

Common Evergreen Terms

Backdated Check In-to mark an item as checked in at an earlier date than the actual date. Most commonly used for checking in the morning book-drop items.

Bibliographic Records-describe the characteristics of the resources retrieved in the OPAC, such as format, title, author, edition, etc. MARC records are the basis of bibliographic records.

Button Bar-see **Toolbar**.

Holds Capture-the physical act of scanning (or typing) in the item barcode and triggering a specific hold for a patron. Holds will be captured if staff members pull targeted items from the stacks to fill a hold. Evergreen also looks at copies being checked in to see if they can potentially fill holds. This process is called opportunistic capture.

Call Number-typically an alphanumeric label indicating an item's subject matter and/or shelving location within the library. In Evergreen call number is synonymous with "Volume". A volume, or call number, level record is created in Evergreen, which allows libraries in a consortium to use different classification systems and schemas.

Circulation Library-the item's home, Circulation Library defines where the item lives. In Evergreen, you can set policies differentiating between the circulation library and the owning library.

Circulation Modifiers-allow you to group resources together by material type and can be used in the creation of circulation and holds policies.

Copies-used interchangeably with the term Items in Evergreen, they are individual barcoded items located at a specific call number within a specific library.

Copy Buckets-allow you to group individual copies together for the purpose of batch processing and modification. Also referred to as item buckets.

Copy Editor-in Cataloging, allows you to define item attributes. You can also create copy templates that can be assigned to items with similar characteristics. Can be accessed through the "Edit Item" or "Edit Item Attributes" menu options.

Copy Level Hold-a hold placed on a specific copy. Available in Staff Client only.

Copy Locations-define the shelving locations in a library. Within a multi-library system, each library can define its own shelving locations.

Copy Statuses-define a copy's current availability, such as checked out, missing, available, on holds shelf, etc.

Grocery Bills-charges that staff members manually apply to a user's account.

Holdings Maintenance-provides access to cataloging functions, such as transferring volumes and copies from one location to another, adding volumes and copies to the bibliographic record, and editing volumes and copies.

Items-see **Copies**.

My Lists-formerly known as book bags, users can add items to temporary lists or login to their accounts and save lists in their OPAC accounts. Users can create lists of books that they have read or want to read. They can also place holds on all titles in the list at one time.

Non-Cataloged Items-“honor system” items that are not cataloged but can still be checked out by users to record the circulation statistic.

Offline Use-enables you to continue using basic Evergreen functions while your network is down. Also known as the Standalone Interface.

Owning Library-the library recognized as the purchaser or owner of an item. In Evergreen, you can set policies differentiating between the circulation library and the owning library.

Permission Groups-allow you to create groups of users and assign permissions to them. Permission groups can be patron types, such as Adult or Juvenile, or staff types, such as Circulation or Catalogers.

Pre-Cataloged-the creation of a temporary bibliographic record containing basic information, not viewable in the OPAC, so that users may check out the item before it has been fully cataloged.

Record Buckets-allow you to group and manage bibliographic records for the purpose of batch processing and modification.

Record ID-the internal bibliographic identifier. Evergreen stores the Record ID in the MARC 901c field.

Standalone Interface-see **Offline Use**.

Title or Bibliographic Record Level Hold-a hold placed on a specific title or bib record. Evergreen will determine the best item to fill the hold based on the Hold Policies that have been configured. Available in the OPAC and Staff Client.

Toolbar-also referred to as the Button Bar, the toolbar buttons provide quick links to common functions and tasks. Toolbars are configurable for a specific org unit, workstation, or login.

Volume-see **Call Number**

Volume and Copy Creator-in Cataloging, allows you to specify both the volume (call number) and item attributes of a copy within the same interface. Also referred to as the Unified Volume / Copy Creator.



Volume Level Hold-a hold placed on a specific call number, all copies within that call number at the corresponding library may be eligible to fill the hold request. Available in Staff Client only.

Workstation-the computer terminal that you use to perform your day-to-day activities.