

Circulation

Patron preferred name: Adds a new set of patron preferred name fields for prefix, first, middle, last, and suffix allowing patrons to provide preferred name information. Preferred names are optional and each acts as an overlay to the analogous primary name field, making it possible to provide preferred name values for individual fields.

- Patrons will see primary names displayed in the catalog when set.
- Staff will see both primary name and preferred name in the patron summary side bar.
- Patron searches for any given name field will search both the primary and preferred name data.

Batch actions from search results (baskets); The “temporary lists” feature has been renamed as “baskets”. These are accessible from both patron and staff accounts.

- Actions:
 - View Basket - This opens the basket in a new screen. Users can select items and perform the following actions:
 - Place Hold - This allows for placement of holds in batch for all of the items in the basket. If not already authenticated, users will be asked to login.
 - Print Title Details - This allows for printing details of all titles within the basket. A confirmation page opens prior to printing that includes a checkbox option for clearing the basket after printing.
 - Email Title Details - This allows for emailing details of all titles within the basket. If not already authenticated, users will be asked to login.
 - Add Basket to Saved List - This allows basket items to be saved to a new permanent list. If not already authenticated, users will be asked to login.
 - Clear Basket - This removes removes all titles from the basket

Privacy waiver (allow others to use my account) - Patrons who wish to authorize other people to use their account may now do so via My Account. In the Search and History Preferences tab under Account Preferences, a new section labeled "Allow others to use my account" allows patrons to enter a name and indicate that the specified person is allowed to place holds, pickup holds, view borrowing history, or check out items on their account. This information is displayed to circulation staff in the patron account summary in the web client. (Staff may also add, edit, and remove entries via the patron editor.)

- A new library setting, "Allow others to use patron account (privacy waiver)," is used to enable or disable this feature.

Patron Parent/Guardian field--Patrons now have a new dedicated parent/guardian field. This field is editable in the patron edit interface, displays in the patron summary side bar on the browser client, and is search-able from the patron search interface in the browser client; as well as being an available column in the patron search results table.

OPAC/TPAC

UPC search: In the Advanced Search Numeric tab, UPC is now an option in the drop-down list.

Baskets: (see "Circulation, Batch actions from search results") are available to OPAC users as well as staff client catalog users.

Administration

Inventory Date: Evergreen now provides an option to add an inventory date to items to facilitate the process of performing inventory in libraries. Staff can add an inventory date to an item in one of the following ways:

- From the check in screen, there is now an Update Inventory check in modifier. When selected, scanned barcodes will have the current date/time added as the inventory date while the item is checked in.
- From the Item Status screen, an action is available to add the current date/time as the inventory date to selected items.
- This new feature will also store the workstation that was used when the inventory date was updated.

Emergency Closing Handler (funded by PaILS) (YAY!): Staff are provided with interfaces and mechanisms to create library closings that, in addition to affecting future circulation and booking due dates, and hold shelf expirations, will automatically move existing circulation and booking due dates and hold shelf expiration times.

Auto renewal of items out: Circulation policies in Evergreen can now be configured to automatically renew certain items checked out on patron accounts. Circulations will be renewed automatically up to a custom limit (the max_auto_renewal field) and patrons will not need to log in to their OPAC accounts or ask library staff to manually renew materials.

- Two new action triggers have been added to Evergreen that permit the Auto-Renew feature: Autorenew and AutorenewNotify.
- A new hook called autorenewal notifies patrons via email of their currently due or auto-renewed items. In the webstaff's Patron Items Out page, the new column AutoRenewalsRemaining indicates how many autorenewals are available for a particular circulation.

Browser Client Settings & Preferences Stored on the Server: Browser client settings and preferences that should persist over time are now stored as settings on the server. This allows settings to follow users and workstations and reduces problems associated with losing settings as a result of clearing browser data. The browser client honors setting values stored as user settings, workstation settings, and org unit settings, depending on which setting types are locally configured.

- Settings types: no setting can be both a user and workstation setting. They are mutually exclusive.
- Any setting can be an org unit setting in addition to being a user or workstation setting.
- Read-Only Settings are useful for defining values that staff can use but not modify. For example, admins may wish to prevent users from locally modifying the grid configuration for a given interface so it remains consistent for all users.

3.1 -> 3.3 Upgrade: New Features!

- Server-Stored Workstation Settings Workstation Admin View: There's a new "Server Workstation Prefs" tab to the stored preferences workstation admin interface. From here, users can view which preferences are stored as server-stored workstation preferences and delete select values.
- Note: if you use the same workstation name at different computers, your setting can now 'follow' you around!

Permission tree display entries: In Local administration - permission tree display entries - you can add/remove what specific permission groups do and do not display in the 'register a patron' interface.

Cataloging

MARC Import/Export Interface Update (Angular Port): This MARC Import/Export (AKA Vandelay) interface is now built on Angular(7) instead of Dojo. The functionality is consistent with the previous version of the interface, with minor UI adjustments to match the Angular style, plus one new interface called Recent Imports.

- Import Templates: Users may now save sets of import attributes from the MARC import form as named templates. Users may select a default template, applied on page load by default, and users may delete existing templates.
- Recent Imports Tab: This is a new interface which allows users to see active and recent Vandelay sessions originating from the same workstation or logged in user account. Active sessions include real-time progress information so the user may track the progress without refreshing the page. This interface makes it possible to exit the main import tab or the Vandelay interface altogether and return at a later time to check on import progress. It also allows users to start multiple imports at the same time and follow the status of each in one interface.
- Fields in the Import Records interface will remember last values selected (they will be "sticky").

Spine Label Sheet Printing: Catalogers can now print spine labels onto 8 1/2 x 11 inch label sheets.

Add UPC to z39.50 search for OCLC and LOC: Add UPC as a search attribute for both OCLC and LOC targets in z39.50 for cataloging.

Also a new option in Numeric Search (in the dropdown with ISBN)

Booking

View upcoming booking reservations in the OPAC: A new tab in the My Account section of the OPAC shows patrons information about reservations on their account. Here, patrons can check on upcoming reservations, as well as reservations they currently have checked out.

- Note: this interface pulls its timezone from the Library Settings Editor. Make sure that you have a timezone listed for your library in the Library Settings Editor before using this feature.



3.1 -> 3.3 Upgrade: New Features!