Sage Library System Evergreen Circulation

This document is a more comprehensive introduction to using Evergreen Circulation to check items in and out, to renew items, to pay fines, and to place and search item holds. It also includes information on item and patron records.

If you have any questions or need additional information, please do not hesitate to contact Systems Staff at Sage Library Consortium by:

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Logging On

1. Double click on the Evergreen icon on your desktop.

2. Enter your Username and Password in the Authentication section. The username and password are case sensitive. Hit enter on your keyboard or click Login.

Check In

1. To check in items, click the Check In button on the Menu Bar at the top of the Evergreen screen.
Or, click the menu bar option **Circulation** and then click **Check In Items**.
2. Scan the item’s barcode. If typing the barcode, hit enter or click Submit.

3. Check In will display messages alerting staff to holds or messages to send the item in transit to another location. *Carefully read the messages in Check In. You must respond to dialog boxes when the system displays a message to continue checking in items. Caution: the scanner will continue to beep even if the items being scanned are not being checked into the system.*

4. **Check In date** - If your library was closed for unforeseen reasons, you can change the check-in date by the **Effective Date**. The Effective Date can be changed in three ways:
   a. change the numbers in the date box (#1) by highlighting one of the numbers and replacing it using the keyboard
   b. click in the box on one of the three numbers and increment the date using the arrows to the right of the box (#2)
   c. use the date picker which can be viewed by clicking the down arrow next to the arrows (#3).

**Checkin Modifiers**

Checkin Modifiers are set by clicking on the Checkin Modifiers button in the lower right corner of the checkin screen and clicking on an option. Those that have a check mark next to them are currently in effect.
These features can speed up your workflow, help patrons, and may cause unwanted issues as well. For this reason, it is important to understand how each Checkin Modifier works before using it. Here is the current list of available Checkin Modifiers and how they work:

- **Ignore Pre-Cataloged Items:** Normally, a pop up box will appear when a pre-cataloged item is checked in but this setting ignores them completely. They will be reshelved and checked out normally the next time a patron wants to check out the item. The only drawback here is that the item will not be fully cataloged and therefore not as searchable in the catalog.

- **Suppress Holds and Transits:** This feature will prevent the items you scan from being captured for holds and transits. Items will instead be assigned “Resheling” status. One use for this might be to check in an item that you intend to put in “Damaged” status, to prevent it from being captured for a hold. **Warning:** This feature also affects items not owned by your library, which could result in an item appearing as though it’s back at its owning library when in reality it is not.

- **Amnesty Mode/Forgive Fines:** Any fines associated with the items checked in will be forgiven without question. This modifier lets you know that it is being used by the big red box at the top of the screen.

- **Auto-Print Hold and Transit Slips:** This feature allows you to skip the ‘turtle’ screen and have Evergreen send a print request. When using this feature with the ‘Printer Prompt’ check box on the bottom of the screen deselected, Evergreen will auto-print transit and holds slips directly to the default printer for receipts, without any dialog boxes.
• **Clear Holds Shelf (formerly Clear Shelf-Expired Holds):** This function clears shelf-expired items from the holds shelf as you go. If a shelf-expired item is checked in with this modifier set, the hold for the item will be cancelled on the patron record, and Evergreen will say where the item should go next.

• **Retarget Local Holds:** When items are checked in with this modifier set, the system will attempt to find a local hold to fill. This is intended to help with proper targeting of newly-cataloged items with In Process status.

• **Retarget All Statuses:** This modifier, when used in conjunction with Retarget Local Holds, will attempt to find a local hold to fill for other holdable statuses. This allows holds to be captured for newly cataloged items that have a holdable status other than In Process.

• **Capture Local Holds as Transit:** With this checkin modifier, any local holds will be given an 'in transit' status instead of 'holds shelf'. The intent is to stop the system from setting shelf-expire time and sending holds notifications before the item is ready to be placed on the holds shelf. Possible use cases include Automated Materials Handling (AMH) checkins, in which items may be sitting in a bin for a while before landing on the holds shelf, and checkins done on closed days.

• **Manual Floating Active:** For now, do not use this modifier.

### Check Out

To check out items to a patron, click the Check Out button at the top of the Evergreen screen.

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Footnotes:

Check Out To check out items to a patron, click the Check Out button at the top of the Evergreen screen.

Return to Top
Or, click the menu bar option Circulation and then click Check Out. Scan or key in the patron barcode and hit enter or click Submit.

When the patron record returns it will automatically display the checkout screen. Begin scanning or entering the item barcodes and they will appear in the list below.
The check out is complete! Optionally, a date due slip can be printed, set to automatically print, and printed multiple times if necessary.

Checkout Box Grayed Out Upon Patron Retrieval

Occasionally, you may come across a patron’s record where the box around their name is blacked out and they are labeled “INACTIVE”. This happens when a patron’s expiration interval (default 3 years) has passed, the library card has been marked inactive, or for some reason or another, the “Active?” checkbox has been unchecked in the EDIT screen of the patron record. They will not be able to check out books or use Library2Go until their account is made active again.
The most common cause for this is the retrieval of a patron record by an *inactive library card number*. Remember, patrons can have multiple library cards attached to their account. In most cases, the patron has been issued a replacement card, either due to loss or theft of their old card. Some patrons may also have multiple barcodes in their record for the purpose of accessing specific databases.

A good first step is to check the barcode you scanned against the barcode listed in the brief patron record. You can also view all barcodes attached to a patron’s record by clicking the **Edit** button on the left-hand side of the screen, and from there, clicking **See All** next to the patron’s barcode.
A small window will pop up, showing all barcodes currently attached to the patron record. Next to each barcode there is a checkbox for “Active” and a radio button for “Primary”.

In this example, the patron record was retrieved via Checkout by an inactive barcode.

*Note:* It is important to remember that, in many cases, a patron requested a new library card because their old card was lost or stolen, so confirming the identity of the patron presenting you with an inactive library card before processing any changes is a good initial step.

If the patron’s identity has been confirmed and the patron wishes to continue to use the inactive card, it must first be set to Active, by clicking the checkbox next to the barcode and clicking **Apply Changes**. You will also need to click **Save** from the Patron Edit screen.
Check Out by Searching Patron

Click the Patron Search button at the top of the Evergreen screen.

Or, click the menu bar option Search and then click Search for Patrons.
Patrons can be searched using a variety of fields. If using the address or telephone number to search, the form data entered must match to the data in the patron record. If the address has ST, then STREET will not find the record. If the telephone number has a hyphen then your search must have a hyphen. Searching is not case sensitive. Basically, enter less information first and refine afterwards. For example, if searching for John Smith, first search for ‘smith’ in the last name field together with ‘j’ in the first name field might be sufficient and then whittling down from there.

Hit Enter, or click Search, or use the keyboard command of ALT-S.

Click on the patron’s name to view a brief informational display which will appear on the top of the screen. Click on Retrieve Patron button in the lower right hand corner to retrieve the full patron record.
The screen defaults to Check Out.
Scan the item barcode or key in the barcode and press enter or click submit (make sure that the barcode field is highlighted). This will check out the item to the patron.

Check Out is complete.
Change Due Date

To specify a due date at checkout, click the ‘Specific Due Date’ check box. Next, type a new date, change the date using the arrows or use the date picker.

Items entered after clicking Specific Due Date will have a due date of the specified date.
To change the due date of an item after it has been checked out, click on the item in the Items Out screen, right click and select Edit Due Date. A date picker will appear, change the date and click Apply.

Libraries can check out items from all circulating Sage member libraries to their patrons. Check Out will **calculate the due date of an item based on the owning library’s loan policy rules**.

**Closed Days** are based on the workstation checking out the item. If an item is checked out at a library that is closed on Thursdays, then the item owned by any library will skip over Thursday for that check out.

**Viewing and Printing Items Out**

To view and print items already checked out to a patron, retrieve the patron’s record and click the Items Out button. The top pane will show all currently checked out items, whether they are overdue or not.

The bottom pane of “Other/Special Circulations” will display items in unique statuses, such as “Claims Returned” or “Lost” titles that don’t have a closed circulation date or still have bills attached. Once an item has been checked in, it will no longer appear anywhere in the Items Out screen, even if the item still has associated fines.
A count in the brief patron record at the left-hand corner will display a count of all items currently checked out to the patron as well as in the top of the screen next to “Items Out”.

To print the entire list of items a patron has listed in either pane, click Print Receipt beneath the pane you want to print. If the patron has items listed in both panes and you want to print them all, you will need to click both Print Receipt buttons.

**Printing Selected Item Receipts**

From the Items Out tab of a patron record, it is possible to print a single item or a selection of items. To print a single item receipt, right-click the item you wish to print a receipt for, or highlight the item and click Actions for Selected Items>Print Item Receipt, or simply select the item and click the Print Item Receipt button beneath the pane the items are displayed in.
To select multiple items, click the first item you want to select, then press and hold the Ctrl key while clicking on each of the other items you want to select. If you want to select several items in a row, you can click the first item, then press and hold the Shift key and click the last item.

A receipt will print for only the selected items.

Welcome to Hood River County Library! You have the following items:

1. Cat
   Barcode: 33892005144283 Due: 2/17/15 10:59 PM

HR-HRCL 2015-02-25 16:52
You were helped by Sage Support

Claims Returned

Below is an overview of the way that Claims Returned items behave and display as of the 2.5 version of Evergreen, as well as instructions for marking an item Claims Returned.

Marking an Item Claims Returned

Highlight the item you would like to mark as Claims Returned. Then, either right-click the item, or click **Actions for Selected Items**, and choose **Mark Claimed Returned**.
You will then need to enter a date that the item was allegedly returned

How a Claims Returned Item Displays

If an item has been marked Claims Returned, and the item still has not been checked in anywhere in the system, the item will display in the bottom pane of the “Items Out” tab of the patron’s record. The status of the item will be “Claimed Returned”. The item will still be counted in the patron’s total Items Out count in the brief patron record as well.

Even though staff will be able to see the Claims Returned item until it has been resolved, the patron will not see the Claims Returned item on his or her account while logged into the OPAC.
*Note: If an item is marked “Claimed Returned” after it has already generated overdue and/or replacement fines, these fines will need to be manually voided or forgiven.

If the Claims Returned Item is Checked In

If an item that has been marked “Claims Returned” is checked in anywhere in the system, a pop-up dialog box will advise that the item is in a Claims Returned status. Choosing “Yes” on this dialog box will check the item in. Check to make sure you have these permissions to allow recirculation of a claims returned item.

Once the item is checked in, it will no longer appear in either the bottom pane of the patron’s “Items Out” tab or in the patron’s count of Items Out. UNLESS the item has fines attached to it. Once the fines are closed out the item will disappear from the “Other Circulations” tab

Renew
Items can be renewed in three different ways:

1. Items can be renewed by the item barcode by clicking Circulation>Renew Items. Enter the barcode number in the text box.

2. Items can be renewed from the patron record by clicking on the Items Out button. Right clicking on the item and clicking Renew, or Renew All to renew all items out.

3. Checking out an item that is already checked out to the same patron also counts as a renewal. You will get a message saying that the checkout failed because there is an open circulation. Simply click Renew Item.
Processing Fines

To pay and manage fines, retrieve the patron's record and click on the Bills button. All fine management is in the Bills section.

Bills are color-coded to reflect whether or not they are still checked out. Fines that are currently accruing on overdue items are highlighted in red, while replacement fines associated with lost or billed items are highlighted in maroon. Fines with no current circulation attached to them are not highlighted.

Paying a Fine
Depending on your library’s individual settings, your Bills screen may default to having all of a patron’s bills checked or unchecked. To collect a payment, you must first make sure that the bills you want to apply the payment to are checked off. The “Check All” and “Uncheck All” buttons at the bottom of the Bills pane are quick ways to select/deselect all of the bills on a patron’s account.

Start by selecting a payment type which can be:

- Cash
- Check
- Credit Card
- Patron Credit (not recommended)
- Work
- Forgive
- Goods

Next, in the **Payment Received** box enter the amount and click **Apply Payment**.

If payment cannot be applied, be sure to click the Check All button in the bottom of the frame and then apply payment.

When a payment is collected, it will be applied towards all checked bills in the order in which they are displayed on the screen. The system will attempt to pay each line item in full before applying payment to the next one. For example, if $6 is paid towards a $5 bill followed by a $3 bill, the $5 bill will be paid off and the remaining $1 will be applied towards the $3 bill.
To apply a payment towards specific items, such as a replacement fee, make sure all other bills are unchecked using “Uncheck All”, and then click next to the line items you want to apply the payment towards.

In order to print a receipt, the Receipt Options must be set up before a payment is accepted. Under the receipt options drop box, there are three options:

- **Receipt Upon Payment:** If checked, Evergreen will attempt to print a receipt when a payment is accepted.
- **Printer Prompt:** Whether or not to give the staff member accepting a payment the option of which printer to print a receipt
- **Number of copies:** The number of copies of a receipt that should be printed. This is a great option if your library needs to keep a copy of each receipt on paper.
Note: Receipt templates, including for fine payment, can be customized to suit your library. For instructions on modifying receipt templates, as well as a useful set of pre-made receipt templates you can import into Evergreen, see [site here (FOR SAGE WITH TEMPLATES)]

Fines History

Click the History button.

To see fines previously paid click Payments.

To view details click on Show Item Details or Full Details in the bottom right corner of the screen.
Adding a charge

Click Bill Patron.

Enter amount and note. Click Submit this Bill.

Evergreen, at the moment, uses Grocery as the type of fine. It's okay.

Fixing Negative Fine
Sometimes, you may come across a patron who has negative fines on his or her record. This is usually caused by a lost and paid, or lost and forgiven, item returning to circulation. To remove the negative fine, right click on the line item for the negative fine, and choose **Add Billing**.

A pop-up box will ask, ‘Are you sure you would like to add billing?’ Click **Yes**. You will get a new pop-up box, prompting you to enter an amount. Enter the positive amount of the negative fine (for example, 25 if the fine is $-25) and click **Submit this Bill**.

This will remove the negative fine, although it may be necessary to click **Reload** at the top of the patron’s record for you to see the changes. This transaction will not be added to the cash report, which may cause confusion.
Placing Holds

Go to the patron record, click Holds, and then the Place Hold button.

An Advanced Search screen displays. Enter your search criteria and press the Search button.

Search the results and when the item is found click the Request this Title button.
Enter patron information and click Submit.

Note that, for the patron to receive text message notifications, both the Mobile Carrier and the Mobile Number must be entered. The Mobile Number should be entered as a ten-digit number, with no spaces or hyphens. This is different from the format of a regular phone number in the patron record.

**Printing Pull Lists**

Click the Menu Bar option Circulation and then click Pull Lists for Hold Requests or select the Pull Lists for Hold Requests button on the main splash page.
Optionally, click the column picker box to the right of **Type** to select columns you wish to display.

There are four main ways to print the holds pull list, each offering different print outputs and varying levels of customization for printing and sorting. There is also a fifth, more in-depth method that involves exporting the list to another program. Some methods of printing require you to use the Column Picker to select fields, while others have default fields.
To ensure the complete list of holds prints, always click **Fetch More Holds** before choosing a printing method.

1. **Print** – This method prints to a receipt printer or a standard 8 ½ by 11 printer using the receipt template for holds_pull_list. This can be a great method to use if you want to create your own customized version of the pull list.

2. **Print Full Pull List** – This method, while quick to print, offers the lowest level of customization. When the holds list is printed using this method, it does not matter which columns you have visible on the screen or what order your data is in. It will print the pull list sorted by shelving location and call number with the following information available for each item: Title, Author, Shelving Location, Call Number, Barcode/Part, Requesting Patron Barcode. This method does not include Call Number Prefix or Suffix information, and long titles will appear truncated (see example images on the next page).

3. **Print Full Pull List (Alternate Strategy)** – This method generally works better than Print Full Pull List. It will also sort the items by shelving location and call number, but will display the Hold Type (T for Title, C for Copy, P for Part, etc) instead of the requesting patron’s barcode. One reason for seeing this information is to know at a glance whether the hold is eligible to be filled by another copy of the same item if the requested copy is not available to send. This method will also print complete item titles, and includes Call Number Prefixes and Suffixes.

*(Example of Print Full Pull List vs Print Full Pull List (Alternate Strategy):)*

Here is the same pull list item printed using methods #2 and #3 to illustrate the differences between Print Full Pull List and Print Full Pull List (Alternate Strategy).
Method #2: Print Full Pull List:

| A big hug for little cub | Grover, Lorie Ann | Juvenile Picture Books | GROVER | 38139012908812 28139002457293 |

Method #3: Print Full Pull List (Alternate Strategy):


4. **Simplified Pull List Interface** – This method is somewhat more complex than the methods above, but allows a great level of customization. It can, however, be sluggish to load for large pull lists. Choosing this option will bring up a new screen that looks like this:

![Simplified Pull List Interface](image)

By default, this feature displays many columns, which can cause the printout to appear very tiny. You can customize which columns print, as well as what order the items are sorted by. Simply right-click anywhere along the tan bar and a pop-up menu will come up, allowing you to uncheck unwanted columns as well as choose sort priority.
In the example above, I’ve unchecked all the columns I don’t want, and set Shelving Location to Priority 1, and Call Number to Priority 2. This will sort items first by shelving location, and then by Call Number within each location. At the bottom of the list there is a **Save** button to save your configuration. Your settings for columns and sort priority are saved to your individual staff login, and so if you set the columns up the way you want once, you should be able to print the pull list the same way in the future without having to set it up again, even if you are printing from a different computer (Just note your settings won’t carry over to another staff login).

You can also filter the Pull List using this method. This can be helpful in several different situations, such as printing a pull list for Juvenile locations only, so that the Children’s Room can get a list of only their own items to pull. To filter the list, click the Filter button after the list has loaded:
Click **Add Row** in the pop-up box to begin setting filtering criteria. In addition to filtering by Shelving Location, you can filter by a number of other fields. To filter by pickup library, use Pickup Library (Shortname) and a drop-down list of libraries will appear.
You can also filter by a set of criteria, instead of only one option. For example, you can filter the list to all items with Adult Fiction and Adult DVD shelving location by using the operator “is in the set” and adding all applicable locations:

Once the list has loaded, and you are satisfied with any filters and/or sorting applied, simply click **Print Pull List** at the top right corner of the screen.

5. **Save List CSV to File (Sort in Excel)** – This method is the most complex method, and requires some familiarity with Microsoft Excel. It gives you a high degree of control over sorting and printout format. Choose which information you would like to import into Excel by using the Column Picker to add or remove columns; any columns that are not checked off in Evergreen will not be imported. You may choose to pre-sort the data by clicking on a particular column header, or you can sort it later in Excel. Once you have chosen columns, in the bottom left corner click **List Actions>Save List CSV to File**. You will be prompted to save the file as a .txt file. Make sure to make a note of where you save the file and what you name it.

Next, open up Microsoft Excel, and go to **File>Open**. Navigate to the location you saved the CSV file. If you can’t see the file, make sure you have “All Files” selected in the drop-down menu instead of just “All Excel files”.
To properly sort the data into columns, Excel should guide you through a Text Import Wizard. Depending on which version of Excel you are using, it might look different from these screen shots, but the bottom line is that you want to let Excel know that the data is delimited (meaning that each value is separated and should be placed into its own cell) and that the data is comma-separated. Here’s how the process might look:

**Important:** Make sure that “comma” is checked off instead of any other delimiter, or your data will not separate into the appropriate columns.
Following these steps should result in a nice Excel spreadsheet of your pull list, which you can then sort and format however you like in Excel.

Capturing Requested Items for Holds
Requested items will remain in your pull list until you check in the item to fill the hold. If the hold is not filled, if it is a title level hold and there are other copies available, the hold will move on to another library (usually) overnight.

To capture the hold, click **Circulation** on the menu bar and click either **Check In Items** or **Capture Holds**. Both functions will capture the hold for the patron.

Enter the barcode number in the barcode field to capture the hold.

The screen displays the Route To library and optionally prints a slip.
Adjustments can be made to the display of the slips using the receipt templates titled hold_transit_slip or hold_slip.
Clicking on **Actions for Selected Items** provides an option to **Abort Transit** if there is a reason that the item cannot be sent to the pickup location. An example would be if the requested item is damaged or missing a part.

**Transferring a Hold**

If the Hold is not filled at the first library paged then an alternate library will be paged in 24 hours or a set number of hours determined by our network. In another 24 hours if the Hold is not filled the page moves on to a new library. This process continues after all eligible libraries have been paged.

Staff may intentionally transfer a Hold to another library by retargeting the Hold from their **Pull List**. Before retargeting the hold, make sure that there are other copies available, and that it is a title or volume level hold. Otherwise, the hold will get retargeted to the same copy and just spin around in hold exile.

To intentionally transfer an item, click to highlight the item.

Click on the right of the screen for **Actions for Selected Holds**. Click **Find Another Target**.
(STOP HERE) Retargeting from the Patron Record.

Changing a Hold’s Pickup Location

At some point, you may need to change the pickup location of a hold that has already been placed. If the hold has not yet arrived at the pickup location, you only need to do step 1 below.

Occasionally, a patron may wish to change the pickup location of their hold after the item has already arrived on your holds shelf and has the hold status “Ready for Pickup”. In this case, please move on to step 2 after completing step 1.

1. Edit the Pickup Location
   From the Holds tab of the patron’s record, click to select the hold the patron wants to change. Click Actions for Selected Item>Edit Pickup Library. Alternately, you can simply right-click the hold and choose Edit Pickup Library.
A box will appear with a drop-down menu. Select the library the patron would like to pick the hold up from, and click **Done**.

**2. Check the Item in**

If the item is already on the holds shelf for the patron, it must be checked in at the original pickup library before it can go to the new pickup library. **This step is very important to making sure that the hold fills properly when it arrives at the new Pickup Library.**

That’s it! You can now place the item in the delivery.

**Note:** If your library’s workflow doesn’t permit you to pull the item from the hold shelf as soon as the patron requests the pickup location to be changed, or if the patron requests this change for an item being held at another library, that’s fine. The item will show up on the Browse Holds Shelf list as a Clearable hold at the original pickup library, with the status “Wrong Shelf”. The item can then be checked in as part of the Clear Holds Shelf process.

Once the item is checked in at the original pickup location, the Wrong Shelf status will be cleared and the item will be removed from the Clear Holds Shelf list.

**Hold Status -1**
Occasionally, you might see a hold on a patron’s record with the hold status of -1, instead of a normal status like “In Transit” or “Waiting for Copy”.

This can happen when the item status and the hold status do not match; for example, if the item gets double-scanned and changes to Reshelving instead of On Holdshelf, or in some cases if the item is checked out by another patron. It can also cause the patron’s Holds Ready counter to display an extra hold that is not really on the holds shelf.

To fix this issue, simply retarget the hold, by right-clicking or choosing **Actions for Selected Holds>Find Another Target**. This should result in the correct hold status displaying and fix the Holds Ready counter. It will not alter the patron’s position in the holds queue. Click through when it asks if you want to Reset the hold.
Holds Notification

Evergreen supports hold notification by phone call, e-mail, or text message (SMS). You can view whether e-mail or SMS notifications are enabled for a particular hold from the Browse Holds Shelf feature, or from the Holds tab of a patron’s record, using the Column Picker.

You can access the holds shelf list from Circulation>Browse Holds Shelf. Some good columns to add via the Column Picker are:

- **Email Notify:** Displays “Yes” if e-mail notification is enabled for a particular hold, and “No” if it is not.

- **Notices:** If a hold displays 1 notice, then either an e-mail or a text notification has been sent to the patron. If a hold displays 2 notices, then both an e-mail and a text message have been sent. If a hold displays 0 notices, then neither e-mail or text notifications have been set. Phone call notifications are not counted.

- **Last Notify Time:** This will tell you the last time that the system sent out either an e-mail or text message hold notification to the patron. If “Last Notify Time” is blank, then no e-mail or text notices have been sent.

Text Message (SMS) Holds Notification

From either the Holds tab of the patron record, or the Browse Holds Shelf function, you can use the column picker to add the columns “Text Carrier” and “Text Notify” as well.
With these columns added, you will be able to see the mobile carrier and mobile number associated with a particular hold:

*Note: For the system to send text (SMS) notifications, the correct carrier **must be entered**, and the mobile number must be the 10-digit number without any hyphens, spaces, or other punctuation. For example, 5081234567 will work, but 508-123-4567 will not.
Modifying the Phone Number for a Specific Hold

Evergreen initially pulls the phone number for hold notification purposes from the patron’s record when a hold is placed. This means that, by default, if a patron updates his or her phone number after placing a hold, the old phone number may still print on the hold slip. However, if you know that a patron’s phone number has changed, you can manually update the phone number for a specific hold.

From the Holds tab of the patron record, select the hold you would like to change. Then, either by right-clicking or from Actions for Selected Holds, choose Edit Phone Number.

A dialog box will appear, prompting you to enter a phone number. Type the patron’s new phone number into the box and click Done.

A second box will ask you to confirm the change. Click Yes. The new phone number you typed in will now print on the hold slip when the item is checked in at the pickup library.
You can also edit more than one hold at a time. A good example of when you might do this is if a patron updates their phone number with you, and you notice that he or she has several outstanding holds. To select the entire list of holds on a patron’s record, click the first hold in the list, then press and hold the shift key, and click on the last hold in the list. Click Actions for Selected Holds>Edit Phone Number and follow the steps above to update all the holds at the same time.

Recording In-House Use

To record the in-house use of an item, go to Circulation and Record In-House Use. Or press F6.

Enter the number of times the item was used, scan the barcode and click Submit.
The In-House Use will be recorded and saved for statistical purposes which can be pulled up in Reports in in Shared Folders > Checkout Data of the Reports Interface such as:

**Item Records**

The Item Status screen will provide a great deal of information about an item. It can provide information about where the item is, what it is, where it will go as well as cataloging information and a host of other bits of data.

To get to the item status screen, click on the Item Status icon on the menu bar at the top of the screen or press F5.

Or, Click on the menu option Circulation and then Show Item Status by Barcode.
Enter the item barcode.

Click **Alternate View** for more details.
A Quick Summary of the copy (item) record displays, including the transaction date and time and the Checkin Workstation.

Circulation History

Hold In Transit Details
It is possible in Evergreen to tell whether a particular item was scanned at your library, and at what time it was scanned. This can be especially helpful for tracking down items that should be on the holds shelf.

You can get this information from the Item Status screen. You can get to Item Status by right-clicking the item in question and choosing Show Item Details.

Alternately, you can go directly to Item Status from the navigation bar at the top of the screen, or through the menu option Circulation>Show Item Status by Barcode.

A field called Status Changed Time will show you when the item was last handled. You can view this field from either the List View or the Alternate View of the Item Status screen. The detailed view (Alternate View) of the item will display this field by default:
To see this field from the List View of Item Status, simply use the Column Picker to add “Status Changed Time” to the displayed fields:

To see where the item was scanned, choose Actions for Selected Items> Edit Item Attributes. A new window will pop-up.
Near the bottom-left corner of the window, there is a field called “Last Editor”. This will display the Client login that scanned the item at the time of the status change. If the login belongs to your library, then you can verify that the item was scanned in-house.

The **Status Change Time** and **Last Editor** together can give you a good idea of where and when the item was last handled, although one thing to be aware of is that renewing an item through the staff client will also update these fields, so in some cases it is possible that the item was not physically handled at the Status Change Time.
Patron Registration
To register a patron, first Search for the patron to be sure a registration does not already exist in the system.

Patron Search
Searching for an existing patron record.
Click the Patron Search button at the top of the Evergreen screen.

Or, click the Menu Bar option Search and then click Search for Patrons.
Patrons can be searched using a variety of fields. If using the address or telephone number to search, its entry must match to the data in the patron record. If the address has ST, then STREET will not find the record. If the telephone number has a hyphen then your search must have a hyphen. Searching is not case sensitive.
Hit Enter, or click Search, or use the keyboard command of Alt+S.

Clicking on the patron’s name will retrieve a brief informational display on the top of the screen. Bring up the full patron record by double clicking on the patron or by highlighting the patron and then clicking Retrieve patron.
From the full patron record screen, staff can check items out, view checked out items, place holds, manage bills, edit the patron record, view messages, view and manage group members (linked patrons), delete a patron record, and several other functions. If you do not find a matching patron record, click the x in the upper right of the screen to clear the screen.

**Registering a New Patron**

To register a patron, click the **Patron Registration** button at the top of the Evergreen screen.
Or, click the Menu Bar option **Circulation** and then click **Register Patron**.
The fields that are yellow with the ! sign are required fields.

Proceed with entering the data according to your library’s Patron Registration Guidelines.

For Example:
Verify the patron’s name and address with a positive form of I.D.

- Drivers License.
- Valid state ID with picture.
- If the above are not available, patrons may provide multiple proofs of address such as:
  - Recently received piece of mail with the current address.
  - Personal checks with the printed current address.
- Positive identification for children can be provided by a parent or guardian, a YMCA ID, a bus pass, or other local forms of positive ID.

This is a tabbed form. After entering data in a field hit the tab key to move to the next field.

OPAC/Staff Client User Name

- Whatever is in this field will be the username that patrons use when they log into their OPAC account. This field will automatically be filled in when an barcode is entered into the first field labeled ‘barcode’ but anything can be entered into this field as long as it
does not match any other username. For example, there cannot be two patrons with ‘librarygal’ as the username.

**Patron’s Password**

- The password is used when patrons log into PAC. When registering a patron the password will default to a random four digit number. However, when the patron’s ‘Daytime Phone’ number is entered, Evergreen will change the password from the random four digits to the last four digits of the patron’s telephone number. Staff may optionally enter a specific password (after entering the telephone number) and patrons may change their password when logged into PAC.

**Name**

- The names have separate boxes for first name, middle name, and last name. The first and last name fields are required.

- Try to avoid punctuation if possible in these fields. A middle initial may be used or a middle name. Remember, we currently have approximately 170,000 patron records in our database so more information is better than less.

**Date of Birth**

- We will be able to track statistics by the Date of Birth field and ask that you complete this field.

**Email Address**

- Enter the email address exactly as if you were emailing the patron. Make sure to double check for accuracy

**Phone Numbers**

- Enter in the format of xxx-xxx-xxxx for the normal Daytime Number and xxxxxxxxxx for the Default SMS Text Number.
  - Example: Daytime phone: 508-755-3323, Default SMS Text Number: 5087553323

**Patron’s Home Library**

- The Home Library defaults to the library creating the patron registration but can be changed at the time of registration.

**Main (Profile) Permission Group**

- For the majority of libraries, Select “FULL PRIVILEGES” for the patron type. Discuss with your library administrator if the patron is a student/teacher or may require a different type of permission set.
Privilege Expiration Date

- This is the patron registration expiration date and defaults to three years from the registration.
- The Privilege Expiration Date format is dd/mm/yyyy
- For example, 02/15/2014

User Settings

- **Default Phone Number** is an optional field that can be used if the patron has more than one phone number on file, but prefers to get all hold notifications at a particular number.

- **Default SMS/Text Number** needs to be filled in if the patron would like to receive text message (SMS) hold notifications. *Important:* This field must be entered as a ten-digit number, with no spaces or hyphens. Example: 5081234567

- **Default SMS/Text Carrier** For text message notifications to work, this field must be filled in along with the Number field above. You must know the patron’s correct Text Carrier. If the patron uses TracFone, they need to tell you which network’s towers their device connects through in order to receive text message hold notifications.

- **Default Hold Pickup Location** You should use this field if a patron does not live in the area that their home library card is registered, or if they prefer to pick up holds at a library other than their home library.

- **Hold Notification Format** If a patron has an e-mail address and phone number in the system, Phone and E-mail will be checked off by default. If the patron adds SMS
notifications and would like it to be enabled for every hold, make sure the “SMS” box is checked off as well. Alternately, text message notification can be enabled for individual holds when the hold is placed.

**Address**

- The patron record may contain one or more addresses. Click ‘New Address’ to add more addresses.

- If the first address is a mailing address, then there should be a second address with the patron’s residential address.

**Statistical Categories**

- Most public library records will display the same patron statistical categories. Statistical categories track circulation statistics and can be used to create reports. Libraries using unique statistical fields can be set to display for only libraries requiring the fields.

**Merging Duplicate Patron Records**

You can use this function to combine information from two patron records into one record.

**Warning:** Public patron records should never be merged with Academic patron records, even when the patron information matches.

To merge duplicate patron records:

1. Search for the patron records based on common information, such as last name.
2. Highlight the two records to be merged and click Merge Patrons.

3. WAIT! Do not merge yet. This is the last chance you will have to change your mind. Be sure you want to merge these two records. Once two records have been merged, the notes, bills, holds and outstanding items under the non-lead record are brought to the lead record. Staff-inserted alert messages are not. If you want to choose the barcode to keep, you need to choose the record with it as the lead record.
4. When you are ready, select a record to be the **Lead Record** and click **Merge**. The process of merging two patrons can occasionally take a few minutes.

**Offline Circulation**

During times when you cannot connect to the Evergreen staff client

1. If Evergreen is already open, exit the client completely.

2. Locate the Evergreen icon on your desktop that accesses catalog.sage.eou.edu.
3. Double click to open the client login screen.
4. After verifying the host name is catalog.sage.eou.edu, click **Standalone Interface** to enter Evergreen Offline Circulation.
Reminders:
You must have the patron’s barcode to check out items.
It is best to check in items after the system is back up live. If the system finds an exception to an item such as an item note “check for 6 CDs”, the item will be listed on a report but not checked in.
Remember that all transactions done during offline circulation are merely being recorded to be processed later, when the system is back online.
Checkout
- Click **Checkout** at the top of the screen and follow the directions on the left.
- Enter the patron’s barcode, enter the due date (or select a loan period), enter the item barcode and click **Enter**. You do not need to click the **Check barcode?** boxes as there will not be a system online to check.
- Repeat these steps for each additional item the patron is checking out.
- When done, click **Save these transactions**. *Checkouts will be accepted regardless of the patron’s expiration date, fines, etc.*

Check In
- Click **Check In** at the top of the screen and follow the directions on the left.
- Enter the item barcode and click **Enter**.
- Repeat this step for all items being checked in.
- When done, click **Save these transactions**.
- *Checking in items will not trigger holds or other actions that require reference to the online system. Overdue fines will be assessed as appropriate after uploading.*

Renew
- Click **Renew** at the top of the screen and follow the directions on the left.
- Enter the patron barcode (optional), enter the due date (or select a loan period), enter the item barcode and click **Enter**.
- Repeat these steps for all items being renewed.
- When done, click **Save these transactions**.
- *A renewal will be accepted regardless of holds, maximum renewals, etc.*
Register Patron

- Please note that Sage does not recommend registering patrons in the Offline Interface. There is no way to search for the patron initially to see if they already have a Sage patron record.
- If registration is necessary and the new patron wants to check out items, be sure to register them before checkout. Offline transactions are loaded in chronological order, so if checkouts are loaded before registration, the patron barcode will not be recognized.
- Click Register Patron at the top of the screen.
- Choose the appropriate Home Library from the dropdown menu.
- Fill in the appropriate information.
- When done, click Save patron registration at the bottom right of the screen.
- Be sure to make a note about the patrons you register. The offline registration form is incomplete, so you will need to go to the patron record after migration to fill in the remainder of the information.

Uploading offline transactions
(Modified from CW Mars who had modified from Sitka)

Once you are able to re-connect to the server, you need to upload the offline transactions. Any admin library staff member (with CircAdmin permission group) has the permissions to do the following processes.

The terms Offline Interface and Standalone Interface mean the same thing - a separate program to handle simple circulation tasks while the network is down.

Once you can connect to the server, there are 3 steps to uploading offline transactions:

1. Create a session
2. Upload transactions to a session
3. Process the uploaded transactions

Once the network has come back up, a session must first be created before uploading transactions. Staff can then upload transactions from each of the workstations used to perform offline circ to that same session. Once all of the branch workstations have uploaded their transactions to the session, the transactions from all of the workstations can then be processed at once.

Circulation Staff uploading transactions to the session does not put the transactions into the Evergreen database. The transactions will not be sent to the Evergreen database until they the session is processed.

Create a Session

1. Log into Evergreen with your username and password.
2. From the menu bar, select Admin (-) → Offline Transaction Management.
3. The Offline Transactions screen will open. Previously created sessions will be listed in the Offline Sessions section. Otherwise, the Offline Sessions section will be blank.

4. In the upper left corner Offline Sessions section, **click on the Create button** to create a new session.

5. **Enter a name for the session**, like “AIC 2009-12-02” (preferably with the name of the library in the description). Click OK.

6. In the Offline Sessions section, **highlight the session you just created**. An Upload button will un-gray in the top-right corner of the screen.
7. Inform library staff that the session has been created and what the session name is.

Upload Workstation Transactions to a Session

Wait until a session has been created and the creator has told you that it's ready for your upload. There may be several sessions shown on the Offline Transaction Management screen, so you will need the name of the correct session from your local system administrator.

1. Log into Evergreen with your username and password.
2. From the menu bar, select Admin ( ) → Offline Transaction Management.
3. The Offline Transactions screen will open. You should see at least one session in the Offline Sessions section. You may see old sessions listed there, as well.
4. In the upper left hand corner of the Offline Sessions section, highlight the correct session, then click Upload which is in the upper right hand corner. Once clicked, a third section on the bottom of the screen will appear.
5. When the uploading is finished, select the session in Offline Sessions section. Now the value in the Upload Count column should have been increased by 1. Your workstation should be listed in Uploaded Transactions section now.

![Offline Transactions](image)

6. Inform your local system administrator that your transaction has been uploaded to the session.

You will need to do this for each workstation you have used for offline circulation. If your library has used more than one workstation for offline transactions, you will need to upload their transactions to the same session.

**Process the Transactions**

Wait until all the appropriate staff workstations have uploaded their transactions to your session. You should see all the workstations that performed offline circulation listed in the Uploaded Transactions section.

1. **Log into Evergreen** with your username and password.
2. From the menu bar, select **Admin (-) → Offline Transaction Management**.
3. **Highlight the correct session** and, if necessary, Refresh to verify all the appropriate workstations have uploaded their transactions to your session.
4. Click on the Process button.

5. The processing may take a while, depending on how many transactions you have done. **Click the Refresh button to check the status.** The processing is complete when the Processing? column shows Completed.

The number in the Transactions Processed column is equal to the number of items checked out or checked in. For example, if there are 5 transactions processed this could be 5 items checked out, or 3 items checked in and 2 items checked out, or 5 items checked in.

**Exceptions**

Exceptions are transactions that require further attention. For example, a miss-scanned patron barcode, an open circulation, or an item that wasn’t checked in before it was checked out to another patron, would be listed as an exception. Those transactions causing exceptions may not be loaded into Evergreen database. Staff should examine the exceptions and take necessary action. To view the exceptions for any uploaded and processed session, click on the session and the exceptions, if any, will appear on the bottom half of the screen.

The example below shows several exceptions:
These are a few notes about possible exceptions. It is not an all-inclusive list.

1. Checking out a DVD with the wrong date (leaving due date set at +2 weeks instead of +1 week) doesn't cause an exception.
2. Overdue books are not flagged as exceptions.
3. Checking out a reference book doesn't cause an exception.
4. Checking out an item belonging to another library doesn't cause an exception.
5. The Standalone Interface doesn't recognize books on hold, no exceptions will be generated for that.
6. The Standalone Interface will recognize blocked, barred, and expired patrons as well as lost cards, IF you have recently done an Admin → Download Offline Patron List on the workstation on which you're using the Standalone Interface. You will get an error message indicating the patron status from within the Standalone Interface at check-out time. However, C/W MARS' patron list is so large that we recommend that the Offline Patron List not be downloaded.

Here are the names of the exceptions in the exact way that they will appear in the Event Name column. There is also information about the best way to handle the exception.

**ROUTE_ITEM.** Indicates the book should be routed to another branch or library system. You'll need to find the book and re-check it in (online) to get the Transit Slip to print.

**COPY_STATUS_LOST.** Indicates a book previously marked as lost was found and checked in. You may need to check in the item again (and then check it out to the patron if applicable).

**CIRC_CLAIMS_RETURNED.** Indicates a book previously marked as claimed-returned was found and checked in. You may need to check in the item again (and then check it out to the patron if applicable).

**ASSET_COPY_NOT_FOUND.** Indicates the item barcode was mis-scanned/mis-typed.

**ACTOR_CARD_NOT_FOUND.** Indicates the patron's library barcode was mis-scanned/ mis-typed. See if the correct barcode can be found and then manually check the item out to the patron.

**OPEN_CIRCULATION_EXISTS.** Indicates that item was already checked out to another or the same patron. It may be that the item was improperly checked in or that the patron re-shelved the item without giving it to library staff first. In either case the item can be
checked out to the patron at which point there is an option to forgive the fines of the last user if necessary.

**MAX_RENEWALS_REACHED.** Indicates the item has already been renewed the maximum times allowed. The item can still be renewed by going to the patron’s record.

**ACTION_CIRCULATION_NOT_FOUND.** Indicates that a renewal was attempted but a circulation on the patron record was not found. The item can be simply checked out to the patron if the patron thought that they already had the item out.

**SKIP_ASSET_CHANGED.** Indicates a copy record has been changed since the either the checkout or the check-in of the item. Further investigation may be required to decide on a course of action. One example that will generate this exception would be for an offline checkout where the patron has already returned the item on the live system.

**USERNAME_EXISTS.** When registering the patron, the username was already used in the system and the patron record will need to be reviewed.