a navigation bar with the title 'Print Item Labels' and several buttons: 'Template' (set to 'Spine-Label-Left-Justified'), 'Printer', 'Save', 'Delete', 'Import', 'Export', 'Default', and 'Print'. Below the navigation bar, there are tabs for 'Call Number Template', 'Call Numbers', 'Settings', and 'Label Template'. The 'Call Numbers' tab is active, showing a list of 'Formatted Call Numbers' with manual adjustments. The 'Label Preview' section shows a preview of the label for 'SWITCH: ROLLERCO ASTER' and 'GAME 243 (SWITCH)'.

Print Spine Labels

There is a basic spine label template in each library share drive with a left-justified and a center-justified label.

From Item Status:

1. Scan the barcode(s).
2. Select all the items you'd like to print labels for.
3. Right-click on the items or click the Actions drop-down menu.
4. Under Show, click on Print Labels. Print Item Labels opens in a new tab.
5. On the Call Numbers tab, in the Formatted Call Numbers area, manually edit each label to adjust as desired to display in the Label Preview area.
6. Remove the Pocket Label. Open the Label Template tab. Scroll to the very bottom of the text box. Highlight and delete all of the content below .
7. Go to the Settings tab. Choose font settings that will be in place for every template that you apply. For standard labels with 3 lines:
 - o Label Font Family - Arial
 - o Label Font Size - 14pt
 - o Label Font Weight - bold -For bold labels with 2 lines
 - o Label Font Family - Arial
 - o Label Font Size - 18pt
8. Be sure you click Save to save the settings.

Font & Label Settings

These settings do get saved with templates and will override corresponding Library Settings.

Item Print Label - Left Margin for Spine Label ⓘ	<input type="text" value=".39in"/>
Item Print Label - Left Margin for Pocket Label ⓘ	<input type="text"/>
Item Print Label - Height for Spine Label ⓘ	<input type="text" value="1.00in"/>
Item Print Label Font Family ⓘ	<input type="text" value="Arial"/>
Item Print Label Font Size ⓘ	<input type="text" value="14pt"/>
Item Print Label Font Weight ⓘ	<input type="text" value="Bold"/>
Item Print Label - Inline CSS ⓘ	<input type="text"/>
Item Print Label - Call Number Wrap Filter Height ⓘ	<input type="text"/>
Item Print Label - Call Number Wrap Filter Width ⓘ	<input type="text"/>
Item Print Label - Width for Spine Label ⓘ	<input type="text" value="1.62in"/>
Item Print Label - Height for Pocket Label ⓘ	<input type="text" value="0"/>
Item Print Label - Width for Pocket Label ⓘ	<input type="text" value="0"/>

7. Scan Items (last step!)

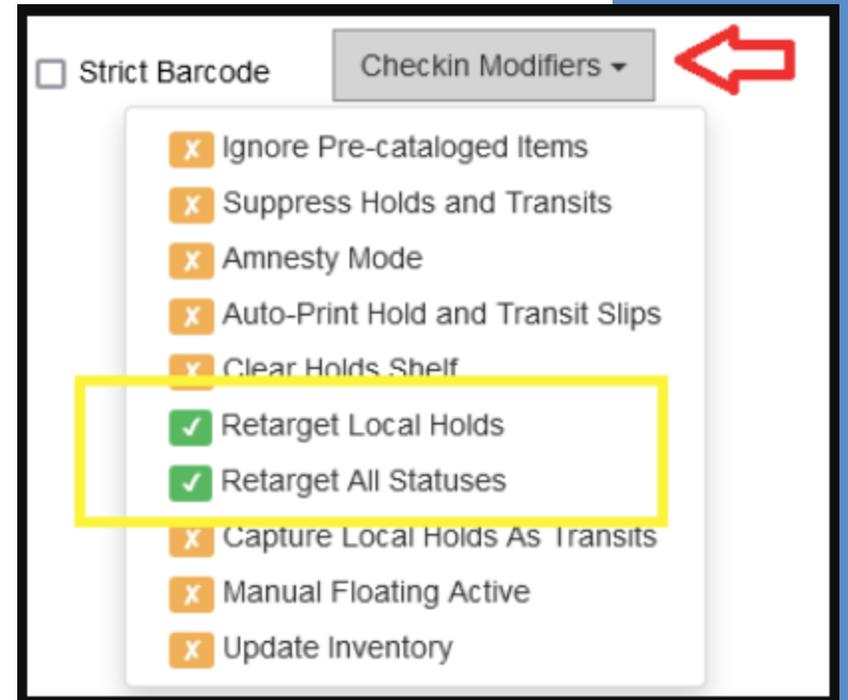
When staff is done linking an item, the best practice and final step of the process is to check in the items with the **Retarget Local Holds** and **Retarget All Statuses** checkin modifiers applied.

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.

NOTE: The recommendation is to use the retarget holds checkin modifiers ONLY when tech services staff is adding new holdings and first putting them into circulation.

They **should not** be set during normal checkin, as local holds should be prioritized at normal checkin by default (this is set up through system configuration), and the checkin modifiers add extra processing time to the checkin which can cause problems, especially for titles with many holds.



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 Display Preferences

- 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
- Unified Holdings, Item Attributes Display, and Item Templates

Holdings Creation Defaults

Default Classification: Dewey (DDC)

Default Prefix: <None>

Default Suffix: <None>

Changes are saved automatically.



Holdings Display Preferences

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

The screenshot shows the 'Item Attribute Settings' and 'Hide Item Attributes' configuration interface. The 'Item Attribute Settings' section includes 'Item Attributes Behavior' with a checkbox for 'Change Circ Lib When Owning Lib Changes' and a 'Default Stat Cat Library Filter' dropdown menu currently set to 'WEST', with a red arrow pointing to it. The 'Hide Item Attributes' section is titled 'Selected Fields Will be Hidden from the Item Attributes Form.' and is organized into five columns: Identification, Location, Circulation, Miscellaneous, and Statistics. Each column contains a list of attributes with checkboxes to indicate whether they should be hidden.

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	

Holdings Display Preferences

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

The screenshot shows the 'Item Attribute Settings' and 'Hide Item Attributes' sections of a web interface. The 'Item Attribute Settings' section includes a 'Default Stat Cat Library Filter' dropdown menu with 'WEST' selected, indicated by a red arrow. The 'Hide Item Attributes' section is divided into five columns: Identification, Location, Circulation, Miscellaneous, and Statistics. Each column contains a list of fields with checkboxes to indicate whether they should be hidden from the Item Attributes Form. The following table summarizes the fields and their hidden status:

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	

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.



Scan Item

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

Item Status

Navigation: [Previous] [Next] [Actions] 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

Scan Item

Submit OR 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		

Quick Summary | Recent Circ History | Circ History List | Holds / Transit | Cataloging Info | Triggered Events

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 Cirs	269	Duration Rule	21_days_1_renew_0_autorenew
Date Active	3/5/2019 10:41 AM	Reference	false	Total Cirs - Current Year	2	Recurring Fine Rule	50_cents_per_day_0_grace
Status Changed	5/24/2022 1:02 PM	OPAC Visible	true	Total Cirs - 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

Item Status

There are four ways to access the item status interface:

1. Through the Search menu

- a. Click Search → Search for Copies by Barcode.
- b. Scan your barcode.

2. Through the Circulation menu

- a. Click Circulation → Item Status.
- b. Scan your barcode.

3. From the Cataloging menu

- a. Click Cataloging → Item Status.
- b. Scan your barcode.

4. From the OPAC view

- a. Click Search → Search the Catalog.
- b. Find a bibliographic record that you are interested in.
- c. Make sure you are on the OPAC View tab of that record.
- d. Locate the BARCODE column in the holdings session.
- e. Click view next to the barcode of the item you're interested in.

Edit Items

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

From Item Status.

1. Scan the item.
2. Select the Item and right-click or select the Actions dropdown menu.
3. Scroll to **Edit** and select from the following options:
 - a. **Call Numbers** *(Edit an item's call number.)*
 - b. **Items** *(Edit any item attributes within a template; status, shelving location, statistical category.)*
 - c. **Call Numbers and Items** *(Edit an item attribute and call number.)*
 - d. **Replace Barcodes** *(Prompts you to replace an item's barcode.)*
 - e. **Manage Item Alerts** *(Edit existing Item Alerts.)*

Edit Multiple Items

From Item Status:

1. Scan items to be edited.
2. Select all items.
3. Right-click, or in the Actions dropdown, select **Add Items to Bucket**.
 - a. Give the bucket a name and description.
 - b. Go to the Cataloging menu> Item Buckets
 - c. Click the Bucket dropdown and select your bucket. The items will load in a list.
 - d. Select some or all of the items.
 - e. Right-click, or in the Actions dropdown, select Edit Selected Items.
 - f. *Multiple Item barcodes can also be loaded in batch from a file in Item Status only.*
4. Run a weeding or other report to generate an Excel file.
5. Select up to 100 barcode IDs and copy.
6. Paste the barcodes into Notepad and save the .txt file.
7. Go to Circulation > Scan Item
8. 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.
9. 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.

NOTE: 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.

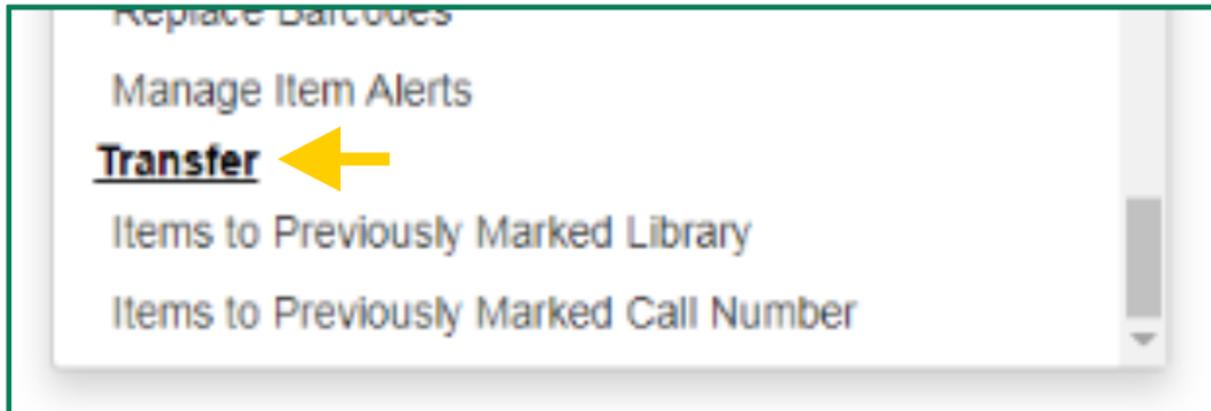
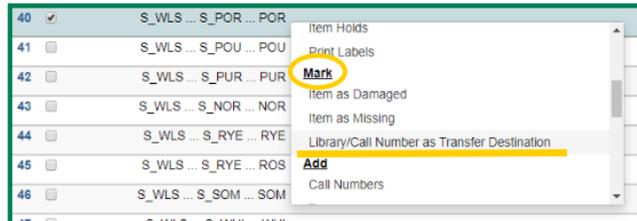
From Item Status:

1. Scan the item.
2. In the list, right-click the row and select *Edit Item*. The Holdings Editor opens in a new tab.
3. In the Status dropdown, choose *Available*.
4. 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.

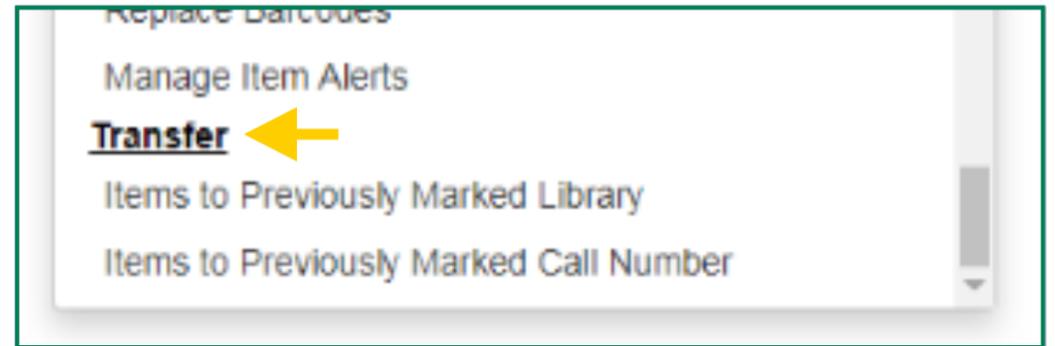
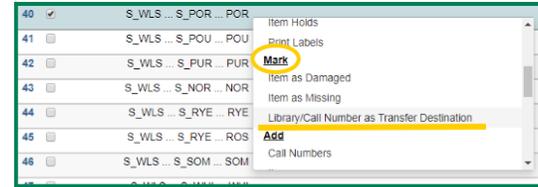
Locate the bibliographic records that match the item that you need to transfer. **If the two records are different editions of the same title, use the Holdings View navigation to move between the two records easily.**



Transfer Call Numbers and Items

Open the **Holdings View** tab:

1. Verify that **Show holdings at or below** are set to **WEST**.
2. 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.)
3. Right-click, or click **Actions**, and select **Mark> Library/Call Number As Transfer Destination**.
4. Navigate to the source item – the one that you want to transfer.
5. Right-click, or click **Actions**, and select either **Transfer>Items to Previously Marked Library OR Items to Previously Marked Call Number**
6. The item will be moved from one record to another.



Delete Items

Checked out and Lost items should not be deleted.

Because 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.

Delete a Single Item

From Item Status:

1. Scan the item.
2. In the Detail View, in the Actions dropdown menu, select Delete Items from Catalog.
3. OR, In the Holdings View, in the Actions dropdown menu, select Delete Items.
4. If an item has a status that Evergreen sees as unusual, like Checked out or Lost, an alert/override like “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.

Delete Multiple Items

From Item Status:

- Scan items to be deleted.
- Select all items.
- Right-click, or in the Actions dropdown, select Add Items to Bucket.
- Name it “Items to be Deleted”

From the Cataloging drop-down menu, select 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 Delete Selected Items from Catalog.

Where to find help:

- [Evergreen Documentation](#) (Evergreen homepage)
- [IT Wiki](http://it.westchesterlibraries.org) (it.westchesterlibraries.org)
- Support@wlsmail.org (WLS IT Help Desk)
- Your Supervisor!

