MISSOURI EVERGREEN CONSORTIUM

LOCAL ADMINISTRATION TRAINING MANUAL

RELEASED: October 2025; updated June 2026

Evergreen versions: 3.15.13

Most processes reviewed in this manual require the user to hold LocalAdmin permissions to implement. Exceptions include some workstation configuration elements, accessing reports, and notices.

Contents

Introduction

In 2024 the Missouri Evergreen Consortium's Onboarding Committee reconvened and discussed, among other things, what member libraries need for onboarding and after onboarding. The Committee changed its name to the Consortium Assistance Network [CAN] to better represent the help we want to provide. We discussed determining mentor libraries for our newest members, helping to train those mentor libraries, and …. What? What else could the Onboarding Committee provide to Missouri Evergreen member libraries?

We decided our first task meant documenting setting various functions available in Evergreen. Local Administration is a key element to Evergreen's proper function. From simpler settings like our Closed Dates Editor (simple but SO necessary) to more complex tasks like the Holdings Template Editor, we needed to document how to best set the various functions available in Local Administration. To that end, we adapted large parts of Indiana's Local Administration Training Manual that would apply to Missouri Evergreen Libraries, resulting in this document.

That knowledge also relies on use of our powerhouse information hub at moevergreeenlibraries.org/member-resources, where others have established best practices for cataloging and circulation, reports resources are archived to save our sanity, and resource sharing materials are available. This online compendium offers our members all the knowledge they need to make the best use of Evergreen locally in accordance with agreed-upon practices. We ask that you refer to these resources.

We thank all preceding contributors before us for their hard work and determination. We know that this manual will need to be updated with each new release of Evergreen. Trust that we will make updating this documentation a priority with each upgrade.

Finally, let us know if you have any concerns or suggestions for that update – we will listen, utilize, and everyone will benefit from that!

The Consortium Assistance Network

Lee Ann Santee, Barry-Lawrence Regional Library, Chair
Bethany Barton, St. Joseph Public Library
Stacy Hisle, Ray County Public Library
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Ronya McCool, Richmond Heights Memorial Library
Terri Moser, Neosho Newton County Library
Mary Kay Emmrich, MEC Migration Specialist and CAN Liaison

November 2025; *updated June 2026*

Accessing the Client

The client may be accessed using Google Chrome and Firefox. Other browsers may not support all features of the client.

The address of the client is: https://[libraryshortname].missourievergreen.org/eg/staff

Workstation Management

NOTE: Local administration permissions are required to register workstations.

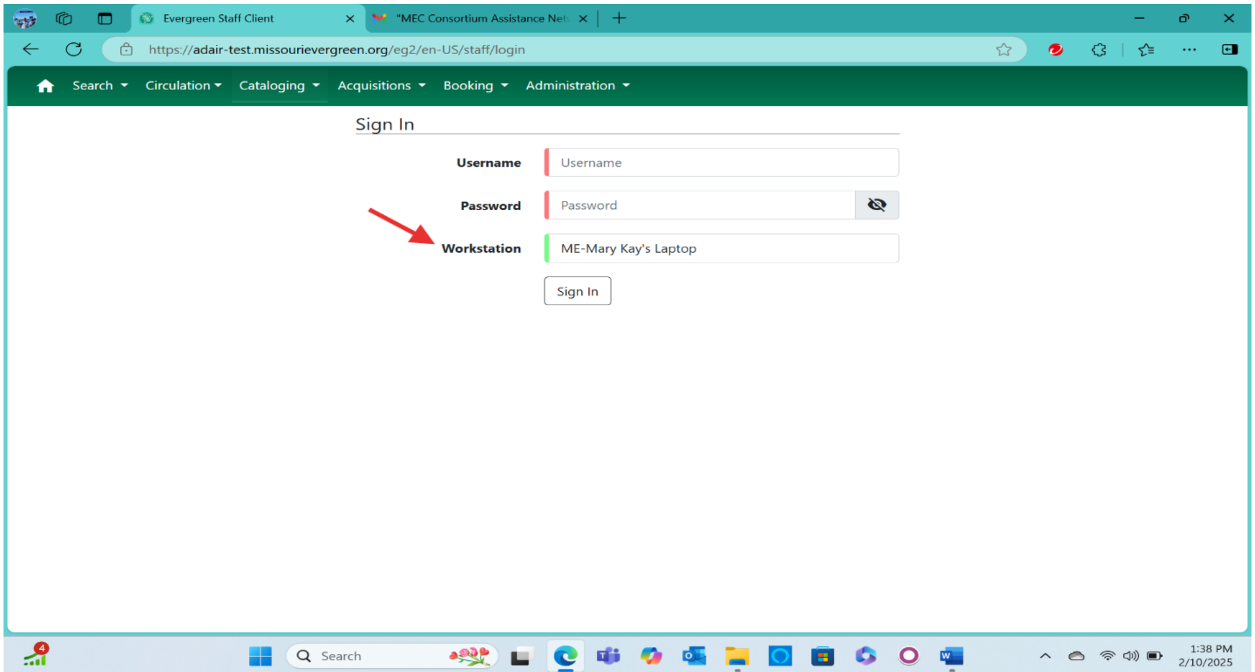
Overview

Workstations are virtual desks for staff within a library branch's presence in the database. Workstations do not grant or retain staff permissions. Each workstation must be registered or created to be used for Evergreen. Workstation information is stored in the browser cache. Clearing the cache may result in workstation registration data being purged, so the workstation will need to be re-registered and reconfigured.

Creating a New Workstation

Location: *Administration → Workstation → Registered Workstations*

Workstations should be created with unique and useful names for reports and

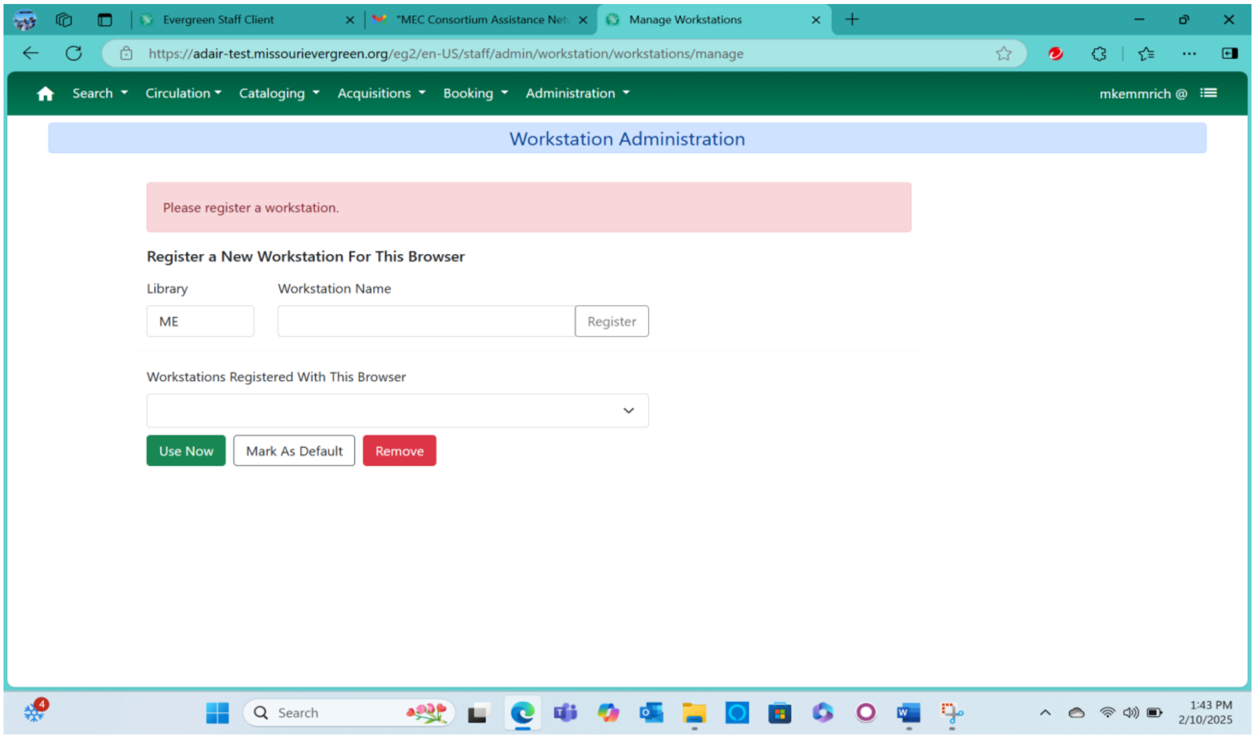


transaction research. Additional workstations may be added as needed. Some cataloging activities may require distinct workstations for working across branches. This means that there may be multiple workstation registrations on one physical computer.

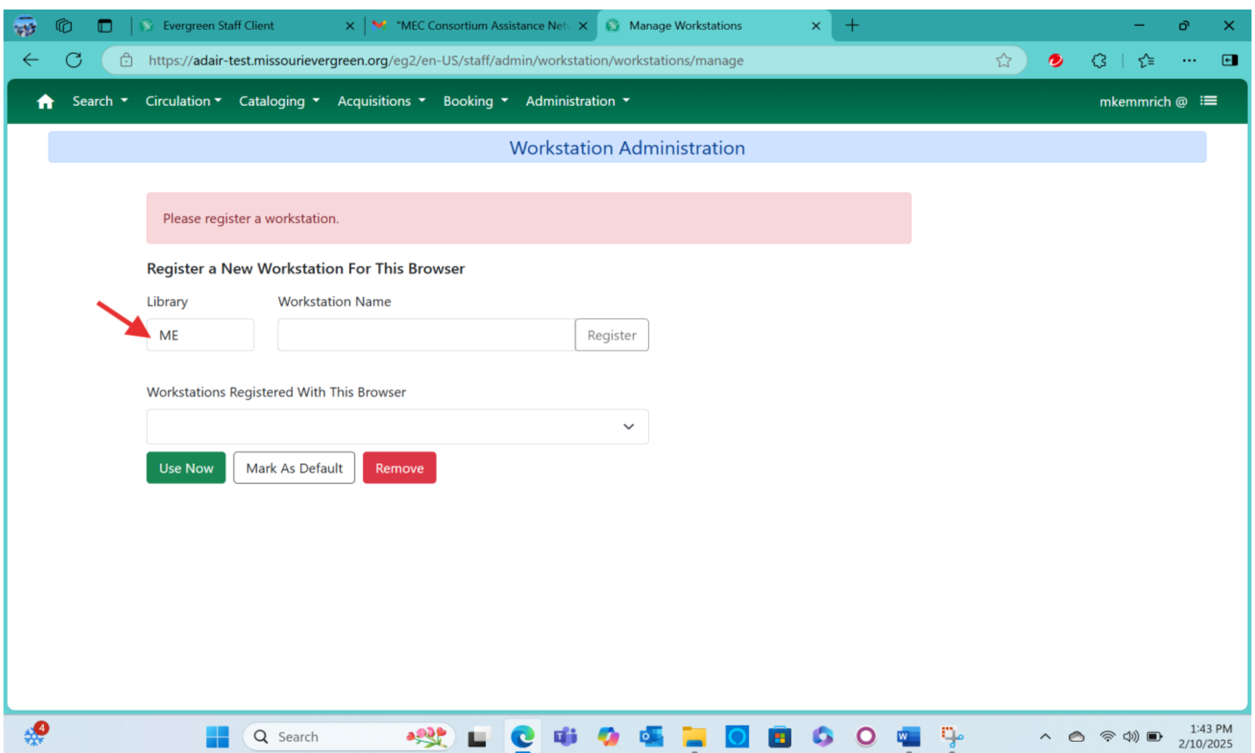
First-Time Registration

A simple visual cue to determine if a workstation has been registered is the presence or lack of a workstation dropdown on the login page. If there is no dropdown, there is no workstation available.

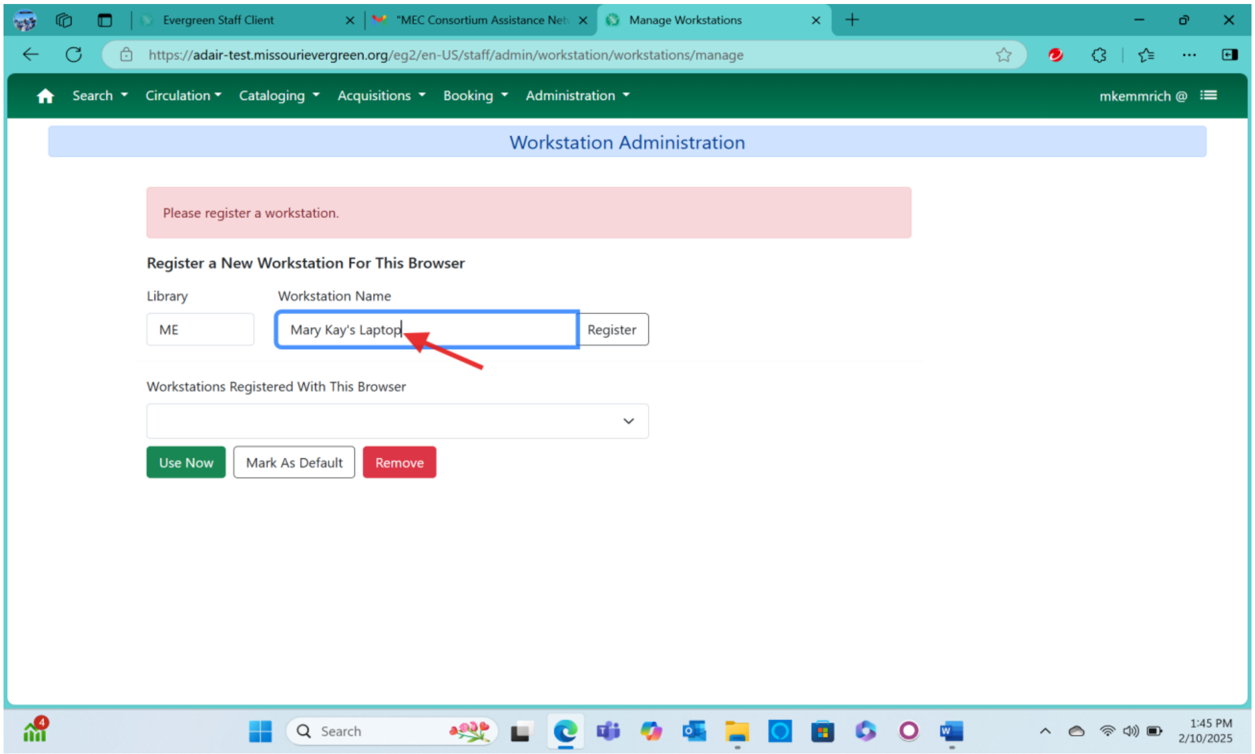
The system will trigger the workstation registration process the first time the web client is accessed.



Choose a branch location to be associated with this workstation.



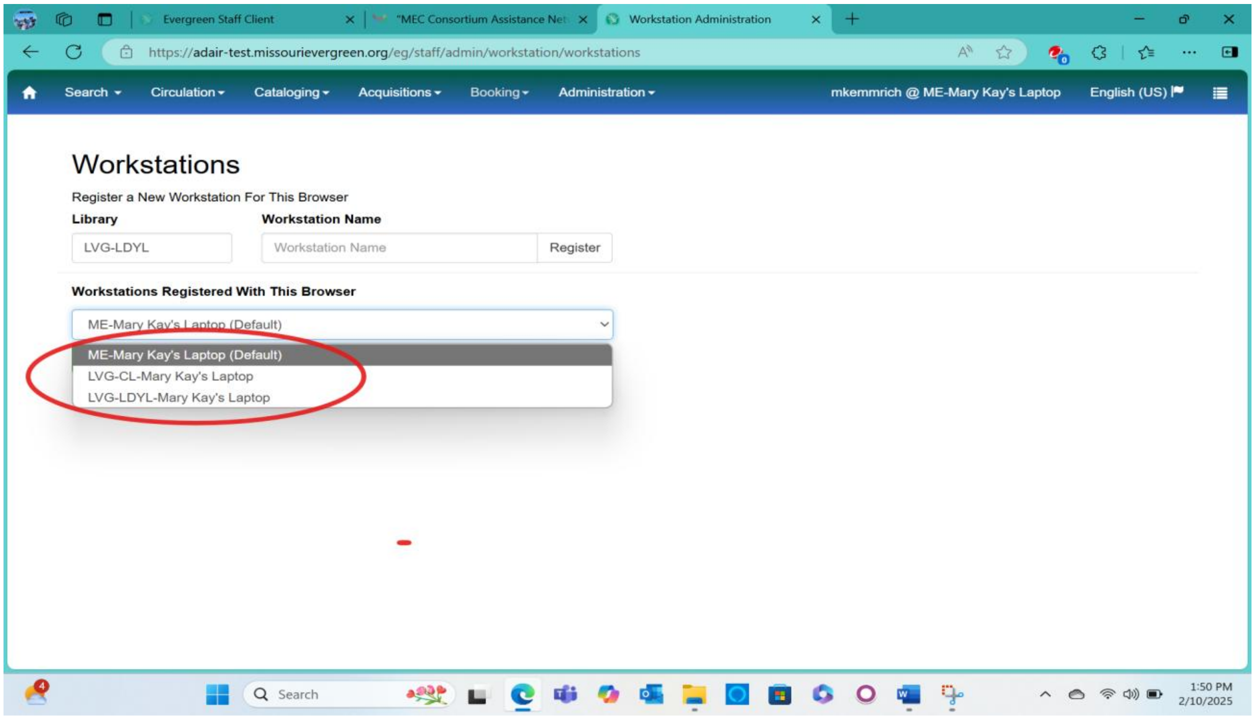
Give the workstation a unique and useful name and click on **Register**.



The workstation will be registered and may be used by clicking on ***Use Now***. The login page will load, and you must log in with your credentials.

Additional Workstations

To add additional workstations, revisit the list of registered workstations in the ***Administration*** → ***Workstation*** menu.



Complete the registration form again, choosing a different location within the library system or a different name. This is beneficial for staff working for library systems that have multiple locations, as it permits administrators and cataloguers to make local changes.

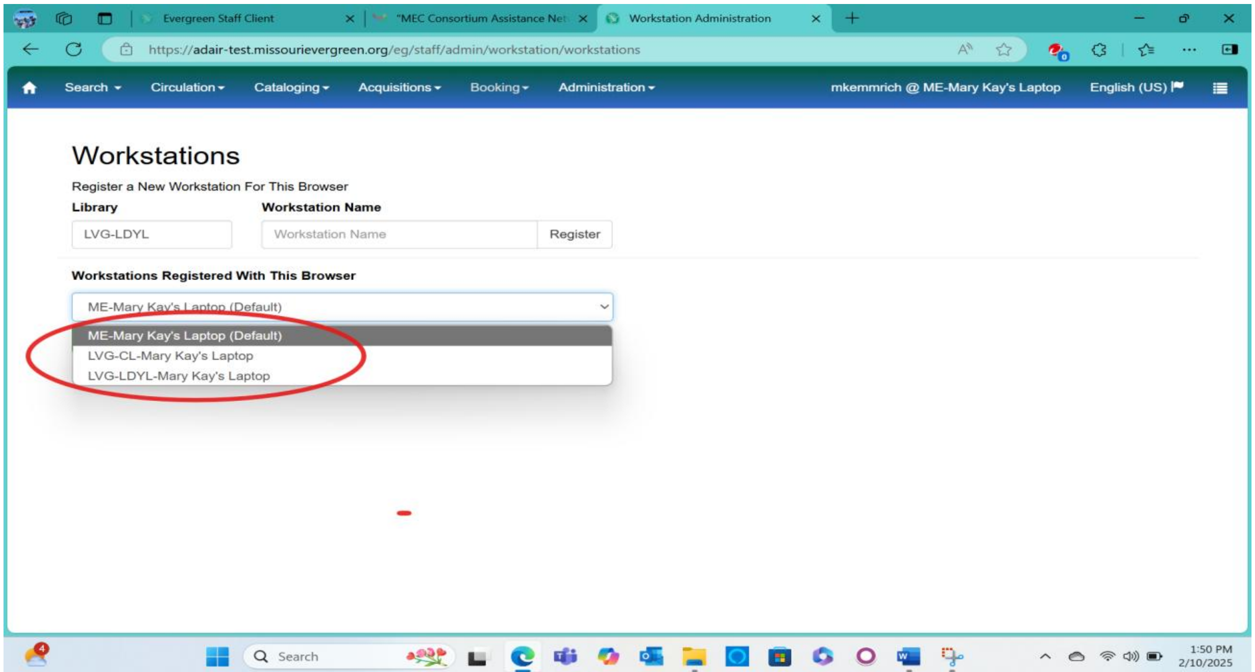
Should you have multiple workstations registered on one device you may choose to set a default workstation.

NOTE: Keep in mind that your credentials work only for your Library. You may only register additional workstations for locations within your Library system.

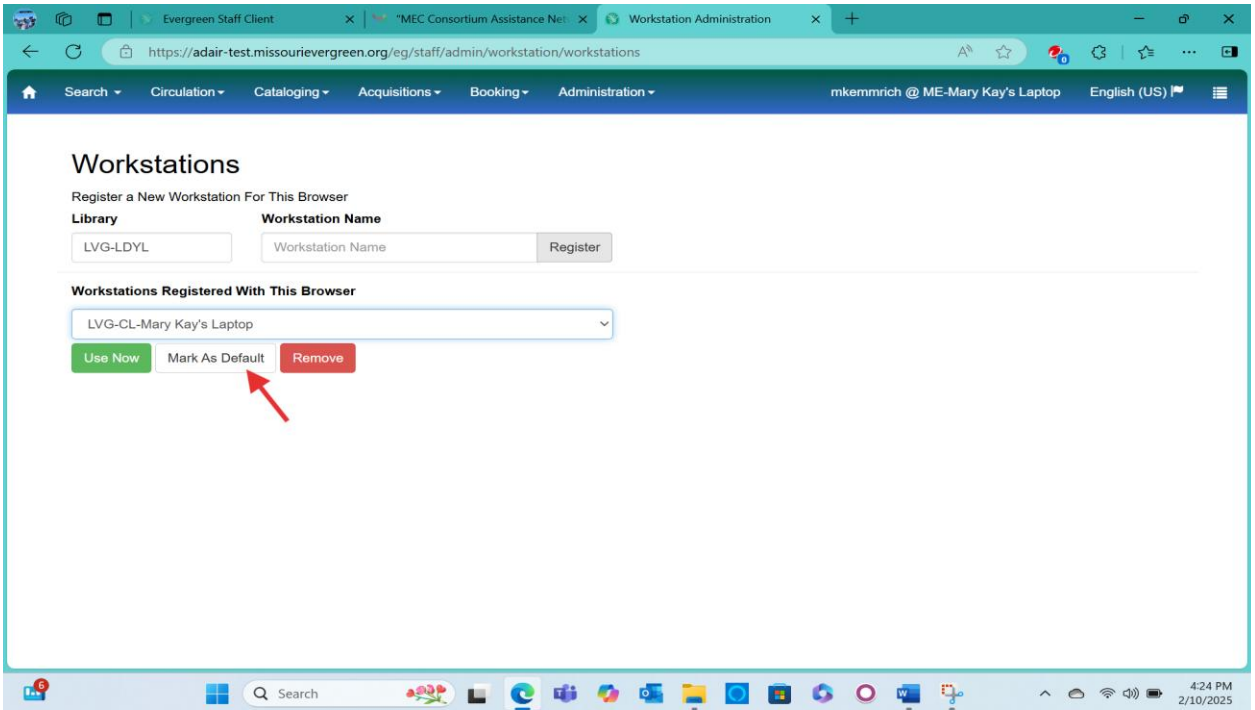
Setting a Default Workstation

Location: *Administration → Workstation → Registered Workstations*

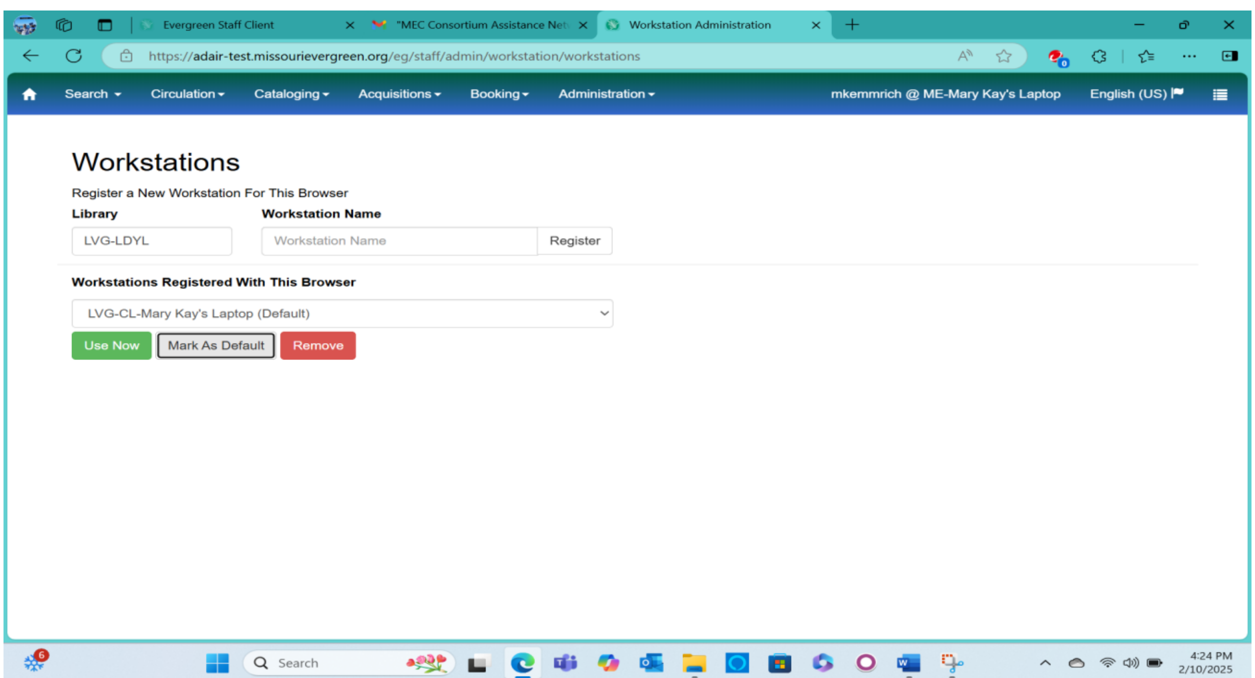
The system will set the first workstation registered in the browser as the default automatically. As you register additional workstations you may wish to switch which workstation is loaded by default.



To declare a default workstation, choose the desired workstation in the ***Workstations Registered with this Browser*** drop-down and click on the ***Mark as Default*** button.



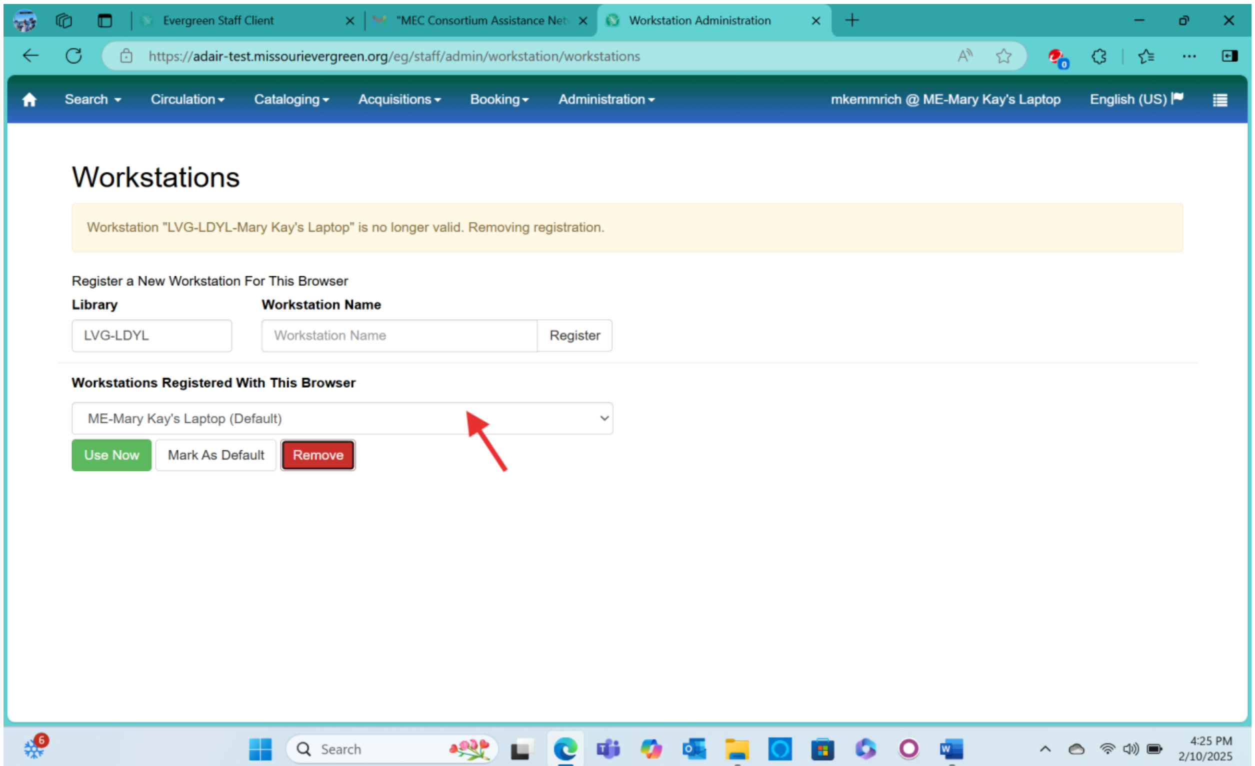
The newly selected default workstation will now be preselected on the login page.



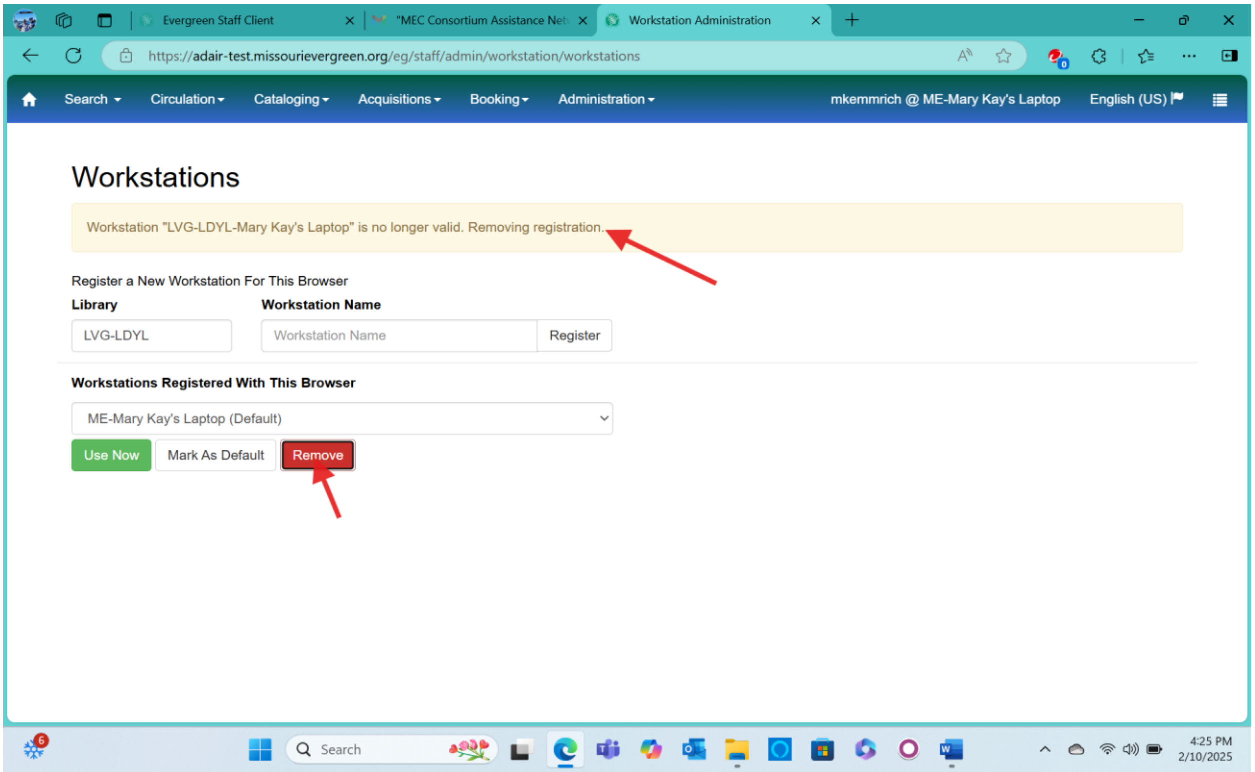
Removing a Workstation

Location: *Administration → Workstation → Registered Workstations*

If a workstation was created in error or is no longer required, it can be removed. Choose the desired workstation in the ***Workstations Registered with this Browser*** drop-down and click on the ***Remove*** button.

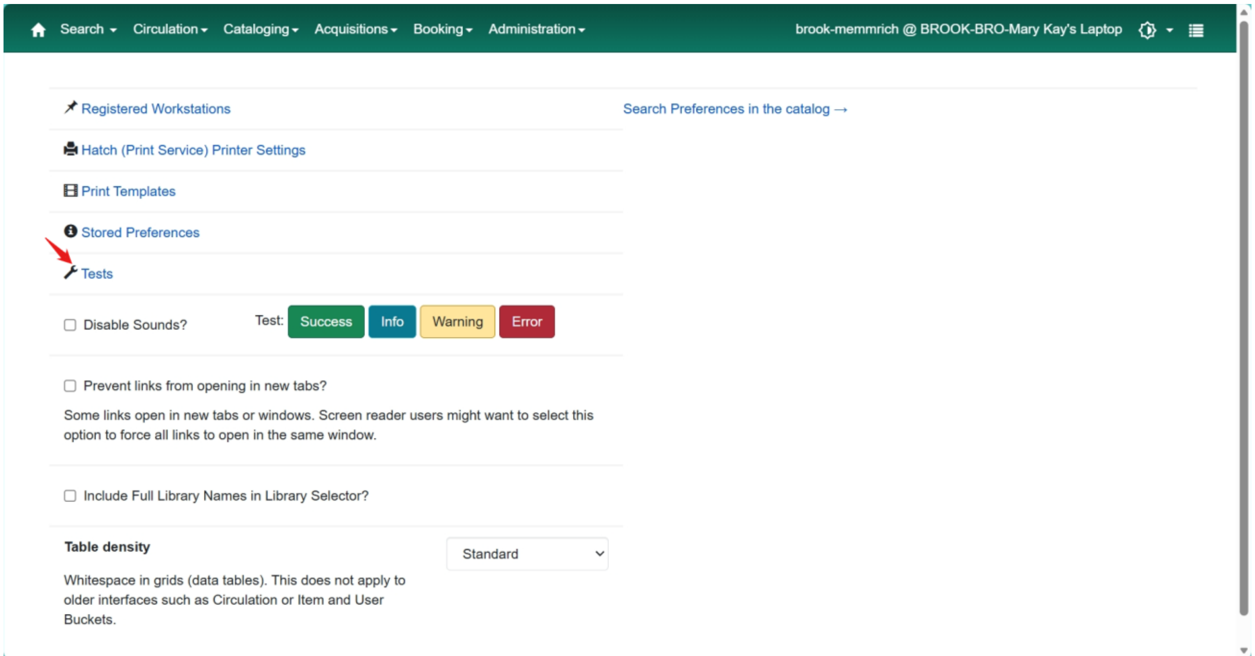


The workstation will be deregistered and removed from the browser.



Simple Workstation Configurations

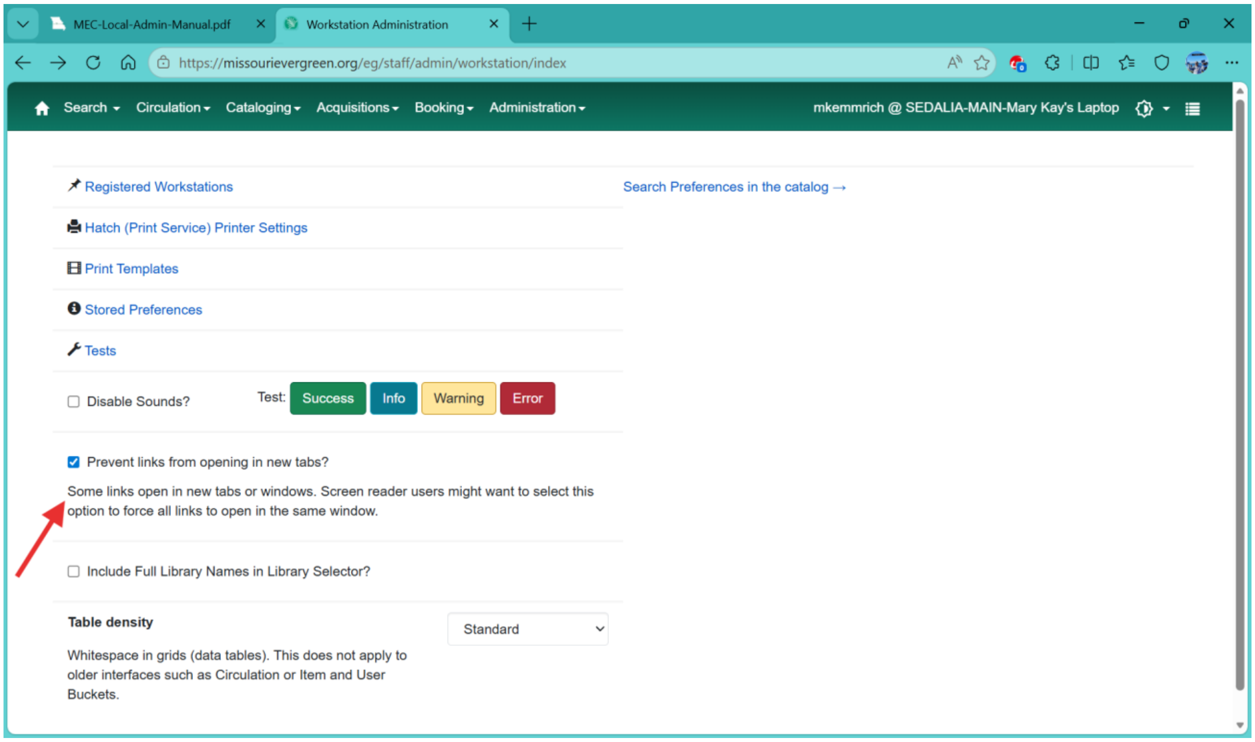
Location: *Administration → Workstation*



The workstation administration interface offers several options to enhance your user experience.

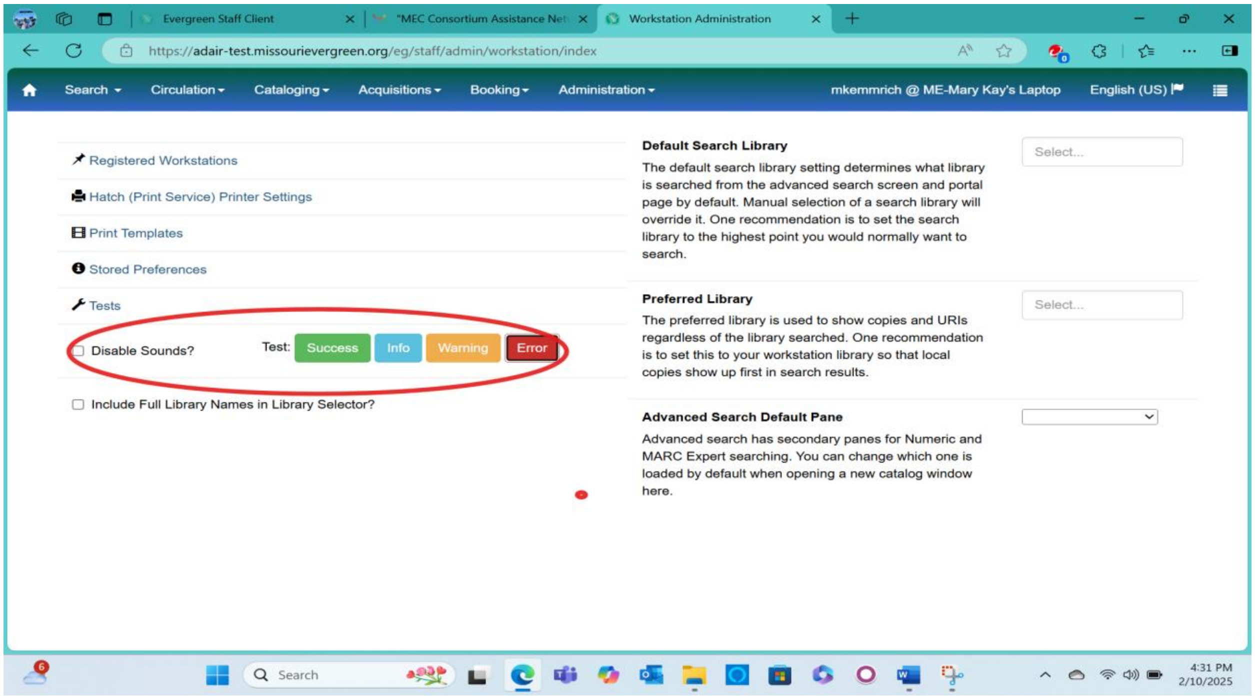
Preventing Links in New Tabs

Evergreen 3.15 now offers users the option of preventing links opening in new tabs. This is a simple toggle setting; if the box is checked, Evergreen will open links in the same window. Otherwise, the Evergreen software will open links in new windows as the software settings require.



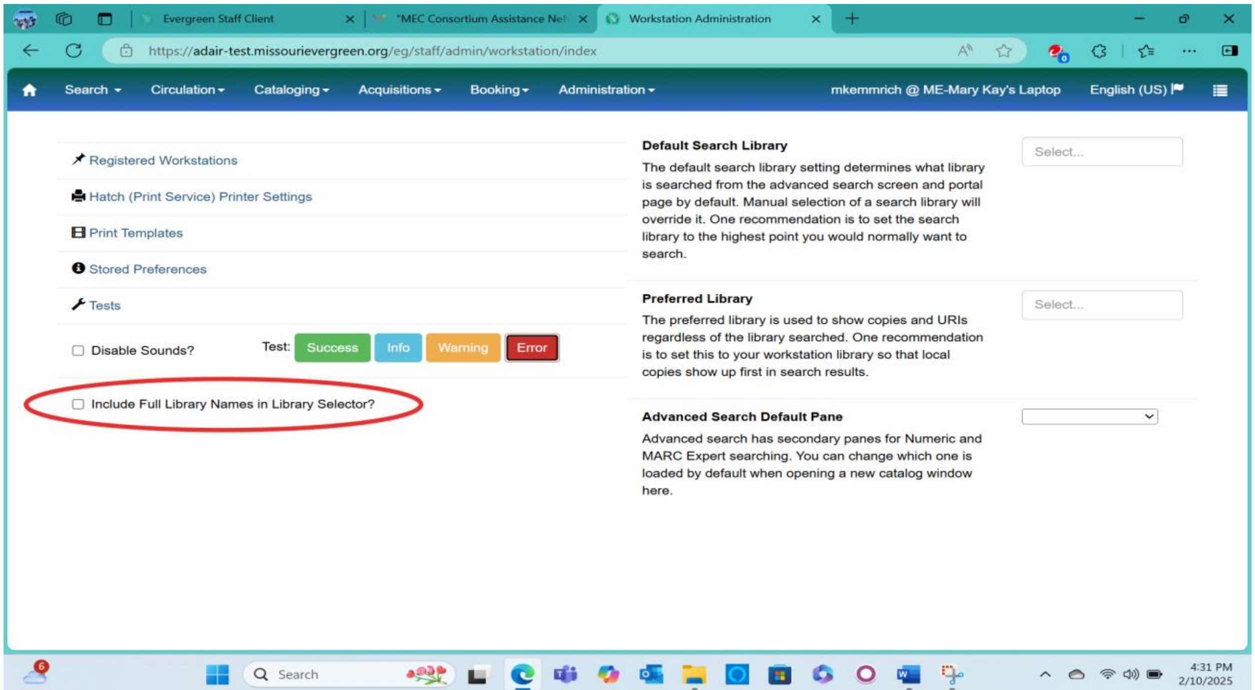
Sounds

The audio cues may be turned on/off by checking or unchecking the box next to ***“Disable Sounds?”***. You may not configure sounds so that only selected sounds play, e.g. only have the Error warning sound turned on and not the Success sound. You may click on the colored buttons to test the sounds.



Library Selector

The Library Selector drop down menus in Missouri Evergreen only show the shortnames of member libraries by default. If the ***"Library Selector Shows Combined Names?"*** button is checked, the menu dropdowns within the angularized areas of the web client will show both the shortname *and* the full name of the member library.

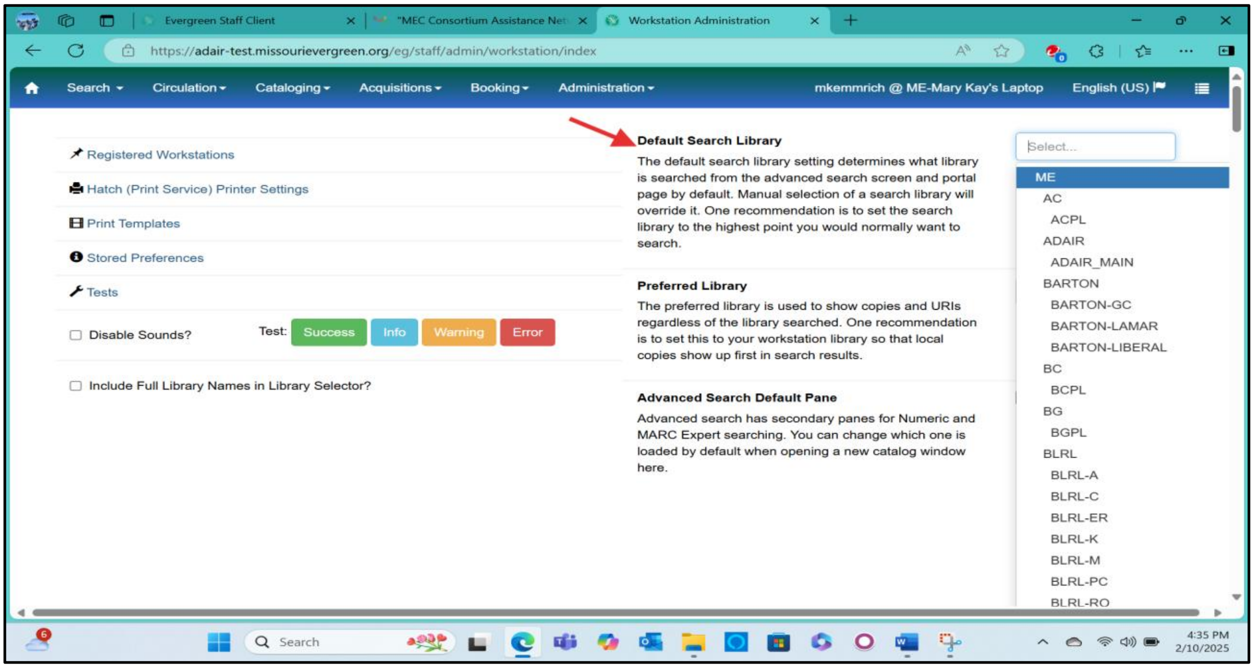


NOTE: You must log out and back into the workstation for the changes to take effect when enabling or disabling this feature.

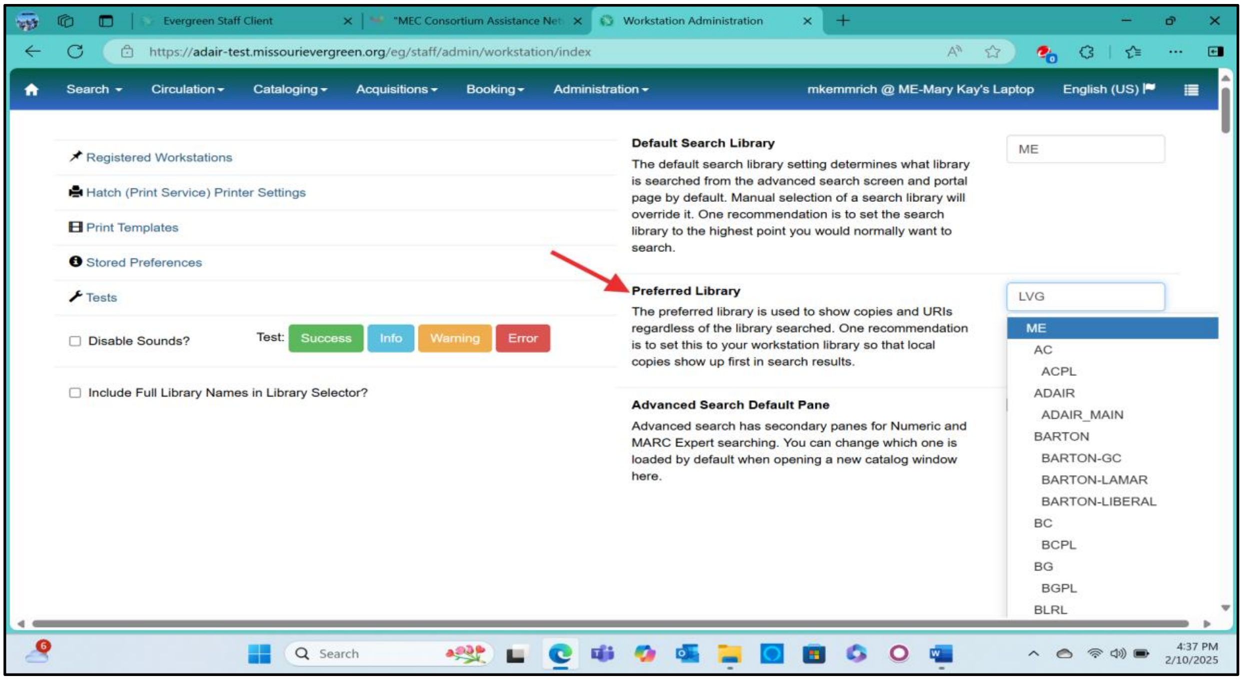
Search

NOTE: *It is recommended to set your catalog preferences directly in the Catalog. To do so, see Search Preferences in the Catalog manual.*

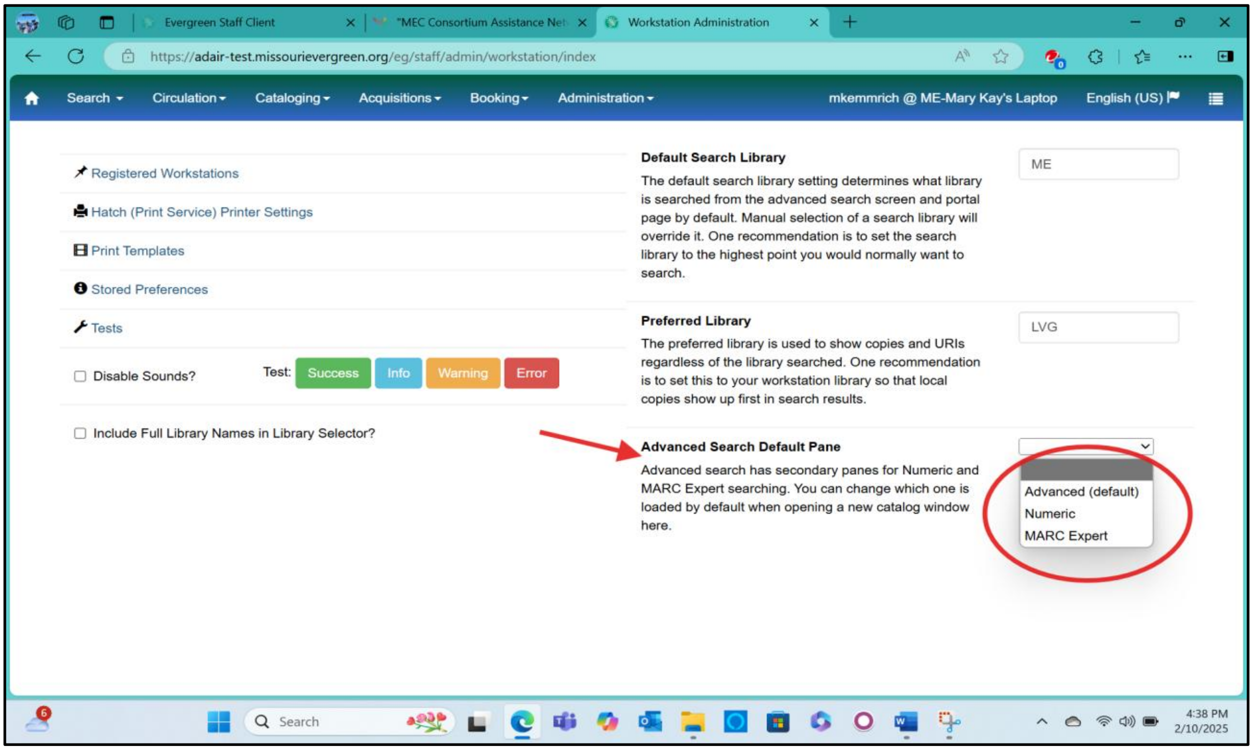
Setting a ***default search library*** for the workstation will override any account settings. If no entry is set for the workstation, the system will use the account settings instead. Catalogers should always have their default set to the consortium level in order to discover all existing records. Front line staff who generally search for local holdings first may choose to have the local branch or system set as the default search library.



The ***preferred search library*** setting will boost the preferred library's holdings to the top of the holdings list on that particular bibliographic record. It is recommended to have this set to your local system or branch.



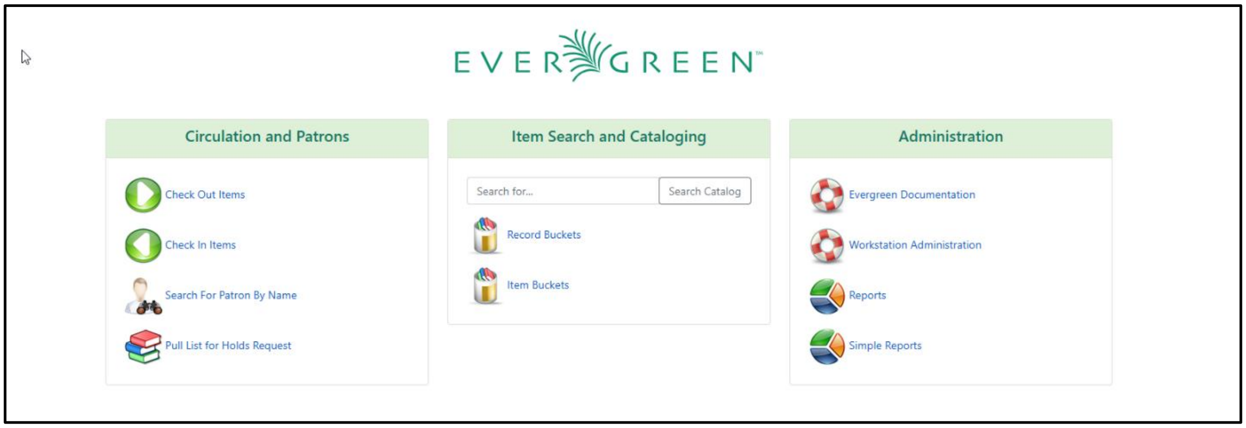
Selecting an alternate ***advanced search default pane*** is useful for catalogers who may be starting their search using ISBNs. Beginning with the Numeric Search option may be a more useful starting point for those searches. This option is unlikely to be used by front line staff.



Staff Portal Page

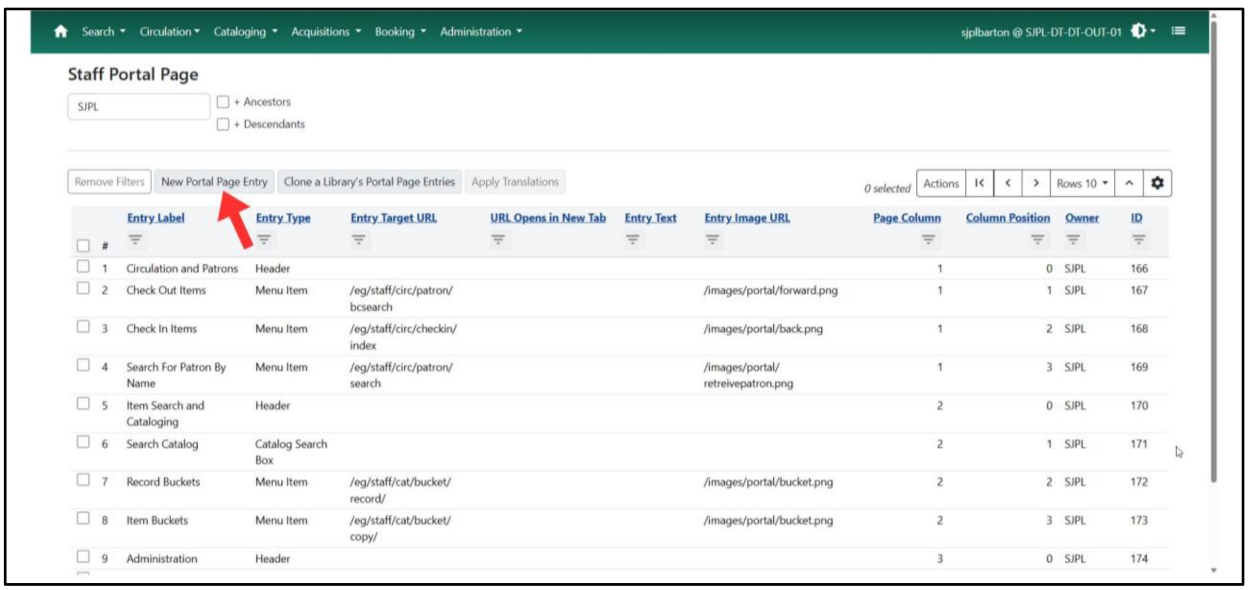
Location: *Administration → Local Administration → Staff Portal Page*

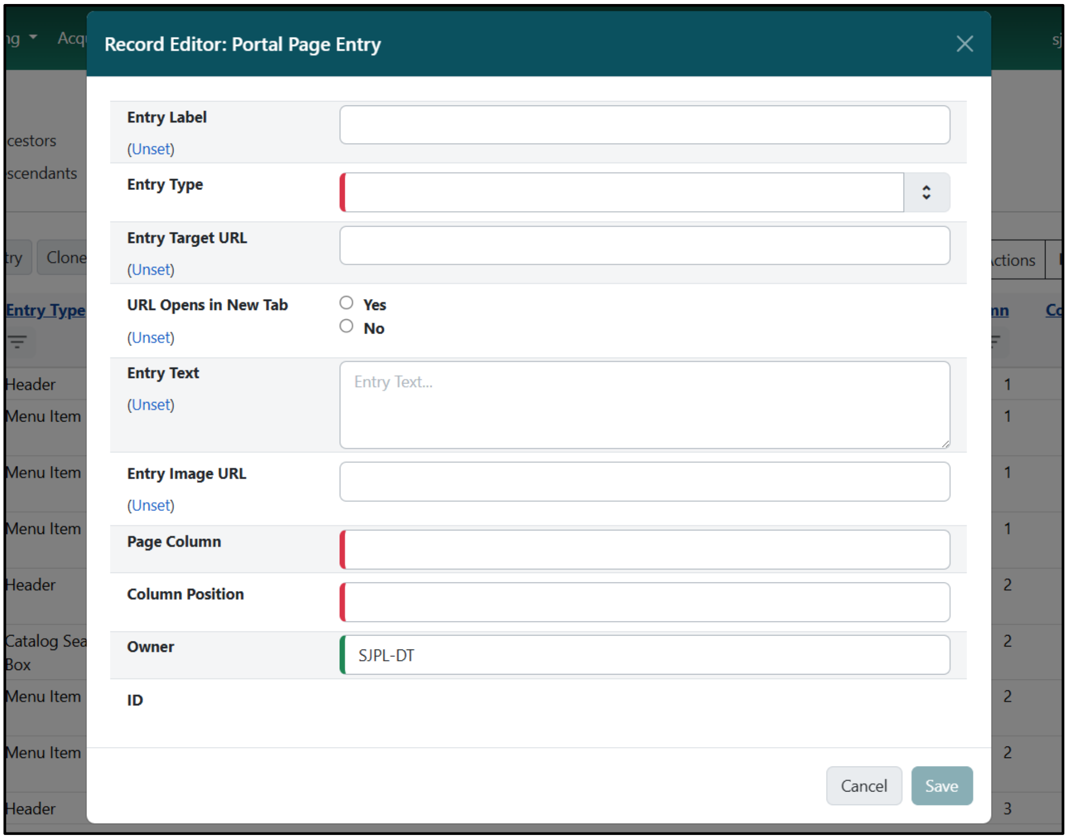
This interface allows staff with the appropriate permissions to customize the staff portal page (AKA homepage or landing page). This can be modified per org unit by the Local Administrator.



Creating a Portal Page Entry

To create a new entry, select **New Portal Page Entry**.





- **Entry Label** (required entry): The text that is shown on the staff portal page.
- **Entry Type** (required entry):
  - Catalog Search Box: This will create a basic Evergreen search box.
  - Header: This will create a column header.
  - Link: This will create a link to an external URL.
  - Menu Item: This will create a link to an internal Staff Client page.
  - Text and/or HTML: This will create a short piece of either plain text or marked up text.
- **Entry Target URL** (required entry if Entry Types are *Link* or *Menu Item*):
  - For *Link*: external URLs must include the full path
  - For *Menu Item*: use relative URLs (these will start with /eg/staff or /eg2/staff)
- URL Opens in New Tab (required entry):
  - Yes: The link will open a new tab.
  - No: The link will open in the current tab.
- **Entry Text** (required entry if Entry Type is *Text and/or HTML*):
  - Basic HTML is acceptable.
- **Entry Image URL** (required entry if Entry Types are *Link, Menu Item or Text and/HMTL)*:

This is a text field to specify an image URL to use for the icon that displays next to each portal page entry.

    - Images must be approximately 48 x 48 pixels.
    - External image links must use an https URL.
    - Stock images on the Evergreen server can use a relative link (i.e. /images/portal/retreivepatron.png)
    - Stock images available in /images/portal include:
        - background.png
        - back.png
        - batchimport.png
        - book.png
        - bucket.png
        - eg_tiny_logo.jpg
        - forward.png
        - helpdesk.png
        - holds.png
        - logo.png
        - map.PNG
        - newtab2.PNG
        - receipt_editor.png
        - registerpatron.png
        - reports.png
        - retreivepatron.png
        - z3950.png
- **Page Column** (required entry): Indicates the column position from left to right horizontally.
    - 1: left column
    - 2: middle column
    - 3: right column
- **Column Position** (required entry): Indicates the row position from top to bottom vertically.
    - 0: the header
    - 1: top row
    - 2: middle row
    - 3: bottom row
- **Owner** (required): This defaults to the workstation organizational unit.
- **ID** (automatically generated): The internal system ID of the specific Portal page element.

Once the fields are filled in, click **Save** to create the new portal page.

Editing a Portal Page Entry

To edit the portal page entry, double click on the entry from the list, or right-click or select **Actions** and choose **Edit Selected**.

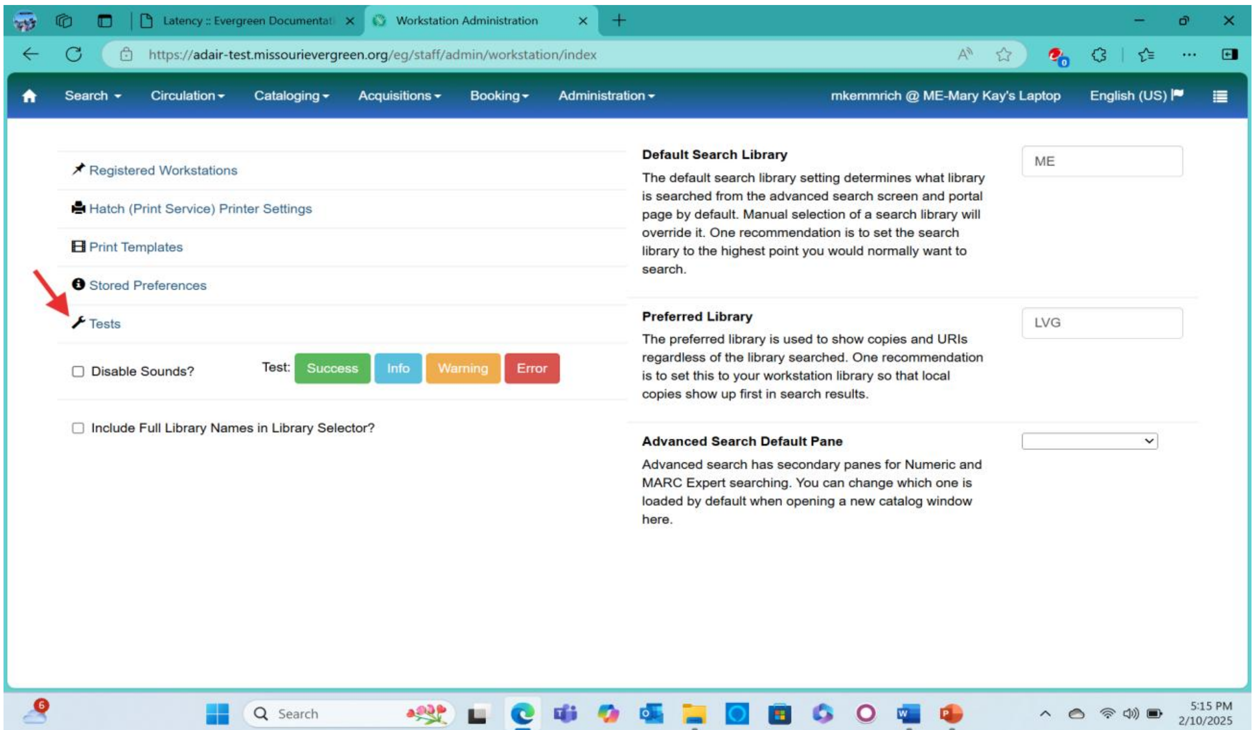
Deleting a Portal Page Entry

If you wish to remove an existing portal page entry, either right-click on the entry, or select **Actions** and choose **Delete Selected**.

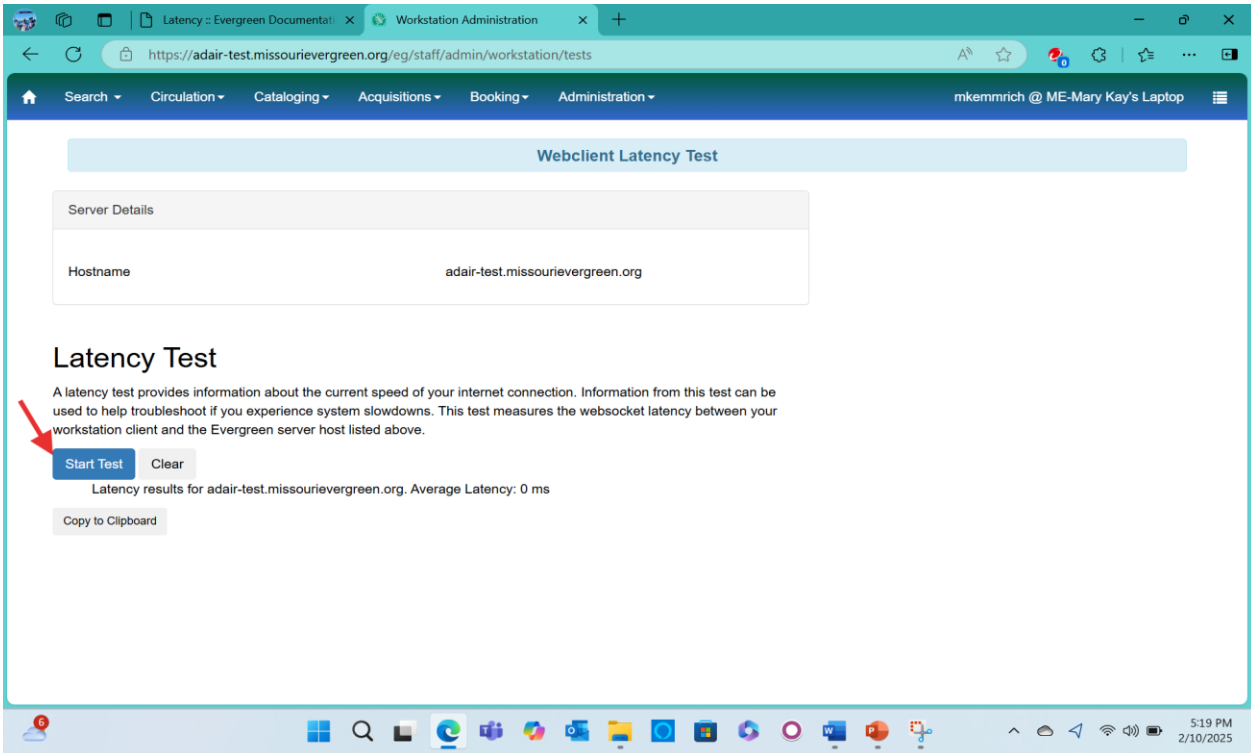
Testing Workstations

There are times when Evergreen response times are slow. The “Tests” option from the workstation administration screen allows users to run a latency test to determine the response time between your workstation client and the Evergreen databases. This information is beneficial when trying to determine the cause for slow response times. Communication errors may exist between your workstation and Evergreen, as this test would show. Other issues may be your local carrier or in-house issues with wi-fi or routing.

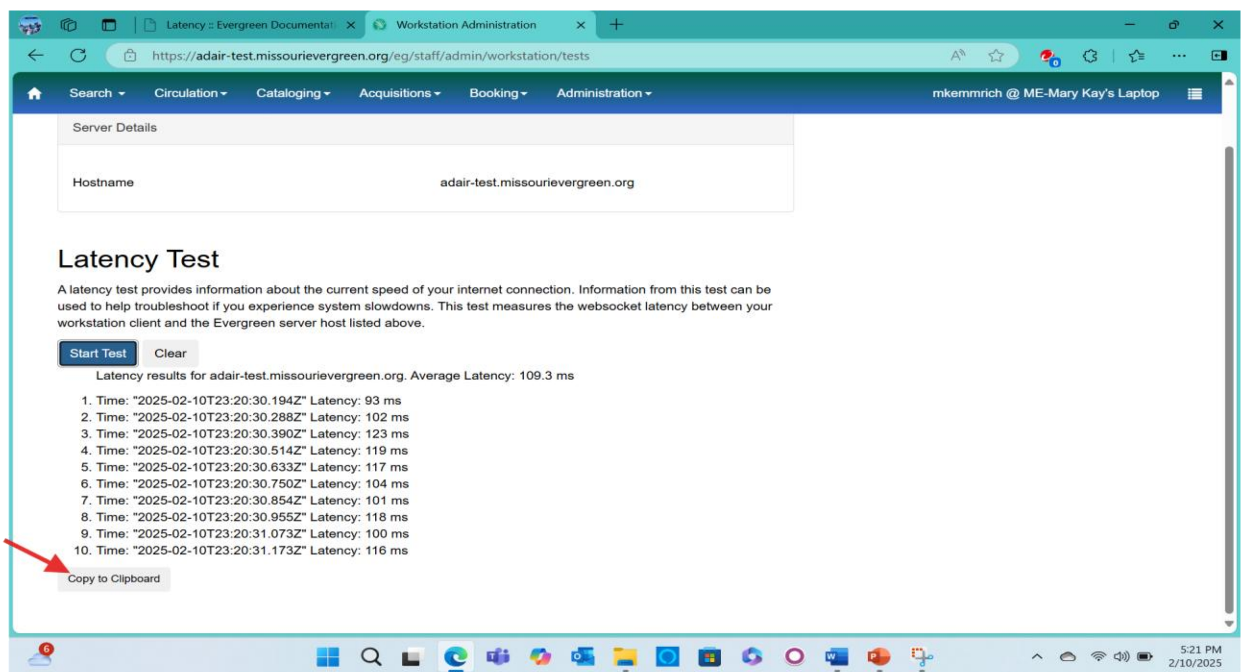
First, select “Tests” on the workstation administration screen:



Read the next screen, and then select “start test.”



The test will run, and a button will appear for you to copy the results of the testing when it is completed. It is recommended that you copy the results so that they are easily accessible when communicating with other agencies.



Using Hatch for Printer Management

Hatch is a browser add-on currently available for Google Chrome and Mozilla Firefox. It will allow for silent printing (send receipts and reports to the printer without staff clicking through the printer dialog) to specific printers. It is not a required add-on nor required for computers connected to a single printer; staff can simply use the native printing dialog to send print jobs.

Hatch stores configurations on your workstation, not in the database, so configurations must be performed on each workstation.

Installation

To install Hatch, you must be logged in as an operating system administrator on the computer where you want to install it. You may need to involve your IT support if you do not have admin access to your computers. (This is separate from administration rights in Evergreen!)

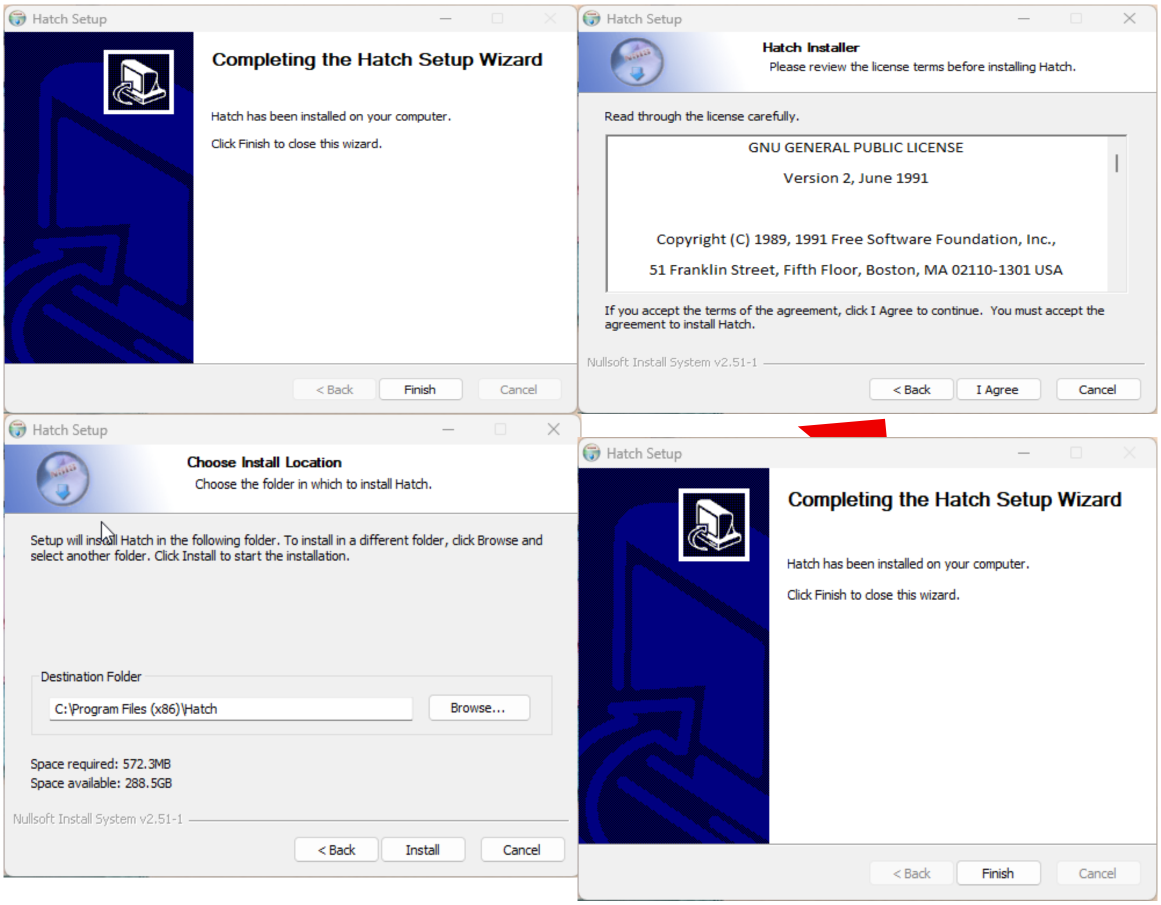
Hatch requires installing both a Windows application and a separate browser extension in order to function. The Windows application **must be installed prior to the extension being enabled**.

Hatch Application

The latest version of the Hatch installer for the application is available at https://evergreen-ils.org/egdownloads/

	3.15 Series	3.14 Series	3.13 Series	3.12 Series
Status	stable	stable	security only	security only
Latest Release	3.15.3	3.14.8	3.13.11	3.12.10
Release Date	2025-07-15	2025-07-15	2025-05-21	2024-12-20
Release Notes	Release Notes	Release Notes	Release Notes	Release Notes
Tabular Release Notes	Tabular release notes summary			
ChangeLog/ShortLog	Git ShortLog	Git ShortLog	Git ShortLog	Git ShortLog
Evergreen Installation	Install Instructions	Install Instructions	Install Instructions	Install Instructions
Upgrading	Notes on upgrading from 3.14.x		Notes on upgrading from 3.12.x	Notes on upgrading from 3.11.x
OpenSRF Software	3.3.2 (md5)	3.3.2 (md5)	3.3.2 (md5)	3.2.6 (md5)
Server Software	Source (md5)	Source (md5)	Source (md5)	Source (md5)
Web Staff Client Extension ("Hatch")	Windows Hatch Installer 0.3.3 (md5) – Installation Instructions (Windows & Linux)			
Git Repository	Git Location	Git Location	Git Location	Git Location

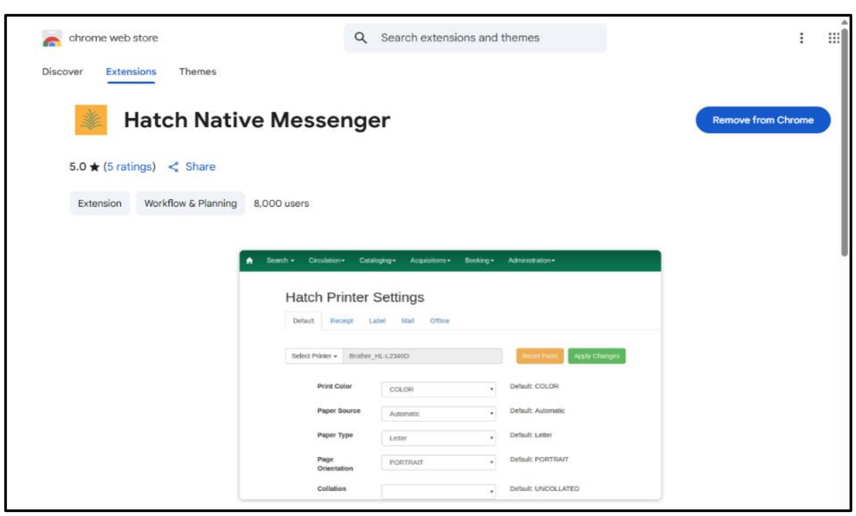
Download the executable and run it. Click through each of the installation confirmation steps.



Hatch Browser Extension

The Hatch browser extension can be installed directly from your browser's extension store:

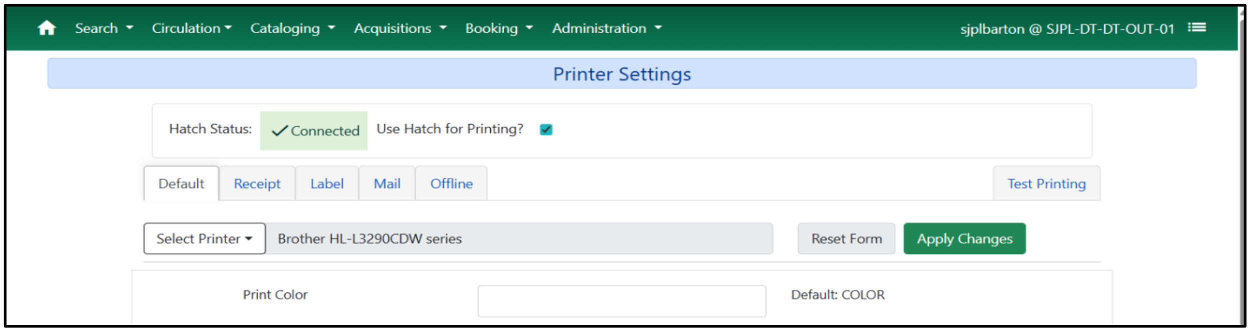
- For Google Chrome: https://chrome.google.com/webstore/category/extensions
- For Firefox Extensions: https://addons.mozilla.org/en-US/firefox/extensions/



Configuring Hatch

Location: *Administration → Workstation → Hatch (Print Service) Printer Settings*

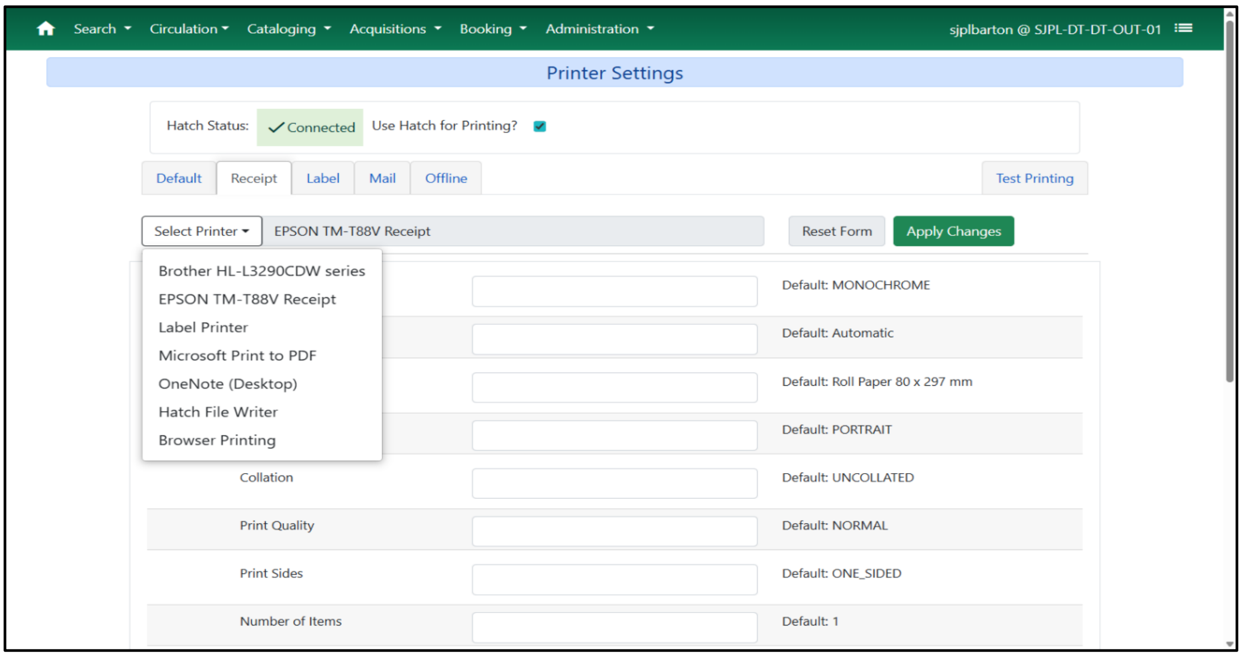
Click in the box next to **Use Hatch for Printing** in order to enable silent printing.



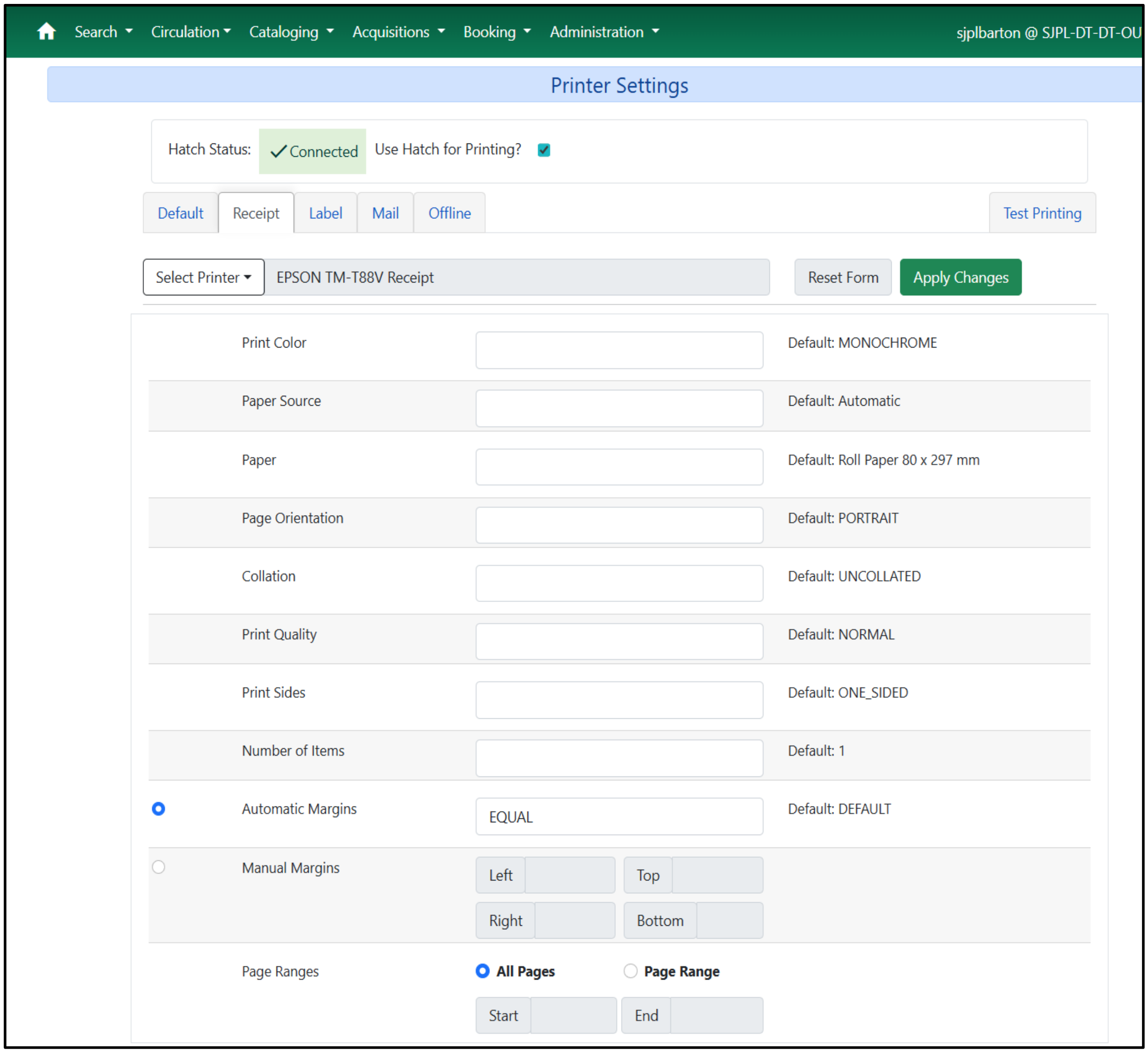
The Hatch printer settings must be configured in order to use multiple printers and print setups.

Printer Contexts

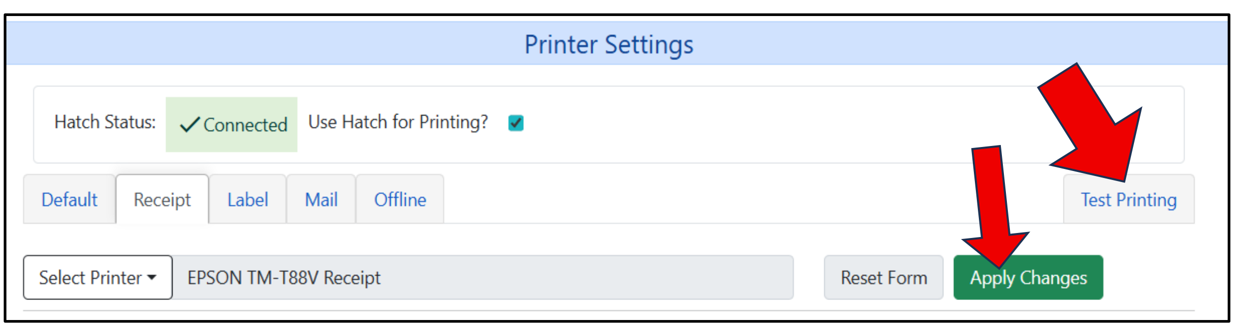
For each tab, which represents printing contexts (Default, Receipt, Label, Mail, and Offline), you may provide a separate printing configuration. Begin with choosing a printer. It is common to set your default to a printer that can handle standard letter paper. Set the receipt context to use a receipt printer. Label should be set for a roll-label printer if you have one. Mail generally prints to letter-sized paper. Offline is used almost exclusively for receipts, so connecting it to the receipt printer is recommended. For more information about print contexts, please check the following section on Print Templates.



Fill the rest of the fields as useful based on your available hardware.

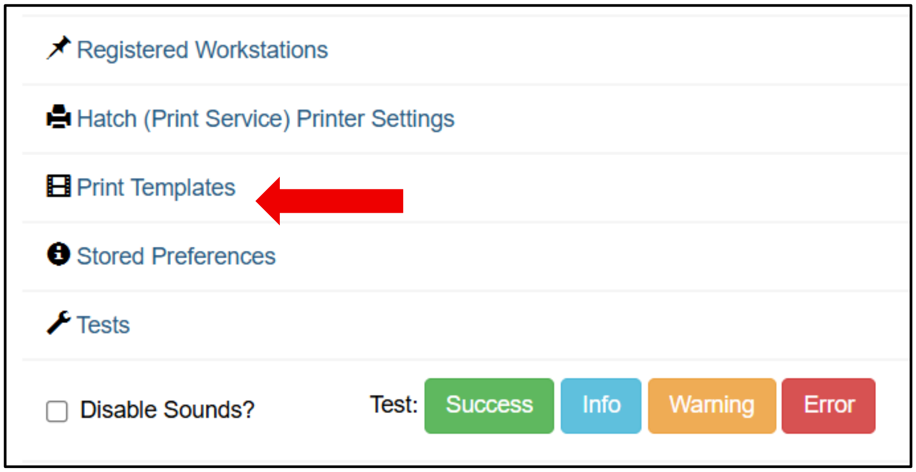


Click on **Apply Changes** to finalize and save any configuration updates you make. The **Test Printing** link at the top of the configuration menu may be used to run a test print.

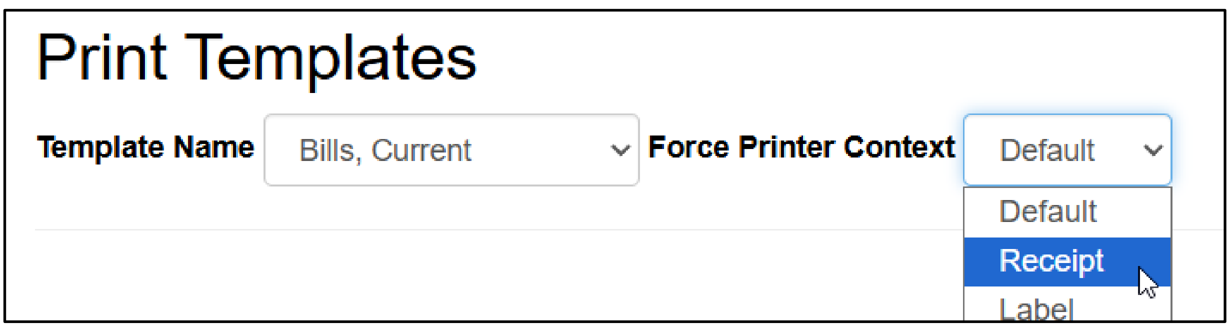


Print Templates

Location: *Administration → Workstation → Print Templates*



Print templates are used to configure various receipts and printable data in Evergreen. They are created using a combination of HTML, CSS, and Angular expressions, and are assigned to printing contexts. Print contexts allow you to use Hatch to preset the printer to which a selected template will be sent. As an example, the Checkout receipt template might be set to the Receipt context so that it always prints on your chosen receipt printer.



HTML tags and CSS styling allow for a great deal of local customization in the presentation. There are hundreds of instructional websites and books out there to help you get to know HTML and CSS. If you'd like slightly more structured instruction, you might try the curriculum at:

- Codecademy
- W3Schools

Angular expressions provide the dynamic content in a receipt or printable report. Angular use is changing rapidly in Evergreen, but there are many online support websites, including:

- Angular (the project)
- W3Schools

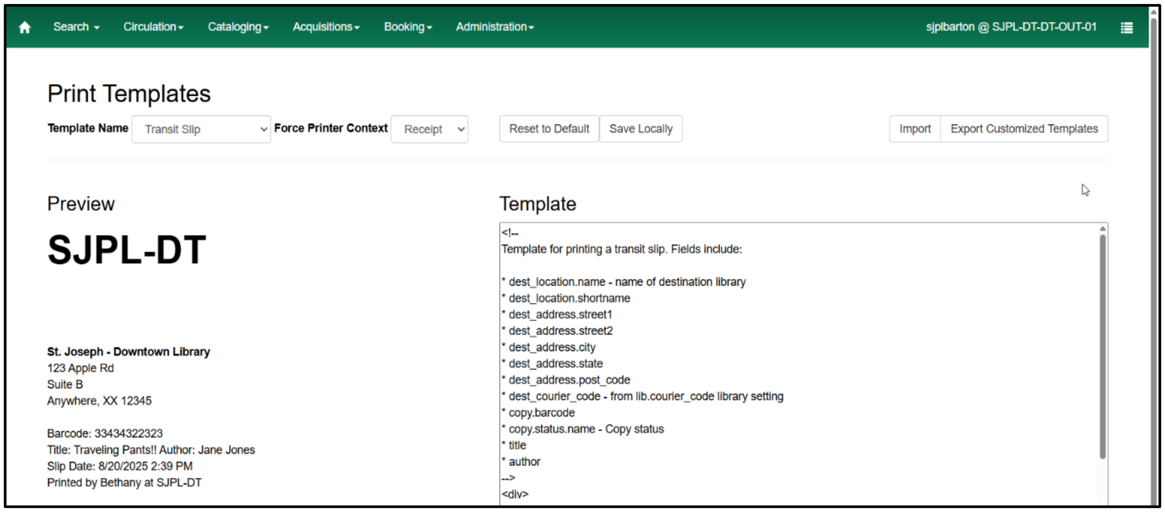
The Angular expressions are used to define what information from the database appears on a selected receipt. Not all expressions are available on every receipt. Most objects and fields specific to a given receipt type are listed in the leading comment section of the receipt template. Expressions are built with fields out of objects. Expressions are placed inside paired double curly brackets, e.g. {{patron.first_given_name}}, {{checkout.title}}, {{dest_location.shortname}}. Use periods to join them and pull out specific data, i.e. {{patron.money_summary.balance_owed}} looks at the value stored for the balance_owed from the money_summary portion of the patron object.

For general use in the Print Template Editor, you only need to know how to enter an expression and how to style it. Angular styling is completed by adding a pipe (|) to the end of the expression and adding a filter to transform the base entry. Examples of some of the transform filters used in templates include:

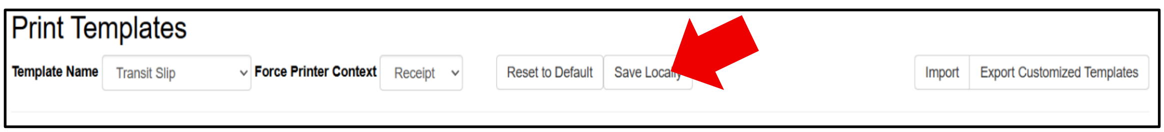
- currency: adds currency notation to a number
    - {{payment_total | currency}} == $12.99
- date: present a date in a specified format.
    - {{checkout.circ.due_date | date:'mediumDate'}} == Apr 15, 2018
    - {{hold.shelf_expire_time | date:'MM/dd'}} == 04/15
- limitTo: creates a substring
    - {{patron.family_name | limitTo:3}} == Jon [*First 3 letters of patron last name*]
    - {{patron.card.barcode | limitTo:-3}} == 345 [*Last 3 digits of patron barcode*]
- uppercase: makes all characters in a string upper case.
    - {{patron.family_name | limitTo:3 | uppercase}} == JON [First 3 letters of patron last name in all capital letters]

Editing Print Templates

To edit templates, select the desired template from the Template Name dropbox and enter your edits into the Template box.

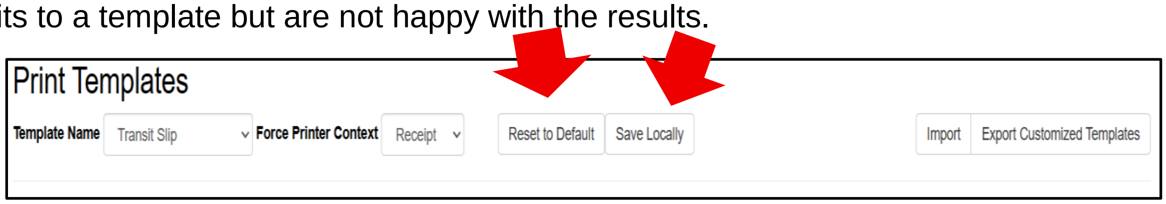


Be sure to click **Save Locally** after each template edit in order to save any changes made!



Restoring Print Templates

You can always restore a print template to the consortium default by clicking on *Reset to Default* and then *Save Locally*. This can be especially useful if you've made a lot of edits to a template but are not happy with the results.



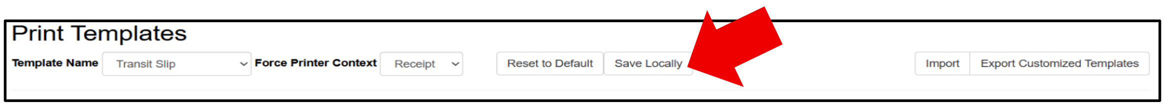
Sharing Print Templates

The entire set of print templates may be exported and shared on other workstations. You cannot pick and choose individual templates for export. Simply click on **Export Customized Templates** to save the file to an accessible location.

Then open that location and click on **Import** on the new workstation.

For sharing single templates, it is simple to copy and paste the text of the template from one workstation to another.

Be sure to *Save Locally* after pasting the replacement template into a new workstation.



Available Customized Print Templates

- Bills, Current
- Bills, Historical
- Bills, Payment
- Checkin
- Checkout
- Hold Shelf Slip
- Hold Transit Slip
- Holds for Bib Record
- Holds for Patron
- Holds Pull List
- Hold Shelf List
- In-House Use List
- Item Status
- Items Out
- Patron Address
- Patron Note
- Renew
- Transit List
- Transit Slip
- Offline Checkout
- Offline Renew
- Offline Checkin
- Offline In-House Use

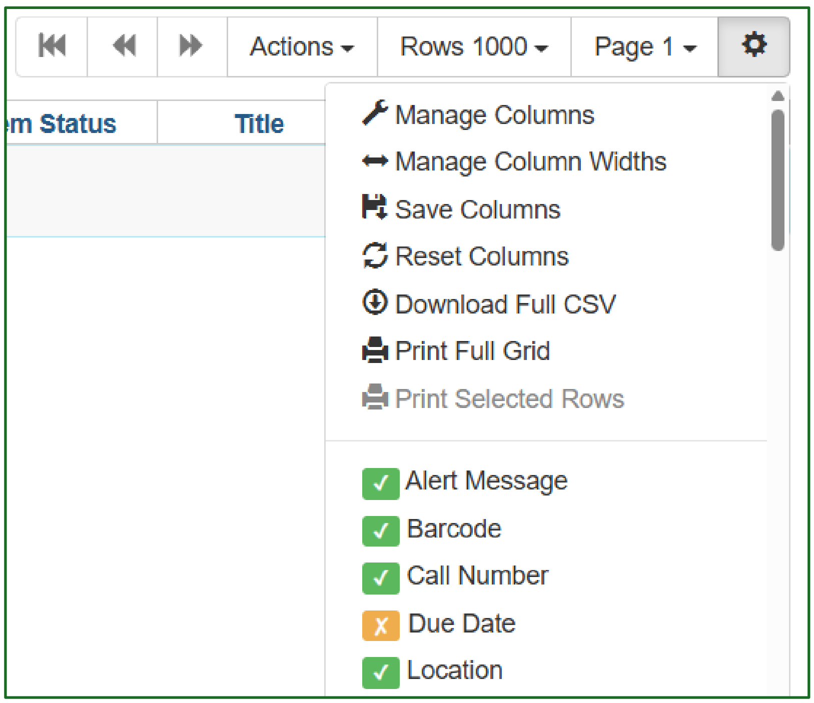
Additional Receipt Template Customization Tips

Some receipt template customization tips and code snippets have been gathered from the Evergreen ILS User community and are available here.

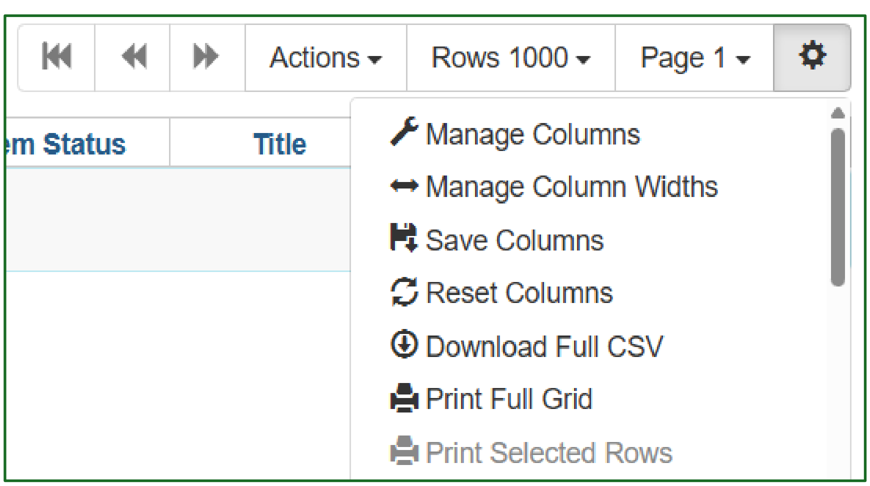
Grid Management

Most interfaces in the client include grids that may be configured using the Column Picker/Grid Manager. Each grid may be configured separately on each user account. Each grid has a unique set of columns that may be added or removed to enhance the interface's usefulness. The column picker/grid manager menu is accessed by clicking on the down arrow button on the grid menu.

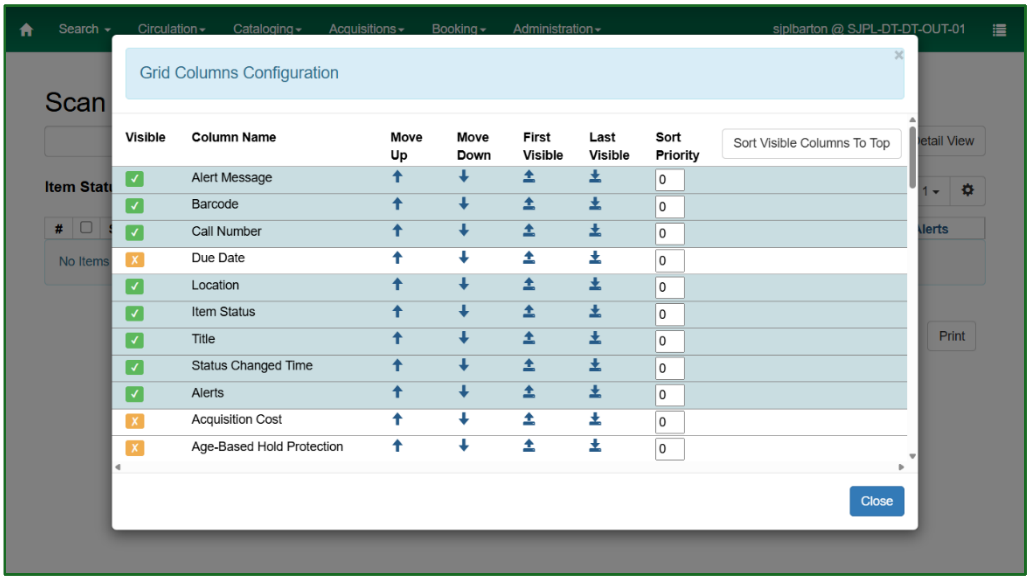
To add or remove columns, click on the column picker/grid manager button and click on the entries. An orange "*x*" indicates that a column is not in use. A green check mark indicates the column appears in the grid.



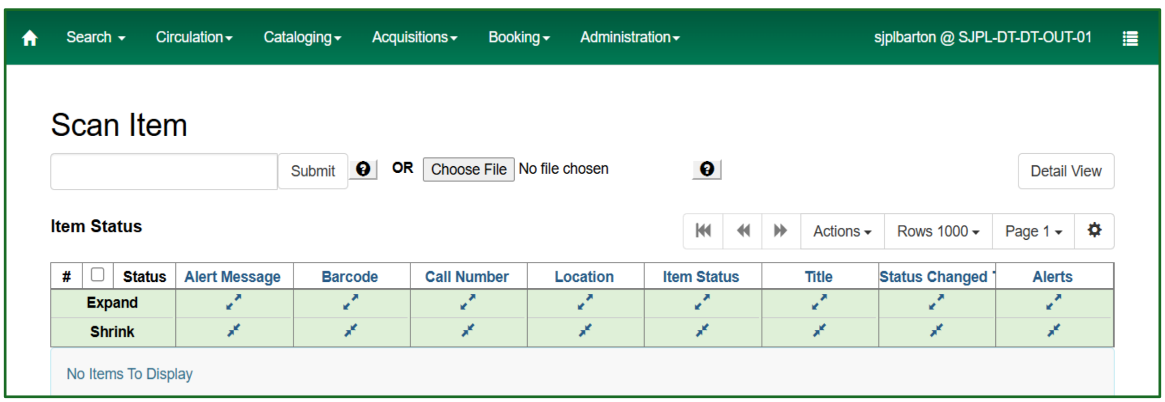
You can move and select/deselect columns using the **Manage Columns** option. Sortable interfaces also allow you to set primary sort columns rather than relying on the default Left-to-Right order.



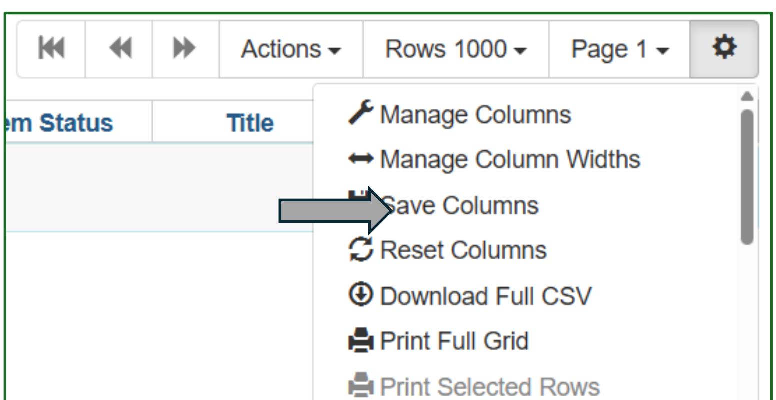
An orange “*x*” indicates that a column is not in use. A green checkmark indicates the column appears in the grid. Use the up arrows to move a selected column to the left; down arrows move columns to the left. Sort priority may be set if you do not wish to sort on the default Left-to-Right order.



You can manage column widths using the **Manage Column Widths** option. Changes made here are relative, so widening one column narrows all of the others.



Use the **Save Columns** menu option to finalize your settings.



Work Log

Location: *Administration → Local Administration → Work Log*

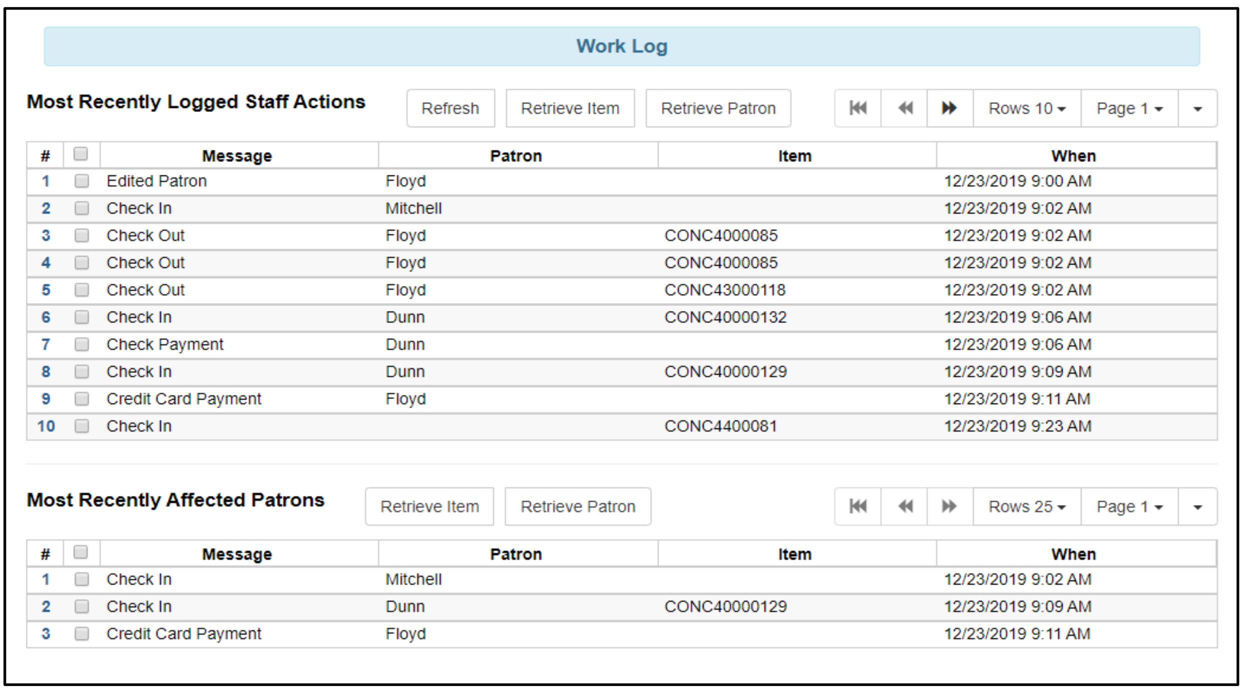
The Work Log records check-ins, check-outs, patron registration, patron editing, renewals, payments and holds placed from with the patron record for a given login.

There are two separate logs: Most Recently Logged Staff Actions and Most Recently Affected Patrons.

- The Most Recently Logged Staff Actions logs the transactions in order they have occurred on the workstation.
- The Most Recently Affected Patrons log is a listing of the last patrons that transactions were created for.

The Work Log can contain a maximum number of transactions; this number is set via the Library Settings Editor. They are in the GUI group of settings. Work Log: Maximum Actions Logged effects the number of transactions listing under the Most Recently Logged Staff Actions and Work Log: Maximum Patrons Logged limits the number of patrons that are listed in the log.

Example



#		Message	Patron	Item	When
1		Edited Patron	Floyd		12/23/2019 9:00 AM
2		Check In	Mitchell		12/23/2019 9:02 AM
3		Check Out	Floyd	CONC4000085	12/23/2019 9:02 AM
4		Check Out	Floyd	CONC4000085	12/23/2019 9:02 AM
5		Check Out	Floyd	CONC43000118	12/23/2019 9:02 AM
6		Check In	Dunn	CONC40000132	12/23/2019 9:06 AM
7		Check Payment	Dunn		12/23/2019 9:06 AM
8		Check In	Dunn	CONC40000129	12/23/2019 9:09 AM
9		Credit Card Payment	Floyd		12/23/2019 9:11 AM
10		Check In		CONC4400081	12/23/2019 9:23 AM

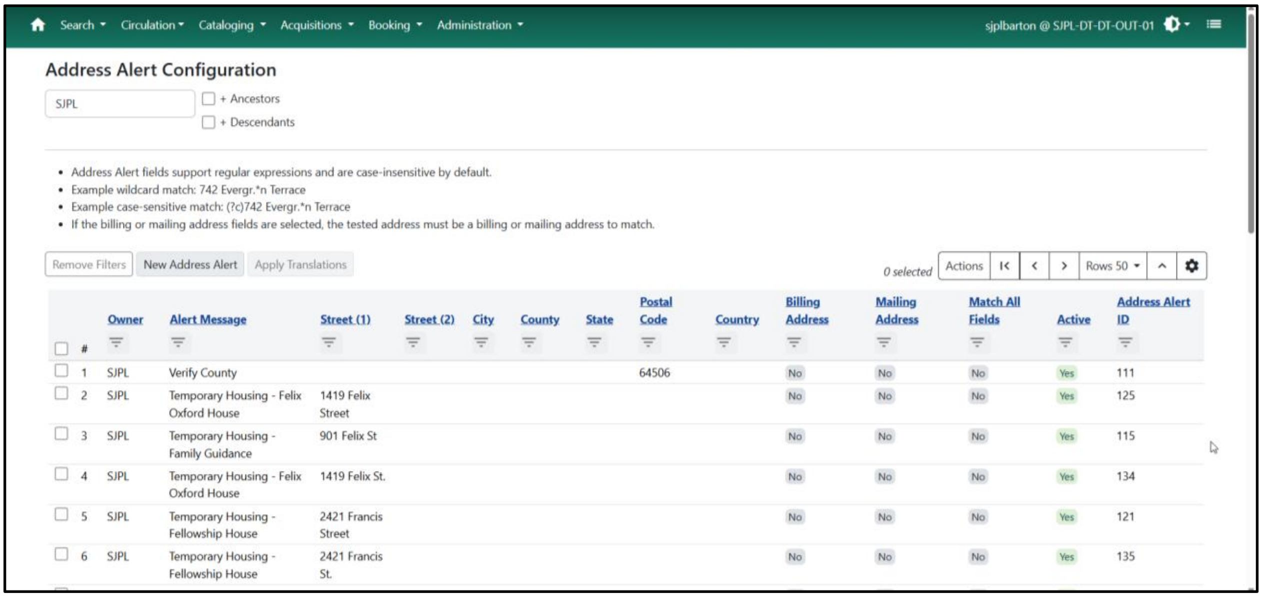
#		Message	Patron	Item	When
1		Check In	Mitchell		12/23/2019 9:02 AM
2		Check In	Dunn	CONC40000129	12/23/2019 9:09 AM
3		Credit Card Payment	Floyd		12/23/2019 9:11 AM

Address Alerts

Location: *Administration → Local Administration → Address Alerts*

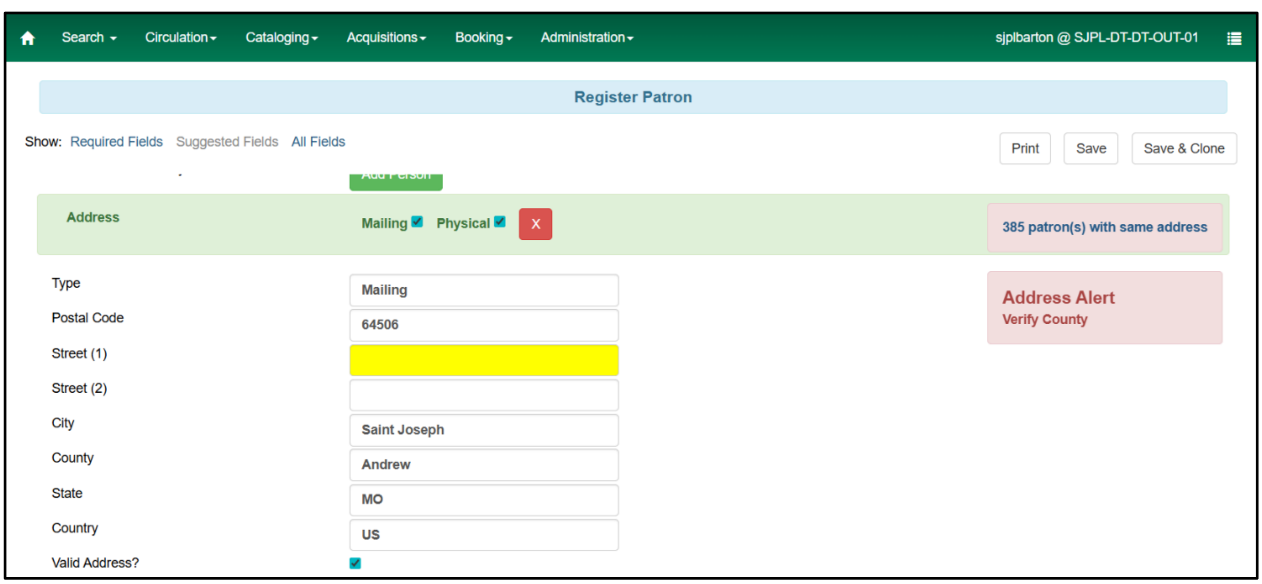
The Address Alert module gives administrators the ability to notify staff with a custom message when addresses with certain patterns are entered in patron records.

This feature only serves to provide pertinent information to your library system's circulation staff during the registration process. An alert will not prevent the new patron account from being registered, and the information will not be permanently associated with the patron account.



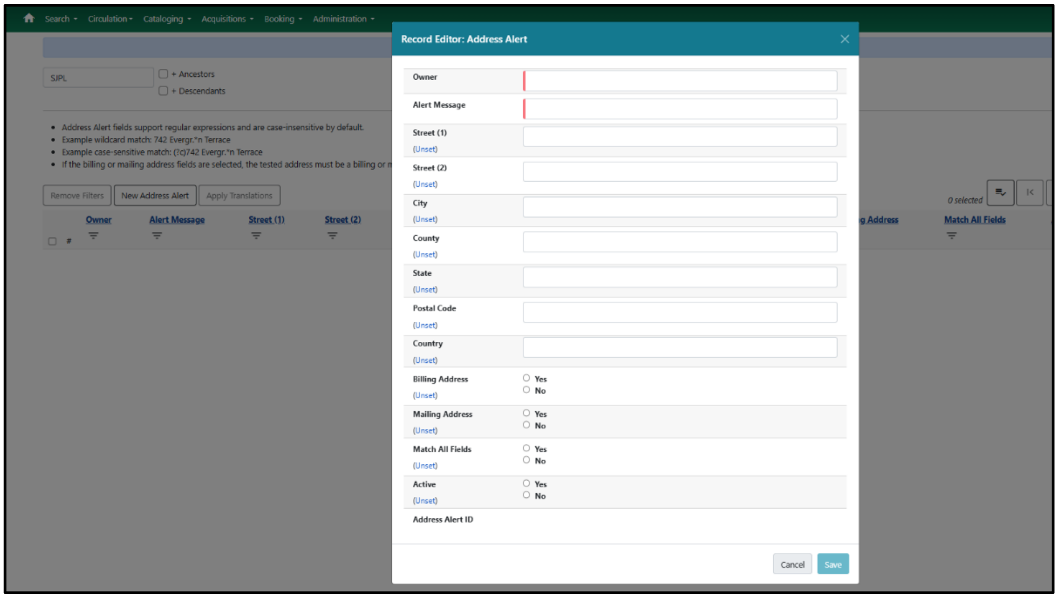
Staff View of Address Alerts

When an Address Alert is triggered by a matching address, staff will see the address block highlighted with a red dashed line, along with an Address Alert block which contains the alert message.



Adding a New Address Alert

To create a new address alert, click **New Address Alert**.



- **Owner** (required): The organization unit who owns this alert. Set to system or branch.
- **Alert Message** (required): Message that will be displayed to staff when this alert is triggered.
- **Street (1)** (optional): Street 1 field regular expression.
- **Street (2)** (optional): Street 2 field regular expression.
- **City** (optional): City regular expression.
- **County** (optional): County regular expression.
- **State** (optional): State regular expression.
- **Postal Code** (optional): Postal Code regular expression.
- **Country** (optional): Country regular expression.
- Billing Address (optional):
  - **Yes:** The alert will only match a billing address
  - **No:** The alert will look at all address types
- Mailing Address (optional):
  - **Yes:** The alert will only match a mailing address
  - **No:** The alert will look at all address types
- Match All Fields (optional):
  - **Yes:** All the fields need to match to trigger the alert
  - **No:** Only at least one field needs to match
- **Active** (optional): Check-box that controls if the alert is active or not. Inactive alerts are not processed.

Once the fields are filled in, click **Save** to create the new Address Alert.

Editing an Address Alert

To edit an address alert, double click on the location from the list, or right-click or select **Actions** and choose **Edit Selected**.

Deleting an Address Alert

If you wish to remove an existing address alert, either right click on the entry or select **Actions** and choose **Delete Selected**.

SIP Accounts – Third Party Authentications

Many Missouri Evergreen libraries contract with third-party software vendors for products that need to connect with the Evergreen ILS to work. To verify certain types of information, an MEC member library will require a SIP user account. SIP user accounts are special accounts that must be created and configured by Equinox; they cannot be activated locally. Please contact the Equinox Help Desk for assistance with SIP.

Some examples of third-party software and/or services that require access to Missouri Evergreen resources are:

- Self-checkout stations including RFID
- PC Time Management Systems that require access to patron accounts
- E-book providers who need to authenticate against the Evergreen Indiana patron database
- Remote database authentication (like EZ Proxy)

The Equinox Help Desk staff should be consulted during all negotiations with vendors to ensure that their products are compatible with the Evergreen software and that those products comply with Missouri Evergreen policies if SIP access will be required.

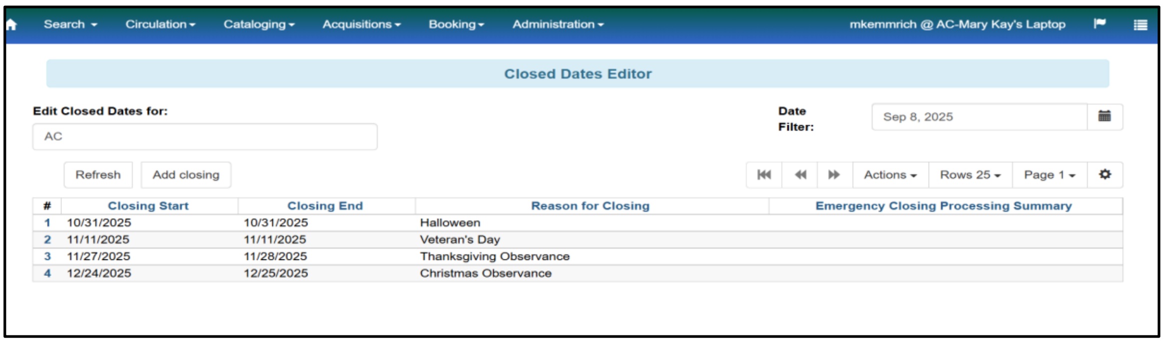
Library Management

Closed Dates Editor

Location: *Administration → Local Administration → Closed Dates Editor*

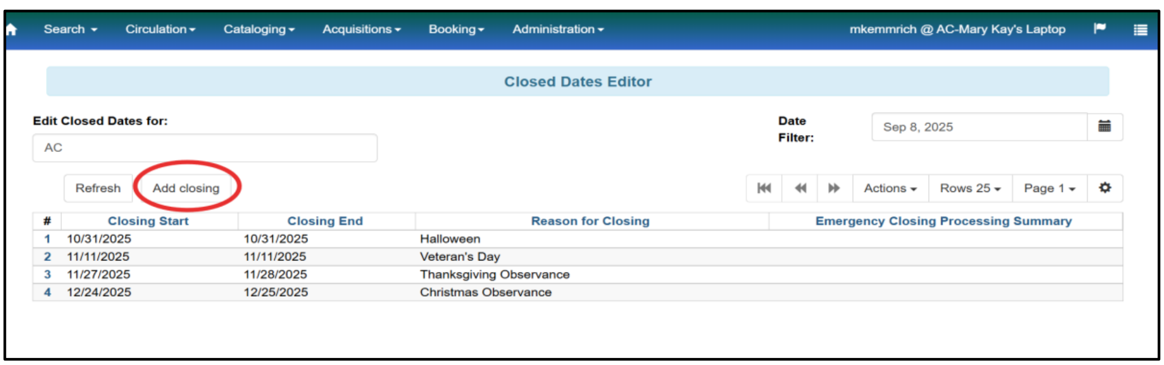
Accessed through the Local Administration page of the Administration menu, the Closed Dates Editor allows staff with local administration permissions to enter special closures into the system. No fines are assessed during-special closures and grace days are forward shifted around them. It is possible to enter a manual specific due date for a special closure date, but the system will not set materials to be due on those dates otherwise.

When opened initially, the editor will show a list of existing closed dates from the date picker forward (previous closures are hidden).

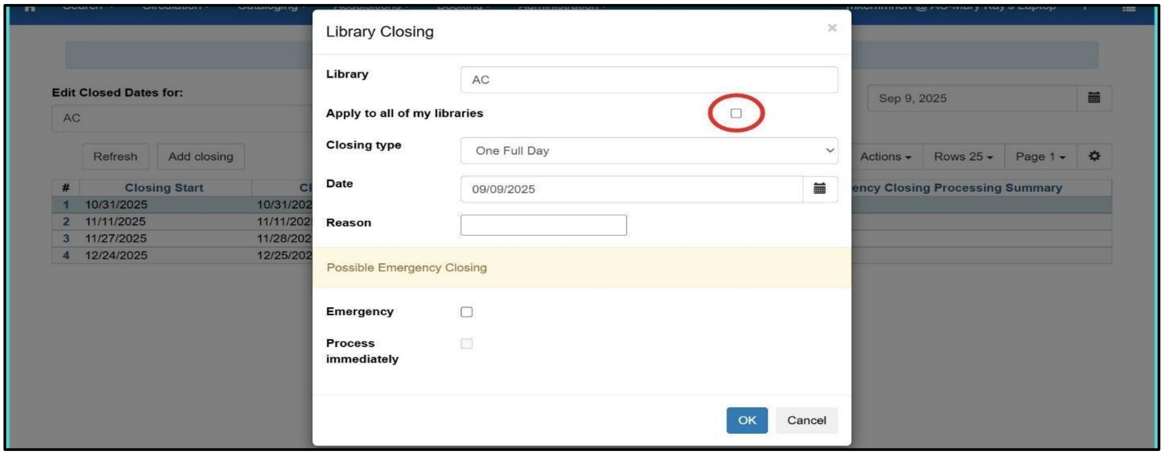


Adding closures

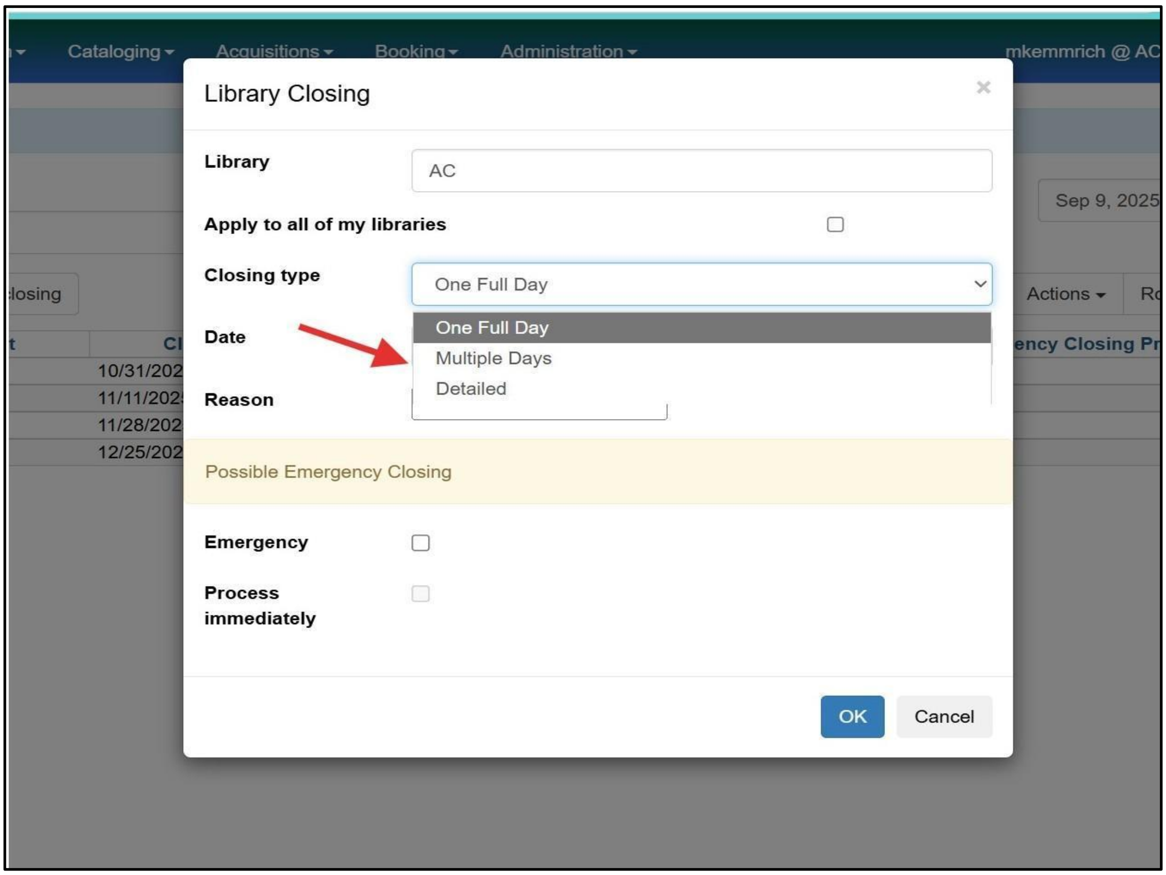
Click on the **Add Closing** button to open the editor.



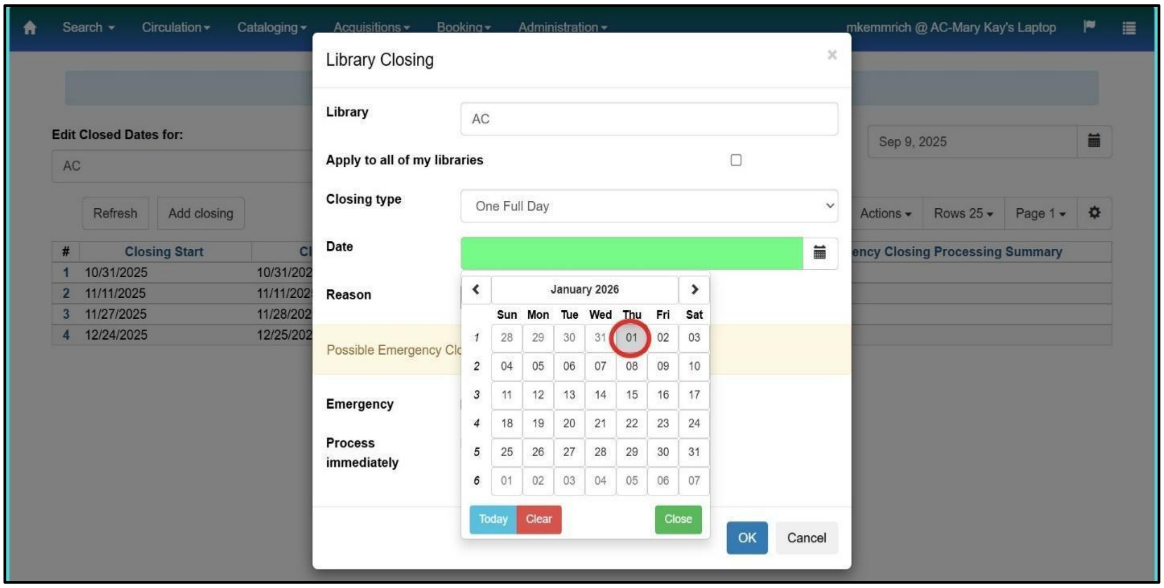
If you have multiple branches, you can apply the closure to all of them by checking the box next to "**Apply to all of my libraries**." Leaving the box blank will apply the closure just to the branch listed at the top of your screen. This will need to be selected even if your library at the system-level is visible.



Select the closure type: 1-day, multiple days, detailed (hourly).



Select a date for the closure. You can enter it using your keyboard or by clicking on the calendar widget and choosing a date there.



Give the closure a name/reason.

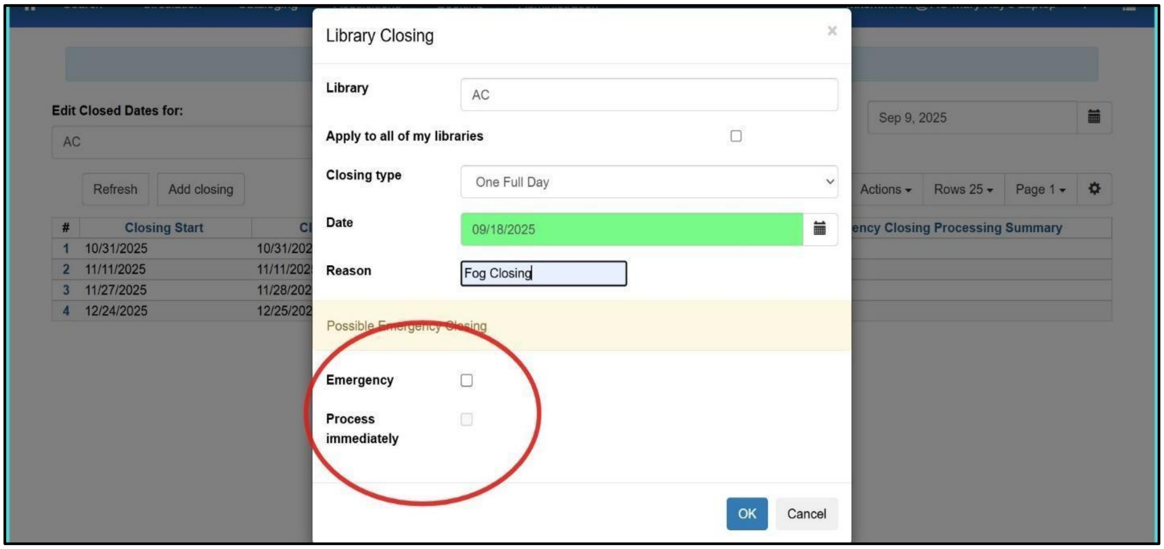
Click **OK** to save.

Your interface will refresh with the new closure appearing in the grid. Note that Emergency closures may require adjusting the date picker at the top of the interface to view.

Emergency closures

If you are forced to close unexpectedly due to circumstances beyond your control or need to schedule a closed date that is **fewer than 21 days in the future**, you can create an emergency closure so patrons are not negatively impacted by the closure. Emergency closures move due dates and hold expirations and void the fines assessed on the date of the emergency.

To create a closure as an emergency, follow the procedure above, but in the lower half of the editor, click the **Emergency** and **Process Immediately** boxes before saving.

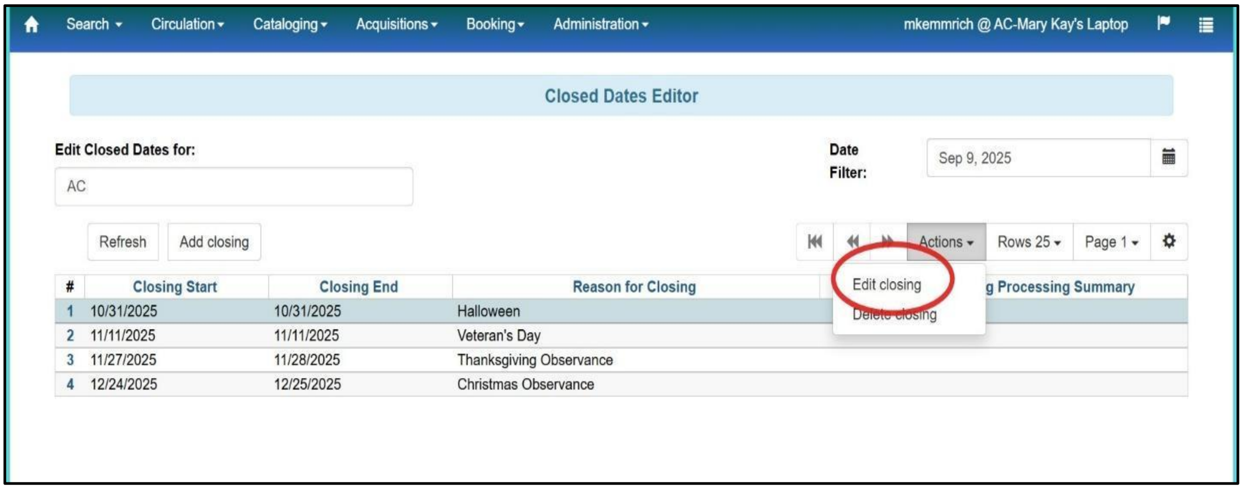


Click on **OK** to finalize and the emergency processing will begin. It may take a few minutes depending on the number of transactions that need to be updated.

Once completed, you may need to adjust the Date Filter to view the date if in the past, but a summary of the transactions affected will appear in your grid for review.

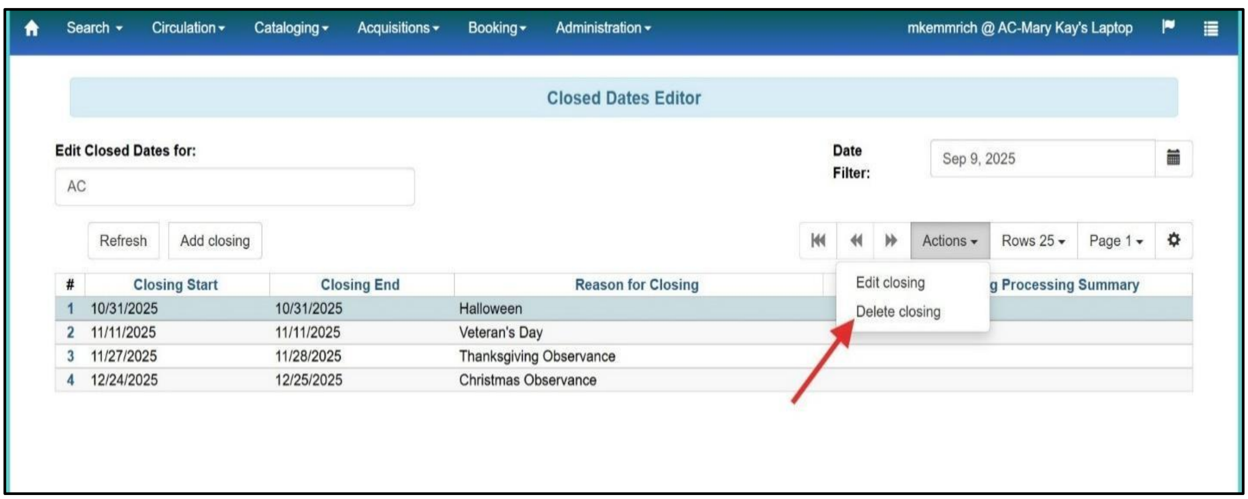
Editing a closed date

Double-click on a closure or choose **Edit closing** from the **Actions** menu to reopen the editor and make any changes necessary.



Deleting a closed date

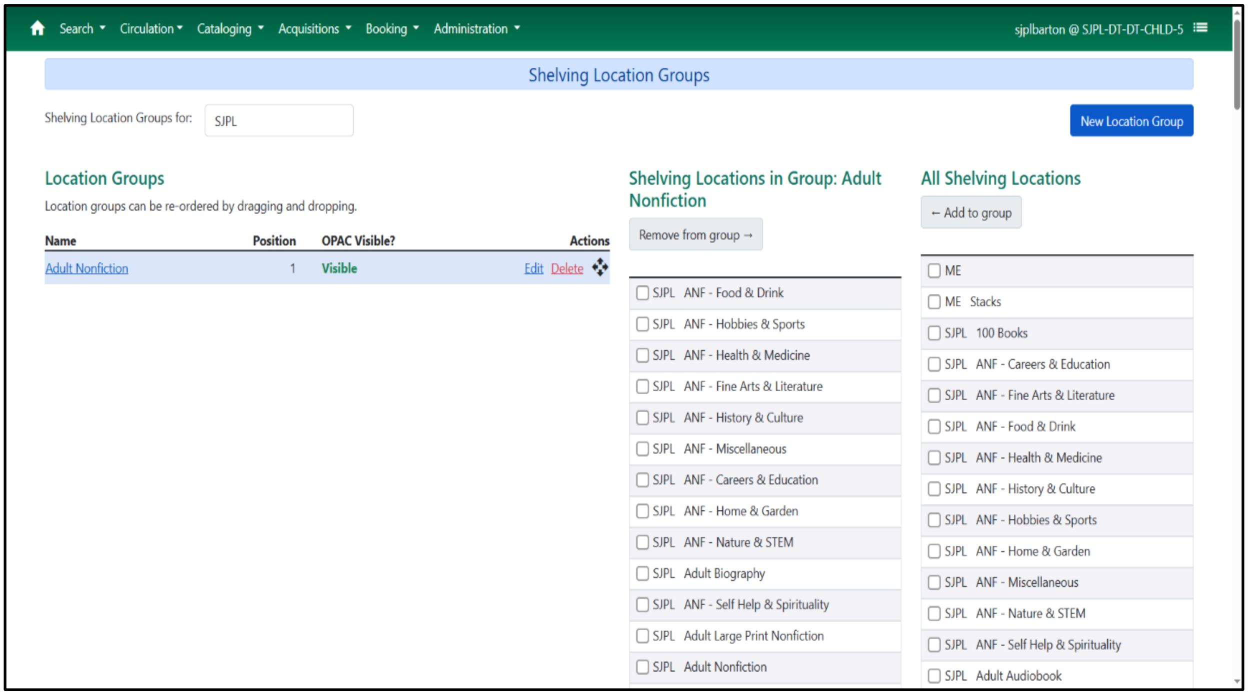
To remove a closing, select the closing and choose **Delete closing** from the Actions menu.



Shelving Location Groups

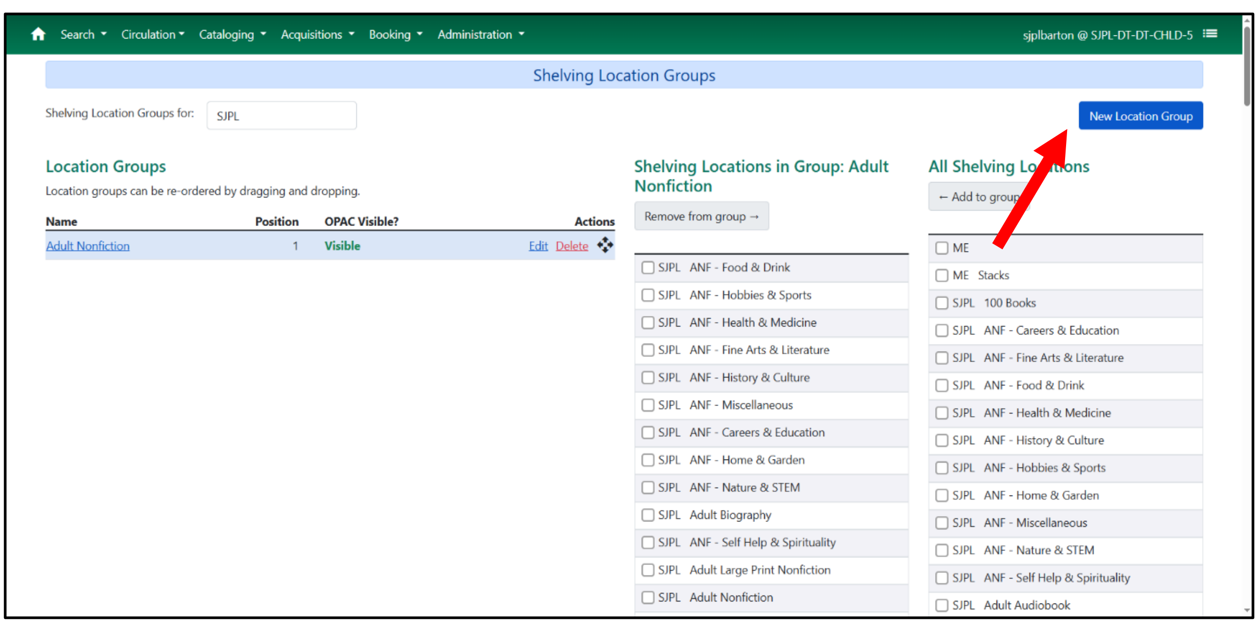
Location: *Administration → Local Administration → Shelving Location Groups*

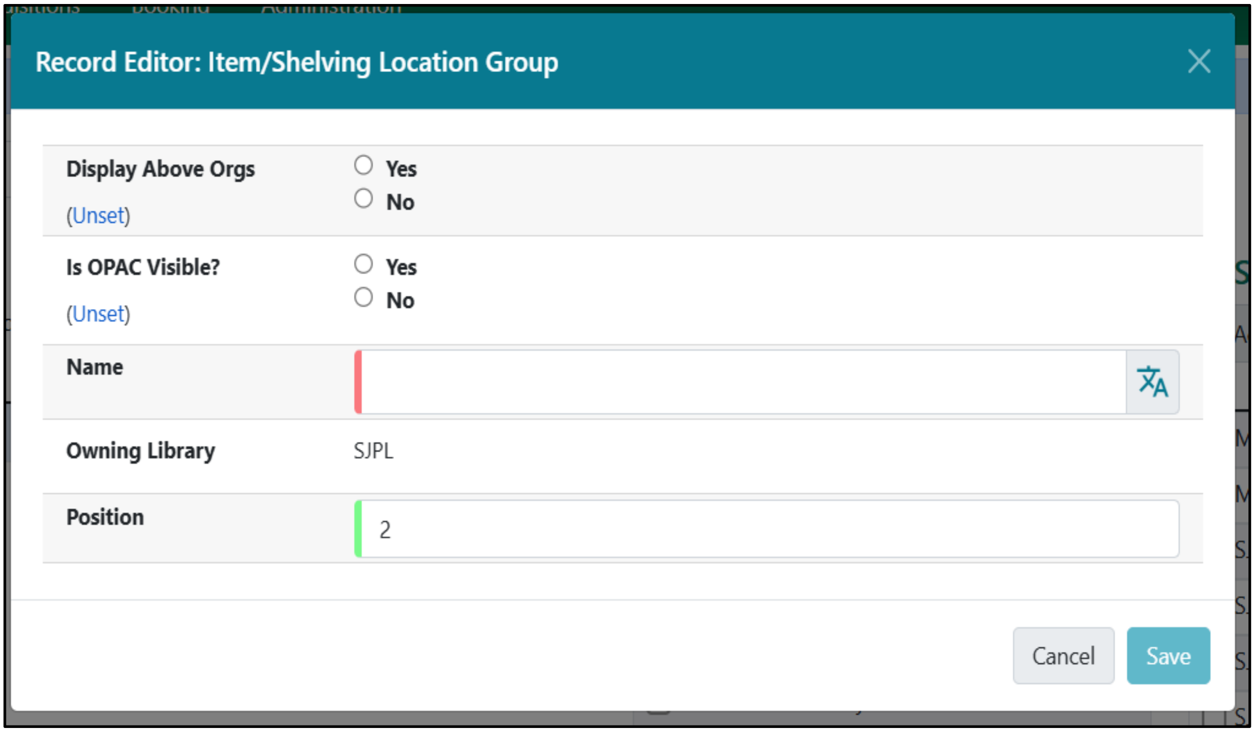
This feature allows Local Administrators to create and name sets of shelving locations to use as a search filter in the catalog. OPAC-visible groups will display within the library selector in the Public Catalog.



Creating a Shelving Location

To create a new shelving *location*, click **New Location Group**.

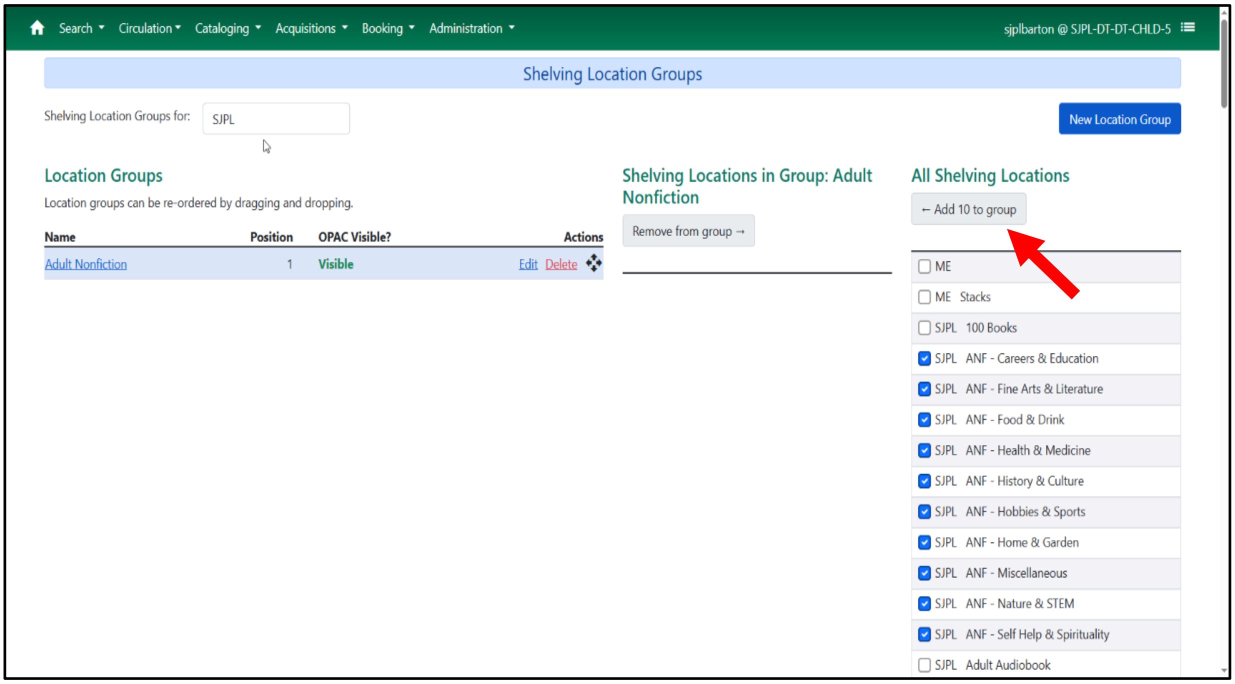




- **Display Above Orgs** (required entry):
    - Yes: The group will appear above the branches or sub-libraries of its parental org unit.
    - No: The group will only appear for the org unit selected.
- **Is OPAC Visible?** (required entry):
    - Yes: Allows patrons to use the location groups on the public catalog.
    - No: Only staff can use the location groups.
- **Name:** The name of the shelving location group as you wish it to appear in the catalog.

Once the fields are filled in, click **Save** to create the new shelving location group.

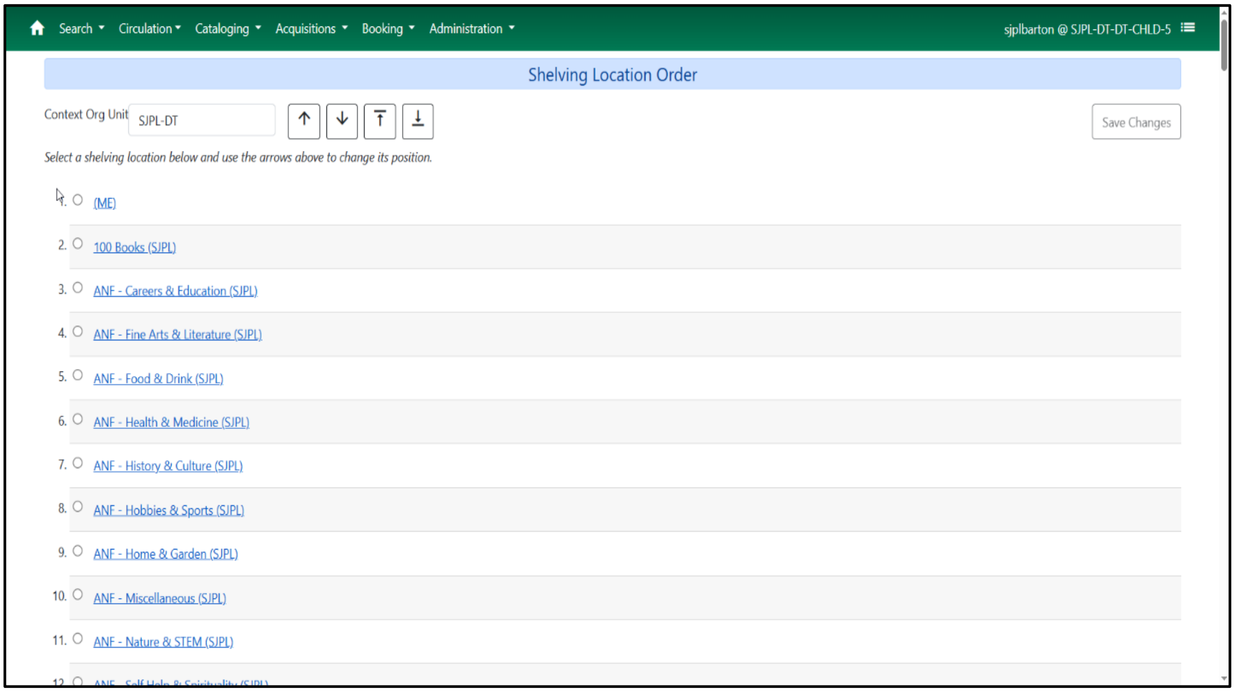
Select the shelving locations that you want to add to the group and click **Add to group**. The shelving locations will populate the middle column, Group Entries.



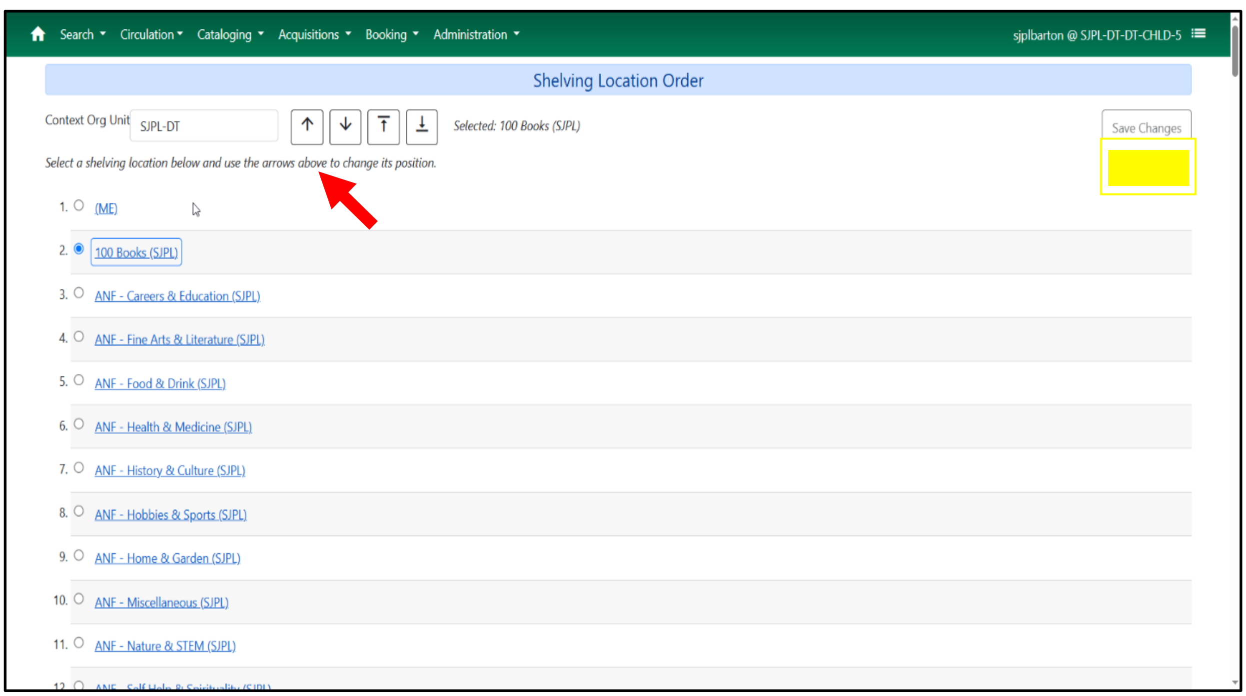
Shelving Location Order

Location: *Administration → Local Administration → Shelving Location Order*

By default, Evergreen displays shelving locations in alphabetical order. This order can be modified per org unit by the Local Administrator.



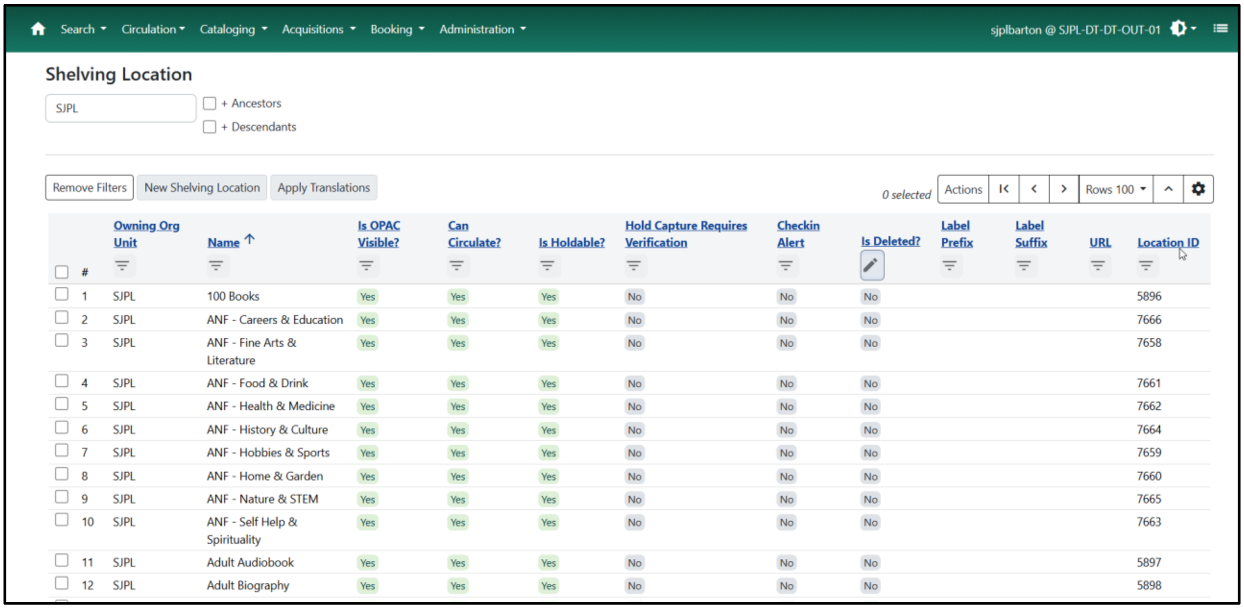
Choose the Org Unit you wish to reorder. Use the arrows to move the Shelving Location to change the position. Click **Save Changes**.



Shelving Locations Editor

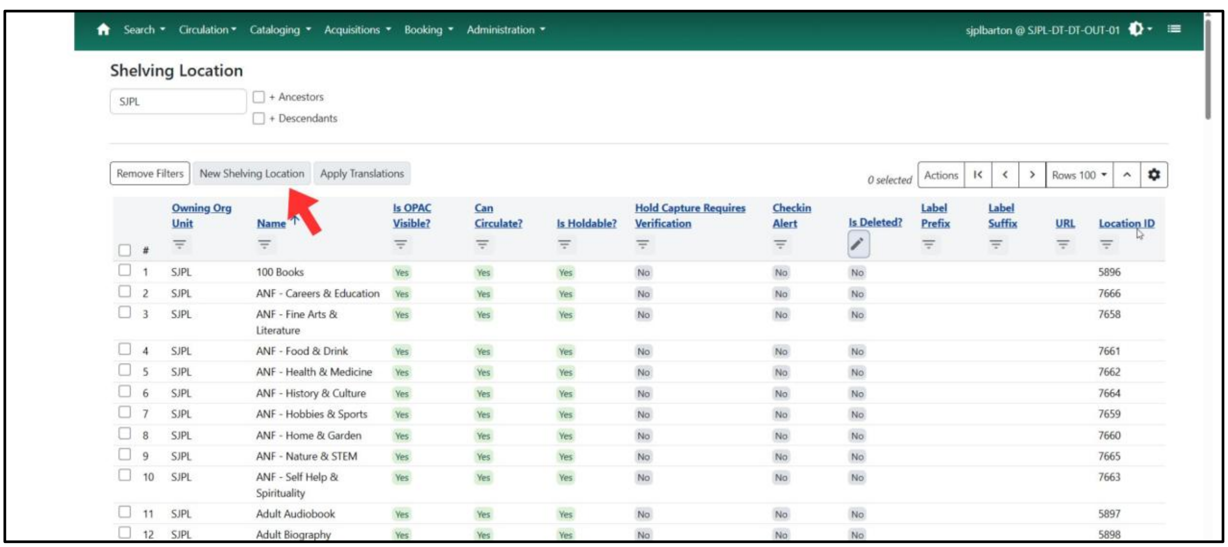
Location: *Administration → Local Administration → Shelving Locations Editor*

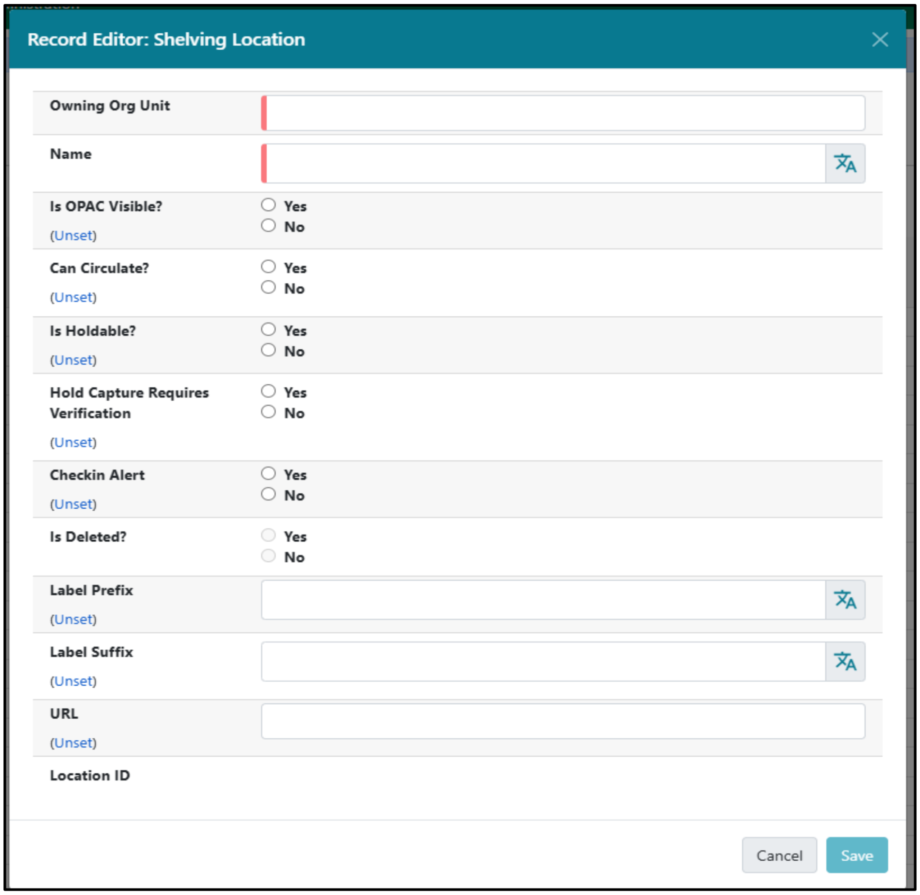
Local Administrators are responsible for configuring and maintaining their libraries' Shelving Locations. The **Shelving Locations Editor** is used to create, modify, and delete shelving locations.



Creating a shelving location

To create a new shelving location, click **New Shelving Location**.





- **Owning Org Unit** (required entry): Use your system for any locations that may be shared across sites. Select a branch level location if it is unique to a specific branch.
- **Name** (required entry): The name of the shelving location as you wish it to appear in the catalog.
- **Is OPAC Visible?** (required entry):
  - Yes: Allows everything in that location to be viewed by both patrons and staff.
  - No: Only staff can see holdings in that location.
- **Can Circulate?** (required entry):
  - Yes: Allows circulation of any holdings in that shelving location.
  - No: Prevents circulation of any holdings in that shelving location. (May be overridden with administrative permissions.)
- **Is Holdable?** (required entry):
  - Yes: Allows holds to be placed on any holdings in that shelving location.
  - No: Prevents holds from being placed on any holdings in that shelving location.
- Hold Capture Requires Verification (optional):
  - Yes: Triggers a verification that the hold can be captured.
  - No: Allows for the capture of holds.
- **Checkin Alert** (optional):

- Yes: Triggers an alert on checkin instructing staff to route materials to the shelving location.
- No: No alert is triggered.

- **Label prefix** (optional): Can be used to generate spine label prefixes for holdings in a shelving location, e.g., LP, JF.
- **Label suffix** (optional): Can be used to generate spine label suffixes for holdings in a shelving location.
- **URL** (optional): An optional feature to allow staff to add documentation, e.g. a location map. Any URL entered here will be the target of a link created with the shelving location's name in the holdings grid of the OPAC bib record view.

Once the fields are filled in, click **Save** to create the new shelving location.

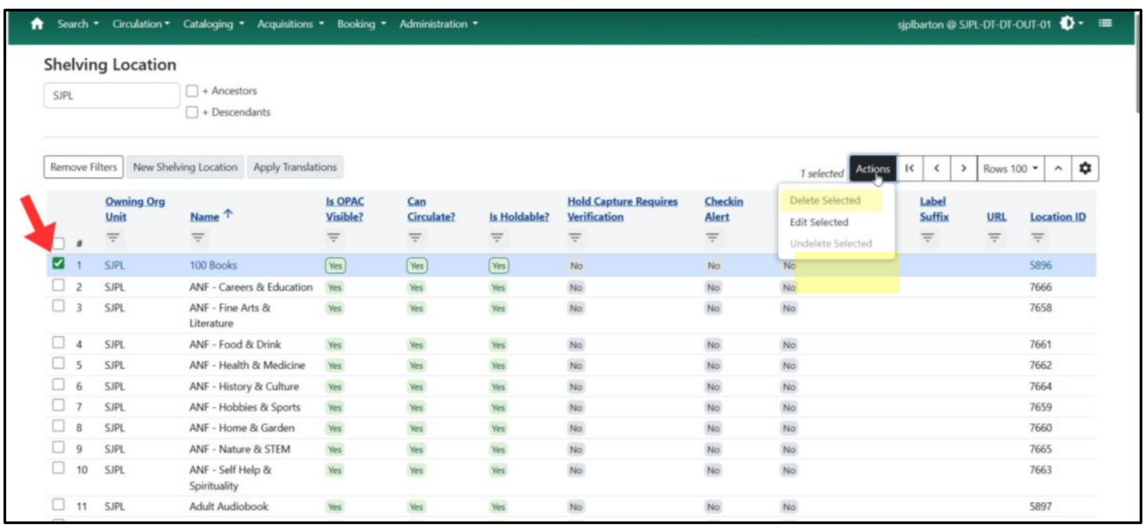
Editing a shelving location

To edit the shelving location, double click on the location from the list, or right-click or select **Actions** and choose **Edit Selected**. You can modify all settings except for the *Owning Org Unit*.

Deleting a shelving location

If you wish to remove an existing shelving location, you must first verify that there are no active holdings still associated with that location. Active holdings may include lost, missing, and circulating holdings. These must be transferred to another location before you can delete the shelving location. You can delete the shelving location two ways:

- Right-click on the location and select **Delete Selected** and click **Confirm**
- Select the location and choose **Delete Selected** from the **Actions** menu and click **Confirm**.



NOTE: Deleted shelving locations may still be shown in the Reports module. Adding "Z" to the name will move it to the bottom of the list and make it less likely that the location will be included in your results.

Barcode Completion

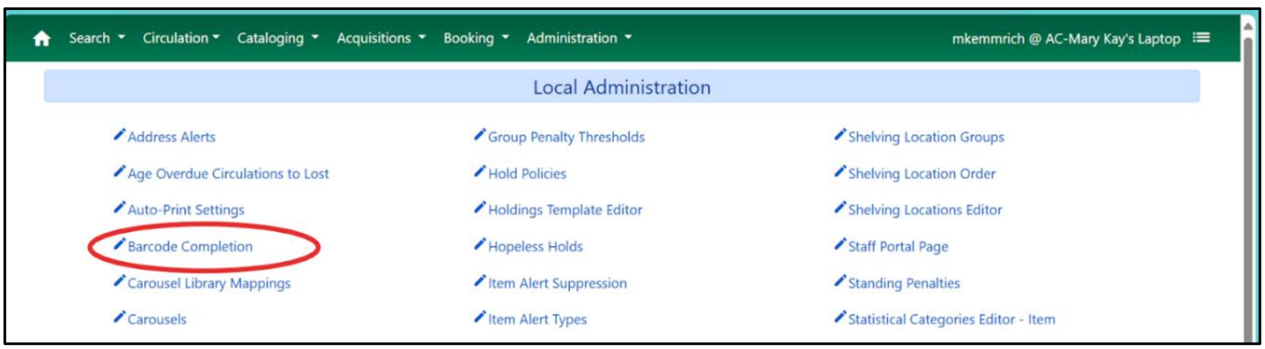
Location: *Administration → Local Administration → Barcode Completion*

Note: Local Administrator permission is needed to access the admin interface of the Barcode Completion feature.

The Barcode Completion feature gives Evergreen users the option of only needing to enter the unique part of patron and item barcodes. This can significantly reduce the amount of typing required for manual barcode input.

This feature can also be used if there is a difference between what the barcode scanner outputs and what is stored in the database, as long as the barcode that is stored has more characters than what the scanner is outputting.

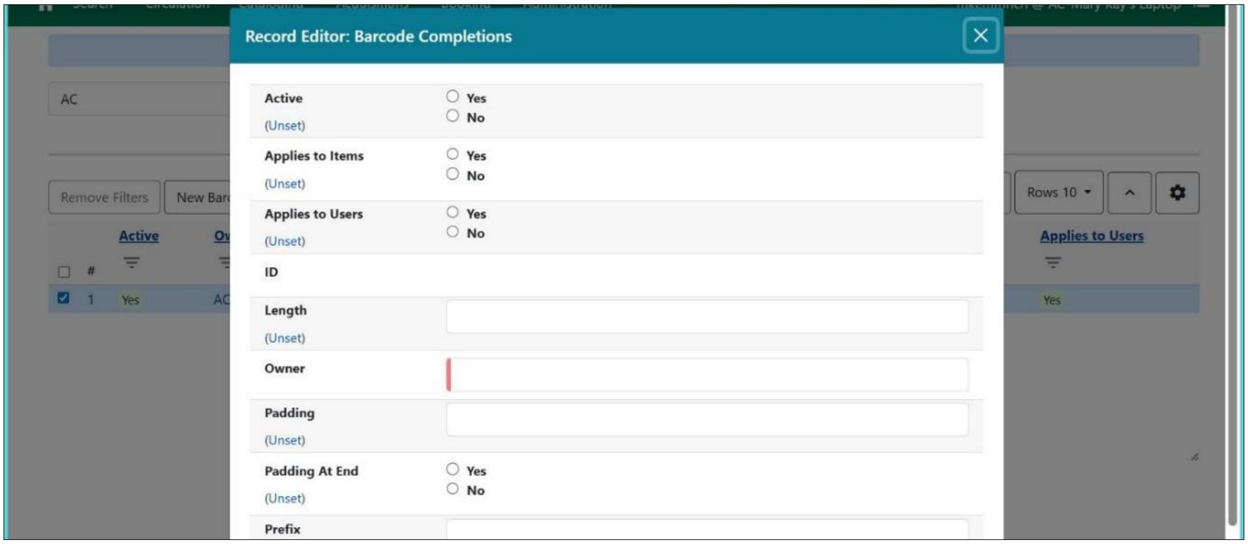
Barcode Completion is additive only; you cannot use it to match a stored barcode that has fewer characters than what is entered. For example, if your barcode scanners previously output a123123b and now exclude the prefix and suffix, you could match both formats using Barcode Completion rules.



NOTE: Because this feature adds an extra database search for each enabled rule to the process of looking up a barcode, it can add extra delays to the check-out process. Please test in your environment before using this in production.

Administrative Rules

To create a barcode completion rule, select Barcode Completion from the Local Administration menu. Select "New Barcode Completions," and you will get a work box:



For Barcode Completion to function select "Active." Determine whether you want this to apply to Items or Users. Mark one "no" and the other "yes."

Next, mark the number of digits the item or patron barcode has.

The owner is your home library.

Padding is the use of repetitive characters or digits at the beginning or end of a barcode. An identifier prefix is often used in barcodes. For example, items may have the identifier 98778, while patron records may have the identifier 88778. Those numeric strings alert staff or other members of a consortium that the barcode represents and item or patron, and possibly a library.

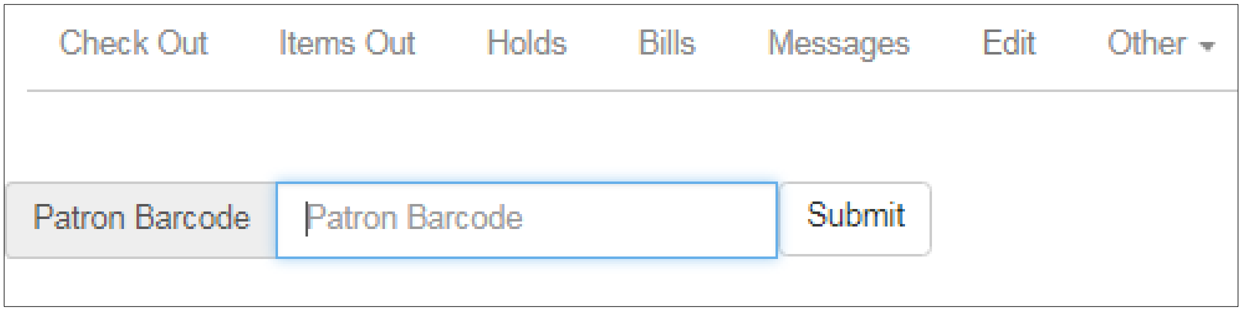
Enter prefix or suffix padding if your library has used these determiners. Select "Save" when finished.

Access Points

The barcode completion functionality is available at the following interfaces:

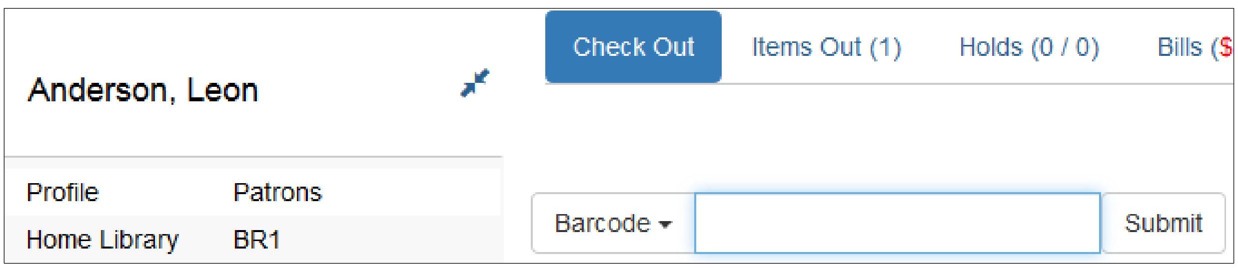
Check Out

Check Out Option 1: Lookup Patron by Barcode



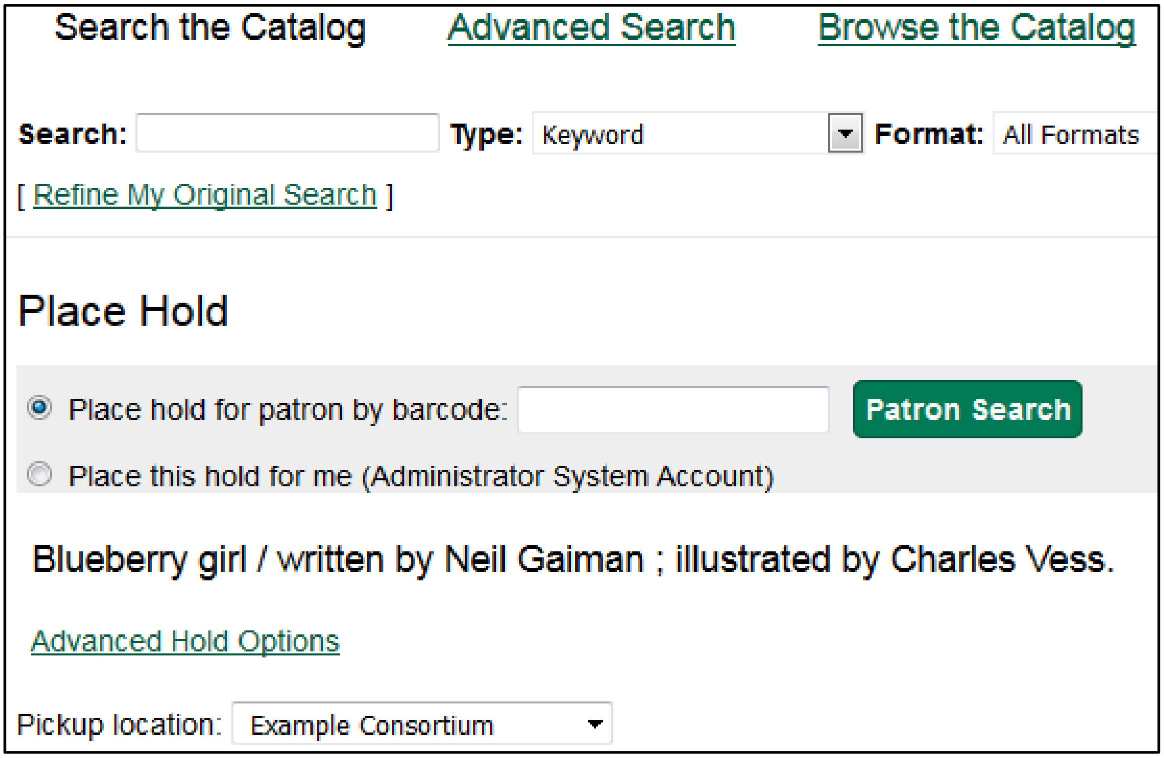
Note: Barcode Completion does not work in the Search for Patron [by Name] interface.

Check Out Option 2: Scanning Item Barcodes

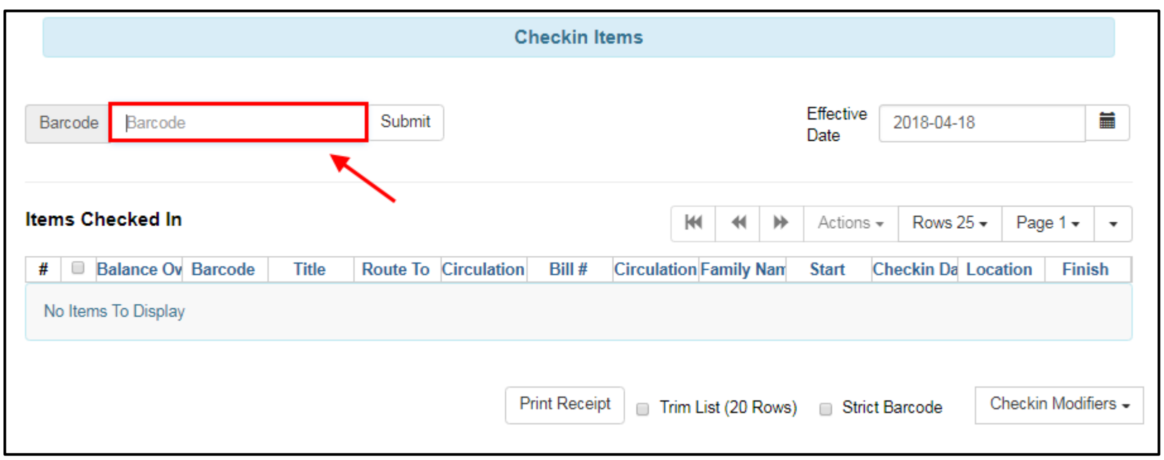


Barcode completion is also available during check out if library setting "Load patron from Checkout" is set. (Automatically detects if an actor/user barcode is scanned during check out, and starts a new check out session using that user.)

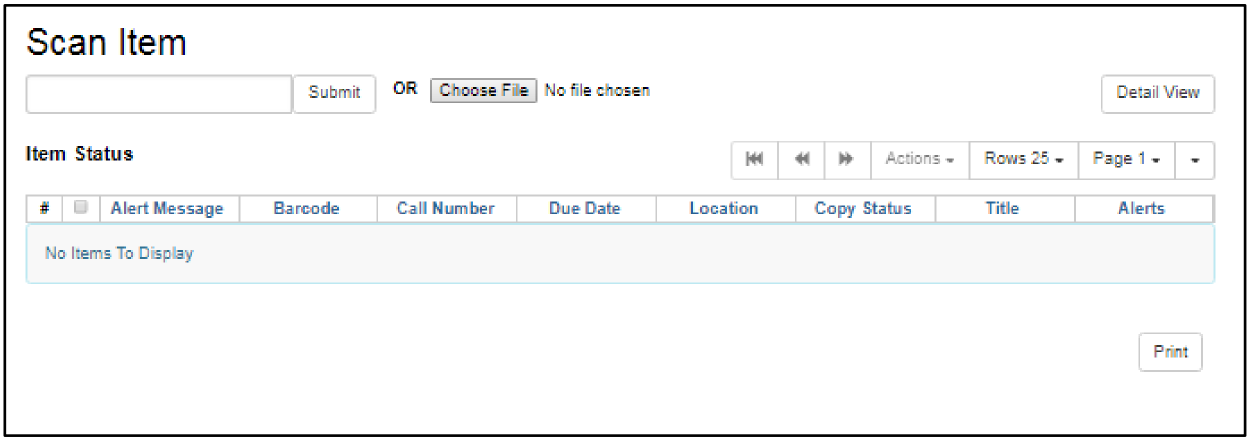
Staff Client Place Hold from Catalog



Check In

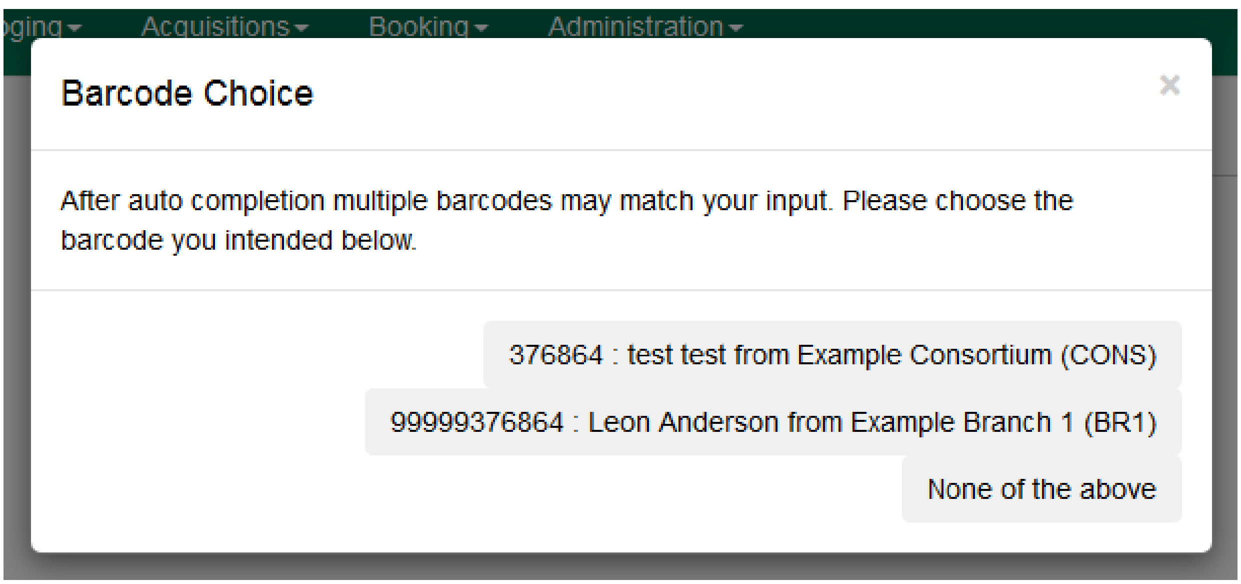


Item Status



Multiple Matches

If multiple barcodes are matched, say if you have both "123" and "00000123" as valid barcodes, you will receive a list of all the barcodes that match all the rules that you have configured. It doesn't stop after the first rule that matches, or after the first valid barcode is found.



Barcode Completion Data Fields Cheat Sheet

The following data fields can be set for each Barcode Completion rule.

Table 1. Barcode Completion Fields

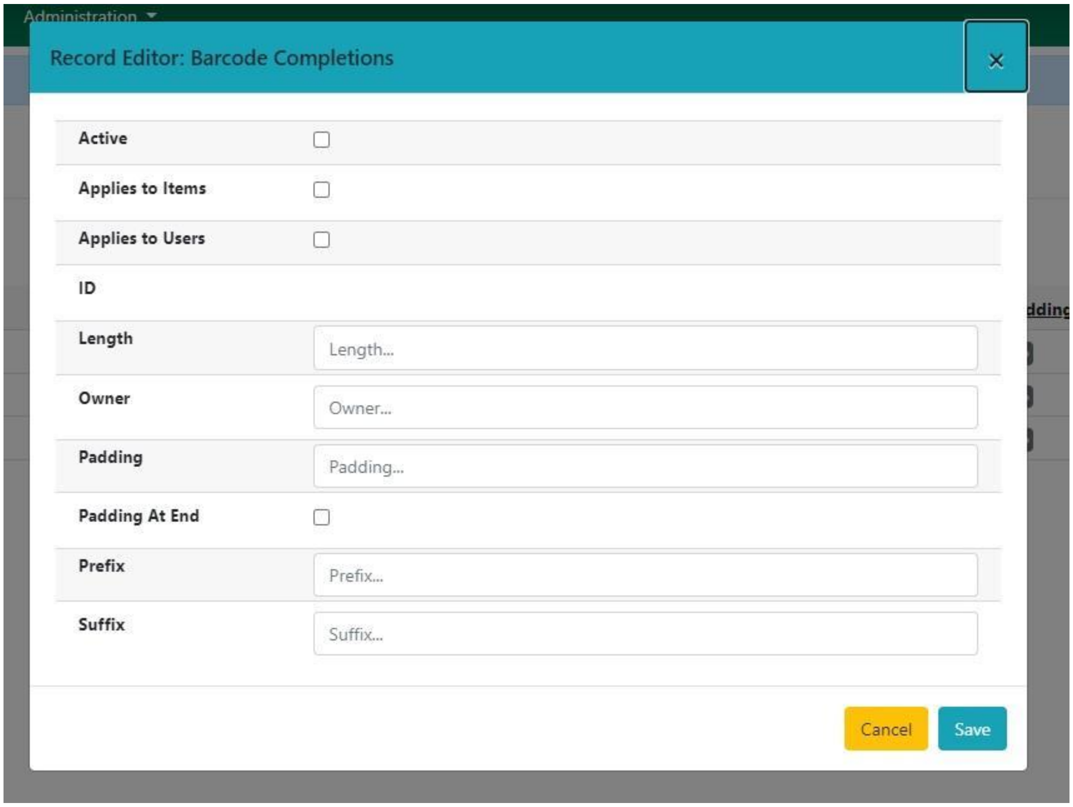
Active	Check to indicate entry is active. Required
Owner	Setting applies to this organizational unit and to all children. Required
Prefix	Sequence that appears at the beginning of barcode.
Suffix	Sequence that appears at the end of barcode.
Length	Total length of barcode.
Padding	Character that pads out non-unique characters in the barcode.
Padding At End	Check if the padding starts at the end of the barcode.
Applies to Items	Check if entry applies to item barcodes.
Applies to Users	Check if entry applies to user barcodes.

Length and Padding

Length and Padding are related; you cannot use one without the other. If a barcode has to be a certain length, then it needs to be able to be padded out to that length. If a barcode has padding, then we need to know the maximum length that we need to pad out to. If length is set to blank or zero, or padding is left blank then they are both ignored.

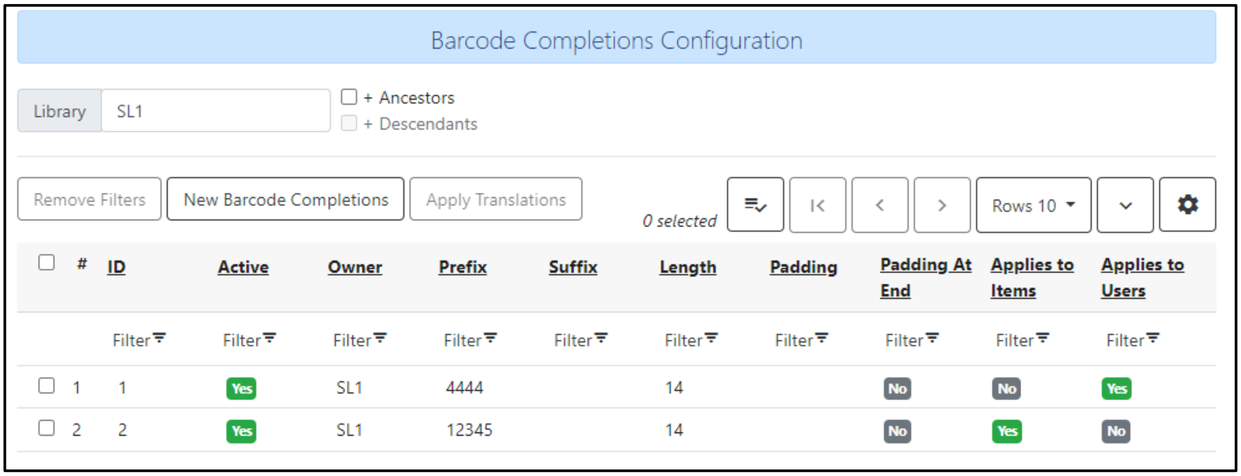
Applies to Items/Users

One or both of these options must be checked for the rule to have any effect.



Create, Update, Filter, Delete/Disable Rules

Location: *Administration → Local Administration → Barcode Completion*



In the Barcode Completion admin interface, you can create, update and disable rules.

Create Rules

To create a new rule, click on the New button in the upper right corner. When you are done with editing the new rule click the **Save** button. If you want to cancel the new rule creation, click the Cancel button.

Update Rules

Double-click on the rule in the main list to edit that rule.

Filter Rules

This may be useful to filter the rules list if there are many rules. Click on the filter link to bring up the Filter Results dialog box. You can filter on any of the data fields, and you can set up multiple filter rules. Click Apply to enable the filter rules, only the rows that match will now be displayed.

To clear out the filter rules, delete all of the filter rules by clicking the X next to each rule, and then click Apply.

Delete/Disable Rules

It isn’t possible to delete a rule from the database from the admin interface. If a rule is no longer needed set Active to "False" to disable it. To keep the number of rules down, reuse inactive rules when creating new rules.

Barcode Completion Examples

In all these examples, the unique part of the barcode is 123. So that is all that users will need to type to match the full barcode.

Barcode With Prefix and Padding

Barcode: 4545000123

To match this 10-character barcode by only typing in 123 we need the following settings.

- Active - Checked
- Owner - Set to your organizational unit.
- Prefix - 4545 - This is the prefix that the barcode starts with.
- Length - 10 - Total length of the barcode.
- Padding - 0 - Zeros will be used to pad out non-significant parts of the barcode.
- Applies to Items and/or Applies to Users – Checked

The system takes the 123 that you entered and adds the prefix to the beginning of it. Then the system adds zeros between the prefix and your number to pad it out to 10 characters. Then it will search the database for that barcode.

Barcode With Suffix

Barcode: 123000book

To match this 10-character barcode by only typing in 123 we need the following settings.

- Active - Checked
- Owner - Set to your organizational unit.
- Suffix - book - This is the suffix that the barcode ends with.
- Length - 10 - Total length of the barcode.
- Padding - 0 - Zeros will be used to pad out non significant parts of the barcode.
- Padding at End - Checked
- Applies to Items and/or Applies to Users – Checked

The system takes the 123 that you entered and adds the suffix to the end of it. Then adds zeros between your number and the suffix to pad it out to 10 characters. Then it searches the database for that barcode.

Barcode With Left Padding

Barcode: 0000000123

To match this 10-character barcode by only typing in 123 we need the following settings.

- Active - Checked
- Owner - Set to your organizational unit.
- Length - 10 - Total length of the barcode.
- Padding - 0 - Zeros will be used to pad out non-significant parts of the barcode.
- Applies to Items and/or Applies to Users – Checked

The system takes 123 that you entered, then adds zeros between your number and the left to pad it out to 10 characters. Then it searches the database for that barcode.

Barcode With Right Padding

Barcode: 1230000000

To match this 10-character barcode by only typing in 123 we need the following settings.

- Active - Checked
- Owner - Set to your organizational unit.
- Length - 10 - Total length of the barcode.
- Padding - 0 - Zeros will be used to pad out non-significant parts of the barcode.
- Padding at End - Checked
- Applies to Items and/or Applies to Users – Checked

The system takes 123 that you entered, then adds zeros between your number and the right to pad it out to 10 characters. Then it searches the database for that barcode.

Barcode of any Length with Prefix and Suffix

Barcode: a123b

To match this 5-character barcode by only typing in 123 we need the following settings. This use of Barcode Completion doesn't save many keystrokes, but it does allow you to handle the case where your barcode scanners at one point were set to output a prefix and suffix which was stored in the database. Now your barcode scanners may no longer include the prefix and suffix. These settings will simply add the prefix and suffix to any barcode entered and search for that.

- Active - Checked
- Owner - Set to your organizational unit.
- Length/Padding - 0/null - Set the length to 0 and/or leave the padding blank.
- Prefix - a - This is the prefix that the barcode starts with.
- Suffix - b - This is the suffix that the barcode starts with.
- Applies to Items and/or Applies to Users – Checked

The system takes 123 that you entered, then adds the prefix and suffix specified. Then it searches the database for that barcode. Because no length or padding was entered, this rule will add the prefix and suffix to any barcode that is entered and then search for that valid barcode.

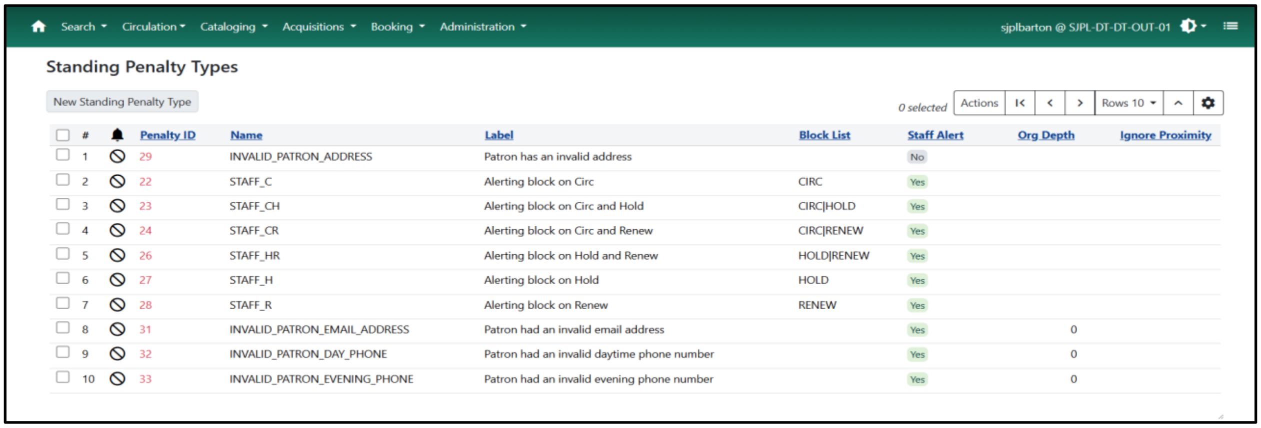
Testing Barcodes

It has been recommended to test this feature before utilizing it. To prepare that test, set up the rules that you want, then set up a controlled group of items/users with barcodes that should match. Then try scanning the short version of those barcodes in the various supported access points.

Standing Penalties

Location: *Administration → Local Administration → Standing Penalties*

Evergreen includes twenty-one stock penalties, and administrators can create other penalty types if needed. Each penalty can be configured to block zero, one, or several circulation actions.



#	Penalty ID	Name	Label	Block List	Staff Alert	Org Depth	Ignore Proximity
1	29	INVALID_PATRON_ADDRESS	Patron has an invalid address		No		
2	22	STAFF_C	Alerting block on Circ	CIRC	Yes		
3	23	STAFF_CH	Alerting block on Circ and Hold	CIRC|HOLD	Yes		
4	24	STAFF_CR	Alerting block on Circ and Renew	CIRC|RENEW	Yes		
5	26	STAFF_HR	Alerting block on Hold and Renew	HOLD|RENEW	Yes		
6	27	STAFF_H	Alerting block on Hold	HOLD	Yes		
7	28	STAFF_R	Alerting block on Renew	RENEW	Yes		
8	31	INVALID_PATRON_EMAIL_ADDRESS	Patron had an invalid email address		Yes	0	
9	32	INVALID_PATRON_DAY_PHONE	Patron had an invalid daytime phone number		Yes	0	
10	33	INVALID_PATRON_EVENING_PHONE	Patron had an invalid evening phone number		Yes	0	

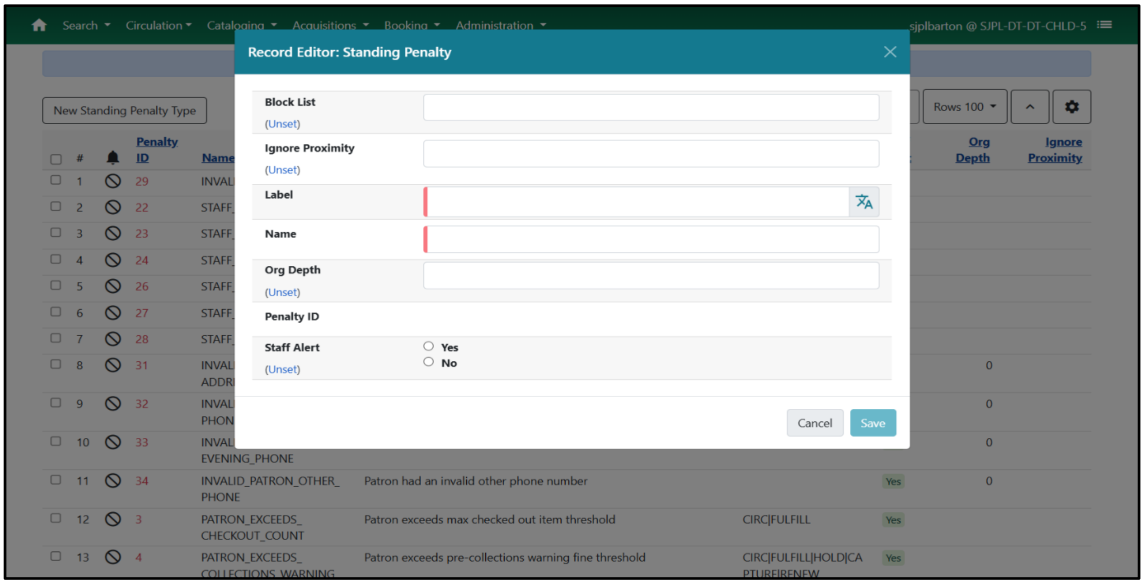
Stock Standing Penalty Types

- PATRON_EXCEEDS_FINES - Patron exceeds fine threshold
- PATRON_EXCEEDS_OVERDUE_COUNT - Patron exceeds max overdue item threshold
- PATRON_EXCEEDS_CHECKOUT_COUNT - Patron exceeds max checked out item threshold
- PATRON_EXCEEDS_COLLECTIONS_WARNING - Patron exceeds pre-collections warning fine threshold
- PATRON_EXCEEDS_LOST_COUNT - Patron exceeds max lost item threshold
- ALERT_NOTE - Alerting note, no blocks
- SILENT_NOTE - Note, no blocks
- STAFF_C - Alerting block on Circ
- STAFF_CH - Alerting block on Circ and Hold
- STAFF_CR - Alerting block on Circ and Renew
- STAFF_CHR - Alerting block on Circ, Hold and Renew
- STAFF_HR - Alerting block on Hold and Renew
- STAFF_H - Alerting block on Hold
- STAFF_R - Alerting block on Renew
- INVALID_PATRON_ADDRESS - Patron has an invalid address
- PATRON_IN_COLLECTIONS - Patron has been referred to a collections agency
- INVALID_PATRON_EMAIL_ADDRESS - Patron had an invalid email address
- INVALID_PATRON_DAY_PHONE - Patron had an invalid daytime phone number
- INVALID_PATRON_EVENING_PHONE - Patron had an invalid evening phone number

- INVALID_PATRON_OTHER_PHONE - Patron had an invalid other phone number
- PATRON_EXCEEDS_LONGOVERDUE_COUNT - Patron exceeds max long-overdue threshold

Creating a Standing Penalty Type

To create a standing penalty type, click **New Standing Penalty Type**.

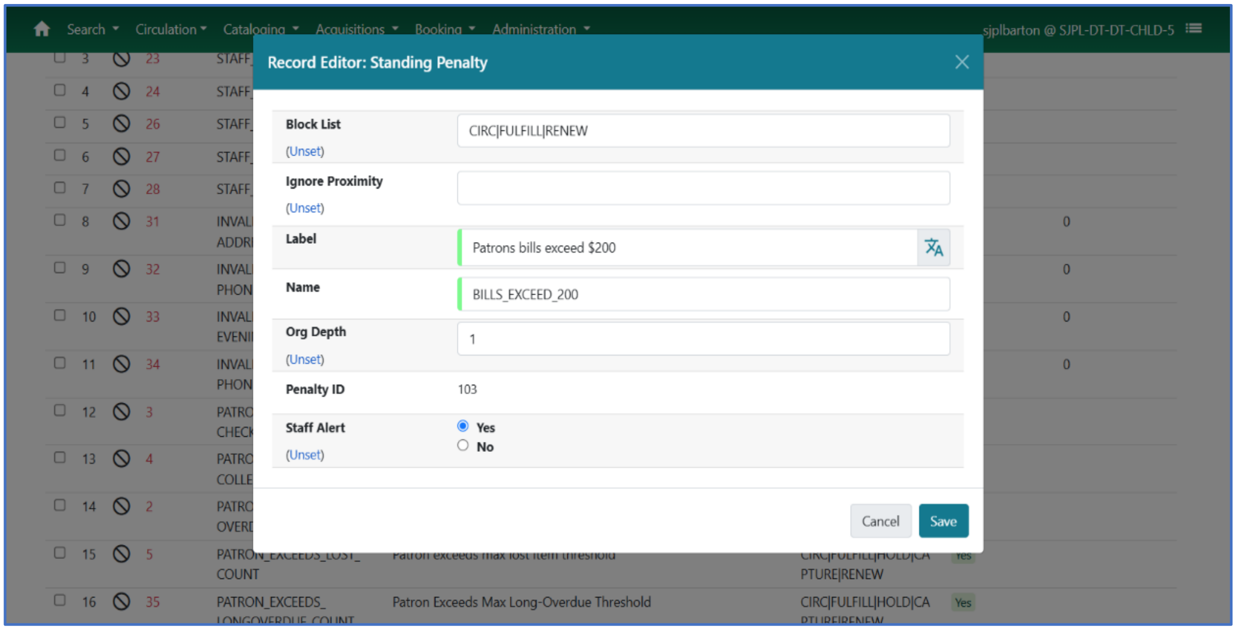


- **Block List** (optional): A list of the actions blocked by the penalty. Entered in any order using the pipe character as a delimiter.
    - **CIRC** – User cannot check out items, except items which may fill a hold. Items which can fill a hold are subject to the FULFILL action.
    - **HOLD** – User cannot place holds on items.
    - **RENEW** – User cannot renew items.
    - **CAPTURE** – User's holds cannot be captured.
    - **FULFILL** – User cannot check out an item that is on hold.
- **Ignore Proximity** (optional): If a value is set, the system will ignore the penalty if the proximity between patron's home library and item's home (or circulating) library is greater than the Ignore Proximity.
    - NULL / no value set – Penalty is not ignored anywhere.
    - 0 – Penalty is ignored at the patron's home branch.
    - 2 – Penalty is ignored at the patron's home system.
- **Label** (optional): A brief description of the penalty.
- **Name** (required entry): The name of the penalty. Do not use spaces.
- **Org Depth** (optional): Scope of the penalty, in terms of where a block or restriction will apply relative to the org unit where the penalty is calculated.
    - NULL / no value set
    - 0 – Penalty applies to the Consortium
    - 1 – Penalty applies to the System
    - 2 – Penalty applies to the Branch
    - 3 – Penalty applies to the Sub-library
- **Staff Alert** (optional): Indicates whether a staff member will be alerted about the penalty when viewing a patron's account.

Once the fields are filled in, click **Save** to create the new Standing Penalty Type.

Editing a Standing Penalty Type

To edit a standing penalty, either select the row and then navigate to **Edit Selected** in the Actions Menu on the upper right of the grid, right click on the row and choose **Edit Selected**, or double click on the grid row you wish to edit.



Make your desired changes, and select **Save** to save your changes, or **Cancel** to exit the window without saving.

NOTE: The Name field cannot be edited for any of the stock penalties since they are referenced by name in legacy code.

Deleting a Standing Penalty Type

To delete a standing penalty type, either select the row and then navigate to **Delete Selected** in the Actions Menu on the upper right of the grid or right click on the row and choose **Delete Selected**.

WARNING: The interface does not warn you before deleting a standing penalty type, and deleting stock standing penalty types may cause unintended negative consequences in your Evergreen system. Proceed with extreme caution.

Custom Penalties

Administrators may customize system-applied penalties by using the following library settings to establish a mapping between a system-applied penalty and a new standing penalty that you create:

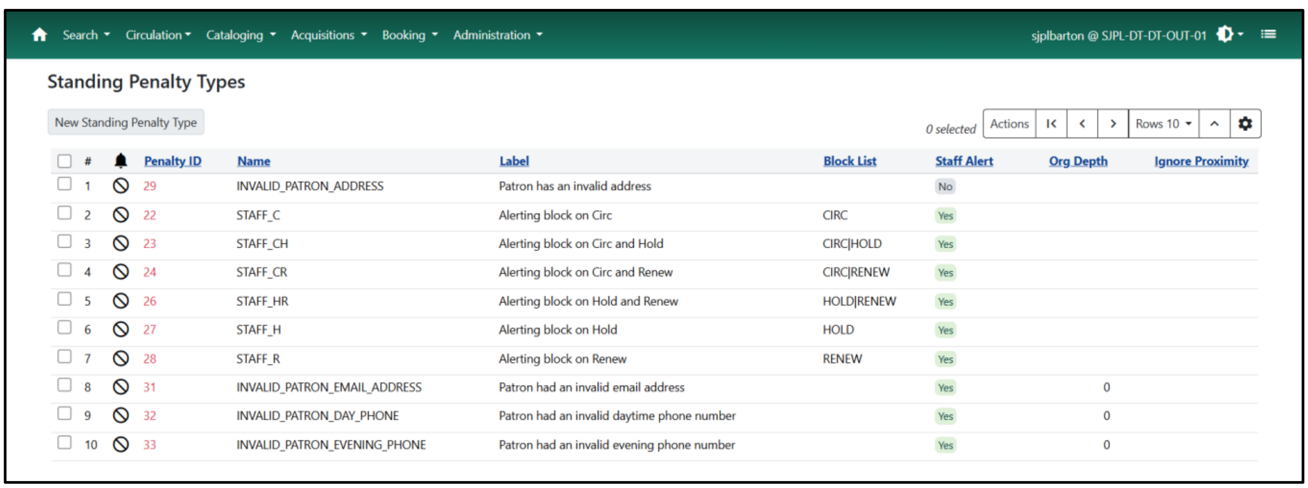
- Custom PATRON_EXCEEDS_FINES penalty
- Custom PATRON_EXCEEDS_OVERDUE_COUNT penalty
- Custom PATRON_EXCEEDS_CHECKOUT_COUNT penalty
- Custom PATRON_EXCEEDS_COLLECTIONS_WARNING penalty
- Custom PATRON_EXCEEDS_LOST_COUNT penalty
- Custom PATRON_IN_COLLECTIONS penalty
- Custom PATRON_EXCEEDS_LONGOVERDUE_COUNT penalty

The library setting instructs Evergreen to use the custom standing penalty in place of the system standing penalty and will automatically apply the custom penalty in the same manner as its mapped standing penalty.

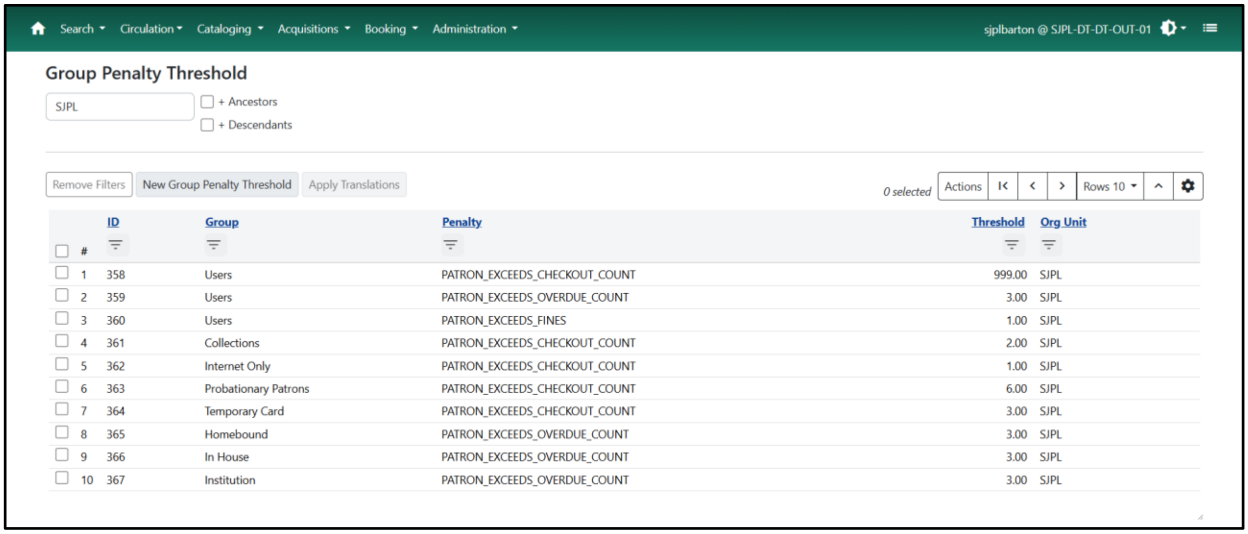
The library setting uses the circulation library as the context organizational unit. Per standard library setting rules, the "closest" setting to the circulation will be applied.

Setting Up a Custom Penalty

Create a new Standing Penalty Type.

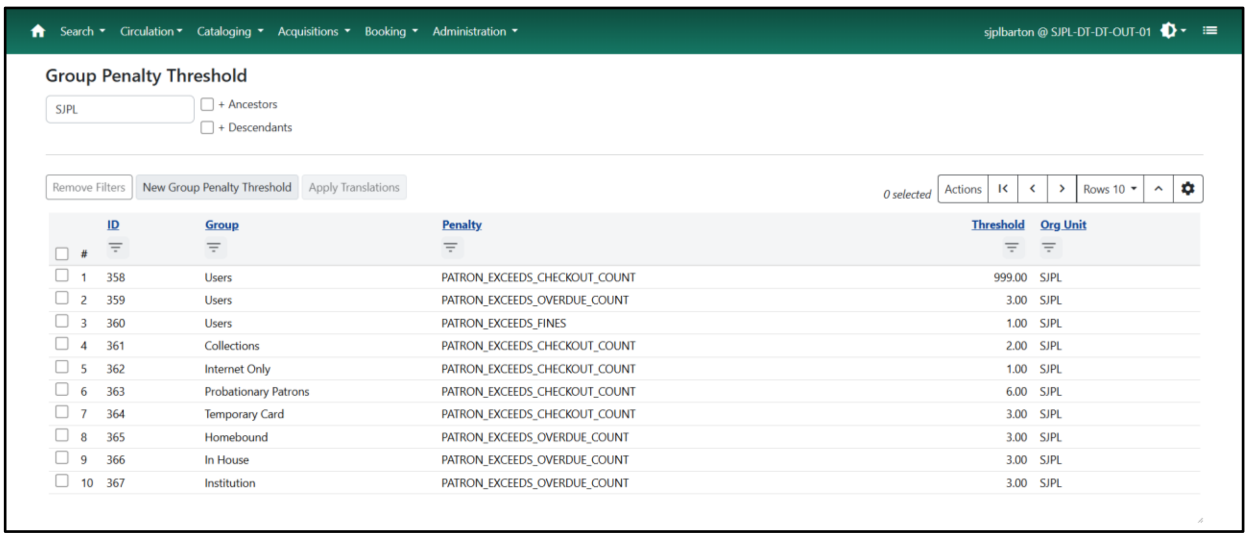


Navigate to *Administration → Local Administration → Group Penalty Thresholds* and establish a threshold, organizational unit, and group for your penalty.



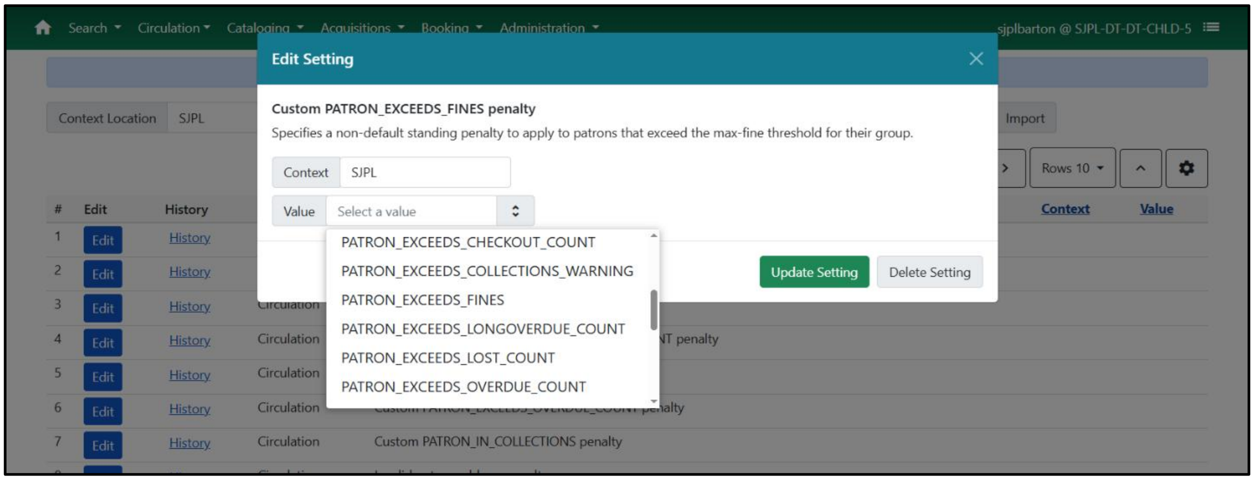
#	ID	Group	Penalty	Threshold	Org Unit
1	358	Users	PATRON_EXCEEDS_CHECKOUT_COUNT	999.00	SJPL
2	359	Users	PATRON_EXCEEDS_OVERDUE_COUNT	3.00	SJPL
3	360	Users	PATRON_EXCEEDS_FINES	1.00	SJPL
4	361	Collections	PATRON_EXCEEDS_CHECKOUT_COUNT	2.00	SJPL
5	362	Internet Only	PATRON_EXCEEDS_CHECKOUT_COUNT	1.00	SJPL
6	363	Probationary Patrons	PATRON_EXCEEDS_CHECKOUT_COUNT	6.00	SJPL
7	364	Temporary Card	PATRON_EXCEEDS_CHECKOUT_COUNT	3.00	SJPL
8	365	Homebound	PATRON_EXCEEDS_OVERDUE_COUNT	3.00	SJPL
9	366	In House	PATRON_EXCEEDS_OVERDUE_COUNT	3.00	SJPL
10	367	Institution	PATRON_EXCEEDS_OVERDUE_COUNT	3.00	SJPL

Navigate to *Administration → Local Administration → Library Settings* and locate the Library Setting for the system penalty you want to replace with your custom penalty.



#	ID	Group	Penalty	Threshold	Org Unit
1	358	Users	PATRON_EXCEEDS_CHECKOUT_COUNT	999.00	SJPL
2	359	Users	PATRON_EXCEEDS_OVERDUE_COUNT	3.00	SJPL
3	360	Users	PATRON_EXCEEDS_FINES	1.00	SJPL
4	361	Collections	PATRON_EXCEEDS_CHECKOUT_COUNT	2.00	SJPL
5	362	Internet Only	PATRON_EXCEEDS_CHECKOUT_COUNT	1.00	SJPL
6	363	Probationary Patrons	PATRON_EXCEEDS_CHECKOUT_COUNT	6.00	SJPL
7	364	Temporary Card	PATRON_EXCEEDS_CHECKOUT_COUNT	3.00	SJPL
8	365	Homebound	PATRON_EXCEEDS_OVERDUE_COUNT	3.00	SJPL
9	366	In House	PATRON_EXCEEDS_OVERDUE_COUNT	3.00	SJPL
10	367	Institution	PATRON_EXCEEDS_OVERDUE_COUNT	3.00	SJPL

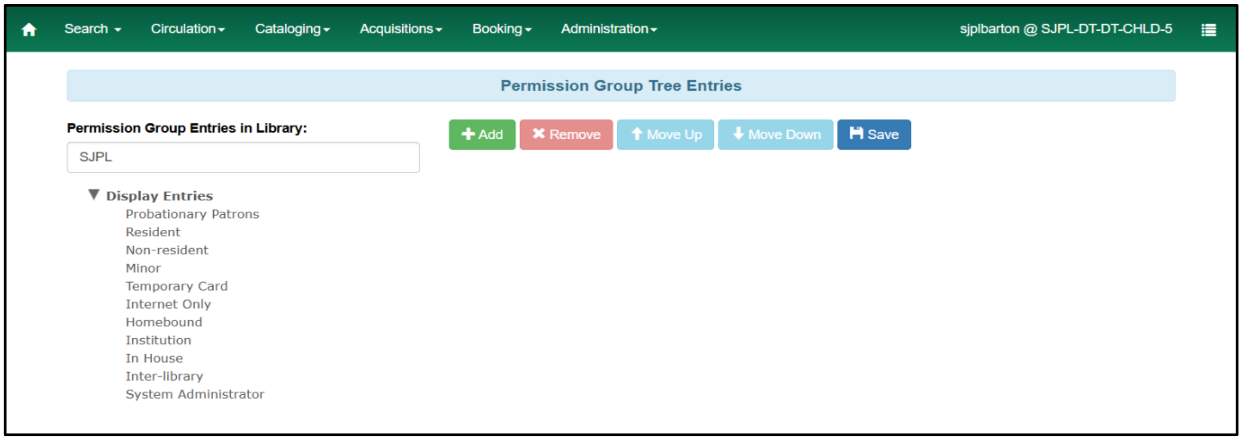
Select the name of your custom penalty from the dropdown and select the organizational unit to which the custom penalty should apply.



Permission Tree Display Entries

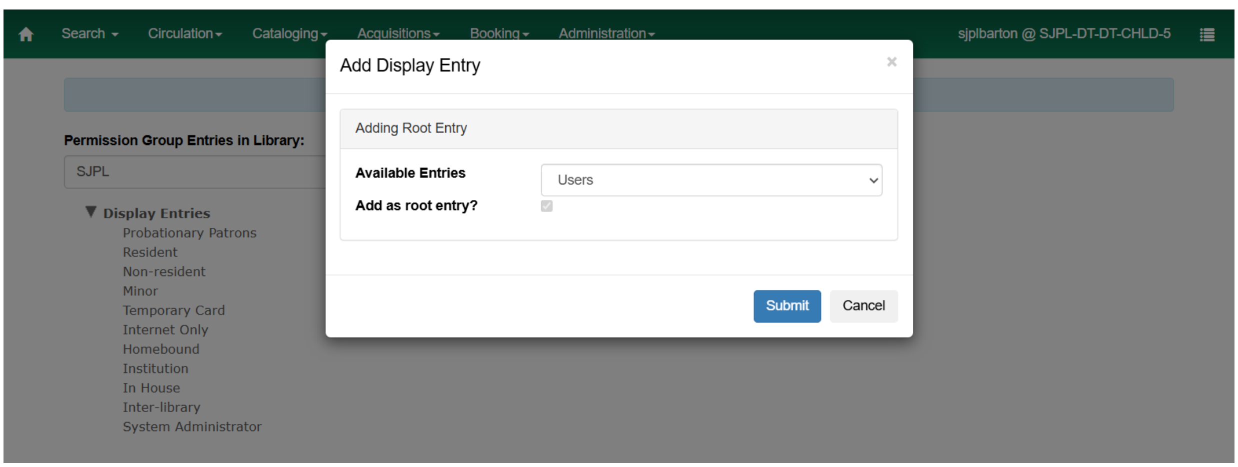
Location: *Administration → Local Administration → Permission Tree Display Entries*

The permission tree display entries allow the list of patron (profile) permission groups to be customized per library.



Adding an Entry

To add a new display entry, select **+Add**.

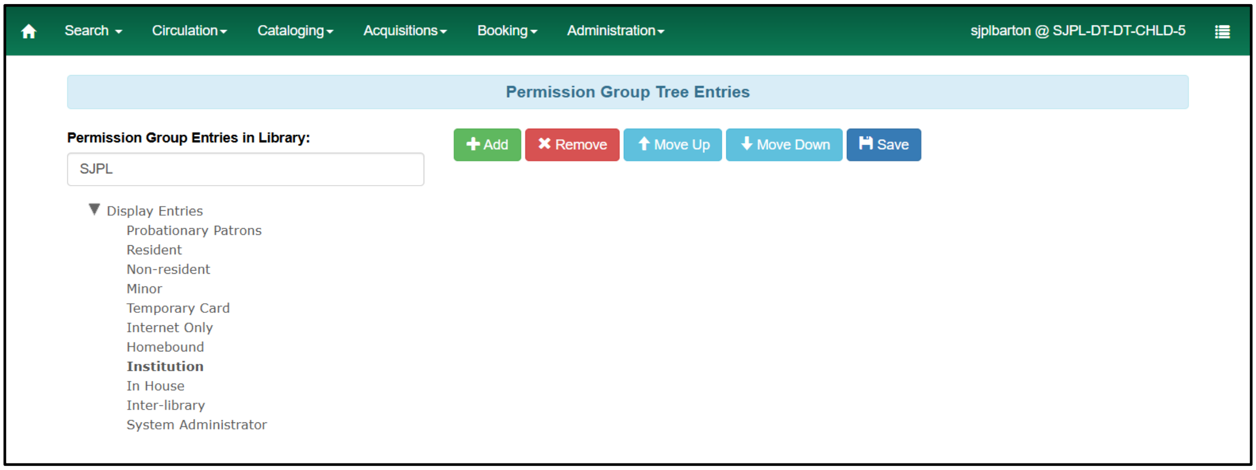


- **Available Entries** (required entry): Select the permission group that you would like to add to the Main (Profile) Permission Group drop-down menu on a patron's account.
- **Add as root entry?**: This will be automatically checked if a pre-existing entry is not selected.

Once the fields are filled in, click **Save** to add the new display entry.

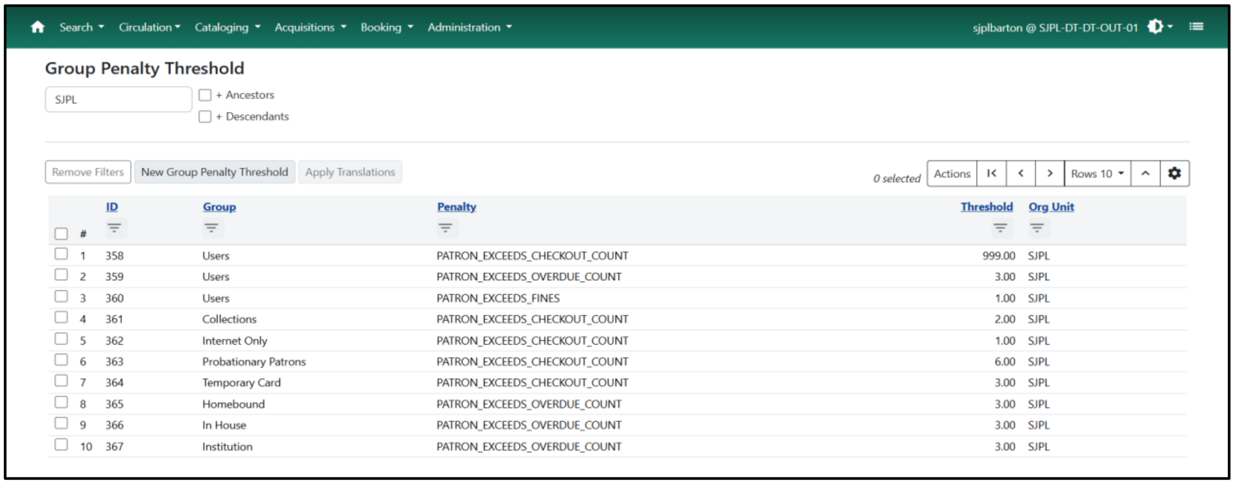
Deleting an Entry

To delete a display entry, select the entry and click **Remove**.



Modify the List

To move the entries throughout the list, select the entry and click on either the **Move Up** button or the **Move Down** button.



#	ID	Group	Penalty	Threshold	Org Unit
1	358	Users	PATRON_EXCEEDS_CHECKOUT_COUNT	999.00	SJPL
2	359	Users	PATRON_EXCEEDS_OVERDUE_COUNT	3.00	SJPL
3	360	Users	PATRON_EXCEEDS_FINES	1.00	SJPL
4	361	Collections	PATRON_EXCEEDS_CHECKOUT_COUNT	2.00	SJPL
5	362	Internet Only	PATRON_EXCEEDS_CHECKOUT_COUNT	1.00	SJPL
6	363	Probationary Patrons	PATRON_EXCEEDS_CHECKOUT_COUNT	6.00	SJPL
7	364	Temporary Card	PATRON_EXCEEDS_CHECKOUT_COUNT	3.00	SJPL
8	365	Homebound	PATRON_EXCEEDS_OVERDUE_COUNT	3.00	SJPL
9	366	In House	PATRON_EXCEEDS_OVERDUE_COUNT	3.00	SJPL
10	367	Institution	PATRON_EXCEEDS_OVERDUE_COUNT	3.00	SJPL

NOTE: An entry cannot be changed from a root entry. The entries will have to be deleted then readded under the root entry.

Group Penalties Thresholds

Location: *Administration → Local Administration → Group Penalty Thresholds*

Group Penalty Thresholds enables you to configure which penalty thresholds apply to which patron groups and organizational units.

Stock Evergreen includes four penalties each with a threshold value of 10, and you can configure three others as needed.

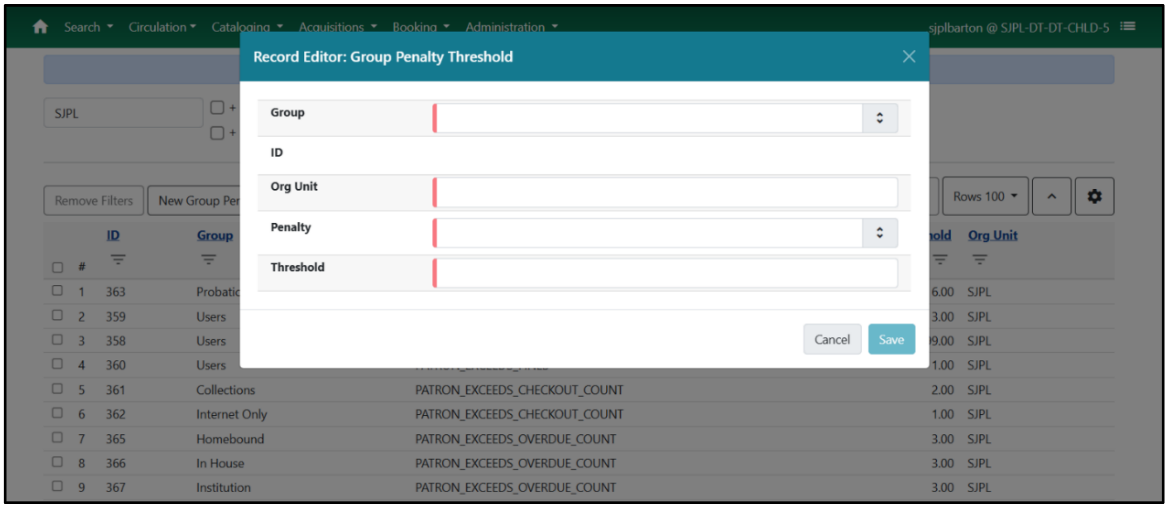
- PATRON_EXCEEDS_FINES: Blocks specified circulation actions if patron exceeds X in fines
- PATRON_EXCEEDS_OVERDUE_COUNT: Blocks specified circulation actions if patron exceeds X overdue items
- PATRON_EXCEEDS_CHECKOUT_COUNT: Blocks specified circulation actions if patron exceeds X items checked out
- PATRON_EXCEEDS_LOST_COUNT: Blocks specified circulation actions if patron exceeds X lost items

Additional penalties that can be configured with Group Penalty Thresholds include:

- PATRON_EXCEEDS_LONGOVERDUE_COUNT: Blocks specified circulation actions if patron exceeds X long-overdue items
- PATRON_EXCEEDS_COLLECTION_WARNING: Blocks specified circulation actions if patron exceeds X in fines. A user with this penalty will be flagged for review by the Collections API.
- PATRON_IN_COLLECTIONS: Blocks specified circulation actions if patron exceeds X in fines. This penalty is set by the Collections API.

Creating a Group Penalty Threshold

To create a new group penalty threshold, click **New Group Penalty Threshold**.

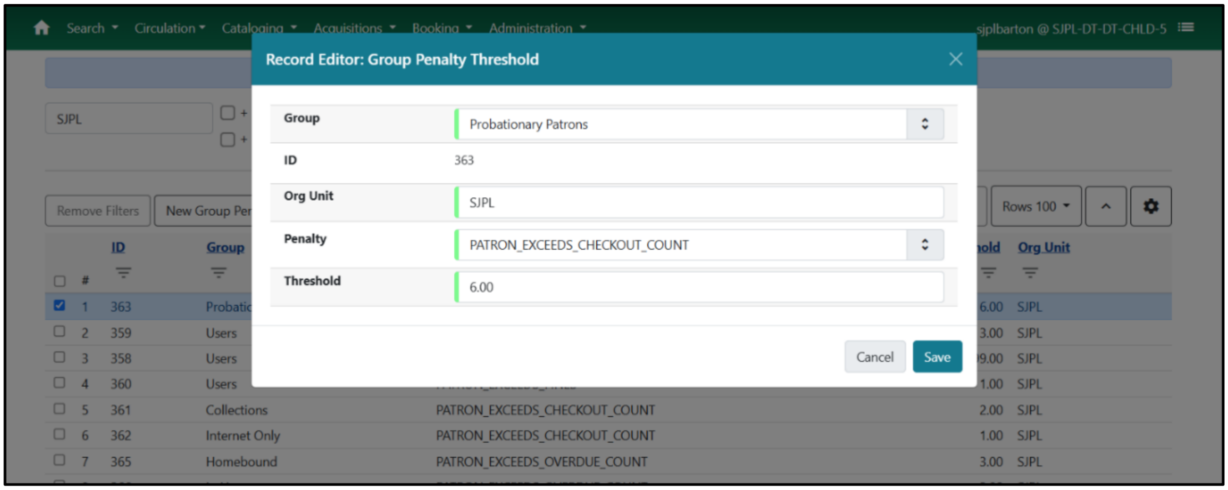


- **Group** (required entry): The profile group to which the threshold should apply.
- **ID**: The system-assigned ID for the Group Penalty Threshold.
- **Penalty** (required entry): The penalty for which the threshold should be set.
  - Note: This dropdown includes several penalties for which numerical thresholds are not applicable. You can ignore ALERT_NOTE, SILENT_NOTE, and anything that starts with INVALID_ or STAFF_.
- **Org Unit** (required entry): The library organization to which the threshold should apply.
- **Threshold** (required entry): the numeric value of the threshold. This can represent a monetary value or a count value depending on the selected penalty.

Once the fields are filled in, click **Save** to create the new Group Penalty Threshold.

Editing a Group Penalty Threshold

To edit a group penalty threshold, either select the row and then navigate to **Edit Selected** in the Actions Menu on the upper right of the grid, right click on the row and choose **Edit Selected**, or double click on the grid row you wish to edit.



Make your desired changes, and select **Save** to save your changes, or **Cancel** to exit the modal without saving.

Deleting a Group Penalty Threshold

To delete a group penalty threshold, either select the row and then navigate to **Delete Selected** in the Actions Menu on the upper right of the grid or right-click on the row and choose **Delete Selected**.

Library Settings Editor

Location: *Administration → Local Administration → Library Settings Editor*

The Library Settings Editor contains a very large number of settings that can be configured. While descriptions are made available in the setting names, some dependencies and functions may not be readily apparent when reviewing the overall list of settings. We encourage you to contact the HelpDesk if you wish to test a setting that is not currently set for your library. Some settings have already been set on a consortium level, but others may be set based on local policy. Please consider impacts on both consortium and local policy when choosing to change a setting to ensure you're in compliance with the consortium rules.

A short list of settings which your library should consider addressing include:

- Staff Login Inactivity Timeout (in seconds)
- OPAC Inactivity Timeout (in seconds)
- Void lost item billing when returned
- Void processing fee on lost item return
- Lost Materials Processing Fee
- Charge processing fee for damaged items
- Default Item Price (Used only if item price is listed as NULL.)

Use the search box at the top of the page to reduce the list of settings you wish to address/review to a more manageable and relevant list.

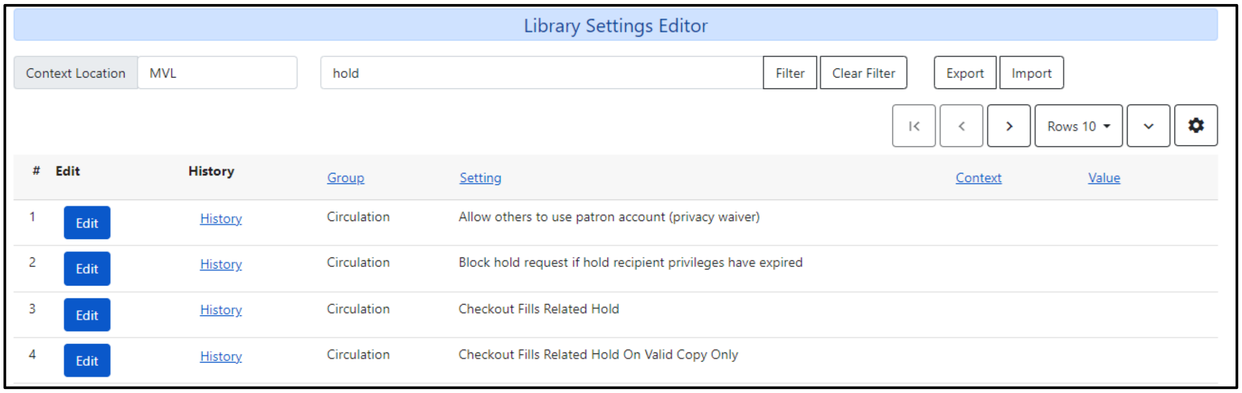
Click on **Edit** to set or update a setting. Deleting will convert the setting to a NULL.

Once you have clicked on either **Update Setting** or **Delete Setting**, your selection will be updated in the table. A toast message will appear on the screen in the bottom right corner.

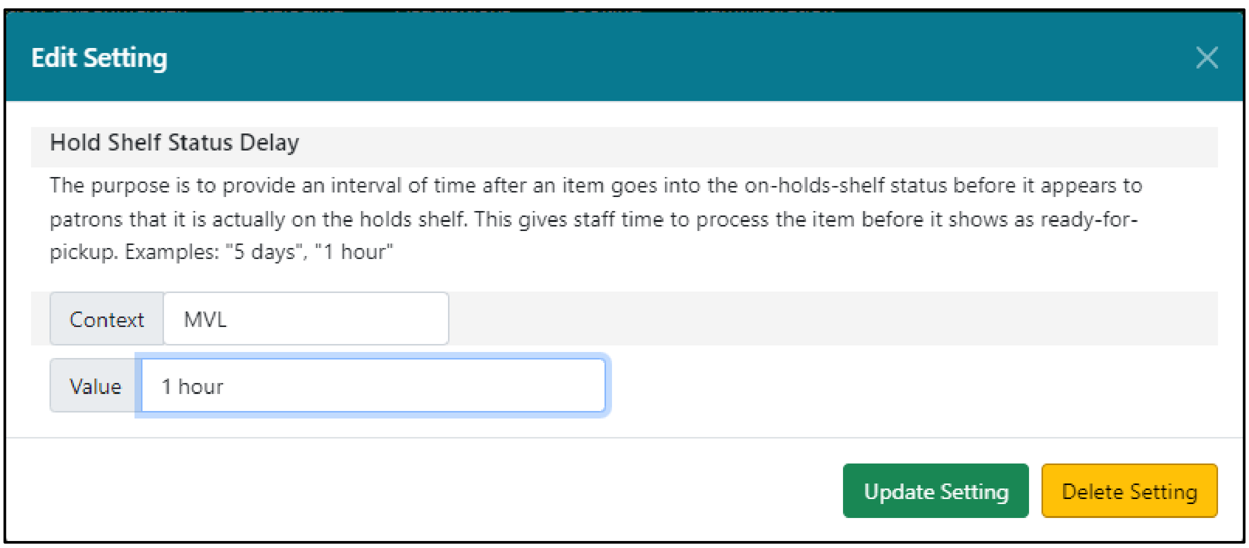
Clicking on **History** will show you the history of the setting as it's been set or removed over time. Use the **Revert** link to roll back a change made to the settings.

Editing Library Settings

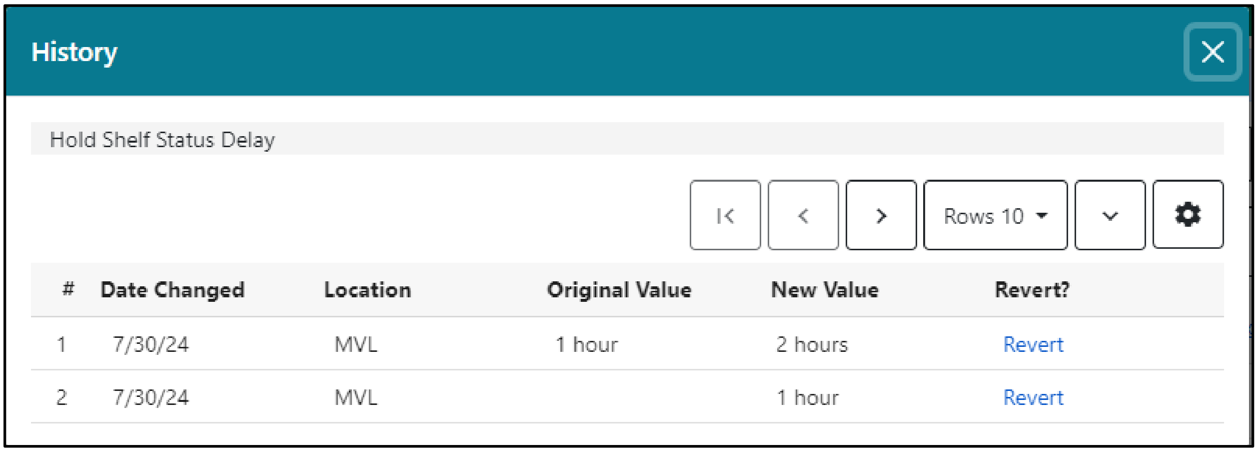
Settings having effects on the same function or module are grouped together. You may browse the list or search for the entry you want to edit. Type in your search term in the filter box. You may clear or re-apply the filter by clicking Clear Filter or Filter.



To edit an entry click **Edit** in the line. Read the instruction in the pop-up window. Make the change. Click **Update Setting** to save the change. Click **Delete Setting** if you wish to delete it.

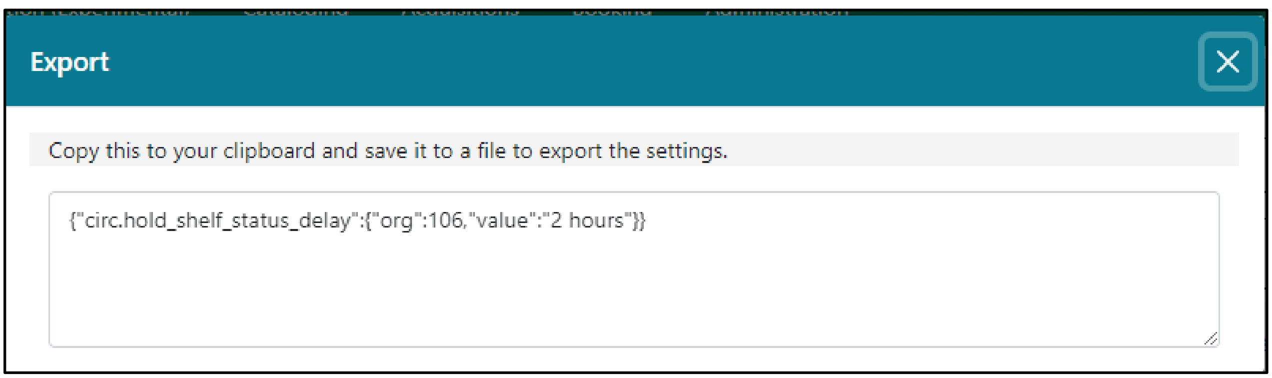


Click **History** to view the previous values, if any, of a setting. You can revert back to an old value by clicking **Revert**.

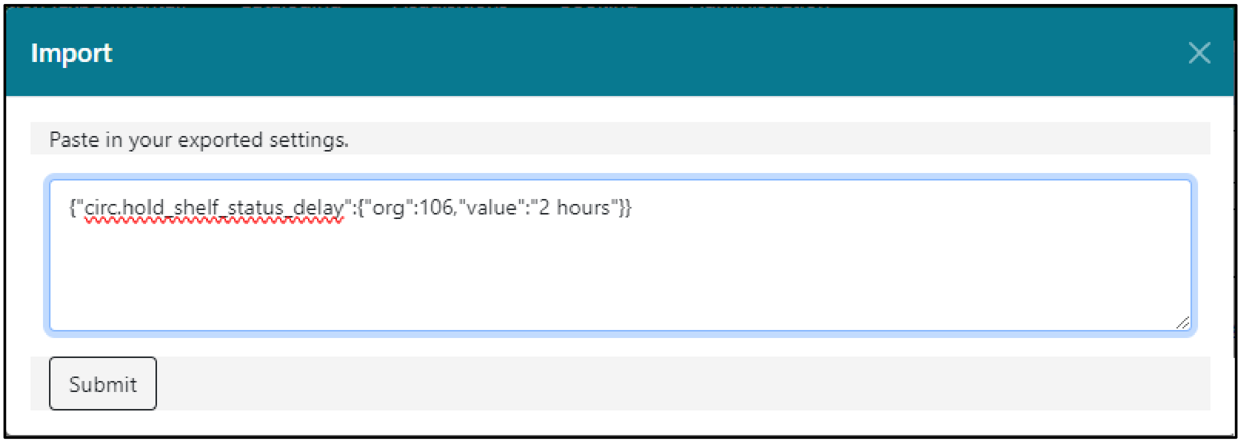


Exporting/Importing Library Settings

To export library settings, click the **Export** button on the above Library Setting Editor screen. Click Copy in the pop-up window. Those settings displayed on the screen are copied to the clipboard. Paste the contents to a text editor, such as Notepad. Save the file on your computer.



To import library settings, click the Import button on the Library Settings Editor screen. Open your previously saved file and copy the contents. Click **Paste** in the pop-up window. Click **Submit**.

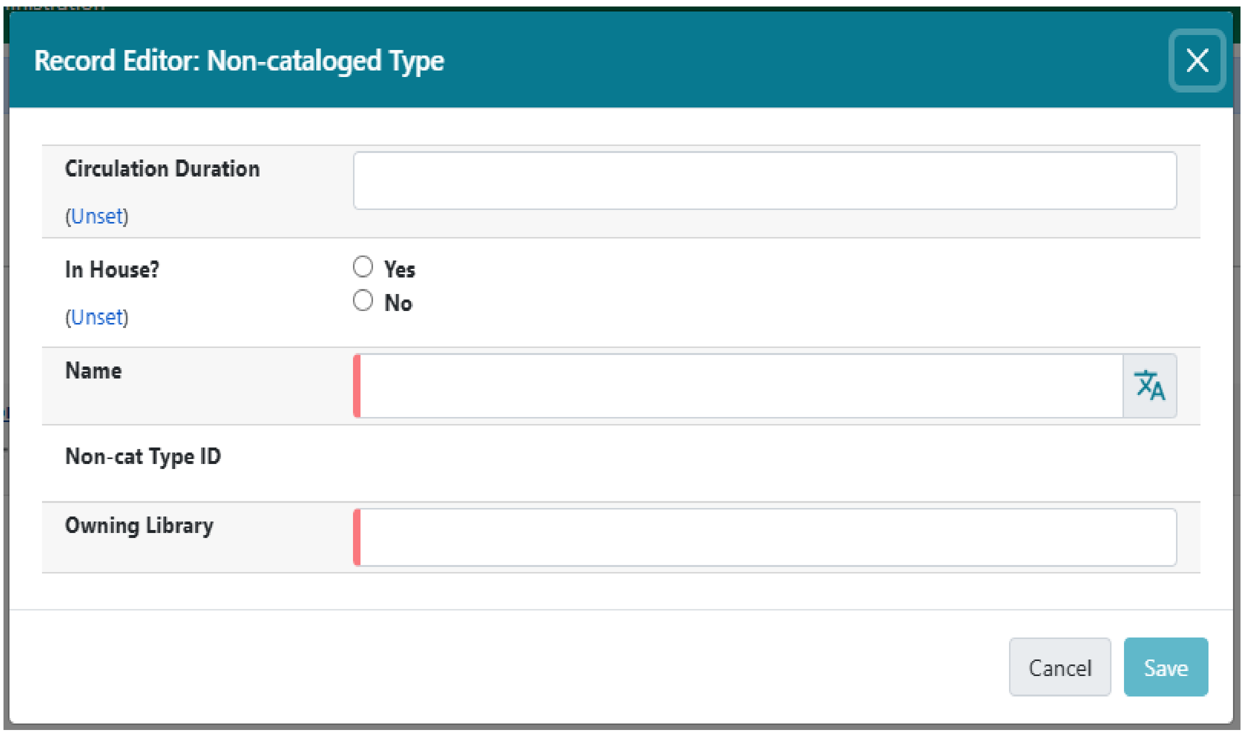


Non-Cataloged Types Editor Directions

Location: *Administration → Local Administration → Non-Cataloged Types Editor*

Creating a new non-cataloged type

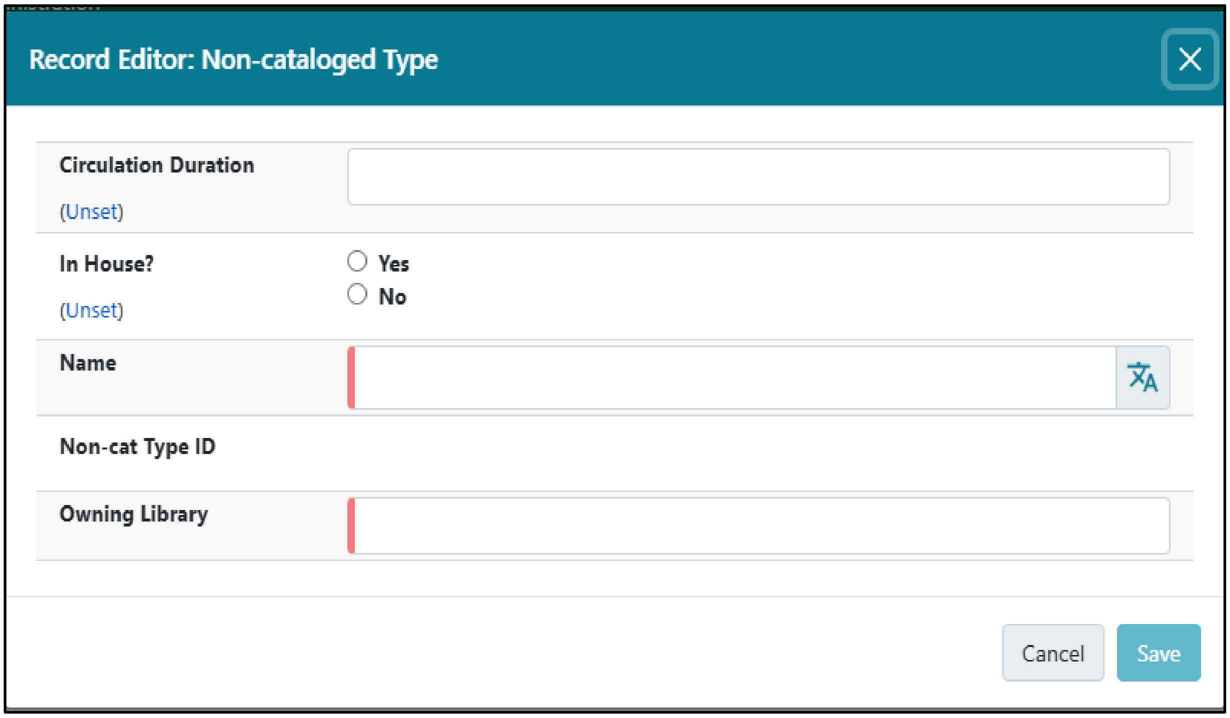
1. In the Non-Cataloged Types Editor, click the **New Non-Cataloged Type** button.
2. Specify the **Checkout Duration** (e.g., 7 days, 14 days). This determines the default loan period for this item.
3. Select whether the item is for **In House** use or not.
4. Enter a descriptive **Name** for the item type (e.g., "Paperbacks," "Game Console"). This name is what staff will see in the circulation module.
5. Select the **Owning Library** to which this item type will belong.
6. Click **Save** to create the new non-cataloged item type.



Editing an existing non-cataloged type

From the list of non-cataloged types, find the one you wish to edit.

Double-click next to the name you will edit.



You can then change the name, checkout duration, and status of in-house use as needed. Click Save to save your changes.

Using non-cataloged types during checkout

Once a non-cataloged type has been created, staff at the relevant library can use it during circulation:

- In the circulation module, access the patron's account.
- In the checkout screen, select the non-cataloged type from the drop-down menu.
- Enter the number of non-cataloged materials being checked out.

Deleting a non-cataloged type

Note: Non-Cataloged Types cannot be deleted at this time.

Statistical Categories Editor

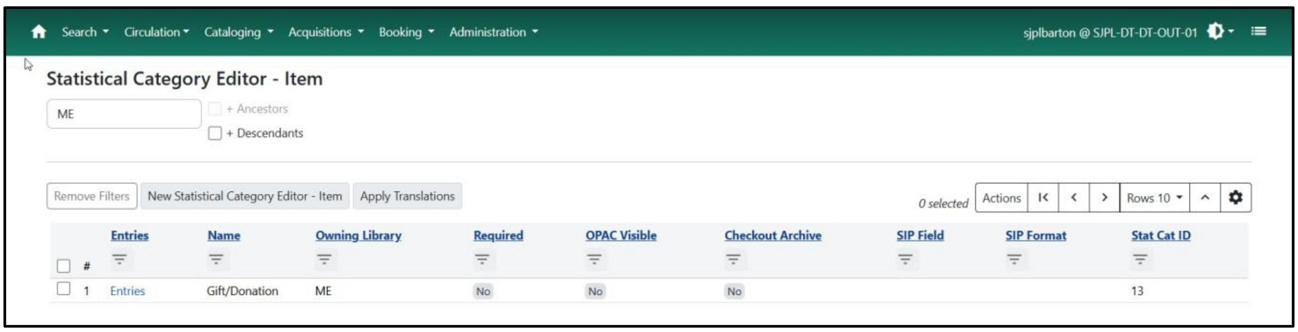
Statistical categories (stat cats) allow libraries to associate locally interesting data with patrons and items. Each library may create and use stat cats when deemed helpful.

The Statistical Categories Editors are found on the Local Administration page of the Administration menu.

Items

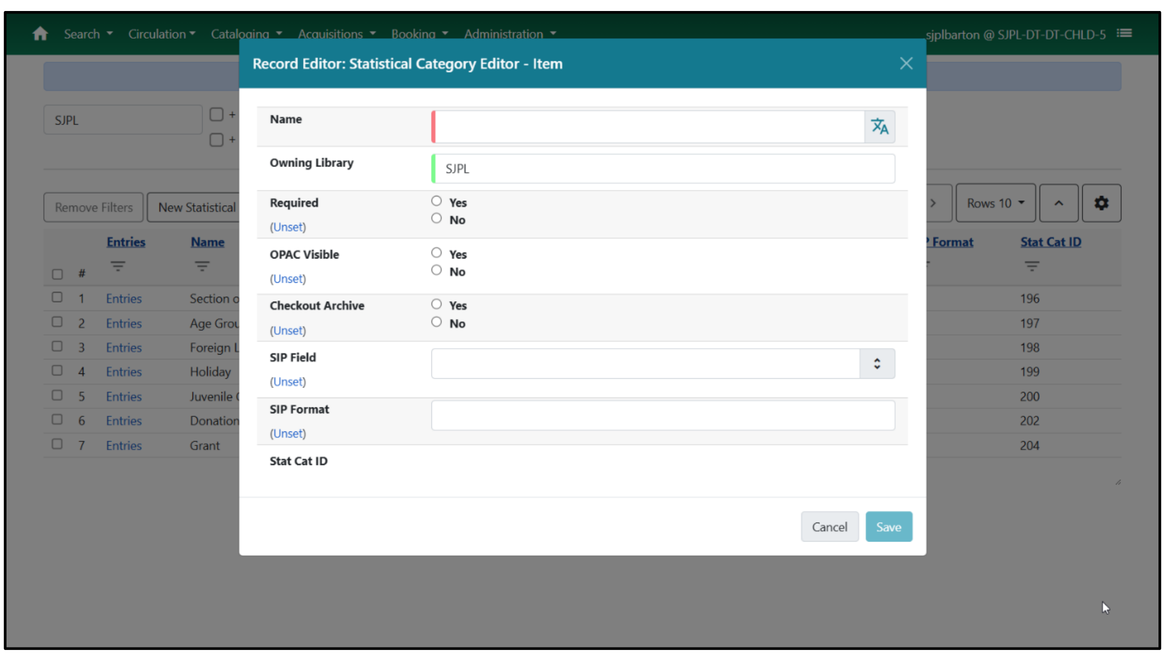
Location: *Administration → Local Administration → Statistical Categories Editor - Item*

Currently, there is one usable consortium level item stat cat.



Create an item stat cat

To create a copy stat cat, click New Statistical Category Editor - Item.

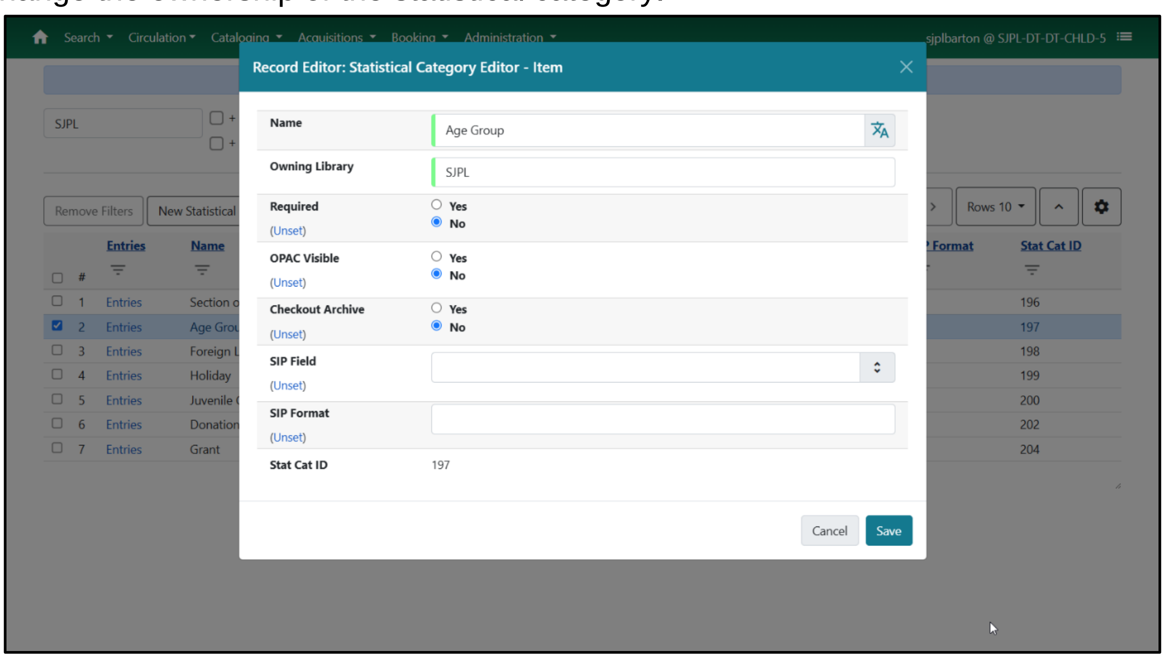


- **Name** (required entry): The name that labels this entry on the item attributes interface.
- **Owning Library** (required entry): Select the library for which the stat cat applies.
- **Required** (required entry):
    - Yes: Every copy within the scope of this stat cat must have an entry for this stat cat.
    - No: Copies within the scope of this stat cat may have an entry for this stat cat.
- **OPAC Visibile** (required entry):
    - Yes: When an option is made available to show copy stat cats in the catalog, the entry will appear.
    - No: When an option is made available to show copy stat cats in the catalog, the entry will not appear.
- Checkout Archive (optional):
    - Yes: Retain information with anonymized circulations.
    - No: Do not retain information with anonymized circulations.
- **SIP Field**: Leave blank
- **SIP Format**: Leave blank

Once the fields are filled in, click **Save** to create the new Item Stat Cat.

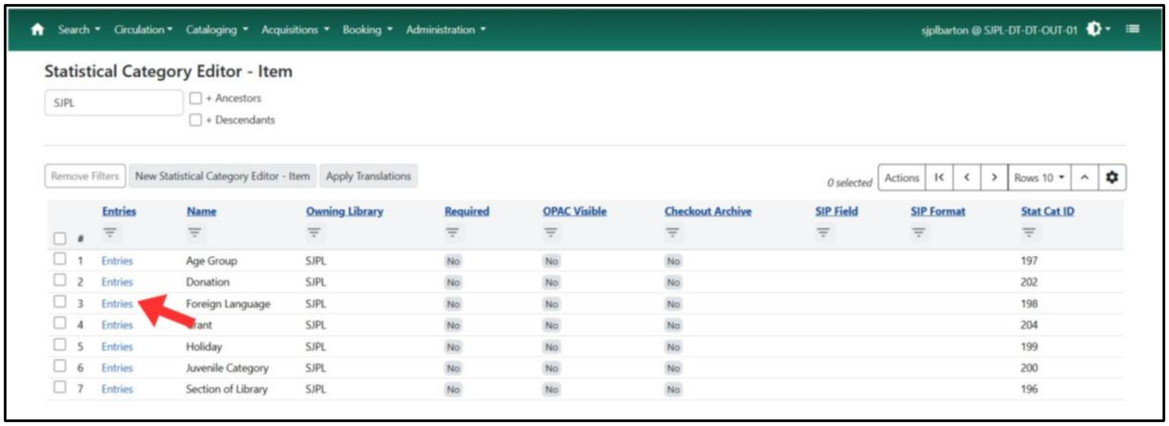
Modify an item stat cat

To modify an existing stat cat, double click on the row, or select from the Actions menu or right-click and choose **Edit Selected**. You can update the name, OPAC visibility and whether or not the information is archived with anonymized circulations. You cannot change the ownership of the statistical category.

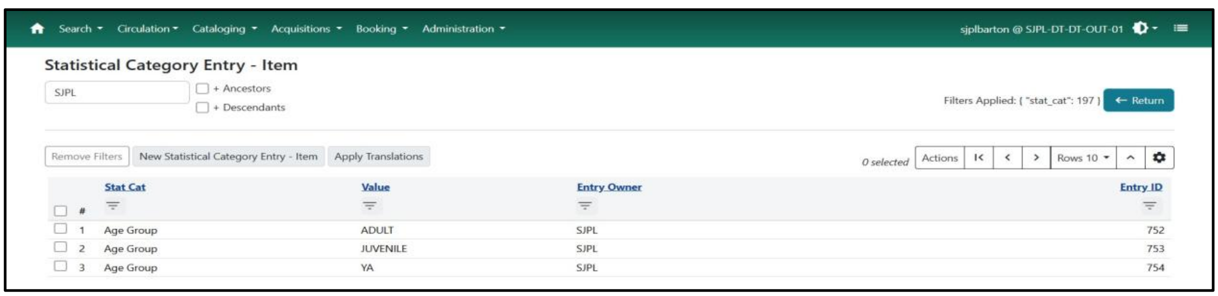


Add listed entries on an item stat cat

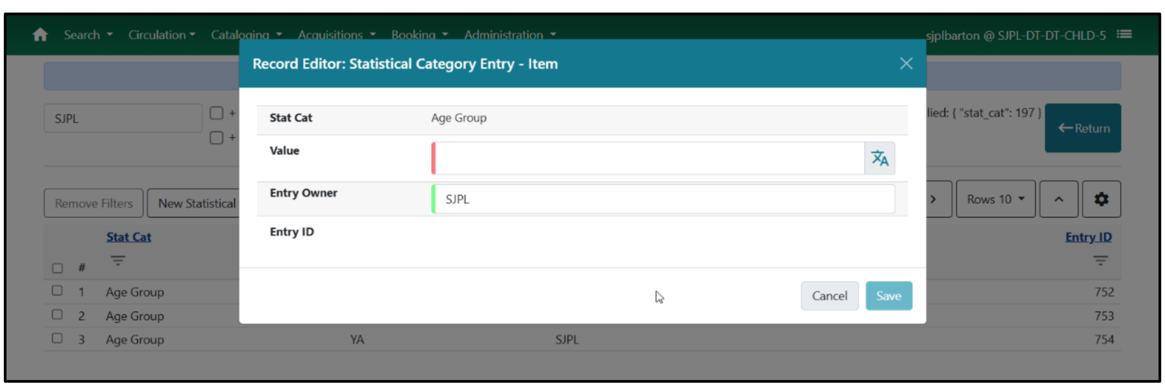
For item stat cats, a list of possible entries must be provided for assignment to holdings. To add new entries, click on the **Entries** button under the *Entries* column of the stat cat grid.



Click New Statistical Category Entry - Item.



Enter the value (entry name). The Entry Owner should match the owner of the statistical category. Click **Save** when finished. The new stat cat value will be available for staff to assign to holdings.

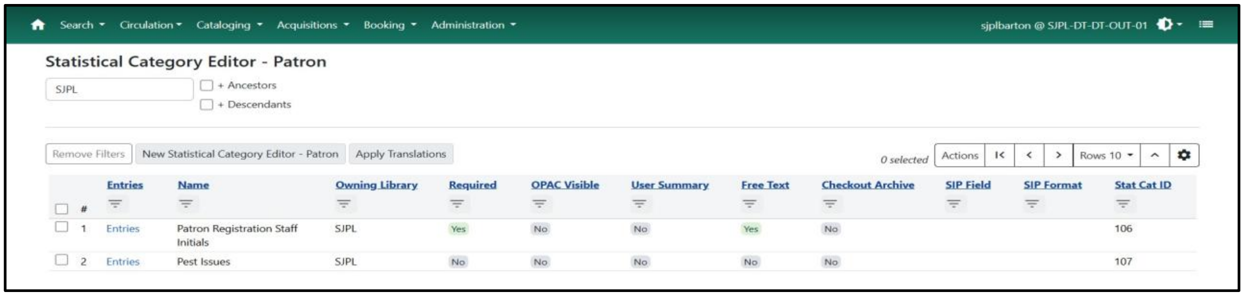


NOTE: You cannot edit entries once they are created. You will have to delete the current entry and create a new one.

Patrons

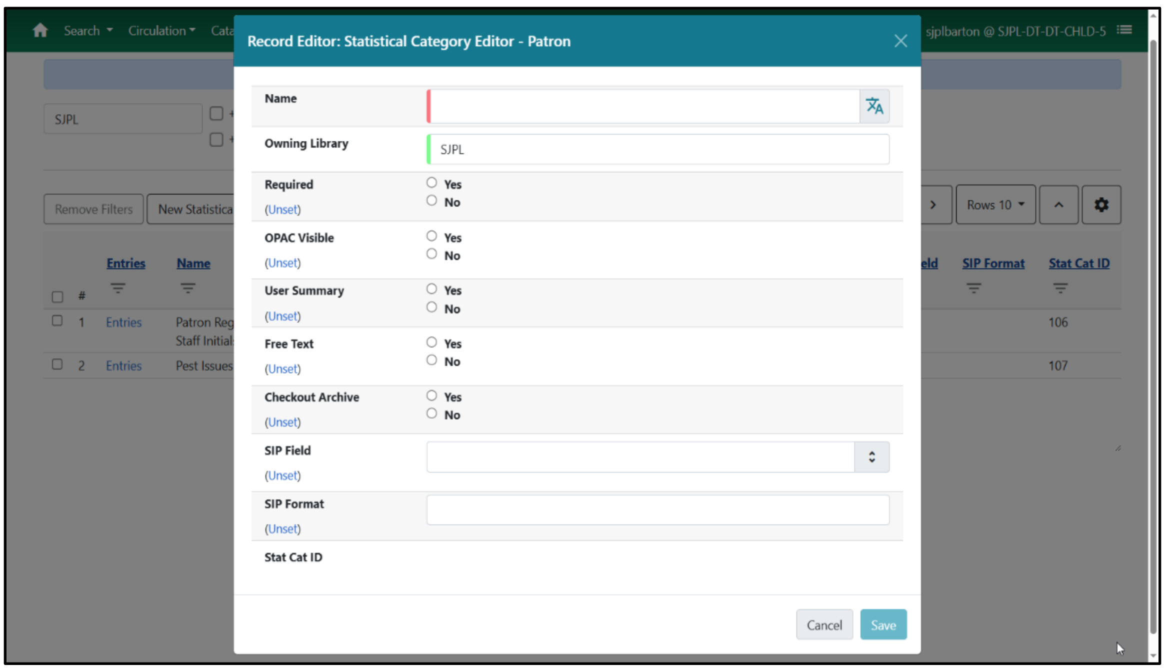
Location: *Administration → Local Administration → Statistical Categories Editor - Patron*

There are no consortium-level patron stat cats.



Create a patron stat cat

To create a patron stat cat, click New Statistical Category Editor - Patron.



- **Name** (required): The name that labels this entry on the patron's account.
- **Owning Library** (required): Select the library for which the stat cat applies.
- **Required** (required):
    - Yes: The category must be assigned a value when editing a patron's account.
    - No: The category may be assigned a value when editing a patron's account.
- OPAC Visibile (required):
    - Yes: The category will be displayed in the patron's account in the OPAC.
    - No: The category will not be displayed in the patron's account in the OPAC.
- **User Summary** (required):

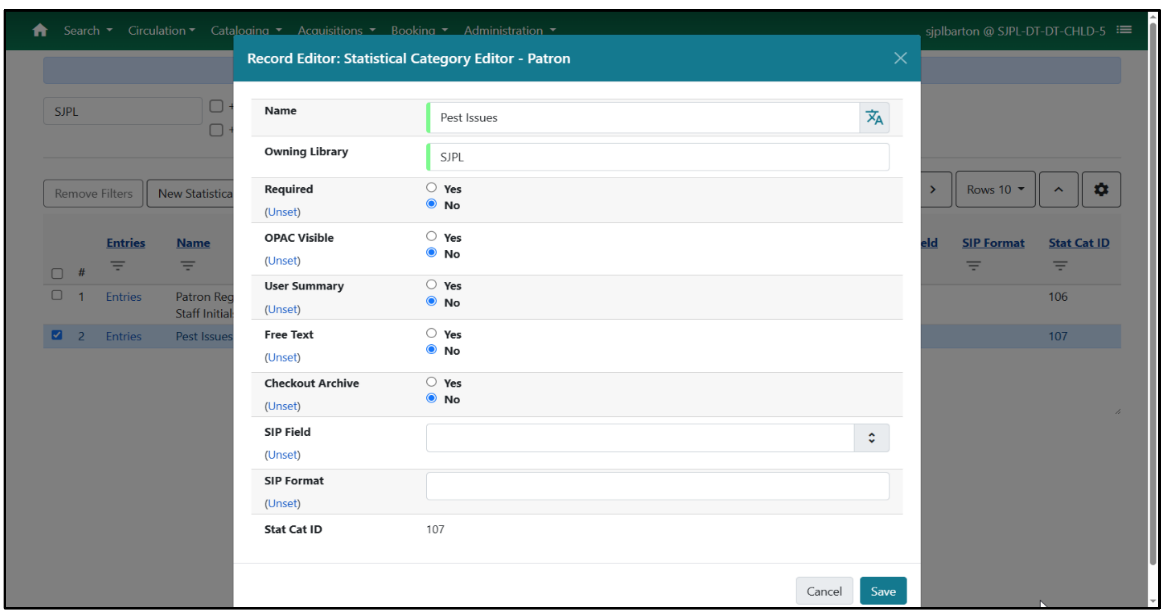
- Yes: Include entry in the patron account summary.
- No: Do not include entry in the patron account summary.

- **Free Text** (required):
  - Yes: Allow free text to be entered instead of specific entries from a drop down.
  - No: Do not allow free text as an entry
- Checkout Archive (required):
  - Yes: Retain information with anonymized circulations.
  - No: Do not retain information with anonymized circulations.
- **SIP Field**: Leave blank.
- **SIP Format**: Leave blank

Once the fields are filled in, click **Save** to create the new Patron Stat Cat.

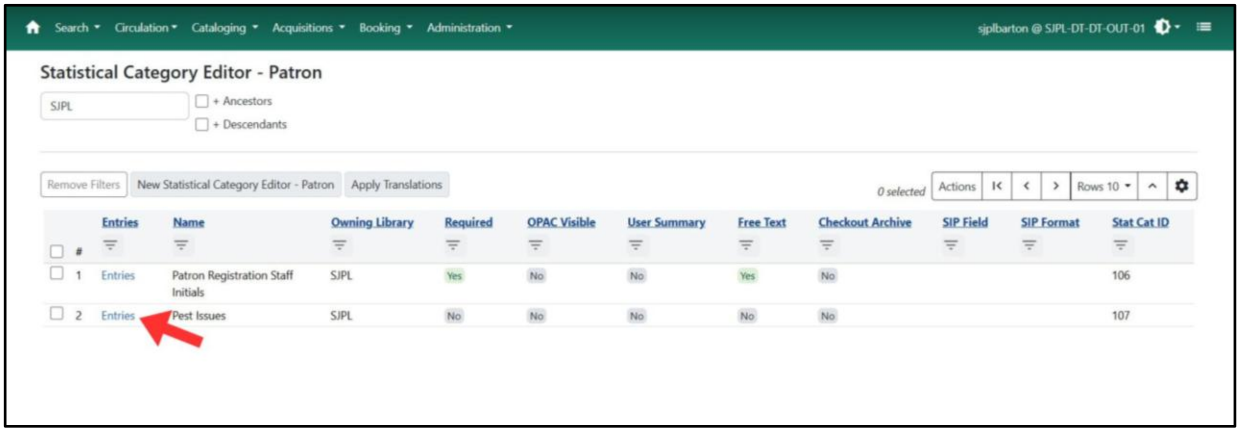
Modify a patron stat cat

To modify an existing stat cat, double-click on the row, or select from the Actions menu or right-click and choose **Edit Selected**. You can update the name, OPAC visibility, required status, summary appearance, free text eligibility, and whether or not the information is archived with anonymized circulations. You cannot change the ownership of the statistical category.

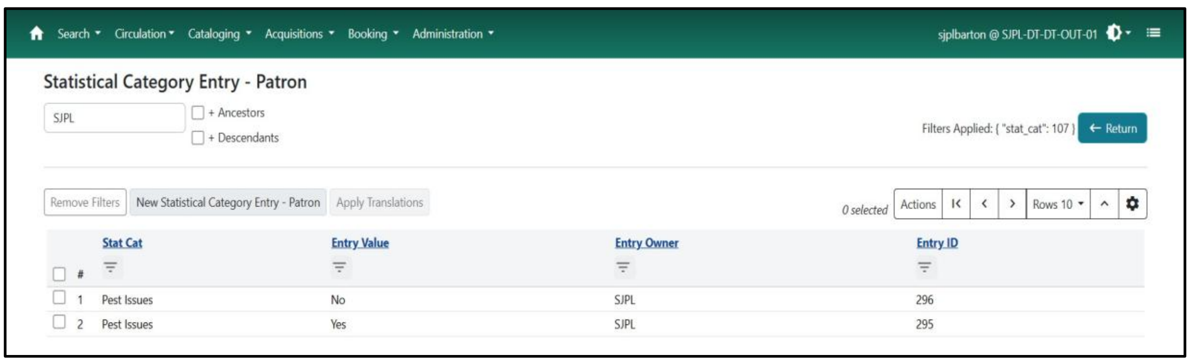


Add listed entries on a patron stat cat

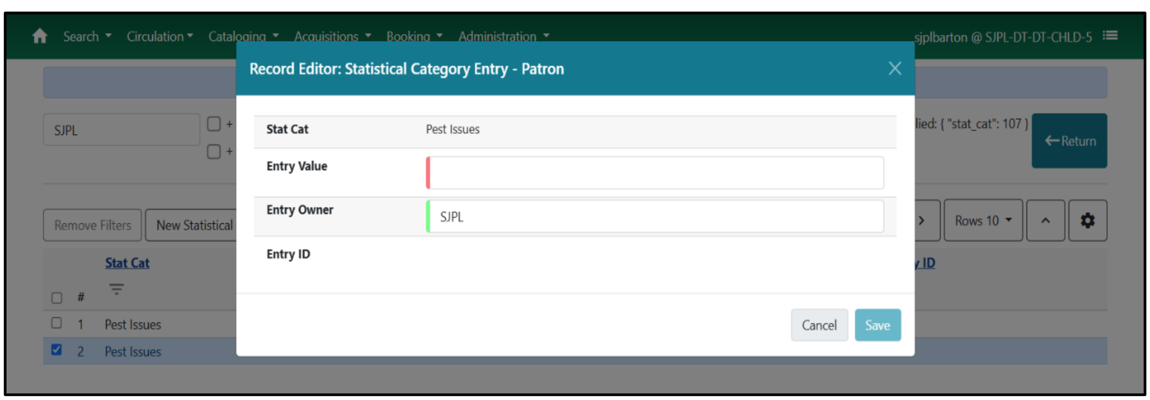
For patron stat cats, a list of possible entries may be provided for assignment to holdings either in addition to or in place of free text entries. To add new preset entries, click on the **Entries** button under the *Entries* column of the stat cat grid.



Click New Statistical Category Entry - Patron



Enter the value (entry name). The Entry Owner should match the owner of the statistical category. Click **Save** when finished. The new stat cat value will be available for usage on patron accounts.



Modify listed entries on patron stat cats

NOTE: It is not currently possible to modify existing entries on a patron stat cat in the web client.

Hold Policies

Location: Administration → Local Administration → Hold Policies

Hold policies define who can place how many holds on what types of materials. They also define whether the library's materials can be used to fill holds to be picked up at other libraries.

Missouri Evergreen grants each library the ability to set their own hold policies. To add a new policy, change an existing policy or delete a policy, contact Equinox at support@equinoxoli.org.

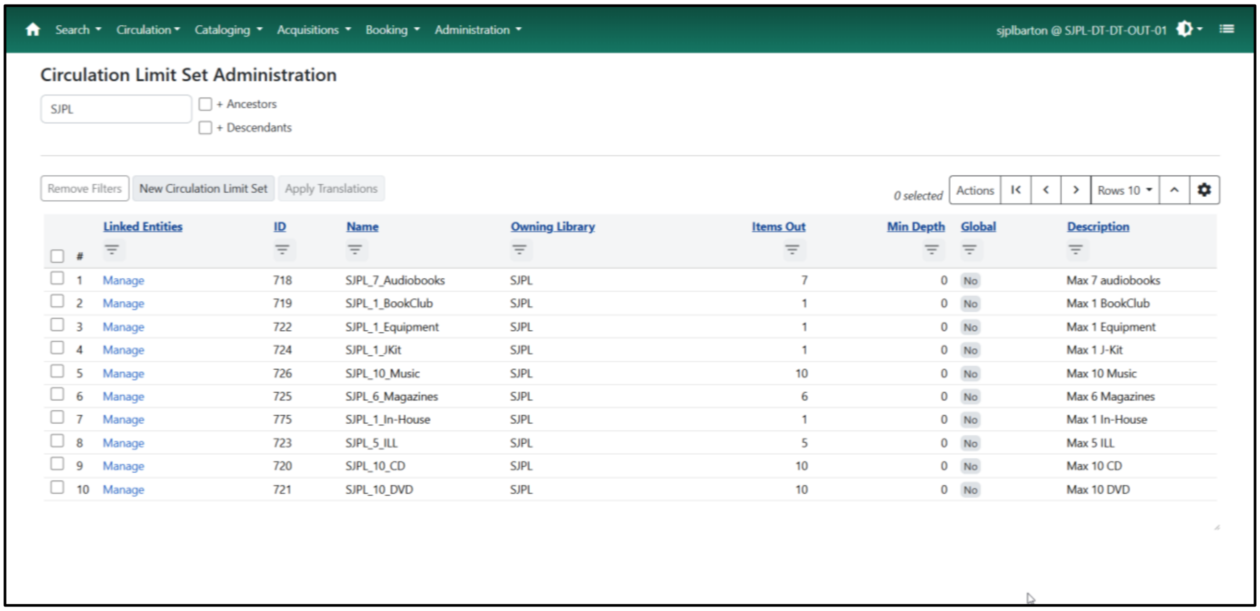
A few things that will need to be included:

- Circulation modifier or item age
- What patron group(s) the policy applies to
- The maximum number of holds (if applicable)
- Whether or not interlibrary connect holds be placed (for libraries participating in reciprocal borrowing)

Circulation Limit Sets

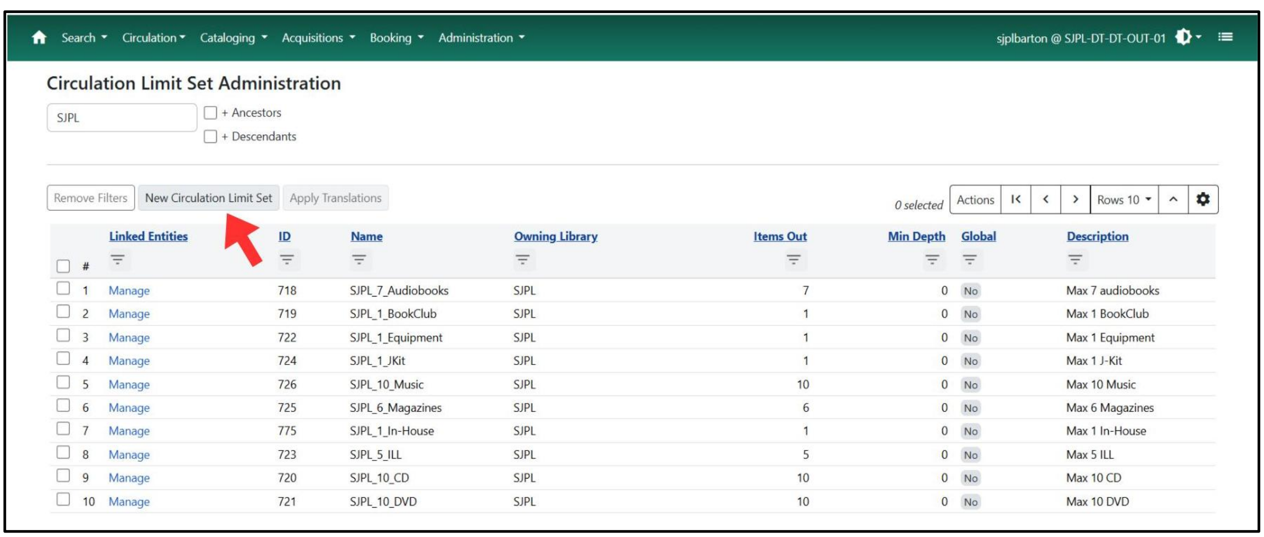
Location*: Administration → Local Administration → Circulation Limit Sets*

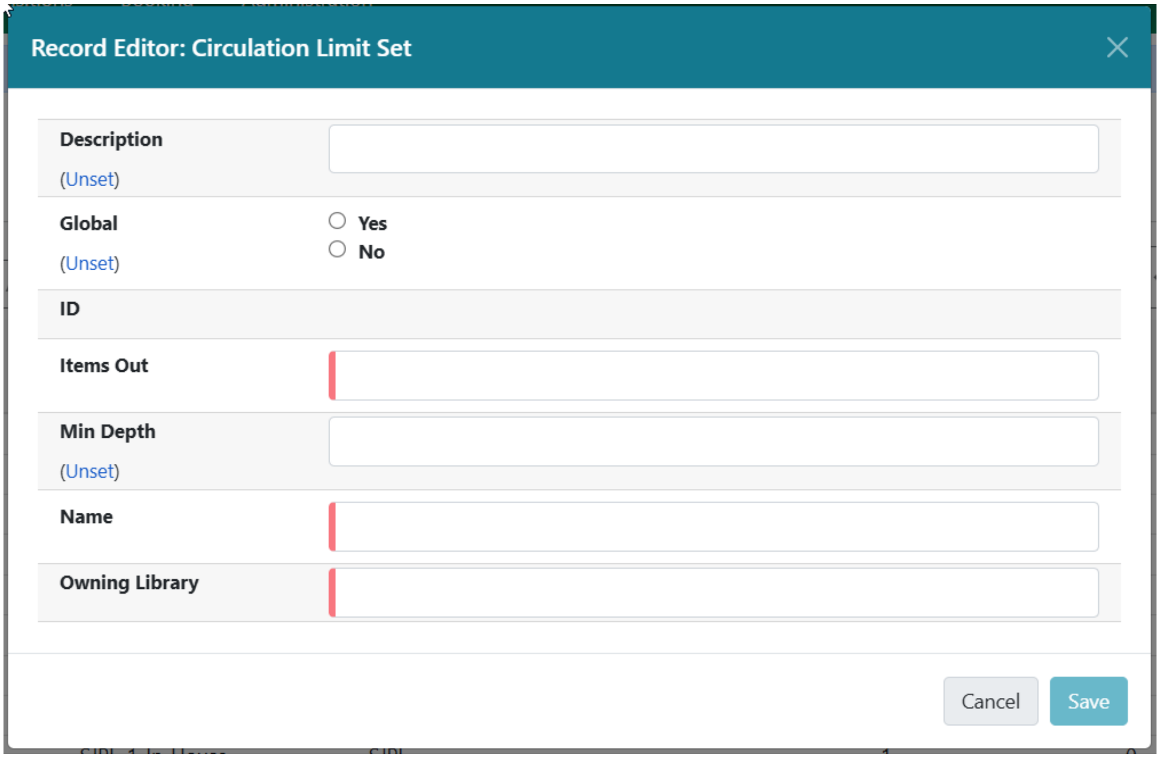
This interface allows staff with the appropriate permissions to specify the maximum number of checkouts of items by shelving location and is an addition to the circulation limit sets. Circulation limit sets refine circulation policies by limiting the number of items that users can check out. Circulation limit sets are linked by name to circulation policies.



Creating a Circulation Limit Set

To create a new entry, select **New Circulation Limit Set**.





- **Description** (required entry): This gives a brief description of the limit set.
- **Global** (required entry):
    - Yes: Restricts all the org units in the consortium to this limit set when applied to a circulation policy.
    - No: The limits will only apply to the direct ancestors and descendants of the owning library.
- **ID** (automatically generated)
- **Items Out** (required entry): The number of items that a patron can take from this shelving location.
- **Min Depth** (required entry): Set as zero (0), so that the items in all the circulating libraries in the consortium to be eligible for restriction by the limit set when it is applied to a circulation policy.
- **Name** (required entry): This will name the circulation set. It will be used to link the circulation limit to the circulation policy.
- **Owning Library** (required entry): Select the library that can create and edit the limit set.

Once the fields are filled in, click **Save** to create the new circulation limit set.

Editing a Circulation Limit Set

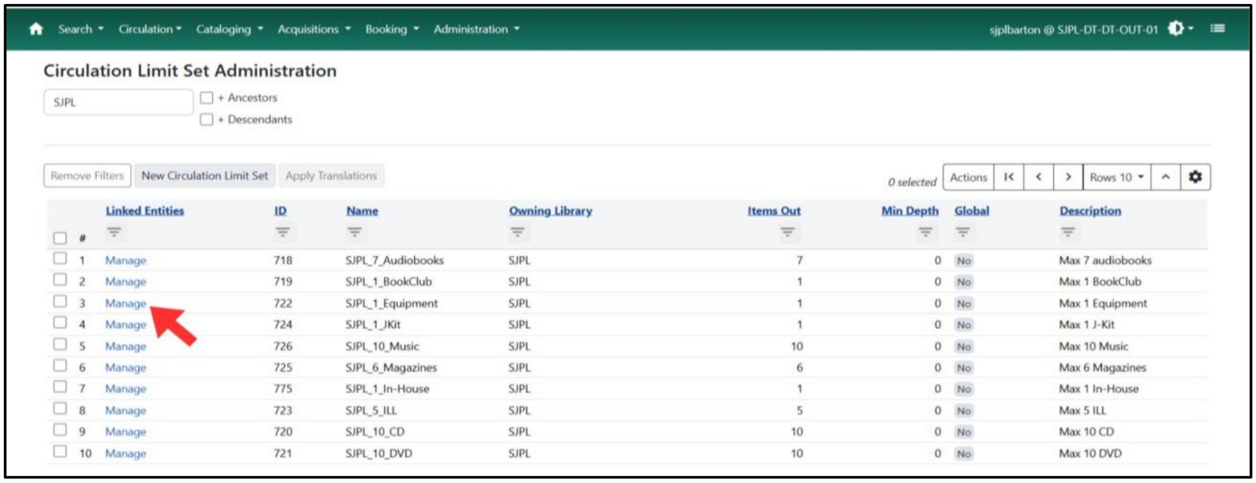
To edit the portal page entry, double-click on the entry from the list, or right-click or select **Actions** and choose **Edit Selected**.

Deleting a Circulation Limit Set

If you wish to remove an existing portal page entry, either right click on the entry or select **Actions** and choose **Delete Selected**.

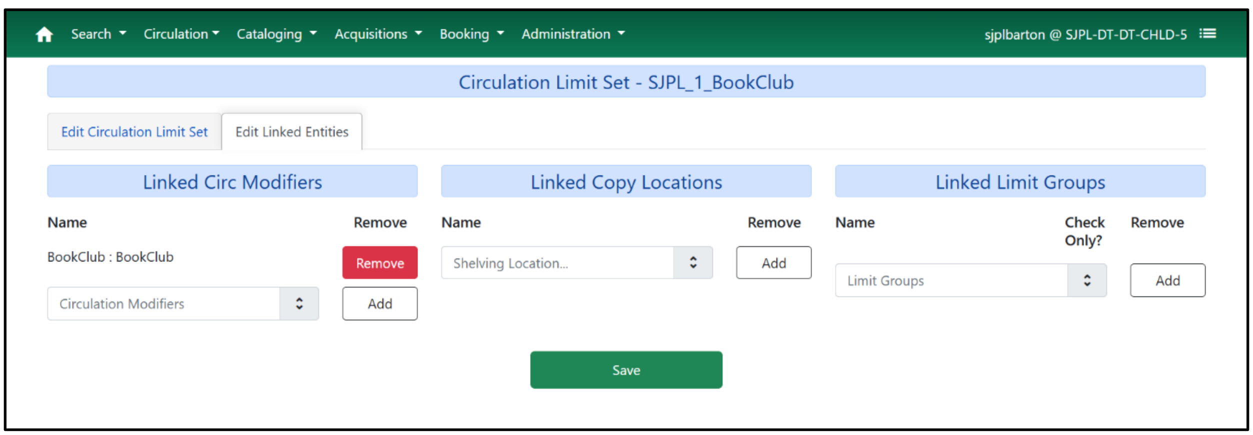
Linking a Circulation Limit Set

To link shelving locations, circ modifiers, and limit groups, click **Manage** in the same line as the entry.



#	Linked Entities	ID	Name	Owning Library	Items Out	Min Depth	Global	Description
1	Manage	718	SJPL_7_Audiobooks	SJPL	7	0	No	Max 7 audiobooks
2	Manage	719	SJPL_1_BookClub	SJPL	1	0	No	Max 1 BookClub
3	Manage	722	SJPL_1_Equipment	SJPL	1	0	No	Max 1 Equipment
4	Manage	724	SJPL_1_JKit	SJPL	1	0	No	Max 1 J-Kit
5	Manage	726	SJPL_10_Music	SJPL	10	0	No	Max 10 Music
6	Manage	725	SJPL_6_Magazines	SJPL	6	0	No	Max 6 Magazines
7	Manage	775	SJPL_1_In-House	SJPL	1	0	No	Max 1 In-House
8	Manage	723	SJPL_5_ILL	SJPL	5	0	No	Max 5 ILL
9	Manage	720	SJPL_10_CD	SJPL	10	0	No	Max 10 CD
10	Manage	721	SJPL_10_DVD	SJPL	10	0	No	Max 10 DVD

Add whatever is applicable.



Once the fields are filled in, click Save.

Financials

Cash Reports

Location: *Administration → Local Administration → Cash reports*

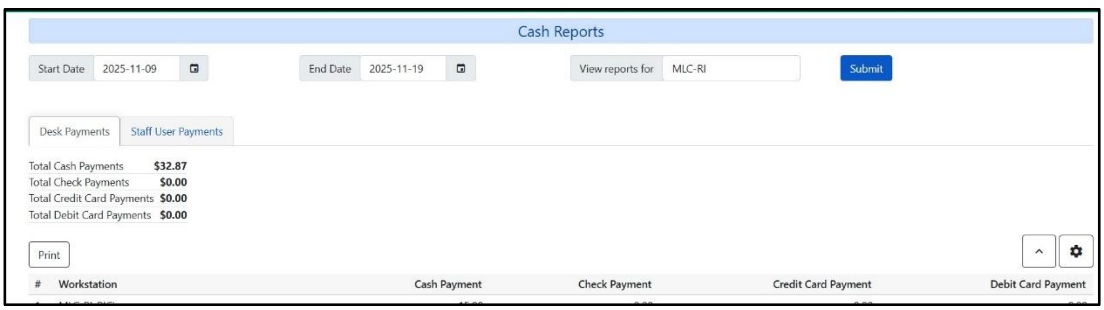
Cash reports are useful for quickly getting information about money that your library has collected from patrons. This can be helpful in a few different scenarios, such as:

- Reconciling a cash drawer at the end of the day
- Assessing the popularity of a specific payment type (eg evaluating food-for-fines program)

To use the cash reports:

Navigate to the cash reports function. Select the time period and library you are interested in. This interface defaults to showing payments accepted during the current day.

Click *Submit*.



You can click on the names of columns to sort the reports.

You need the VIEW_TRANSACTION permission to view these reports.

These payments are divided into two different types:

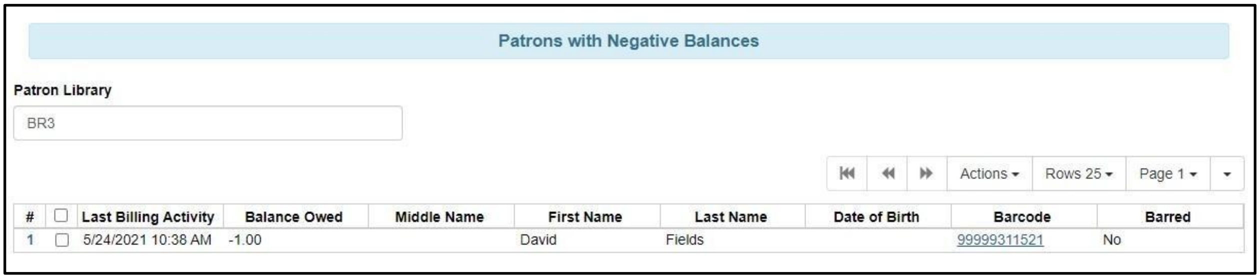
- Desk payments—in which a staff member simply accepted a credit card, check, or cash payment
- User payments—in which a staff member had to make a specific decision about whether to accept a payment of goods or work; or forgave or granted credit to a particular patron.

Patrons with Negative Balances

Location: *Administration → Local Administration → Patrons with negative balances*

This report lists all patrons at a branch with a Negative Balance. Negative balances can appear when bills are voided. One common example is a patron who needs to be refunded for paid lost items so that bill becomes voided within their account.

To access a branches list of patrons with negative balances, choose the branch in the upper lefthand corner. Only branches and Systems can be selected.*Consortium* cannot be selected.



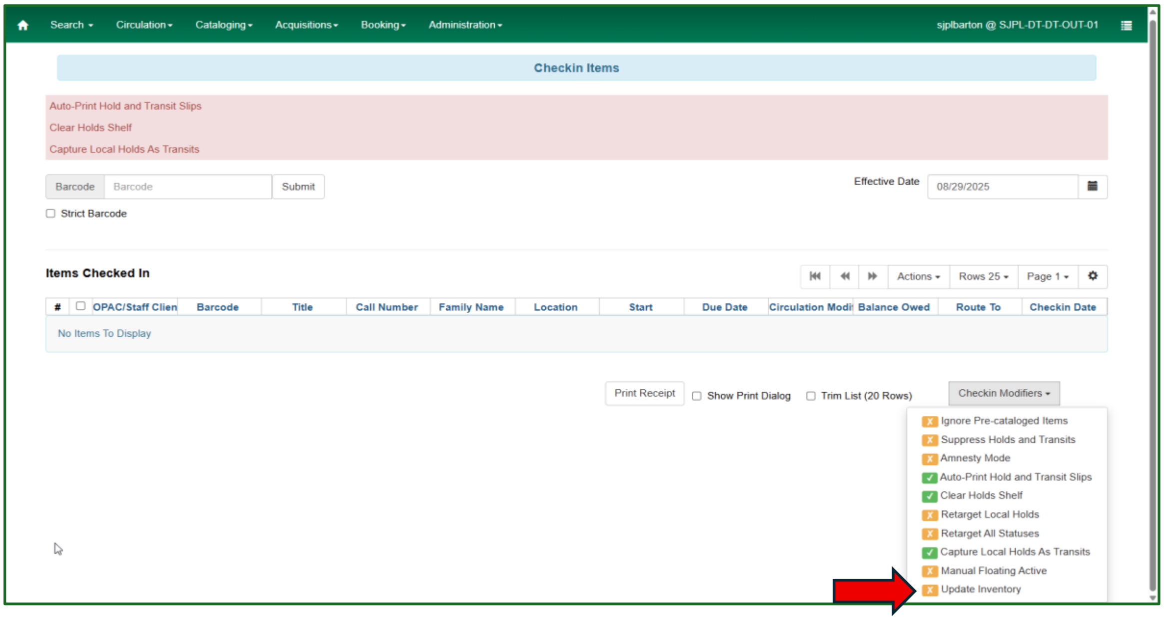
To clear the negative balance, click on the patron's barcode to access their account.

To avoid producing negative balances, use the *Prohibit negative balance on bills* (DEFAULT) library setting.

You can also choose Prohibit negative balance on bills for lost materials or Prohibit negative balance on bills for overdue materials library settings if you want to apply a specific condition.

Inventory

You can run an inventory on a single shelving location, a department, or your whole collection. It's entirely up to you!



Once you've set the scope of your inventory, turn on the **Update Inventory** check in modifier and scan every item in that collection into the Checkin screen.

Recommendations from past inventory events suggest that staff use the scanning process to note any materials that appear to have incorrect circ mods, shelving locations, or missing prices or are in need of repair and turn them over to the cataloging division.

Then you can run reports to see what materials were scanned as part of the process or to see what materials should be marked missing and searched for in other locations.

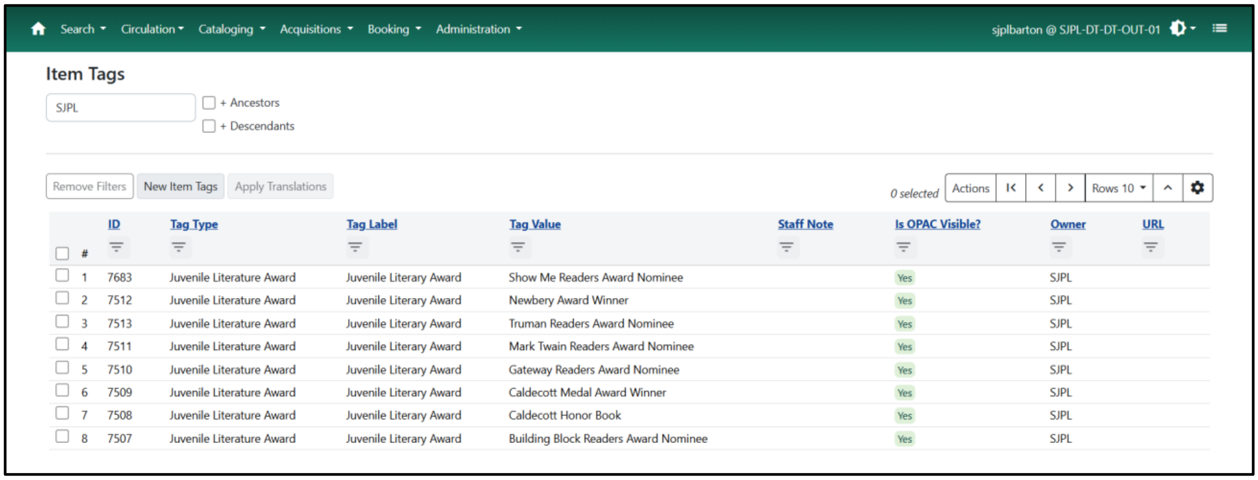
Holdings Template Editor

Holdings Templates, used to define items in Cataloging, may be created or edited in the Cataloging function, Holdings Editor, which can be accessed from Holdings View of a bibliographic record or from Item Status—Actions Menu—Edit Call Number and Items. These templates also may be edited through Local Administration. Select Holdings Template Editor from the menu, then utilize the drop-down box on the left to find the template you wish to edit.

For more in-depth discussion and best practices regarding Holding Template Editor, please refer to the Missouri Evergreen Consortium Cataloguing Best Practices manual, pages 19-21. This document is located at [Cataloging Training Materials – Welcome to Missouri Evergreen.]

Item Tags

Item Tags allow staff to apply custom, pre-defined labels or tags to items. Item tags are visible in the public catalog and are searchable in both the staff client and public catalog based on configuration. This feature was designed to be used for Digital Bookplates to attach donations or memorial information to items but may be used for broader purposes to tag items.

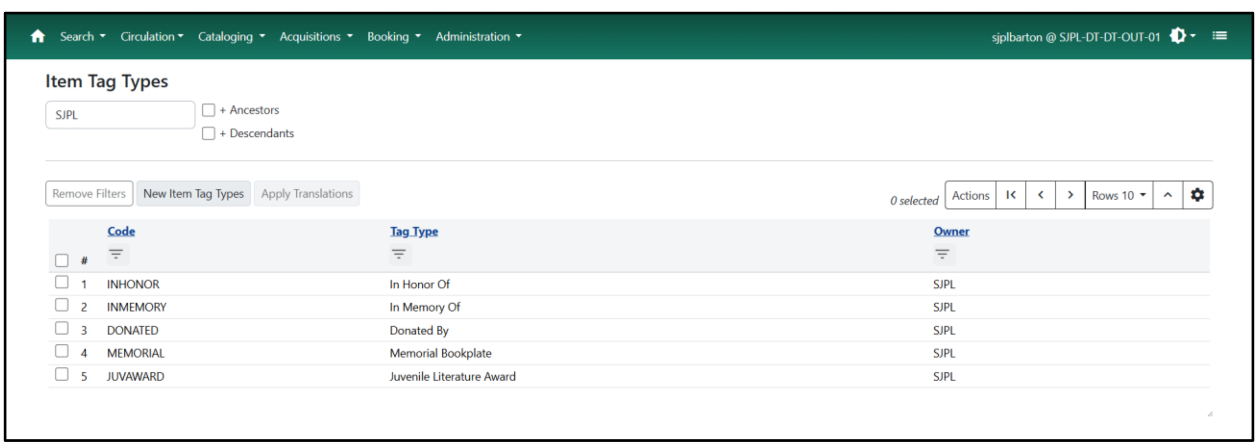


There are two components to this feature: Item Tag Types and Item Tags.

Item Tag Types

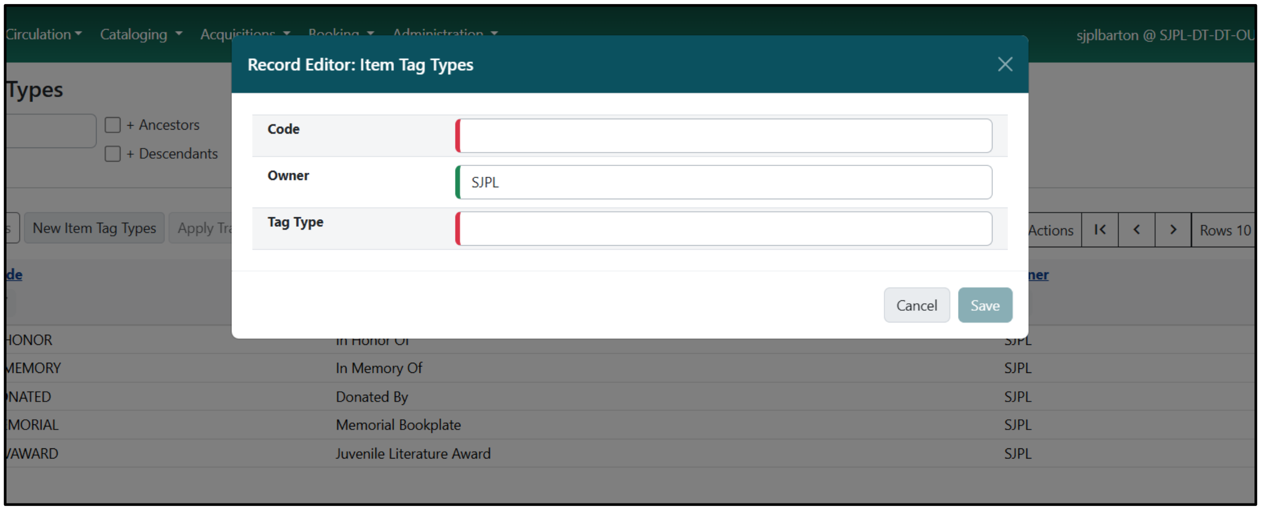
Location*: Administration → Server Administration → Item Tag Types*

Item Tag Types are used to define the type of tag, such as “Bookplates” or “Local History Notes”, as well as the organizational unit scope for use of the tag type.



Create an item tag type

To create a new entry, select **New Item Tag Types**.



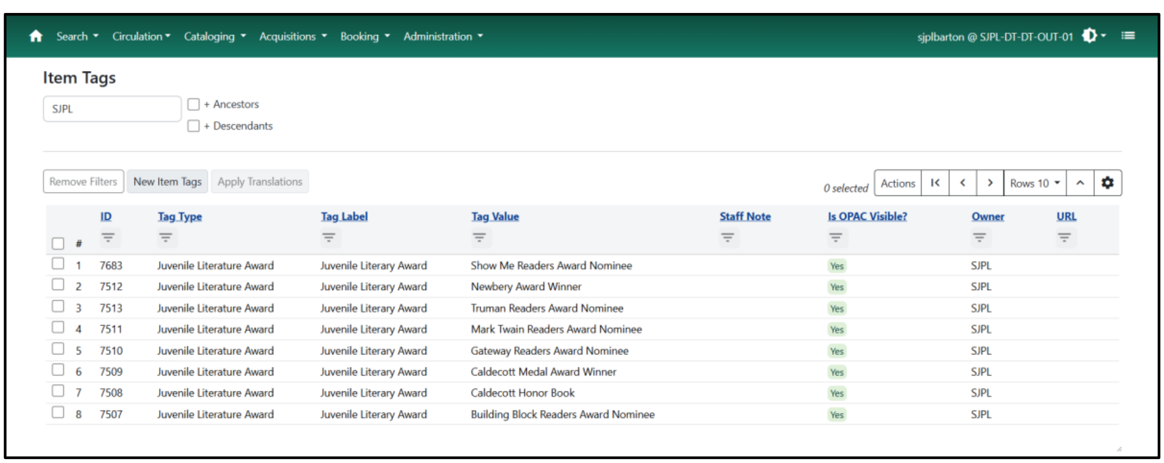
- **Code** (required entry): A code to identify the item tag type.
- **Owner** (required entry): The org. unit that can see and use the item tag type.
- **Tag Type** (required entry): A tag that will appear in drop-down menus to identify the item tag type.

Once the fields are filled in, click **Save** to create the new Item Tag Type. Now, create the associated Item Tags.

Item Tags

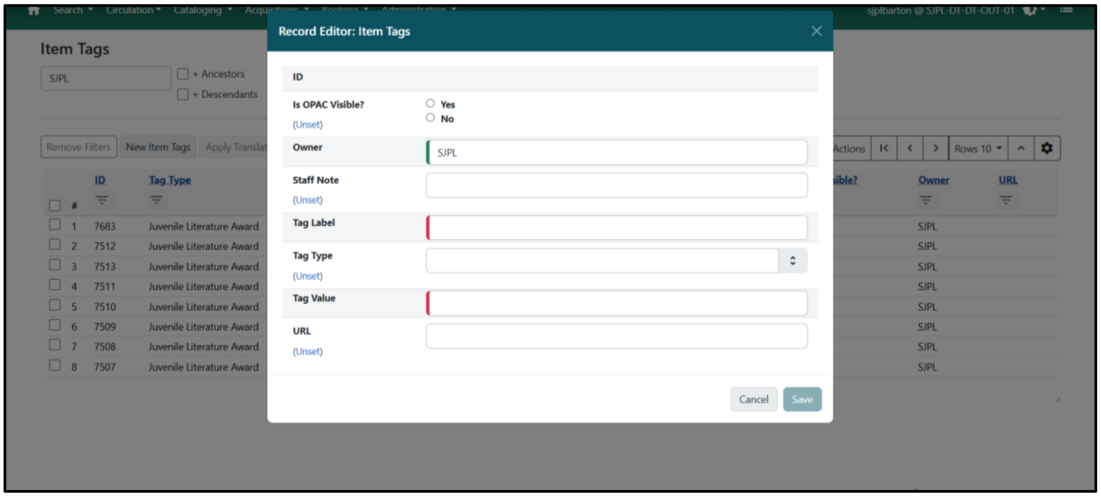
Location: *Administration → Local Administration → Item Tags*

Item Tags are associated with an Item Tag Type and are used to configure the list of tags that can be applied to copies, such as a list of memorial or donation labels, that are applicable to a particular organizational unit.



Create an item tag

To create a new entry, select **New Item Tags**.

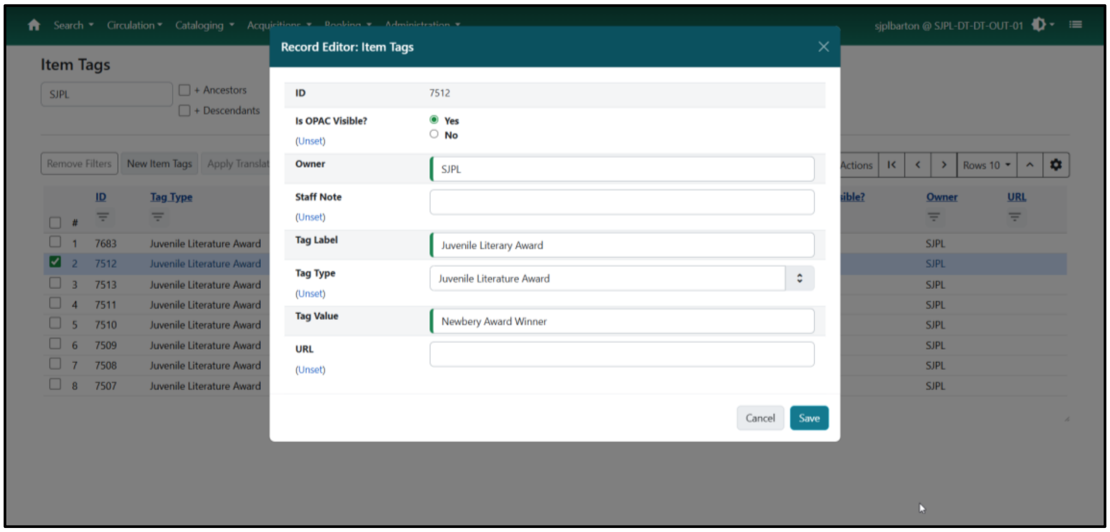


- **Is OPAC Visible?** (required entry):
  - **Yes**: It can be searched for and viewed in the OPAC and staff catalog.
  - **No**: It can only be searched for and viewed in the staff catalog.
- **Owner** (required entry): Select the org. unit at which the tag can be seen and used.
- **Staff Note** (optional): A note may be added to guide staff in when to apply the item tag.
- **Tag Label** (required entry): Assign a label to the new item tag.
- **Tag Type** (required entry): Select the Item Tag Type with which you want to associate the new Item Tag.
- **Tag Value** (required entry): Assign a value to the new item tag. This will display in the catalog.

Once the fields are filled in, click **Save** to create the new Item Tag.

Modify an Item Tag

Existing item tags can be edited by double clicking on the row or selecting from the Actions menu or right-clicking and choose **Edit Selected**. The dialog box will appear, and you can modify the item tag. Click **Save** to save any changes. Changes will be propagated to any items that the tag has been attached to.



Delete an Item Tag

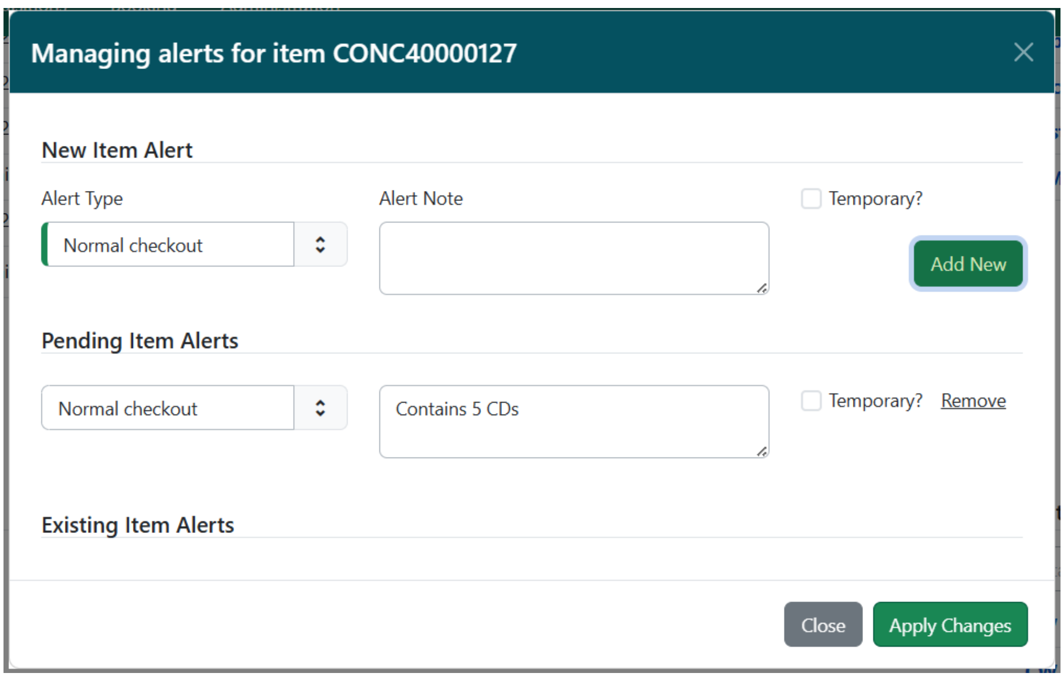
Existing item tags can be deleted by selecting from the Actions menu or right-clicking and choosing **Deleted Selected**. Deleting a tag will delete the tag from any items it was attached to in the catalog.

Adding an Item Alert

Item Alerts can be added to new items or existing items using the Holdings Editor. They can also be added directly to items through the Check In, Check Out, Renew, Capture Holds, and Item Status screens; or from the bibliographic record in the *Holdings View* tab.

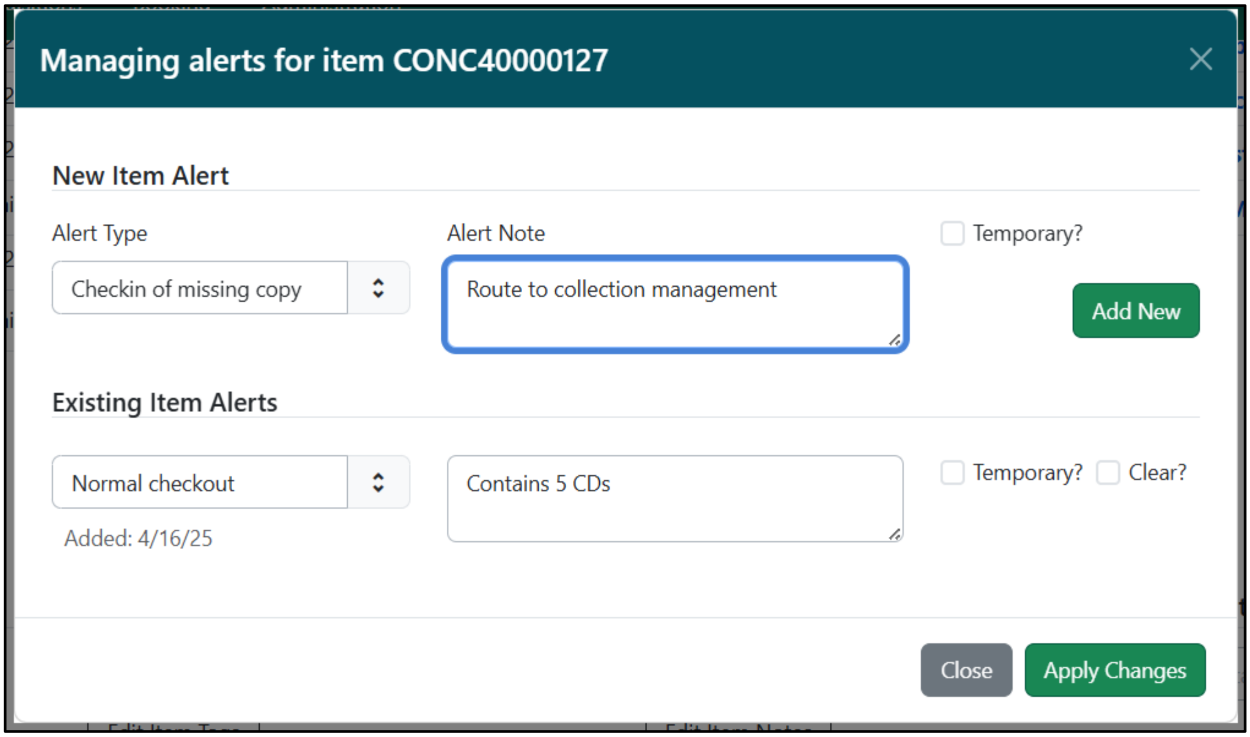
To add an Item Alert in the Holdings Editor:

1. At whichever entry point, select your item and then select **Actions** → **Edit Items.**
    a. If you are in the Holdings View tab, you can also select **Actions** → **Add / Manage Item Alerts**. This will open the alerts modal, and you can proceed to step 3.
2. Within the Holdings Editor, scroll to the bottom of the screen and select **Edit Item Alerts**.
3. This will open a window labeled “Managing alerts for item <barcode>”.



4. Select an *Alert Type* and enter an additional alert message if needed in the *Alert Note* field.
    a. Select the box next to *Temporary?* if this alert should not appear after the initial alert is acknowledged.
    b. Leaving the *Temporary* box unchecked will create a persistent alert that will appear each time the action to trigger the alert occurs, such as check in or check out.
5. Select Apply Changes to save the new Item Alert.
    a. If you accessed the modal directly from the Holdings View tab, Item Status, or Check In / Check Out interfaces, this will save your changes.
    b. To close without saving, select Close.

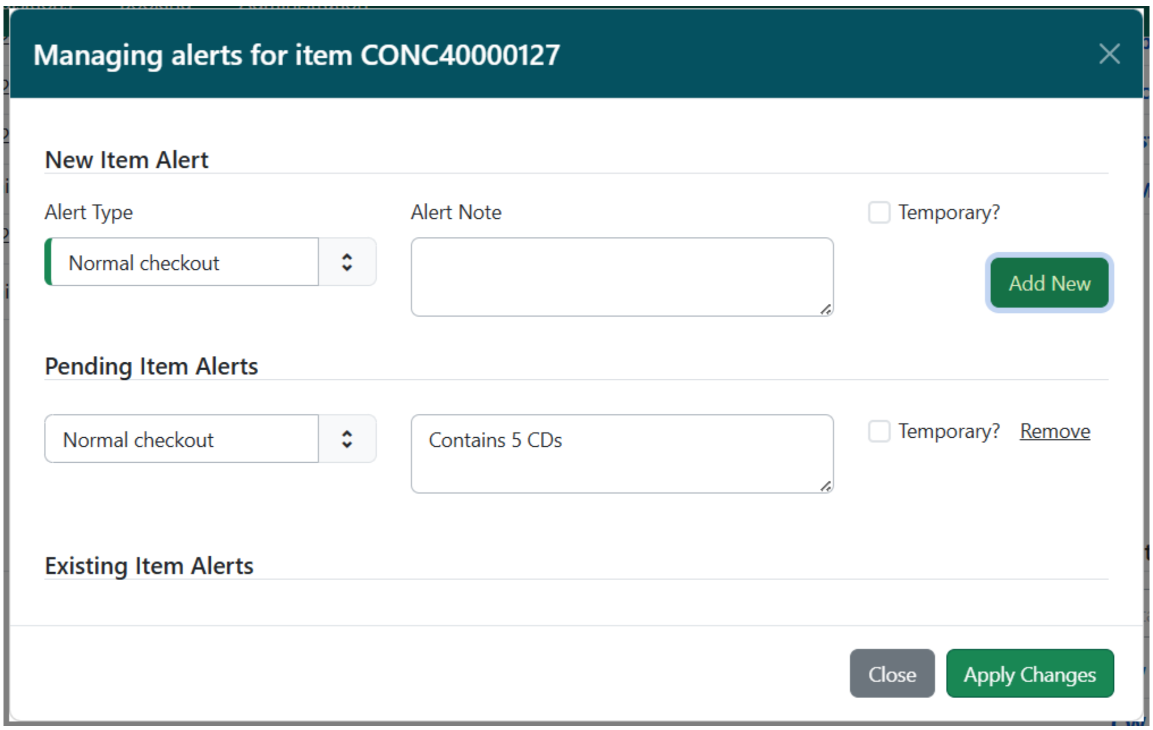
6. After an Item Alert has been added, selecting the **Edit Item Alerts** button in the Holdings Editor will allow you to add another item alert and to view and/or edit existing item alerts.



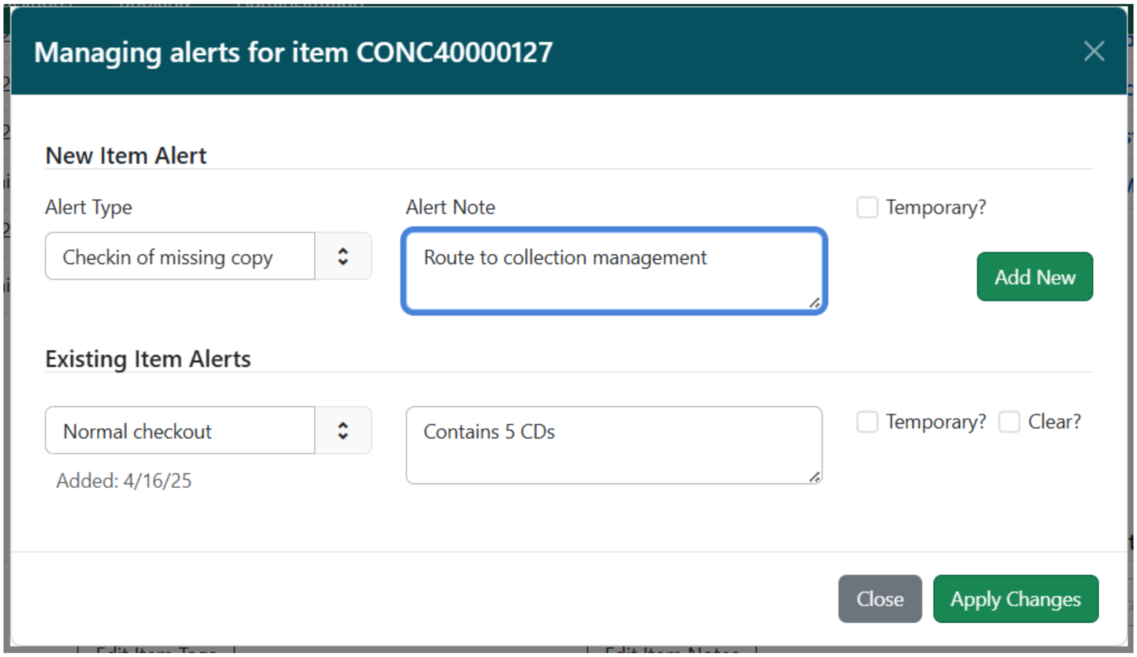
7. Proceed with the rest of your edits to the item, and then select either **Apply All & Save** or **Apply All, Save & Exit** to finish your edits.

Add an Item Alert from Check In, Check Out, Capture Holds, or Renewal Screens

1. Navigate to the appropriate screen, for example to **Circulation →Check In**.
2. Scan in the item barcode.
3. Select the item row and go to **Actions → Add Item Alerts** or right click on the item row and select Add Item Alerts.
4. This will open a new tab with a modal labeled “Managing alerts for item <barcode>”.

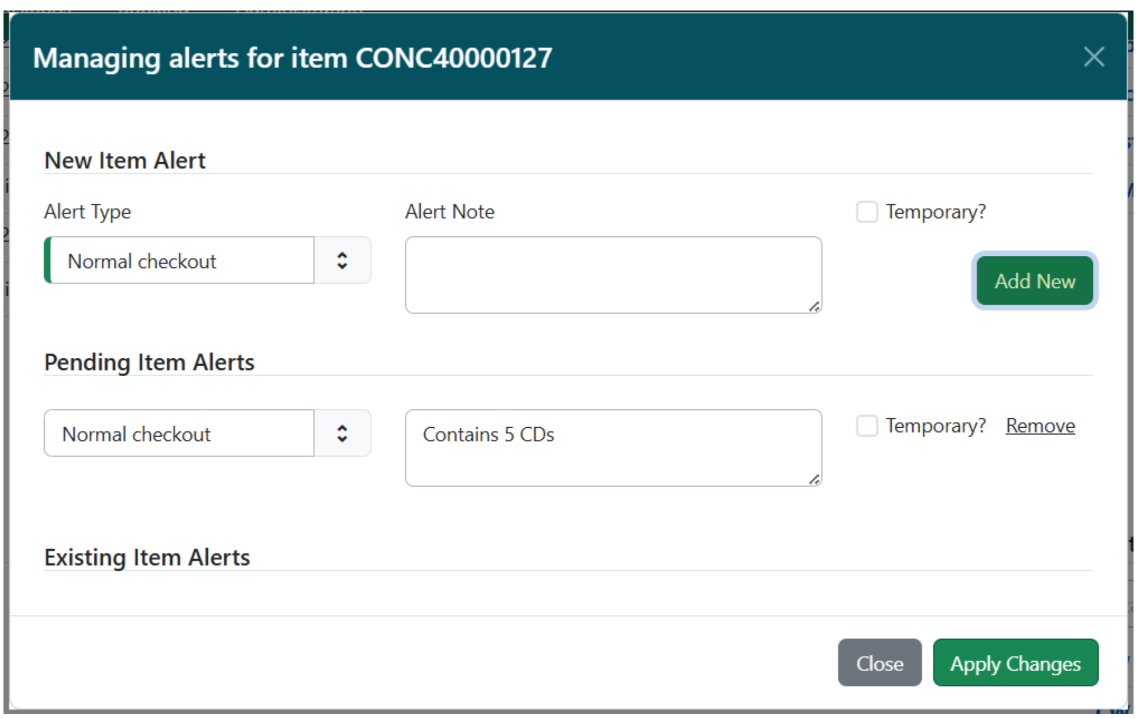


5. Follow the instructions above, starting with step 4.
6. After an Item Alert has been added, selecting the **Manage Item Alerts** action will allow you to add another item alert and to view and/or edit existing item alerts.



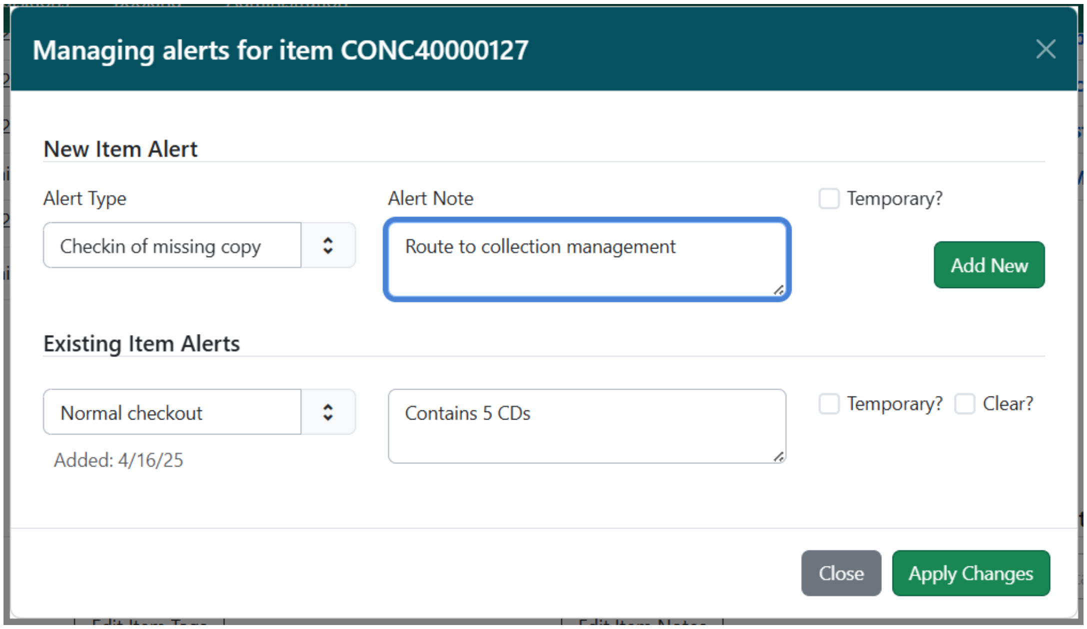
To add an Item Alert from the Item Status list view:

1. From the Item Status list view, scan in the item barcode.
2. Select the item row and go to **Actions** → **Add Item Alerts** or right click on the item row and select **Add Item Alerts**.
3. This will open a new tab with a modal labeled “Managing alerts for item <barcode>”.



4. Follow the instructions above, starting on step 4.

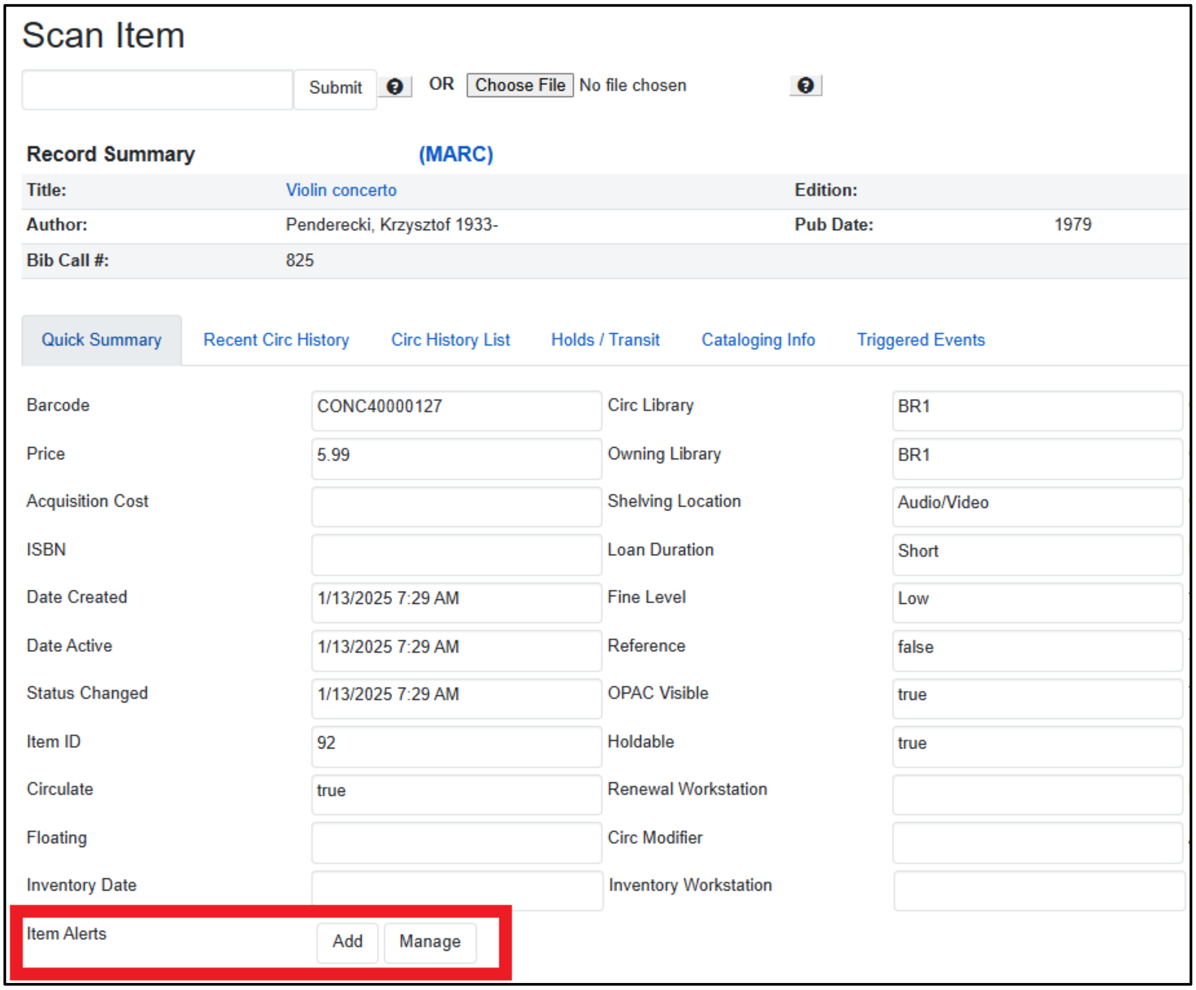
5. After an Item Alert has been added, selecting the **Manage Item Alerts** action will allow you to add another item alert and to view and/or edit existing item alerts.



Alternatively, you can add or manage alerts from the detail view in Item Status.

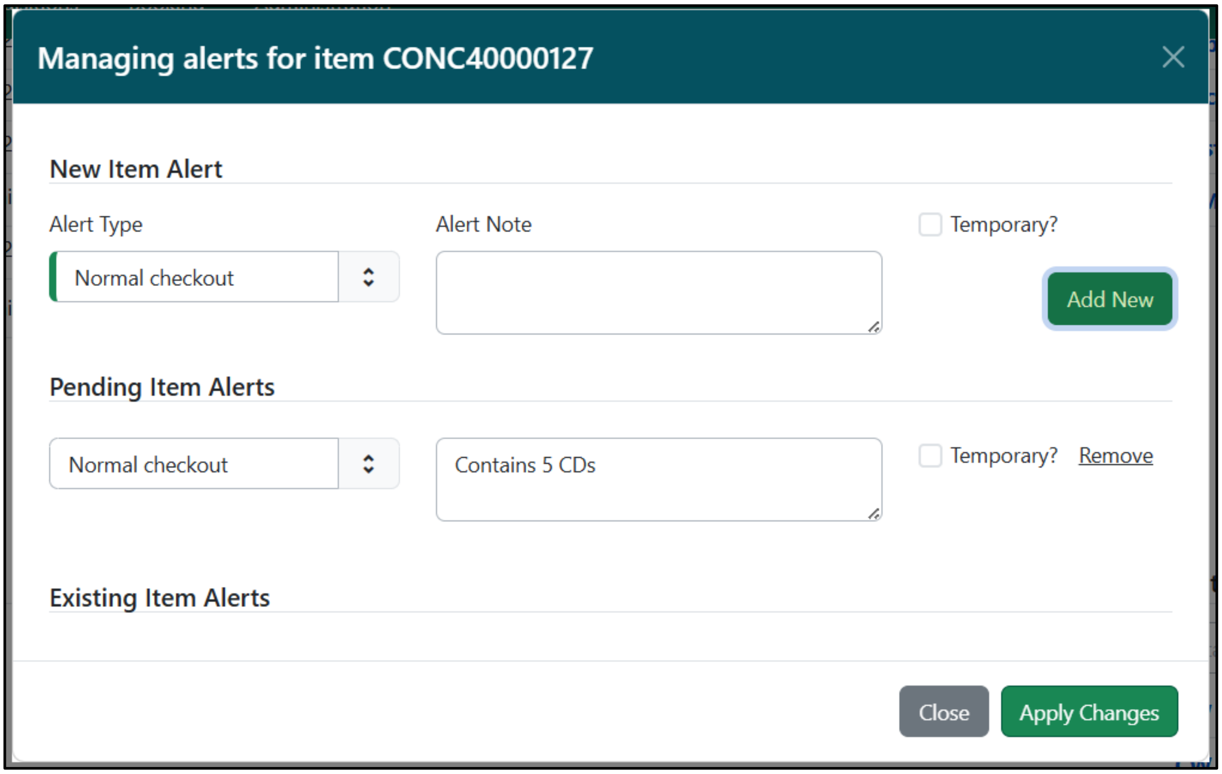
1. Select the *Detail View* button in the top-right of the Item Status screen.

2. In the bottom-left corner of this view are two buttons for Add and Manage Alerts.
3. Select Add Item Alerts.



4. This will open a new tab with a modal labeled “Managing alerts for item <barcode>”.
5. Follow the instructions above, starting on step 4.
6. After an Item Alert has been added, selecting the Manage button will allow you to add another item alert and to view and/or edit existing item alerts.

Removing an Item Alert



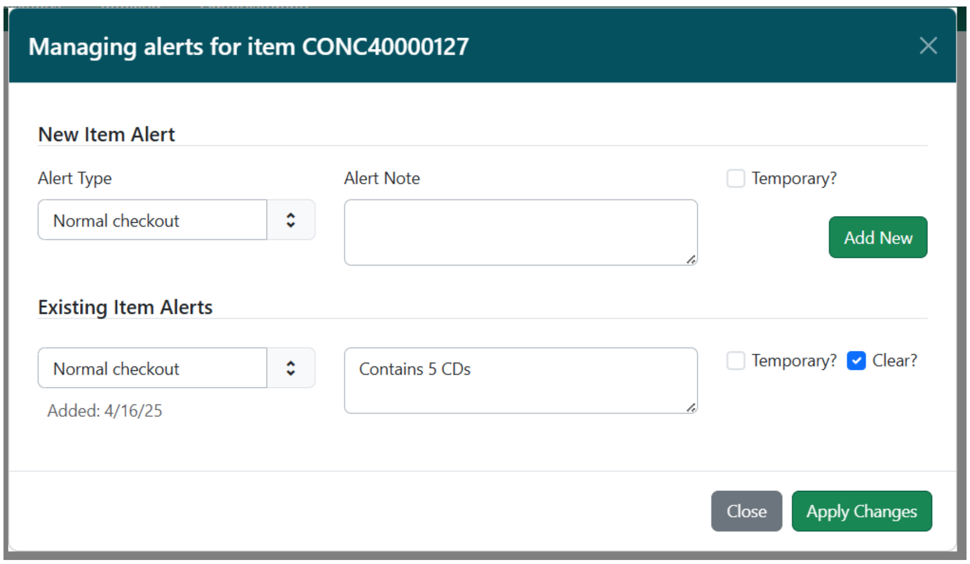
Navigate to the Manage Item Alerts modal via one of the routes described above. Under *Existing Item Alerts*, select the checkbox next to *Clear?* for the alert(s) you want to remove. Select Apply Changes to save your changes; or select Close to close without saving.

Adding and Managing Item Alerts in Batch

Item alerts can be added to multiple items in batch via the Holdings Editor, directly from the Holdings View tab, from the Item Status interface, or from circulation interfaces such as Check In, Check Out, Capture Holds, and Renew.

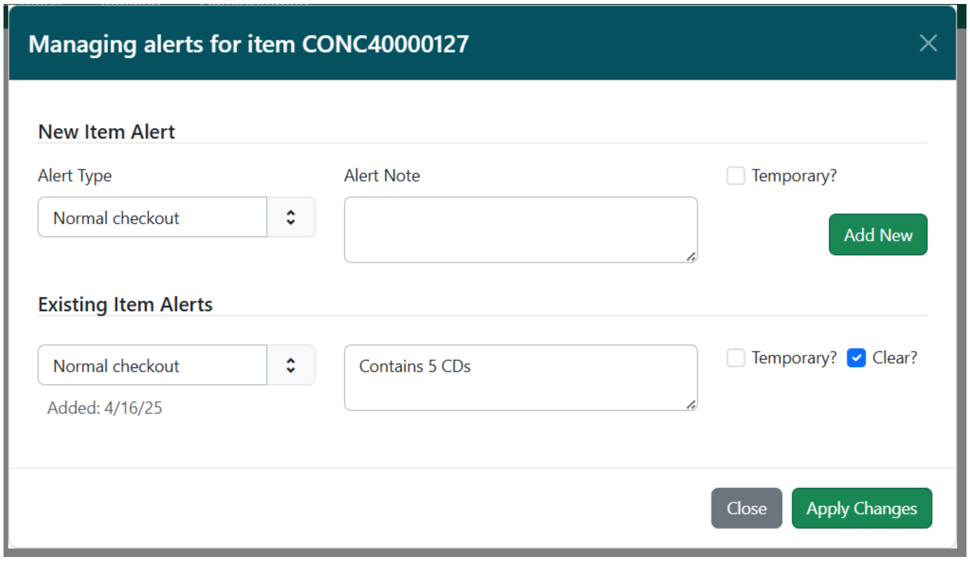
To add item alerts in batch via the Holdings Editor, open a set of items in the Holdings Editor. You can do this from the Item Status interface or from the bibliographic record in the Holdings View tab.

1. At whichever entry point, select your set of items and then click Actions → Edit Items.



   a. If you are in the Holdings View tab, you can also select Actions → Add / Manage Item Notes. This will open the tags modal, and you can proceed to step 3.
   b. If you are in a circulation interface, or Item Status list view, you can select Actions → Add Item Alerts or Actions → Manage Item Alerts. This will open the tags modal in a new tab, and you can proceed to step 3.
2. In the Holdings Editor, select Edit Item Alerts. This will open a modal named *Managing alerts in common for <number> item(s)*.

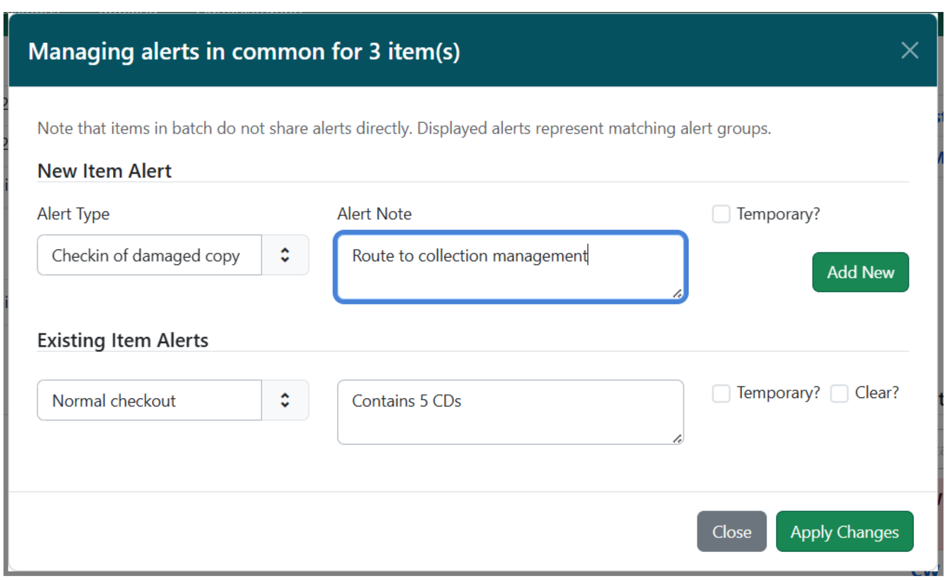
IMPORTANT: This modal will only show existing alert types that are commonly held among all selected items. Items do note share alerts directly.



Select an *Alert Type* and enter an additional alert message if needed in the *Alert Note* field.

   a. Select the box next to *Temporary?* if this alert should not appear after the initial alert is acknowledged.
   b. Leaving the *Temporary?* box unchecked will create a persistent alert that will appear each time the action to trigger the alert occurs, such as check in or check out.

3. Select **Apply Changes** to save the new Item Alert.
   a. If you accessed the modal directly from the holdings view tab, Item Status, or check in / check out interfaces, this will save your changes.
   b. To close without saving, select Close.



4. After an Item Alert has been added, selecting the Item Alerts button in the Holdings Editor will allow you to add another item alert and to view and/or edit existing item alerts.
5. Proceed with the rest of your edits to the item, and then select either Apply All & Save or Apply All, Save & Exit to finish your edits.

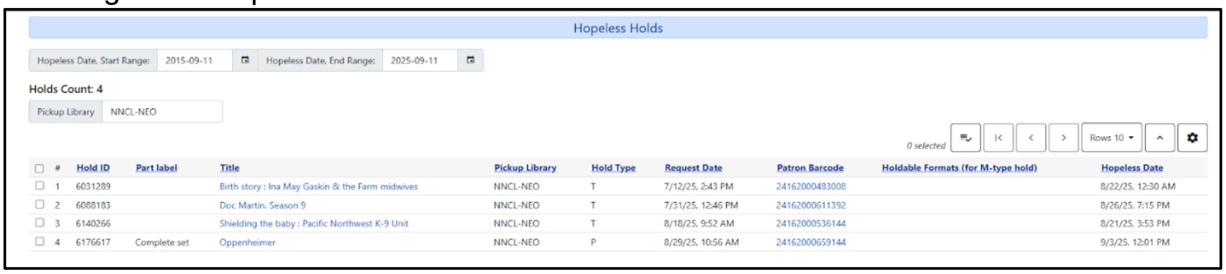
Hopeless Holds

Location: *Administration > Local Administration > Hopeless Holds*

Hopeless Holds are **holds** that cannot be filled because all copies on the record have been deleted or because all copies on the record are in an unholdable status.

Once a hold has become hopeless, it will never revert to being fillable even if a new item is added to the record. These holds need to be canceled in the patron's account and a new hold placed on a different record if there is another record in the catalog.

1. Navigate to Hopeless Holds.



2. Open the patron's account.
3. Look in the patron's Holds for the item that isn't available.
4. Search for an available copy of the item and place a hold on that record.
5. Edit the Request Date if necessary to ensure the patron doesn't lose their place in the queue.
6. Cancel the hold that is Hopeless.

Follow any other procedure for this action that is in line with your library procedures.

Online Public Access Catalog

Summary

The Missouri Evergreen Online Public Access Catalog (OPAC) is the public online presence of the Missouri Evergreen Library Consortium and provides access to materials available. The OPAC includes access to library account holders through the "My Account" feature. There are a variety of ways that member libraries can link to, configure, and display the OPAC to provide the best user experience.

Adding Carousels to Library OPAC homepage

Carousels are a visual element that can be added to a library's OPAC homepage to enhance patron experience by highlighting various aspects of the library collection.

Currently, it is recommended that libraries have no more than 3 carousels visible on the local OPAC homepage because of the possibility of website performance issues.

Carousel Permission

Creating and managing carousels requires a permission granted to individual staff accounts or some individuals with local administration permission. This permission *cannot* be applied to shared staff accounts.

Types of Carousels: automatic and manual

Automatic Carousels

Evergreen ILS has four different types of automatic carousels. If a library would like to include one of these carousels on their OPAC homepage, please submit a helpdesk ticket to Equinox. Automatic carousels are refreshed automatically on a regular basis (twice a week), but may be manually refreshed by individuals with the appropriate permission.

Types of automatic carousels

- **Newly Cataloged Items** - titles appear automatically based on the active date of the title's copies.
- **Top Circulated Items** - titles appear automatically based on the most circulated copies during a defined interval by the Item Libraries configured by Missouri Evergreen administrative staff in the settings. Circulations include both checkouts and renewals.
- **Newest Items by Shelving Location** - titles appear automatically based on the active date and shelving location of the title's copies.
- **Recently Returned Items** - titles appear automatically based on the mostly recently circulated copy's check-in scan date and time.

Manual Carousels

Manual carousels are created and managed by local library staff members with appropriate training and account permission.

Create Manual Carousel

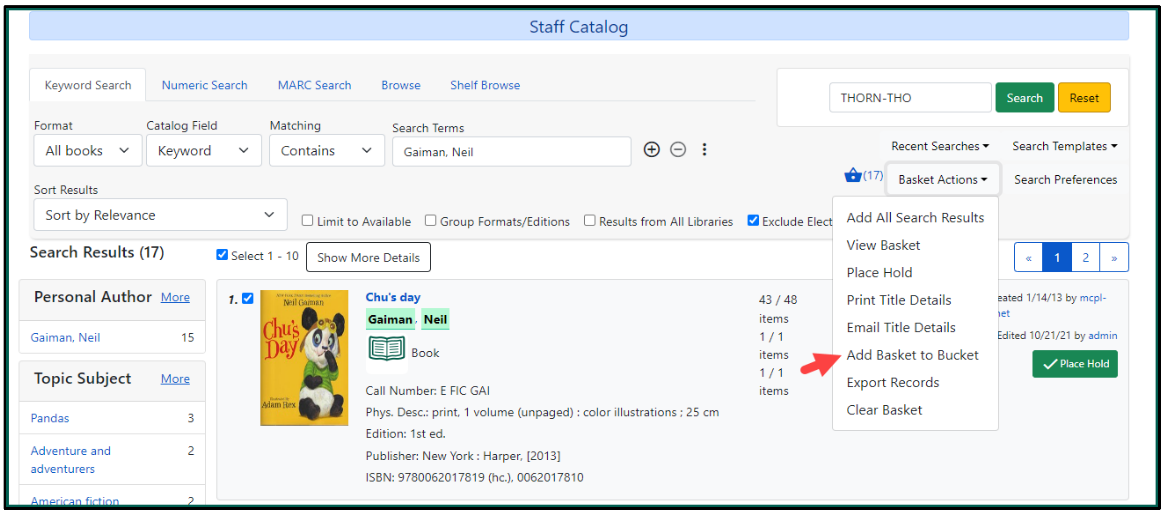
From Record Bucket Interface

You can add records to buckets that will become carousels directly from the Record Query tab in the Record Bucket Interface.

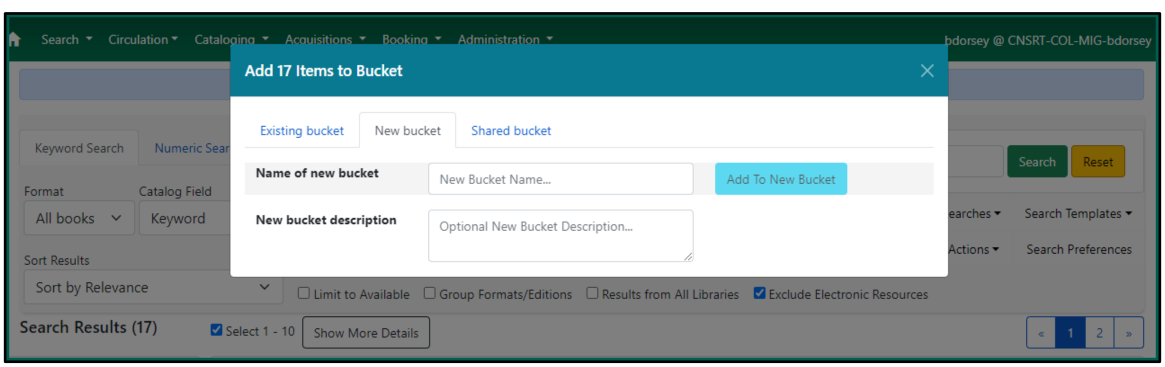
From Catalog Basket

The easiest way to populate a bucket that will become a carousel is by selecting results from catalog searches.

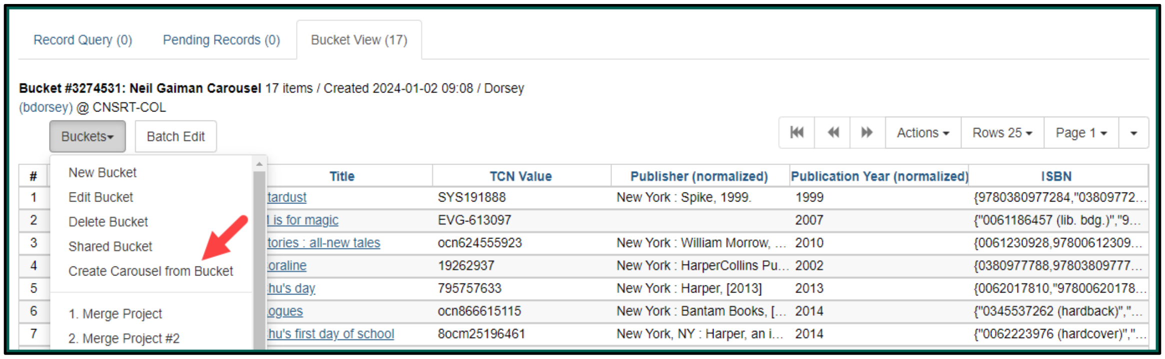
- Perform one or more catalog searches, and, from the results, select the box next to records to add them to the basket.
- From the basket actions menu, select **Add Basket to Bucket**.



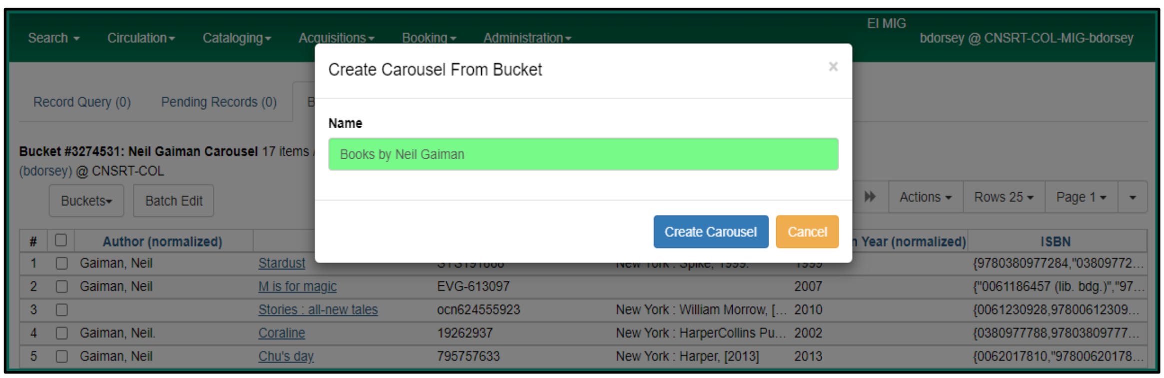
- The Add to Bucket window will open with the option to add to an existing record bucket, create a new record bucket, or add to a shared record bucket.



- In the Record Bucket interface (accessible via ILS client splash page link or Cataloging menu), select the desired bucket from Buckets drop down menu to populate the grid with catalog records in that bucket.
- After the grid is populated, from the Buckets drop down menu, select **Create Carousel from Bucket.**



- The “Create Carousel From Bucket” window will open with a prompt to name the carousel. Enter an appropriate carousel name and click “Create Carousel.”

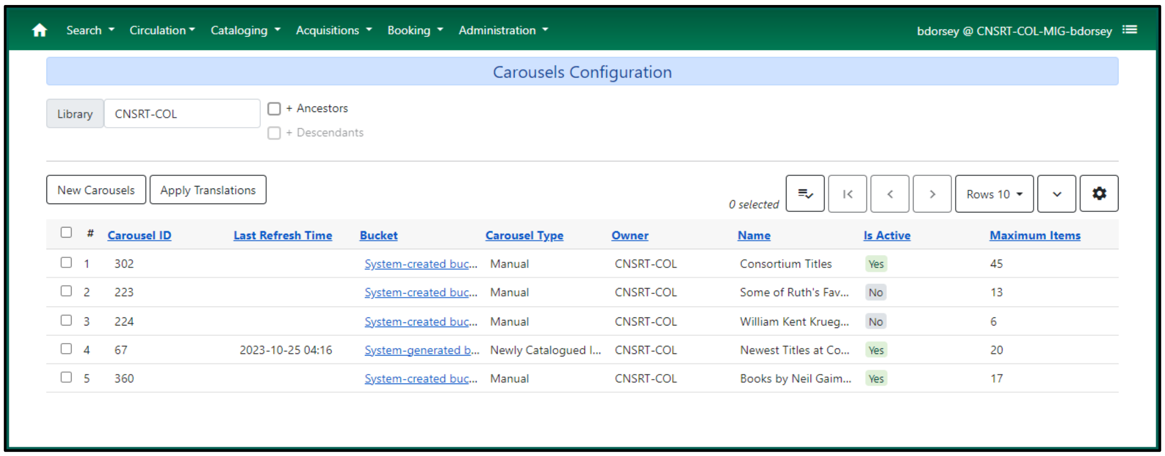


- The Carousels Configuration page will open allowing you to further edit the carousel if necessary.

Edit Carousels

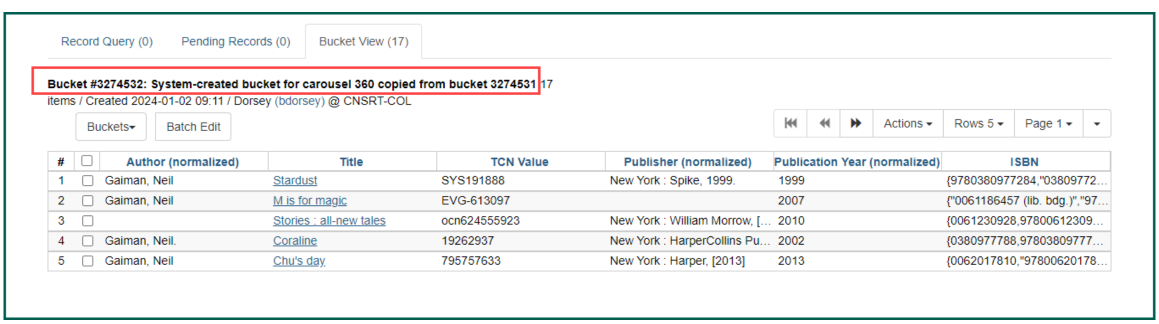
Location: Administration → Local Administration → Carousels

The Carousels Configuration interface will show a list of carousels (both manual and automatic) that have been created for the location designated by registered workstation. Other carousels may be visible by changing the Library designated in the upper left-hand corner of the interface, but may or may not be available for editing depending on the working locations/permissions of the individual accessing the interface.



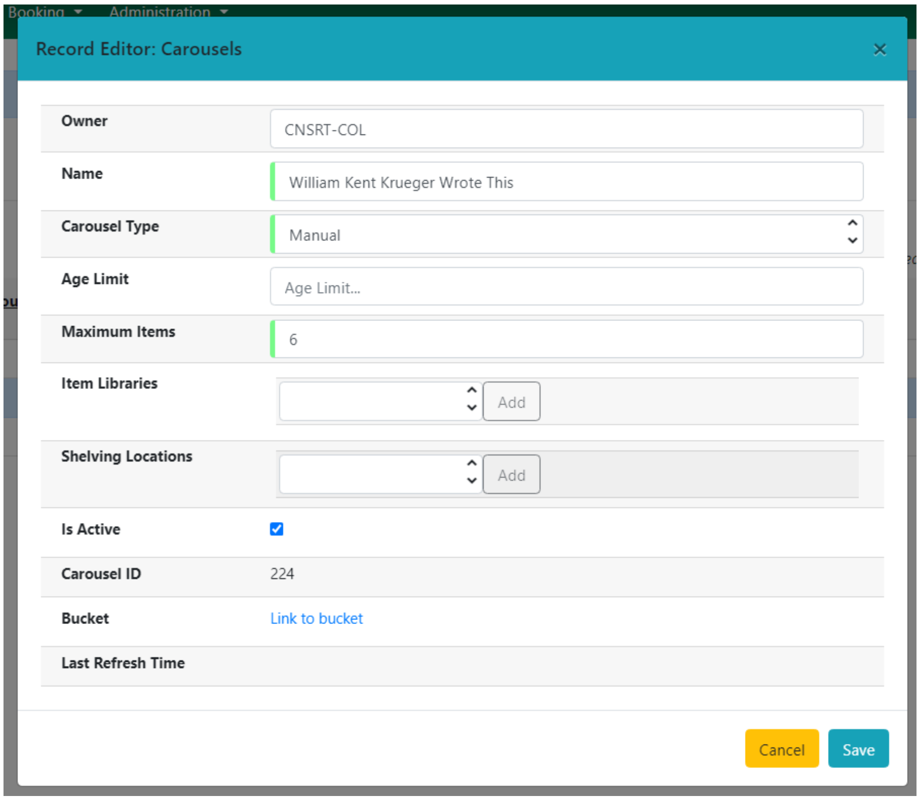
Edit Manual Carousel Contents

To edit the contents of a manual carousel, click on the linked bucket name in the carousel record row. It is important to note that editing the original bucket used to create the carousel will not affect the resultant carousel. When a carousel is created, a copy of the original record bucket is made and is used for the carousel. This new bucket is the one that must be used to add or delete records from the created carousel.



Edit Carousel Settings

From the Carousels Configuration page, settings for individual carousels can also be updated. To edit the settings, select a carousel and choose **Edit Selected** from the **Actions** menu or by right-clicking on the carousel line itself. This will open the *Record Editor: Carousels*



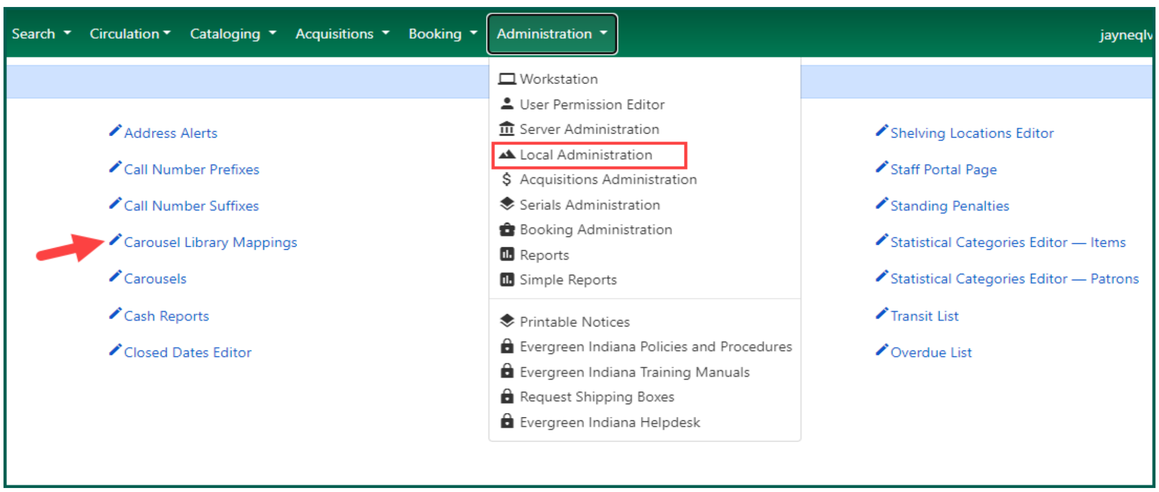
Owner: The library system or branch that owns the carousel.
Name: The name of the carousel.
Carousel Type: Select Manual.

Make Carousel(s) Visible on OPAC homepage

Carousels configured for member library holdings are displayed on a custom homepage with a URL distinct from that library's local catalog URL. Please see the section on OPAC URLs for more information on adding or replacing OPAC and OPAC Carousel URLs to your website or kiosk.

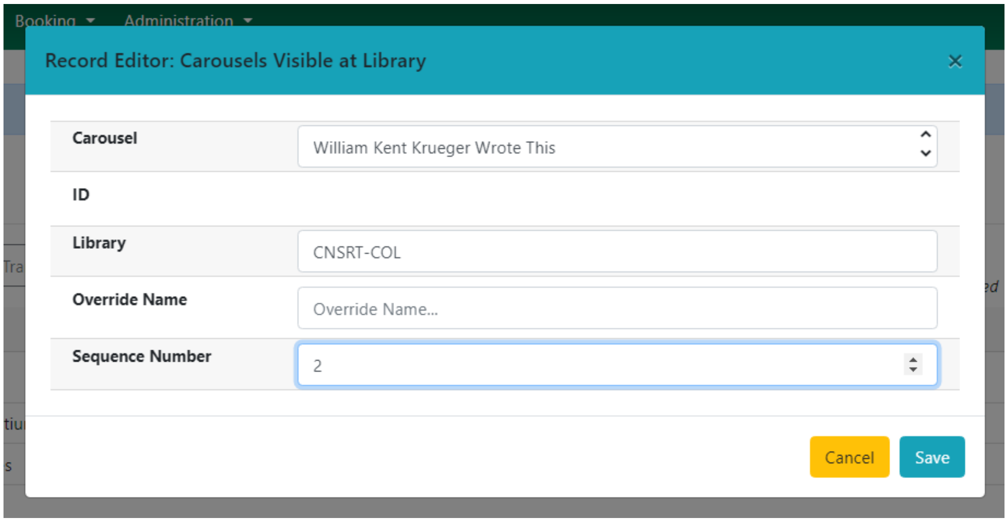
Automatic carousels are immediately available on the OPAC homepage for their owning location as soon as the "Is Active" box is selected in the Carousel Record Editor.

Manual carousels must be made visible in the "Carousels Visible at Library" Configuration page accessible at Administration menu > Local Administration > Carousel Mapping.



This grid will be populated with those carousels visible on the OPAC homepage of the library shown in the upper left hand corner of the interface.

To make a new carousel visible, click the “New Carousels Visible at Library” button. The **Carousels Visible at Library Record Editor** will open. Select from the list of carousels available as well as the library location where the carousel will be visible. Options are also included to input a different display name as the “Override Name” and/or to set the “Sequence Number” if more than one carousel will be displayed on the library’s OPAC homepage. Carousels will display from top to bottom in order from lowest to highest sequence number with 0 being the lowest number.



From the Carousels Mapping interface, you can also edit already visible carousels.

Delete Carousel(s) from OPAC homepage

To delete a carousel from your OPAC homepage, in the Carousels Mapping interface, select the carousel to be deleted. From the Actions menu or the Right Click menu, click Delete Selected. This will not delete the carousel bucket, but will remove it from visibility.

Getting Help

Helpdesk tickets

Each library has up to three authorized contact persons who may submit help tickets to Equinox. These library contacts must create an account with Equinox before submitting or viewing tickets.

Contact persons can submit a support ticket in one of three ways:

- Email support@equinoxOLI.org
- Use their direct ticketing portal: https://support.equinoxoli.org/index.php
- Contact Equinox by phone at 1-877-OPEN-ILS (877-673-6457). Libraries are encouraged to use this in system-down situations.
- Equinox's business hours are M-F, 9:00 AM – 6:00 PM ET.

To submit or check on a request via the web portal: Authorized contacts logging in for the first time—select "Check on a Request," click on "Forgot Password," then enter your email address and click "Send Password Reset Link" to have a password generated and emailed to you. **This password will allow you to check on all tickets submitted.**

To check on one specific request: After a ticket has been created, the contact person will receive a confirmation of submission message. This email will include both an access key and a link to take the contact directly to the ticket. Input the access key to update or retrieve more information about the ticket issue.

Resources

- Missouri Evergreen: https://moevergreenlibraries.org/
- Evergreen Documentation: https://docs.evergreen-ils.org/docs/latest/shared/about_this_documentation.html
- Evergreen/Equinox Templates: https://wiki.evergreen-ils.org/doku.php?id=evergreen-reports:sample_reports