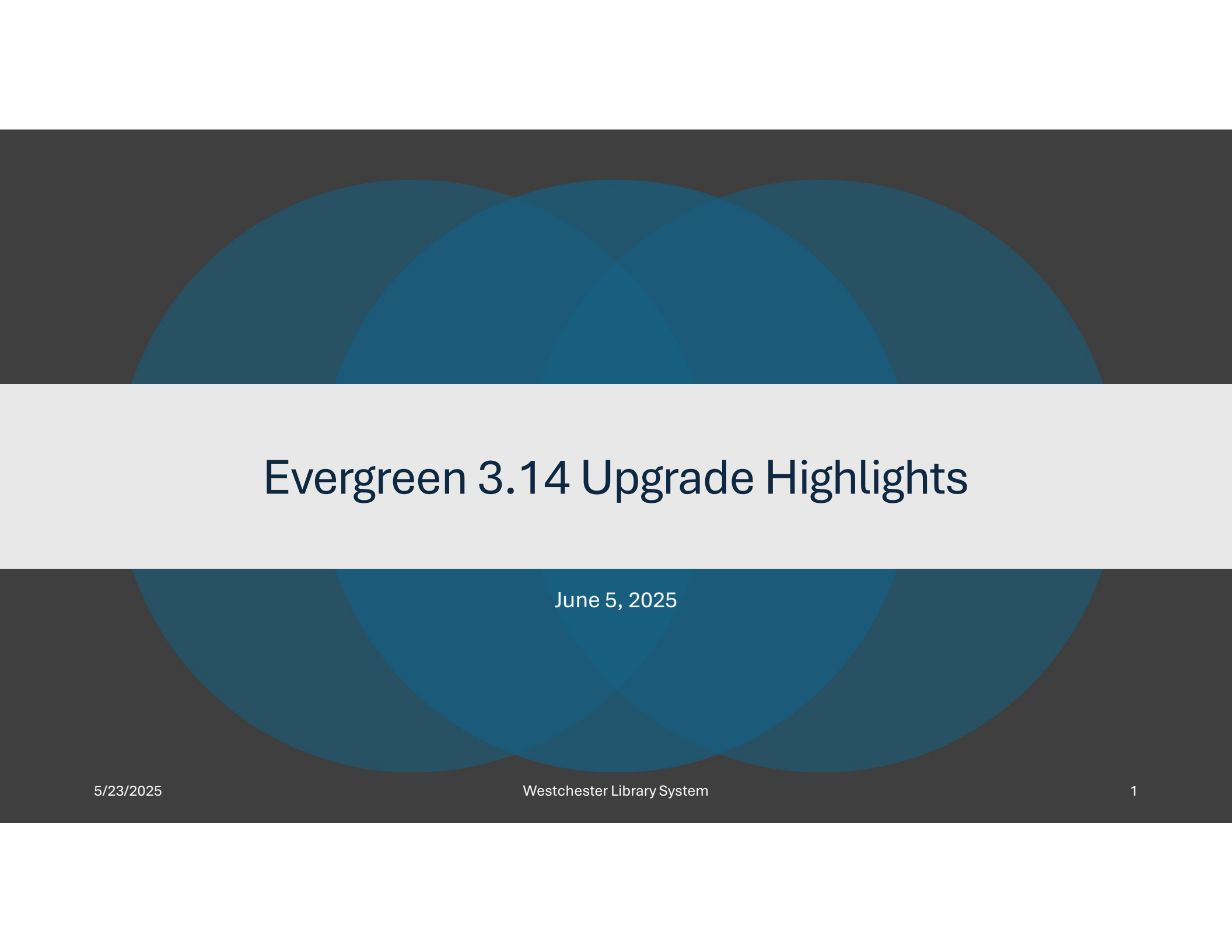


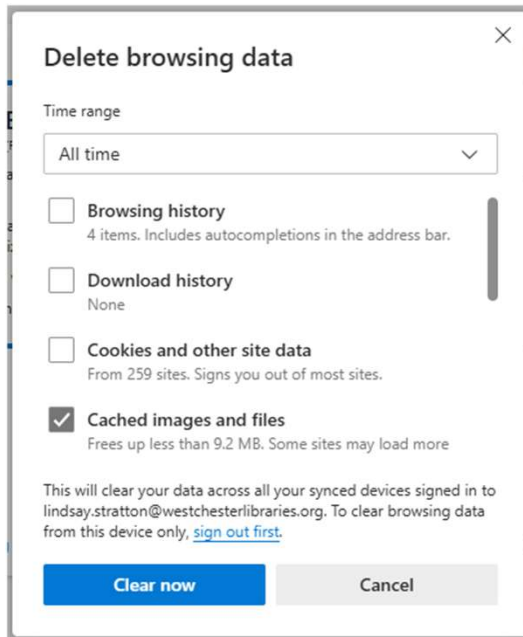


Evergreen 3.14 Upgrade Highlights

June 5, 2025

First! Clear your cache!!

Edge



The Edge 'Delete browsing data' dialog box is shown. It has a title bar with a close button. Below the title, there is a 'Time range' dropdown menu set to 'All time'. A list of data types follows: 'Browsing history' (4 items), 'Download history' (None), 'Cookies and other site data' (From 259 sites), and 'Cached images and files' (319 MB). The 'Cached images and files' option is checked. At the bottom, there is a 'Clear now' button and a 'Cancel' button. A note at the bottom states: 'This will clear your data across all your synced devices signed in to lindsay.stratton@westchesterlibraries.org. To clear browsing data from this device only, [sign out first](#).'

Delete browsing data

Time range
All time

☐ Browsing history
4 items. Includes autocompletions in the address bar.

☐ Download history
None

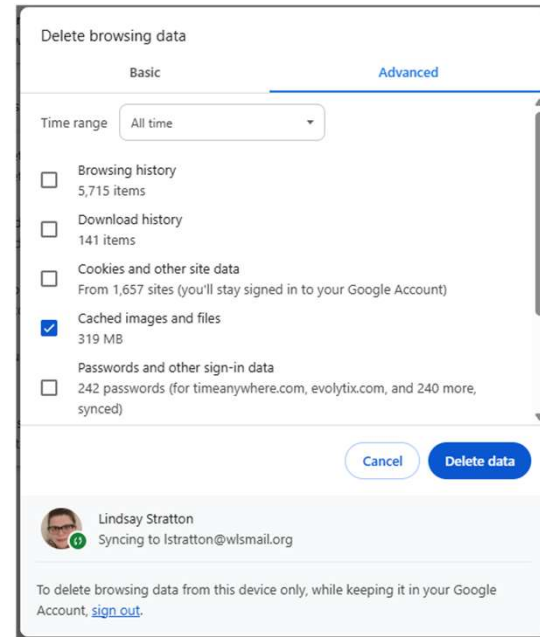
☐ Cookies and other site data
From 259 sites. Signs you out of most sites.

☒ Cached images and files
Frees up less than 9.2 MB. Some sites may load more

This will clear your data across all your synced devices signed in to lindsay.stratton@westchesterlibraries.org. To clear browsing data from this device only, [sign out first](#).

Clear now **Cancel**

Chrome



The Chrome 'Delete browsing data' dialog box is shown. It has a title bar with a close button. Below the title, there are two tabs: 'Basic' and 'Advanced'. The 'Time range' dropdown menu is set to 'All time'. A list of data types follows: 'Browsing history' (5,715 items), 'Download history' (141 items), 'Cookies and other site data' (From 1,657 sites), 'Cached images and files' (319 MB), and 'Passwords and other sign-in data' (242 passwords). The 'Cached images and files' option is checked. At the bottom, there are 'Cancel' and 'Delete data' buttons. A user profile section at the bottom shows 'Lindsay Stratton' and 'Syncing to lstratton@wlsmail.org'. A note at the bottom states: 'To delete browsing data from this device only, while keeping it in your Google Account, [sign out](#).'

Delete browsing data

Basic **Advanced**

Time range
All time

☐ Browsing history
5,715 items

☐ Download history
141 items

☐ Cookies and other site data
From 1,657 sites (you'll stay signed in to your Google Account)

☒ Cached images and files
319 MB

☐ Passwords and other sign-in data
242 passwords (for timeanywhere.com, evolytix.com, and 240 more, synced)

Cancel **Delete data**

Lindsay Stratton
Syncing to lstratton@wlsmail.org

To delete browsing data from this device only, while keeping it in your Google Account, [sign out](#).

Test server
URL

<https://wls-test.sequoia.evergreencatalog.com/eg2/en-US/staff/>

General interface changes

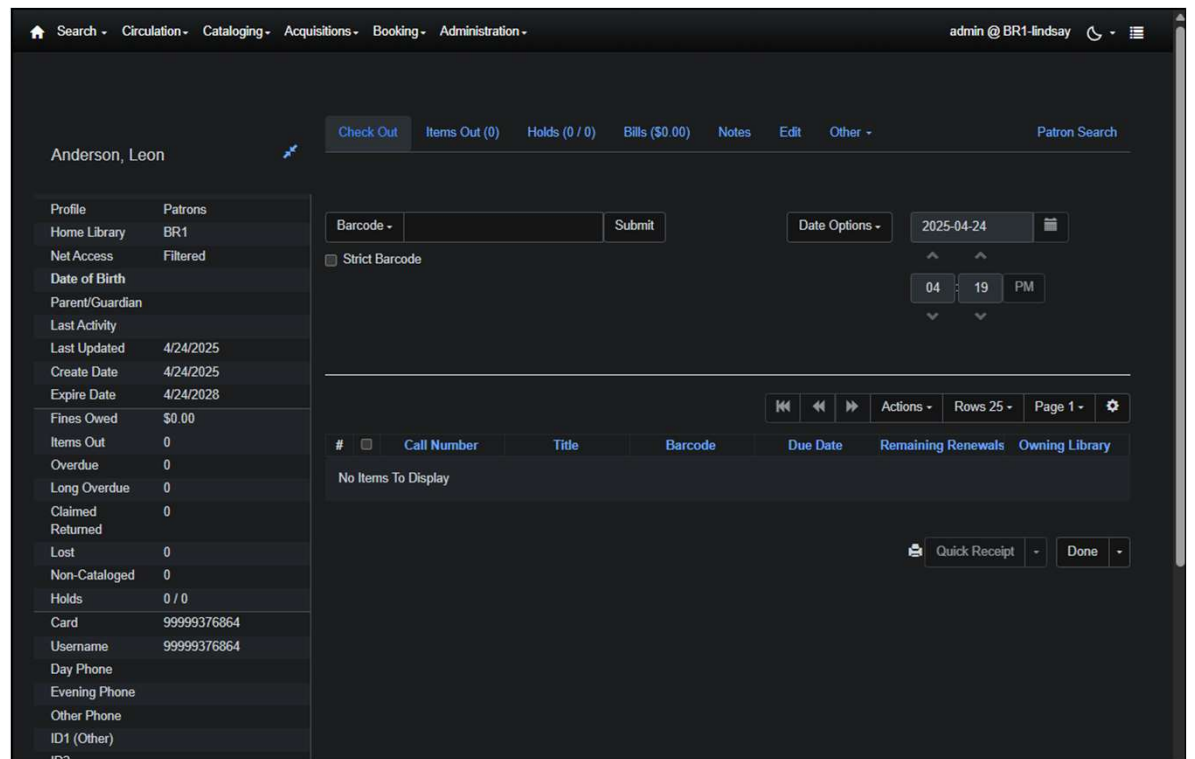
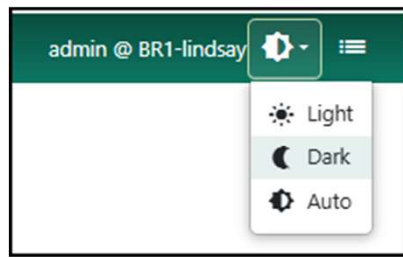
Colors – font, button, alerts,
required fields, etc.

Page header style and color

Active tab highlighting

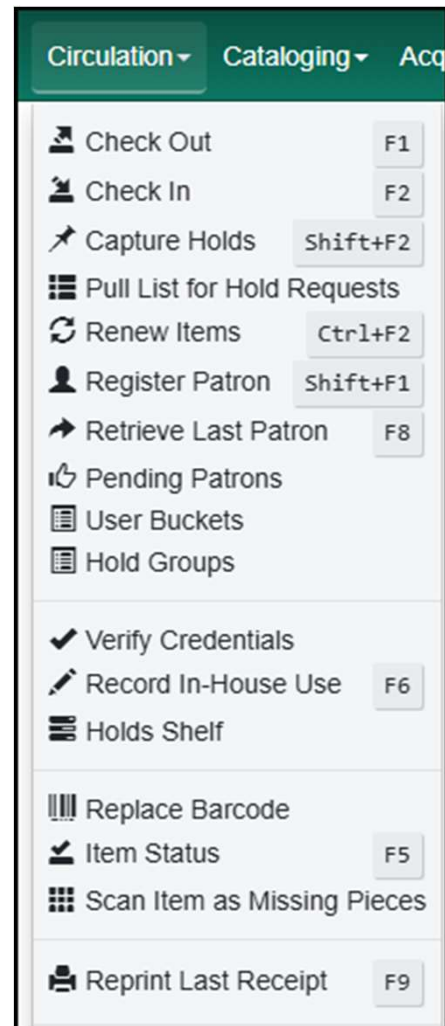
“Angularized” interfaces

Dark Mode



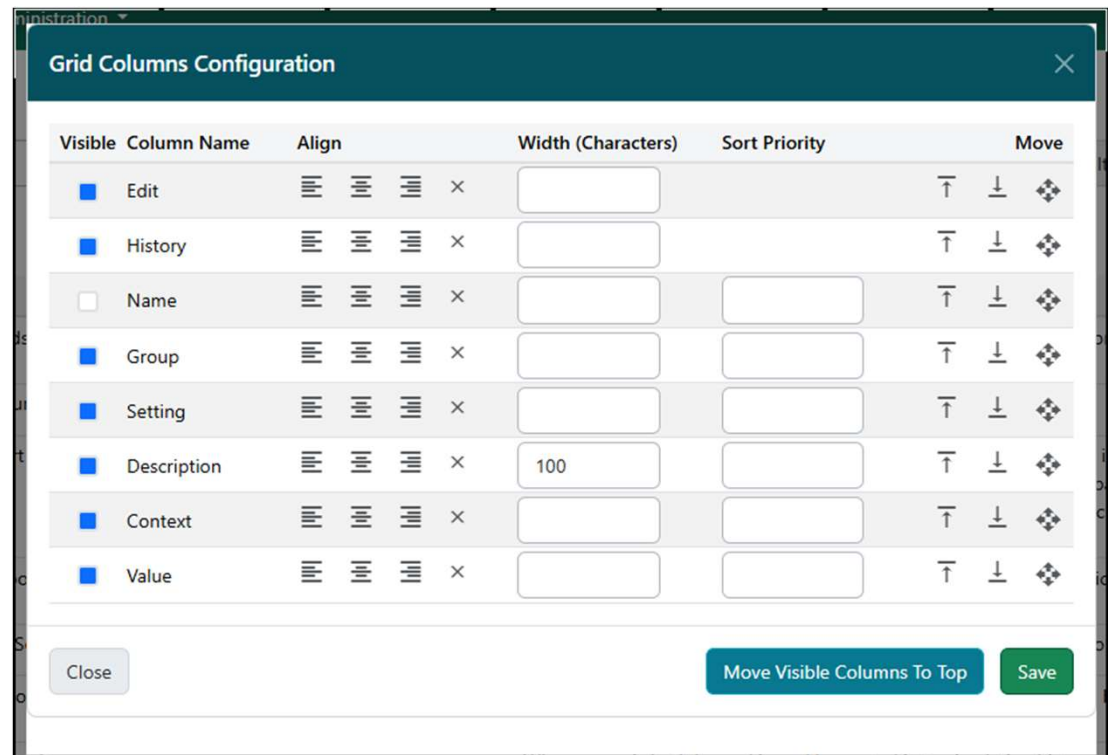
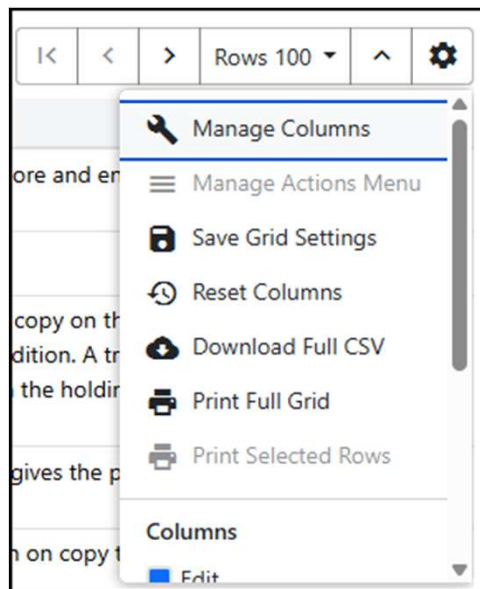
Keyboard shortcut hints

5/23/2025



Westchester Library System

Manage Columns – inconsistent!



Patron alert and note display

5/23/2025

MACARENA, OLIVIA 		
Library by Mail	08/07/2024	
Patron exceeds fine threshold	04/14/2025	
They / Them	04/04/2022	
Profile	ADULT	
Home Library	WLS	
Net Access	Unfiltered	
Date of Birth	11/11/2019	
Parent/Guardian		
Last Activity	02/18/2025	
Last Updated	04/17/2025	
Create Date	11/18/2019	
Expire Date	08/19/2027	
Fines Owed	\$38.03	
Group Fines	\$38.83	
Items Out	0	

Westchester Library System

Default Phone and SMS examples

User Settings

Default Phone Number

Example: 5551234567

Default Hold Pickup Location

WLS

Clear Default Pickup Location

Hold is behind Circ Desk

☒

Collection Exempt

☐

Holds Notices

☐ Phone☒ Email☐ SMS

Default SMS/Text Number

9145551230

Send Test Text

Example: 5551234567

Hold canceling staff user and workstation display

Open Hold Requests

Recently Canceled Holds

Place Hold

Detail View

⏮

⏪

⏩

Actions ▾

Rows 100 ▾

Page 1 ▾

⚙

#	☐	Status	Request Date	Available Date	Pickup Library	Hold Canceling Staff	Hold Canceling Workstation	Hold Cancel Date
1	☐	Canceled	1/31/2025 9:13 AM	1/31/2025 9:14 ...	WLS	lindsay.stratton	WLS-lindsay	4/30/2025 10:5...
2	☐	Canceled	4/30/2025 10:49 AM		WLS	lindsay.stratton	WLS-lindsay	4/30/2025 10:5...
3	☐	Canceled	3/25/2025 10:58 AM		WLS	lindsay.stratton	WLS-lindsay	4/25/2025 11:5...
4	☐	Canceled	5/26/2021 9:00 AM	5/26/2021 9:00 ...	WLS			5/26/2021 10:2...

Hold Reset Entries

Record Summary
(MARC)

Title:	Demon Copperhead	Edition:	Segunda edición.	TCN:	5331238	Created By:	melissaglazer
Author:	Kingsolver, Barbara	Pub Date:	2023	Database ID:	5331238	Last Edited By:	melissaglazer
Bib Call #:	813/ 6	Record Owner:		Last Edited On:	5/3/2024 6:46 AM		

Hold Details

Request Date	4/30/2025 10:49 AM	Capture Date		Available On	
Hold Type	T	Current Item	31022152477466	Call Number	KINGSOLVER
Pickup Lib	WLS	Status	Canceled	Behind Desk	true
Current Shelf Lib		Current Shelving Location	Spanish Language	Force Item Quality	true
Email Notify	true	Phone Notify		SMS Notify	
Cancel Cause	Patron via email	Cancel Time	4/30/2025 10:57 AM	Cancel Note	
Canceling Staff	lindsay.stratton	Canceling Workstation		Hopeless Date	

Notes
Staff Notifications
Reset Entries

Time	Reason	Requestor	Requestor Workstation	Note	Previous Copy
4/30/2025 10:49 AM	HOLD_MANUAL_RESET	lindsay.stratton	WLS-lindsay		31035163066151
4/30/2025 10:51 AM	HOLD_FROZEN	lindsay.stratton	WLS-lindsay		31035163066151
4/30/2025 10:56 AM	HOLD_UNFROZEN	lindsay.stratton	WLS-lindsay		
4/30/2025 10:57 AM	HOLD_CANCELED	lindsay.stratton	WLS-lindsay	Cancel Cause: Patron via email	31022152477466

Bibliographic Record Bucket rewrite

Bibliographic Record Buckets

New Bucket

My buckets (47)

Favorites (0)

Recent (0)

Shared with others (0)

Shared with me (0)

Visible to me (1935)

Search for...

Search Catalog

Remove Filters

Bucket ID:

Search

0 selected

Actions

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Rows 10

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⚙

☐	#	★	Bucket ID	Name	Description	# of entries	# of org shares	# of user view shares	# of user edit shares	Bucket Type	Public?	Created On	Actions
☐	1	☆	163679	National Novel Writing Month	Inspiration to write your novel	0	0	0	0	carousel	Yes	06/04/2020	
☐	2	☆	207794	Hotspot Records		5	0	0	0	staff_client	No	08/27/2020	
☐	3	☆	387422	Empty Bibs to Delete	Bibs with no vols or items to delete	0	0	0	0	staff_client	No	09/21/2021	
☐	4	☆	529160	245 fields \$b before \$a		3	0	0	0	staff_client	No	07/28/2022	
☐	5	☆	557820	International Day of the Girl 2022		72	0	0	0	staff_client	No	09/09/2022	
☐	6	☆	676688	Image update tests		5	0	0	0	staff_client	No	03/08/2023	
☐	7	☆	772195	Cover Updates thru 20230810		142	0	0	0	staff_client	No	08/11/2023	

Staff catalog record bucket quick add

6. ☐		Game of Scones: A Cozy Mystery (With Dragons) Watt, Kim M. Book Call Number: FICTION Publisher: [Place of publication not identified] : Kim Watt, 20191101. ISBN: 9781916078062, 1916078060	1 / 1 items	@ WEST	TCN: 5252414 Holds: 0	Created 8/11/22 by douglas.wray Edited 8/11/22 by douglas.wray
✓ Place Hold Add to Bucket ▼ Favorites Recent						
7. ☐		Bakery detectives cozy mystery boxed set Books 1-3 Alabaster, Stacey	1 / 1 items	@ WEST	TCN: 5334154	

Staff Catalog – Search Preferences

5/23/2025

Search Preferences		
Default Search Library	WEST	The default search library setting determines what library is searched from the advanced search screen and portal page by default. Manual selection of a search library will override it. One recommendation is to set the search library to the highest point you would normally want to search.
Preferred Library		The preferred library is used to show copies and URIs regardless of the library searched. One recommendation is to set this to your workstation library so that local copies show up first in search results.
Default Search Pane		Focus this search tab by default when opening new catalog pages.
Default Sort Order	Sort by Releva	The default way to Sort Results upon opening a keyword search
Default Limit to Available	☐	Should the 'Limit to Available' search setting be checked by default?
Default Group Formats/Editions	☐	Should the 'Group by Formats/Editions' search setting be checked by default?
Search Results Per Page		The number of search results to display per page.
Exclude Electronic Resources	☐	Add the 'Exclude Electronic Resources' checkbox to the main search form.
Highlight Search Terms	☒	Whether to highlight the search terms in the results of a keyword search.

View own circulation rules by default

Circulation Policy Configuration

GRE

☐ + Ancestors

☐ + Descendants

Remove Filters

New Circulation Policy

0 selected

Actions

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Rows 10

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☐	#	Active?	Checkout Library	Circulation Modifier	Duration Rule	Recurring Fine Rule	Description
☐	1	Yes	GRE	AV Equipment	14_days_0_renew_0_autorenew	10_dollars_per_day_0_grace	lcirc limit exception 2024-08-07; limit 1 item; Used for streaming devices
☐	2	Yes	GRE	AV Equipment	14_days_0_renew_0_autorenew	10_dollars_per_day_0_grace	Use for streaming devices
☐	3	Yes	GRE	Laptop	21_days_0_renew_0_autorenew	10_dollars_per_day_0_grace	fine free exception 2024-08-07; 2020-10-01
☐	4	Yes	GRE	Laptop	21_days_0_renew_0_autorenew	10_dollars_per_day_0_grace	fine free exception 2024-08/07; 2020-10-01
☐	5	Yes	GRE	Mobile Hotspot	21_days_0_renew_0_autorenew	5_dollars_per_day_0_grace	fine free exception 2024-08-07; 2020-10-01

Reports rewrite – landing page



Reports rewrite – folder view

Evergreen Reports

Browse

Search

My Folders

^ Templates

Items

✓ Reports

✓ Outputs

Shared Folders

✓ Templates

✓ Reports

✓ Outputs

Items

Remove Filters

New Template

Rename Folder

Delete Folder

Add Subfolder

Share Folder

0 selected

Actions

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Rows 10

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⚙

	<u>Name</u>	<u>Date Created</u>	Owner
☐	#		
☐	1 Shelf List by Shelf Location	5/7/25, 11:32 AM	lindsay.stafftest

Reports rewrite – data source and field selection

The screenshot displays a web-based interface for configuring reports. It is divided into three main sections:

- Left Panel (Tree View):** A hierarchical list of data sources. The 'Call Number/Volume' source is currently selected and highlighted.
- Middle Panel (All Fields):** A list of available fields for the selected data source. The 'Call Number Label (text)' field is selected with a blue checkmark.
- Right Panel (Field Display Order):** A configuration area for the selected field. It shows the field name, a transform dropdown set to 'Raw Data', and a 'Supply Hint' checkbox. The field is listed in the display order.

The 'Field Display Order' section contains three entries, each with a minus icon, a name field, a transform dropdown, a 'Supply Hint' checkbox, and up/down arrows for reordering:

- Entry 1: Name 'Active Date/Time', Transform 'Raw Data', Supply Hint unchecked. Below the name field is the text 'Item -> Active Date/Time'.
- Entry 2: Name 'Barcode', Transform 'Raw Data', Supply Hint unchecked. Below the name field is the text 'Item -> Barcode'.
- Entry 3: Name 'Call Number Label', Transform 'Raw Data', Supply Hint unchecked. Below the name field is the text 'Item -> Call Number/Volume -> Call Number Label'.

Reports rewrite – report definition filter values

Location ID

Operator

In List

Filter value

<Unset>

Owned by

HHPL-HHPL

☐ Include descendants?

Transform

Add

Raw Data

Stacks (CONS)

X

Item -> Shelving Location -> Location ID

Organizational Unit ID

Operator

In List

Filter value

Filter:

X

Transform

Raw Data

Example Consortium

Happy Harbor Public Library

Happy Harbor Public Library - Main Library

Leilholm Public Library

Rohan Public Library System

Shire Public Library System

Smallville Public Library System

Wakanda Public Library System

Hold the Shift key to select a range.

Westchester Library System

Reports rewrite – report layout and scheduling

Pivot Label Column: **Select One (Optional)** Pivot Data Column:

Choose your output format(s):

- ☐ Calculate grouping subtotals
- ☐ Excel Output
- ☒ CSV Output
- ☒ HTML Output
- ☐ Bar Chart
- ☐ Line Chart

Report Folder: **Holds** Output Folder: **Holds**

▼ ^ ▼ ^

▼ Reports ▼ Outputs

Bibliographic Record Bucket Options

Column for bib id: **No bib record c**

- ☐ New Record Bucket
- ☐ Existing Record Bucket

Destination Record Bucket Id:

Recurrence: ☐ **Recurring Report?**

Scheduling: ☒ **Run Report Now** ☐ **Schedule Report For Later**

Email: **Email Address** **Istratton@wlsmail.org**

[Previous](#) **Save and schedule report**