

## Missouri Evergreen Consortium Glossary

**Acquisitions:** Processes related to ordering materials and managing materials expenditures.

**Age-Based Holds Protection:** A setting in Evergreen that allows libraries to prevent holds on new materials from outside the owning library's branch or system for a designated amount of time. This action is performed on an item-by-item basis through the holdings record.

**Anglo-American Cataloguing Rules, Second Edition (AACR2):** A content standard published by the American Library Association ([ALA](#)), Canadian Library Association ([CLA](#)), and Chartered Institute of Library and Information Professionals ([CILIP](#)). AACR2 includes instructions for describing library materials and for the establishment of access points for the creators of these materials. For more information visit [AACR2](#).

**Angularizing Data:** Refers to the process of rewriting interfaces in Angular code, a powerful open-source framework that is the standard for the Evergreen Staff Client. This change is part of a multi-year project aimed at converting pre-Web Client interfaces to Angular, enhancing the user experience and functionality of the software by improving accessibility and better organization of data.

**Apache:** Open-source web server software used to serve both static content and dynamic web pages in a secure and reliable way. More information is available at <http://apache.org>.

**Authority Record:** Records used to control the contents of MARC fields.

**Balance Stop Percent:** A setting within Evergreen Acquisitions that prevents purchases when only a specified amount of the funding remains. This setting halts negative balance spending.

**Barcode:** The scannable code and visual number that is attached to each item and to each individual patron record that is accessible and functional in Evergreen.

- **ITEM** barcodes are assigned to items at the owning location to facilitate circulation and bibliographic control of those items.
- **PATRON** barcodes are assigned to patrons as they are registered to allow patrons to utilize resources available in a uniform and confidential manner.
- Missouri Evergreen Consortium uses 14 digits for barcodes, using the CODABAR symbology and a check digit algorithm of Mod 10.
- Item barcodes typically use the prefix "3" plus a four-digit agency code confirmed by EOLI and MEC.

- Patron barcodes typically use the prefix “2” plus a four-digit agency code confirmed by EOLI and MEC.

**Bibliographic Record:** A record containing standardized information about a work, such as title, author and copyright date. Bibliographic records are created to allow the attaching of items for circulation. A bibliographic record is analogous to "Work" and "Instance" in BIBFRAME.

**BIBFRAME:** A conceptual model for bibliographic description that defines works, instance and items along with other concepts. BIBFRAME was designed to replace the [MARC standards](#), and to use [linked data](#) principles to make [bibliographic data](#) more useful both within and outside the library community. More information is available at [Overview of the BIBFRAME 2.0 Model](#)

**Booking:** Processes relating to reserving cataloged and non-bibliographic items.

**Brick:** A brick is a unit consisting of one or more servers. It refers to a set of servers with ejabberd, Apache, and all applicable Evergreen services. It is possible to run all the software on a single server, creating a “single server brick.” Typically, larger installations will have more than one such brick and, hence, be more robust.

**Buckets:** These are containers of items. See also [Item Bucket](#), [Patron Bucket](#), and [Record Bucket](#).

**Call Number:** An item’s call number is a string of letters and or numbers that work like map coordinates to describe where in a library a particular item "lives."

**Catalog:** The database of titles and objects.

**Cataloging:** The process of adding materials to be circulated to the system.

**Check-in:** The process of returning an item.

**Check-out:** The process of loaning an item to a patron.

**Circulation:** The process of loaning an item to an individual.

**Circulating Library:** The library which has checked out the item.

**Circulation Library:** See [Home Library](#).

**Circulation Limit Sets:** Refines circulation policies by limiting the number of items that users can check out.

**Circulation Modifiers:** Circulation modifiers pull together Loan Duration, Renewal Limit, Fine Level, Max Fine, and Profile Permission Group to create circulation rules for different types of materials. Circulation Modifiers are also used to determine Hold Policies.

**Cloud Computing:** The use of a network of remote servers hosted on the Internet to store, manage, and process data, rather than a local server or computer. Terms such as “Software as a Service” (SaaS) refer to these kinds of systems. ILS vendors offering hosting where they manage the servers used by the ILS and provide access via the internet is an example of cloud computing.

**Commit:** To make code changes to the software code permanent. In open-source software development, the ability to commit is usually limited to a core group.

**Community:** Community in the open-source world of software development and use refers to the users and developers who work in concert to develop, communicate, and collaborate to develop the software.

**Compiled:** A compiled software is where the software has been translated to a machine code for use. Compiled software usually targets a specific computer architecture. The code cannot be read by humans.

**Consortium:** A consortium is an organization of two or more individuals, companies, libraries, consortiums, etc. formed to undertake an enterprise beyond the resources of any one member.

**Consortial Library System (CLS):** An ILS designed to run a consortium. A CLS is designed for resource sharing between all members of the consortium, it provides a union catalog for all items in the consortium.

**Copy:** See [Item](#).

**Default Search Library:** This 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.

**Distribution Formulas:** Used to specify the number of copies that should be distributed to specific branches and item locations in Acquisitions.

**Due date:** The due date is the day on or before which an item must be returned to the library to avoid being charged an overdue fine.

**Electronic Data Interchange (EDI):** Transmission of data between organizations using electronic means. This is used for Acquisitions.

**Evergreen:** Evergreen is an open-source ILS designed to manage a variety of library activities for libraries of all sizes and geographic dispersal.

**FIFO:** First in, first out. In a FIFO environment, holds are filled in the order that they are placed.

**Floating:** A feature that allows items to change their circulating library to the library they are checked in at. The item floats from one location to another depending on where it is returned.

**Hatch:** An additional program that is installed as an extension of your browser to extend printing functionality with Evergreen.

**Hold:** A patron-initiated request to reserve a specific item, which can be placed on a specific copy or title.

**Hold Boundaries:** Define which organizational units are available to fill specific holds.

**Hold Groups:** A special use of Patron Buckets where lists of patrons that can then be used to place multiple title-level holds on the same bibliographic record.

**Home Library:** This is the library where the patron is registered for library service. It is the institution from which the patron's borrowing privileges, account settings, and circulation rules are applied.

**Hopeless Holds:** Holds which have become unfillable due to there being no copies in *hold\_copy\_map* and/or all copies in *hold\_copy\_map* are of an item status with the *hopeless\_prone* property set to "True."

**Integrated Library System (ILS):** The software platform (e.g. Evergreen) used by all member libraries to manage operations, cataloging, and circulation.

**Inter-Consortium Loans (ICL):** These are like ILLs, but differ because they occur within a Consortium. See [Transit](#).

**Inter-Library Loan (ILL):** While the Consortium primarily uses internal resource sharing, this term refers to borrowing materials from non-member libraries outside of the Missouri Evergreen system.

**International Standard Book Number (ISBN):** The ISBN is a publisher product number that has been used in the book supply industry since 1968. A published book that is a separate product gets its own ISBN. ISBNs are either 10 digits or 13 digits long. They may contain information on the country of publication, the publisher, title, volume or edition of a title.

**International Standard Serial Number (ISSN):** International Standard Serial Number is a unique 8-digit number assigned by the International Serials Data System to identify a specific Serial Title.

**Item:** Item records contain information about an object such as a book, DVD, or kit, that may be available to circulate to patrons (based on circulation policies). Items belong to bibliographic records. The Evergreen Item is analogous to "Item" in BIBFRAME.

**Item barcode:** Item barcodes uniquely identify each specific item entered in the Catalog.

**Item Bucket:** This is a container of individual items that are set aside for editing.

**Item Status:** Item Status allows you to see the status of an item without having to go to the actual Title Record. Item status is an integral part of Evergreen and how it works.

**Juvenile Flag:** User setting used to specify if a user is a juvenile user for circulation purposes.

**Kids' OPAC (KPAC):** Alternate version of the Template Toolkit OPAC that is kid friendly. This public catalog (OPAC) is designed for children and teens. Colorful menu items, large buttons, and simple navigation make this search interface appealing.

**LaunchPad:** Launchpad is an open-source suite of tools that help people and teams to work together on software projects. Launchpad brings together bug reports, wishlist ideas, translations, and blueprints for future development of Evergreen. Visit [Evergreen in Launchpad](#) to learn more.

**Library Management System (LMS):** See [Integrated Library System \(ILS\)](#).

**Library of Congress Control Number (LCCN):** The LCCN is a system of numbering catalog records at the Library of Congress.

**Library Management System (LMS):** See [Integrated Library System \(ILS\)](#)

**LISTSERV:** An automated email-based mailing list system that allows messages to be sent to all subscribers of a group efficiently. Missouri Evergreen Consortium offers the following listservs:

[Circulation](#)

[Cataloging](#)

[Reports](#)

[General Membership](#)

[Library Directors](#)

[Aspen Discovery Layer](#)

[Acquisitions](#)

[ILL/Resource Sharing](#)

**Loan Duration:** Loan duration (also sometimes referred to as "loan period") is the length of time a given type of material can circulate.

**MALA:** An acronym for Mid-America Library Alliance, MALA Courier Services and its subcontractor, Henry Industries, are responsible for keeping materials moving between

Missouri Evergreen libraries. MALA offers interlibrary loan courier delivery service, professional development workshops and consulting.

**MARC (Machine Readable Cataloging):** MARC formats are standardized descriptors for the representation and communication of bibliographic and related information in machine-readable form.

**MARC Batch Export:** Mass exporting of MARC records out of a library system.

**MARC Batch Import:** Mass importing of MARC records into a library system.

**MARXML:** Framework for working with MARC data in an XML environment.

**Match score:** Indicates the relative importance of that match point as Evergreen evaluates an incoming record against an existing record.

**MEC:** Acronym for **M**issouri **E**vergreen **C**onsortium.

**Mentor Library:** Any current Missouri Evergreen Consortium member library may be asked to give support and advice to an onboarding library as they migrate into the Evergreen environment and learn how the ILS works.

**Minimum Quality Ratio:** Used to set the acceptable level of quality for a record to be imported.

**Missouri Library Association (MLA):** MLA is the state's professional organization for Missouri's librarians and library workers.

**Missouri Research and Education Network (MORENET):** [MOREnet](#) operates as a department within the University of Missouri System. MOREnet provides its members with a robust and secure fiber network infrastructure, and technical services including cybersecurity, network consulting, technical support, videoconferencing, training and hosted and managed applications, as well as affordable access to online resources.

**Missouri State Library (MOSL):** [Missouri State Library](#), located in Jefferson City, Missouri, provides library and reference services directly to the executive and legislative branches of the state's government. This agency supports libraries in Missouri with resource sharing and continuing education programs as well as overseeing state certification for public libraries.

**Memorandum of Understanding (MOU):** A formal document outlining an agreement between two or more parties. Non-Evergreen libraries agree to an MOU with Missouri Evergreen Consortium as a commitment to advance toward becoming active participants in the Consortium.

**Non-Cataloged:** Items that have not been cataloged.

**Online Public Access Catalog (OPAC):** An online interface used to access the database of a library's holdings to find resources in their collections. It is possibly searchable by keyword, title, author, subject or call number. Also known as the public view of a catalog.

**Organizational Unit (Org Unit):** An organizational unit is a specific library or library system within a larger hierarchy (like a consortium).

**Organization Unit Type:** The organization types in the hierarchy of a library system. (Consortium, System, Branch)

**Overlay/Merge Profiles:** During a MARC import this is used to identify which fields should be replaced, which should be preserved, and which should be added to the record.

**Owning Library:** The specific library that physically owns a particular item and where the item's record is attached.

**Parent Organizational Unit:** An organizational unit directly above whose policies may be inherited by its child units.

**Parts:** Provide more granularity for copies, primarily to enable patrons to place holds on individual parts of a set of items.

**Patron:** A user of the ILS. Patrons in Evergreen can both be staff and public users.

**Patron Barcode / Library Card Number:** Patrons are uniquely identified by their library card barcode number.

**Patron Bucket:** This container allows staff to gather patron registration records to perform batch actions on them, such as adding notes, applying statistical categories, or updating settings.

**Permission Groups:** A grouping of permissions granted to a group of individuals, i.e. patrons, cataloging, circulation, administration. Permission Groups also set the depth and grantability of permissions.

**Pickup Library:** Library designated as the location where requested material is to be picked up.

**Preferred Library:** The library that is used to show items and URIs regardless of the library searched. It is recommended to set this to your Workstation library so that local copies always show up first in search Results.

**Print Templates:** Templates that Evergreen uses to print various receipts and tables.

**Printer Settings:** Settings in Evergreen for selected printers. This is a HATCH function.

**Propagate Funds:** Creating a new fund for the following fiscal year with the same parameters as the current fund in Evergreen Acquisitions.

**Providers:** Vendors from whom you order your materials. Set in the Acquisition module.

**Pull List for Holds Request:** A dynamic, real-time list in the Circulation module showing available library items on the shelf that patrons have requested. Used by staff to print, collect and check in items to fulfill holds.

**Purchase Order (PO):** A document issued by a buyer to a vendor, indicating types, quantities, and prices of materials.

**Quality Metrics:** This mechanism is used in Evergreen to measure the quality of records and to make importing decisions based on quality.

**RDA (Resource Description & Access):** RDA is a set of cataloging standards and guidelines based on FRBR and FRAD. RDA is the successor for AACR2. Visit the [RDA Toolkit](#).

**Record Bucket:** This is a container of bibliographic records set aside to allow various batch actions to be performed in batch like editing and merging records.

**Record Match Sets:** When importing records, this identifies how Evergreen should match incoming records to existing records in the system.

**Recurring Fine:** Recurring Fine is the official term for daily or other regularly accruing overdue fines.

**Resource Sharing:** This allows MEC member libraries to share their collections electronically and physically so that patrons may access and borrow materials from any participating library in the consortium.

**Register Patron:** The process of adding a Patron account within Evergreen.

**Rollover:** Used to roll over remaining encumbrances and funds into the same fund the following year.

**SAN (Standard Address Number):** SAN is an identification code for electronic communication within the publishing industry. SAN uniquely identifies an address for location and is used in the Evergreen Acquisitions Module.

**Shelving Location:** Shelving location is the area within the library where a given item is shelved.

**Search & Retrieve URL (SRU):** Acronym for Search & Retrieve URL Service. SRU is a search protocol used in web search and retrieval. It expresses queries in Contextual Query Language (CQL) and transmits them as a URL, returning XML data as if it were a web page.

**Staff Client:** The graphical user interface used by library workers to interact with the Evergreen system. Staff use the Staff Client to access administration, acquisitions, circulation, and cataloging functions.

**Standard Interchange Protocol (SIP):** SIP is a communications protocol used within Evergreen for transferring data to and from other third party devices, such as RFID and barcode scanners that handle patron and library material information. Version 2.0 (also known as "SIP2") is the current standard. It was originally developed by the 3M Corporation.

**Standing Penalties:** Serve as alerts and blocks when patron records have met certain criteria, commonly excessive overdue materials or fines; standing penalty blocks will prevent circulation and hold transactions.

**Statistical Categories:** Allow libraries to associate locally interesting data with patrons and holdings. Also known as stat cats.

**Template Toolkit (TT):** A template processing system written in Perl.

**Top Level Domain (TLD):** TLD is the domain at the highest level in the hierarchical Domain Name System of the Internet. For example, in the web address **www.chicken.com**, ".com" is the TLD.

**TPAC:** Evergreen's Template Toolkit-based OPAC. The web-based public interface (OPAC) in Evergreen is written using functionality from the Template Toolkit.

**Transit:** A general term to describe the movement of items between different locations, both within a library system and in the Missouri Evergreen Consortium. Transit may be to a requesting library to fulfill a patron request, or to the owning library after the patron request has been fulfilled. See [Resource Sharing](#).

**Universal Product Code (UPC):** The UPC is a number uniquely assigned to an item by the manufacturer.

**Universal Resource Identifier (URI):** A URI is a string of characters that identify a logical or physical resource. Examples are URL and URN.

**Universal Resource Locator (URL):** This is the address of a web page.

**Universal Resource Number (URN):** This is a standard number created to identify a resource. Examples of URNs are ISBNs, ISSNs, and UPCs.

**User Activity Type:** This feature enables the Library to specify the user activity to be recorded in the database. Libraries may use this feature for reporting purposes. This function will also display the last activity date in a patron's account.

**Vandalay:** MARC Batch Import/Export tool's original name.

**Web-Client:** The web-client is a software delivery system designed to offer remote access to Evergreen by allowing access from various locations using tablets or laptops.

**Wiki:** The Evergreen Wiki can be found at [Evergreen ILS Wiki](#). The Evergreen Wiki is a knowledge base of information on Evergreen, offering information from a variety of Evergreen users.

**Workstation:** This unique name is associated with a specific computer and Org Unit.

**eXtensible Markup Language (XML):** Acronym for eXtensible Markup Language, a subset of SGML. XML is a set of rules for encoding information in a way that is both human-readable and machine-readable. It is primarily used to define documents but can also be used to define arbitrary data structures. It was originally defined by the World Wide Web Consortium (W3C).

**eXtensible Messaging and Presence Protocol (XMPP):** The open-standard communications protocol (based on XML) used for client-server message passing within Evergreen. It supports the concept of a consistent domain of message types that flow between software applications, possibly on different operating systems and architectures. More information is available at <http://xmpp.org>. See also: [Jabber](#).

**Xpath:** The XML Path Language, a query language based on a tree representation of an XML document. It is used to programmatically select nodes from an XML document and to do minor computation involving strings, numbers and Boolean values. It allows you to identify parts of the XML document tree, to navigate around the tree, and to uniquely select nodes. It was originally defined by the World Wide Web Consortium (W3C). The current version is "XPath 2.0."

**YAOUS:** Yet Another Organization Unit Setting; slang for Library Settings.

**Z39.50:** The international standard client/server protocol to search and retrieve information between computer systems, primarily library and information related systems. Z39.50 is developed and maintained by the Library of Congress.

Z39.50 is widely used in library environments, for interlibrary loan and catalogue search. It is incorporated into Evergreen for use as bibliographic reference software. See Also: [Search & Retrieve URL \(SRU\)](#)