Chapter 1. Server Administration

Abstract

Administration of Evergreen involves configuration done from both the Staff Client as well a the command line. The goal of this chapter is to provide you with the procedures to help you optimize your Evergreen system.

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Organizational Unit Types and Organizational Units

Organizational Unit Types

Organizational Unit Types are the terms used to refer to levels in the hierarchy of your library system(s). Examples could include>All-Encompassing Consortium, Consortium Within a Consortium, Library System, Branch, Bookmobile, Sub-Branch, Twig, etc.

You can add or remove organizational unit types, and rename them as needed to match the organizational hierarchy that exists in reality for the libraries using your installation of Evergreen. Evergreen can support organizations as simple as a single library with one or more branches or as complex as a consortium composed of many independently governed library systems. Organizational unit types should never have proper names since they are only generic types .

The fields in the organizational unit type record include:

- Type Name - The name of the organization unit type.
- Opac Label - This is the label displayed in the OPAC to describe the search range and the copy count columns for results. They are *range relative* labels.
- Parent Type - The parent organizational unit type of this type.

- Can Have Volumes - Flag that allows an organizational unit of this type to contain Volumes/Call Numbers and thus Copies.
- Can Have Users - Flag that allows an Organizational unit of this type to be home to Users.

An organizational unit type can be added, edited, or removed using the staff client.

To navigate to the *Organization Unit Types* from the staff client select Admin # Server Administration # Organization Types

Procedure 1.1. Adding Organization Types

1. Select an organization type from the organization type tree on the left and click New Child.
2. Make sure your new type is selected and edit the Type Name, OPAC Label and Parent Type.
3. Change the Parent Type if necessary.
4. Check the Can Have Volumes and Copies checkbox if the organization units of this type will have volumes and copies assigned to it.
5. Check the Can Have Users checkbox if you will allow users to be have the organization units of this type as their home unit.
6. Click Save to save your new organization type.

Procedure 1.2. Deleting Organization Types

Note

You will not be able to delete organization types if organization units are assigned to that type. Before you can delete the organization Type, you must change the organization type of the units associated with the type or delete the units.

1. Select the *organization type* from the *Organization Type* tree.
2. Click Delete.
3. Click OK on the warning alert box.

Procedure 1.3. Editing Organization Types

1. Select the *organization type* you wish to edit from the organization type tree.
2. Make the changes in the right pane.
3. Click Save to save your changes.

Organizational Units

Organizational Units are the specific instances of the organization unit types that make up your library's hierarchy. These can include consortia, systems, branches, etc. The organizational units should have distictive proper names such as *Main Street Branch* or *Townsville Campus*.

To navigate to the organizational units adminstration page in the staff client select Admin # Server Administration # Organizational Units

Procedure 1.4. Adding Organizational Units

1. Select an *Organizational Unit* from the organizational unit tree on the left and click New Child.
2. Make sure your new unit is selected and edit the Organizational Unit Name, Organizational Unit Policy Code, Main Email Address and Main Phone Number.

   Note

   The *Organizational Unit Name* is the name that will appear in the OPAC. The *Policy Code* is used by the system to associate policies and copies with the unit.
3. Select the Organization Unit Type and Parent Organization Unit.
4. Check the Can Have Volumes and Copies checkbox if the organization units of this type will have volumes and copies assigned to it.
5. Check the OPAC Visible checkbox if you want this location to be visible in the OPAC for searching.
6. Click Save to save your new organizational unit.

Procedure 1.5. Deleting Organizational Units

Note

You will not be able to delete organizational units if you have users, workstations or copies assigned to the unit. Before you can delete the organizational unit, you must move its users, workstations, copies and other associated resources to other organizational units units.

1. Select the *organizational unit* you wish to delete from the organzational unit tree in the left pane.
2. ClickDelete.
3. Click OK on the warning alert box.

Procedure 1.6. Editing Organizational Units

1. Select the organizational unit you wish to edit from the organizational unit tree in the left pane.
2. Edit the fields in the right pane.
3. Click Save to save your changes.

Adjusting Search Relevancy Rankings

Abstract

This section describes indexed field weighting and matchpoint weighting, which control relevance ranking in Evergreen catalog search results. Adjusting relavancy can only be completed through access to the Evergreen database as of version 1.6.

Tip

In tuning search relevance, it is good practice to make incremental adjustments, capture search logs, and assess results before making further adjustments.

Indexed-field Weighting

Indexed-field weighting is configured in the Evergreen database in the weight column of the config.metabib_field table, which follows the other four columns in this table: field_class, name, xpath, and format.

The following is one representative line from the config.metabib_field table:

author | conference | //mods32:mods/mods32:name[@type='conference']/mods32:namePart[../mods32:role/mods32:roleTerm[text()='creator']] | mods32 | 1)

The default value for index-field weights in config.metabib_field is 1. Adjust the weighting of indexed fields to boost or lower the relevance score for matches on that indexed field. The weight value may be increased or decreased by whole integers.

For example, by increasing the weight of the title-proper field from 1 to 2, a search for **jaguar** would double the relevance for the book titled *Aimee and Jaguar* than for a record with the term **jaguar** in another indexed field.

Matchpoint Weighting

Matchpoint weighting provides another way to fine-tune Evergreen relevance ranking, and is configured through floating-point multipliers in the multiplier column of the search.relevance_adjustment table.

Weighting can be adjusted for one, more, or all multiplier fields in search.relevance_adjustment.

You can adjust the following three matchpoints:

- boosts relevance if the query is one term long and matches the first term in the indexed field (search for **twain**, get a bonus for **twain, mark** but not **mark twain**)
- increases relevance for words matching the order of search terms, so that the results for the search **legend suicide** would match higher for the book *Legend of a Suicide* than for the book, *Suicide Legend*
- boosts relevance when the full query exactly matches the entire indexed field (after space, case, and diacritics are normalized). So a title search for *The Future of Ice* would get a relevance boost above *Ice>Ages of the Future*.

Here are the default settings of the search.relevance_adjustment table:

Table 1.1. search.relevance_adjustment table

field_class	name	bump_type	multiplier
author	conference	first_word	1.5
author	corporate	first_word	1.5
author	other	first_word	1.5
author	personal	first_word	1.5
keyword	keyword	word_order	10
series	seriestitle	first_word	1.5
series	seriestitle	full_match	20
title	abbreviated	first_word	1.5

field_class	name	bump_type	multiplier
title	abbreviated	full_match	20
title	abbreviated	word_order	10
title	alternative	first_word	1.5
title	alternative	full_match	20
title	alternative	word_order	10
title	proper	first_word	1.5
title	proper	full_match	20
title	proper	word_order	10
title	translated	first_word	1.5
title	translated	full_match	20
title	translated	word_order	10
title	uniform	first_word	1.5
title	uniform	full_match	20
title	uniform	word_order	10

Combining Index Weighting and Matchpoint Weighting

Index weighting and matchpoint weighting may be combined. The relevance boost of the combined weighting is equal to the product of the two multiplied values.

If the relevance setting in the config.metabib_field were increased to 2, and the multiplier set to 1.2 in the search.relevance_adjustment table, the resulting matchpoint increase would be 240%.

Note

In practice, these weights are applied serially -- first the index weight, then all the matchpoint weights that apply -- because they are evaluated at different stages of the search process.

Adjusting Relevancy for Keyword Searches

Searching the out of the box *keyword* does not boost the ranking for terms appearing in, the title or subject fields since there is just one keyword index which does not distinguish terms that appear in the title field from those in the notes field for example. In comparison, the title index is actually composed of a number of separate indexes: title|proper, title|uniform, title|alternative, title|translated, etc, that collectively form the title index. You can see this in the config.metabib_field table. The following procedure will add a keyword|title index so that terms found in the title field of an item are given more weight than terms in other fields.

1. From the command line, access the PorstgreSQL command line interface

   ```
   psql -U evergreen
   ```

2. Clone the title|proper index to create a keyword|title index

   6 = the title|proper index

   ```
   INSERT INTO config.metabib_field
        (field_class, name, xpath, weight,
   ```

```
format, search_field, facet_field)

SELECT 'keyword', 'title', xpath, weight, format,

search_field, facet_field

FROM config.metabib_field

WHERE id = 6;
```

3. Populate the keyword|title index with a set of index entries cloned from the metabib.title_field_entry table;

   6 = the title|proper index

```
INSERT INTO metabib.keyword_field_entry (source, field, value)

SELECT source, 17, value (the field value, 17, field be different
     in your database so you may need to check the
     config.metabib_field for the id of your new index).

FROM metabib.title_field_entry

WHERE field = 6;
```

4. Bump the relevance when the first search term appears first in the title in a keyword search.

   17 = our new keyword|title index (This may be different in your database so you may need to check the *config.metabib_field* for the id of your new index).

```
INSERT INTO search.relevance_adjustment
     (active, field, bump_type, multiplier)

VALUES (true, 17, 'first_word', 5);
```

5. Boost the relevance for search terms appearing in the title in general

   17 = our new keyword|title index (This may be different in your database so you may need to check the *config.metabib_field* for the id of your new index).

```
UPDATE config.metabib_field

SET weight = 10

WHERE id = 17;
```

User and Group Permissions

It is essential to understand how user and group permissions can be used to allow staff to fulfil their roles while ensuring that they only have access to the appropriate level.

Permissions in Evergreen are applied to a specific location and system depth based on the home library of the user. The user will only have that permission within the scope provided by the *Depth* field in relation to his/her working locations.

Evergreen provides group application permissions in order to restrict which staff members have the ability to assign elevated permissions to a user, and which staff members have the ability to edit users in particular groups.

User Permissions

Tip

Ihe User permissions editor allows an administrator to set up permission fopr an individual user. However, In most cases, permissions can be controlled more efficiently at the group level with individuals being assigned to specific groups based on their roles in the library.

To open the user permission editor, select Admin # User Permission Editor. Type the user's barcode when prompted.

Working Locations

The first section of the User Permission Editor is the the Working Locations section. You may select more than one working location for a user. This will effect the availability of certain permissions which are dependent on the user having the working location.

User Permission Settings

Below the working locations is the long list of all the permissions available on your system. For each permission you can apply it by checking the *Applied* check box. You can also select a depth to which the permission is applied and also make the permission *grantable*, allowing the user the ability to grant the permission to others.

Group Permissions

Most permissions should be assigned at the group level. Here you can create new groups based on the roles and responsibilities of the users in your system. Staff will be able to assign users to these groups when they register patrons.

Tip

It is a good idea to create your groups soon after creating your organizational units. It is also imprtaant to give careful consideration to the hierarchy of your groups to make permission assignment as efficient as possible.

To enter the *Group Permission* module from the staff client menu, select Admin # Server Administration # Permission Groups

Procedure 1.7. Adding Groups

1. Select the Group Configuration tab if not already selected in the right pane
2. Click New Child
3. Enter a unique Group Name
4. Enter a Description
5. Select a Permission Interval. This will determine the default expiry date of user account when you register patrons and select their groups
6. Selecting an Editing Permission will determine the group level the user will have for editing other users.

7. Select the Parent Group for the group.

Note

The group will inherit its parent group's permissions so it is unecessary to assign permissions already inherited from its parent.

8. Click the Save button.

Procedure 1.8. Deleting Groups

1. Select the group you wish to delete from the group tree on left pane.
2. Click the Delete button.
3. Click on OKto verify.

Procedure 1.9. Editing Groups

1. Select the group you wish to edit from the group tree on left pane.
2. Edit the fields you wish to change in the right pane.
3. Click on Save to save changes.

Procedure 1.10. Adding Group Permissions

1. Select the Group Permissions tab on the right pane
2. Click on New Mapping.
3. Select the permission you would like to add from the Permission Select box.
4. Select the Depth you wish to set the permission. This will determine if the group has the permission at a local level or across a system, or consortium, or other organizational unit type.
5. check the Grantable check box to allow the user to grant the permission to others.
6. Click Add Mapping to add the permission to the group

Procedure 1.11. Deleting Group Permissions

1. Select the group permission you wish to delete.
2. Click the Delete Selected button.
3. Click on OK to verify

Procedure 1.12. Editing Group Permissions

1. Click on the Depth or Grantable field for the permission setting you wish to change.
2. Make changes to other permissions in the same way.
3. Click Save Changes when you are finished all the changes.

Permissions

Table 1.2. Permissions Table

Permission Name	Permission Description
ABORT_REMOTE_TRANIST	Allows user to abort a copy transit if the user is not at the transit source or destination
ABORT_TRANSIT	Allows user to abort a copy transit if the user is at the transit destination or source
ASSIGN_WORK_ORG_UNIT	Allows user to define where another staff member's permissions apply via the Permissions Editor interface.
BAR_PATRON	Allows user to bar a patron
CANCEL_HOLDS	Allows user to cancel holds
CIRC_CLAIMS_RETURNED.override	Allows user to check in/out an item that is claims returned
CIRC_EXCEEDS_COPY_RANGE.override	Allows user to override the copy exceeds range event
CIRC_OVERRIDE_DUE_DATE	Allows user to change due date
CIRC_PERMIT_OVERRIDE	Allows user to bypass the circ permit call for i checkout
COPY_ALERT_MESSAGE.override	Allows user to check in/out an item that has an alert message
COPY_BAD_STATUS.override	Allows user to check out an item in a non-circulatable status
COPY_CHECKIN	Allows user to check in a copy
COPY_CHECKOUT	Allows user to check out a copy
COPY_CIRC_NOT_ALLOWED.override	Allows user to checkout an item that is marked as non-circ
COPY_HOLDS	Allows user to place a hold on a specific copy
COPY_IS_REFERENCE.override	Allows user to override the copy_is_reference event
COPY_NOT_AVAILABLE.override	Allows user to force checkout of Missing/Lost type items
COPY_STATUS_LOST.override	Allows user to remove the lost status from a copy
COPY_STATUS_MISSING.override	Allows user to change the missing status on a copy
COPY_TRANSIT_RECEIVE	Allows user to close out a transit on a copy
CREATE_BILL	Allows user to create a new bill on a transaction
CREATE_CONTAINER	Allows user to create containers owned by other users (containers are Item Buckets, Volume Buckets, and Book Bags)
CREATE_CONTAINER_ITEM	Allows user to place an item in a container (even if the container is owned by other users).
CREATE_COPY	Allows user to create a new copy object
CREATE_COPY_LOCATION	Allows user to create a new copy location

Permission Name	Permission Description
CREATE_COPY_NOTE	Allows user to create a new copy note
CREATE_COPY_STAT_CAT	Allows user to create a statisitcal category for copies
CREATE_COPY_STAT_CAT_ENTRY	Allows user to create a new entry for a copy statistical category
CREATE_COPY_STAT_CAT_ENTRY_MAP	Allows user to link a copy to a statistical category (i.e., allows user to specify the appropriate entry for a copy and given statistical category)
CREATE_COPY_TRANSIT	Allows user to create a transit
CREATE_DUPLICATE_HOLDS	Allows user to create duplicate holds (e.g. two holds on the same title)
CREATE_HOLD_NOTIFICATION	Allows user to create new hold notifications
CREATE_IN_HOUSE_USE	Allows user to create a new in-house-use
CREATE_MARC	Allows user to create new MARC records
CREATE_MY_CONTAINER	Allows user to create containers for self (containers are Item Buckets, Volume Buckets, and Book Bags).
CREATE_NON_CAT_TYPE	Allows user to create a new non-cataloged item type
CREATE_PATRON_STAT_CAT	Allows user to create a new patron statistical category
CREATE_PATRON_STAT_CAT_ENTRY	Allows user to create a new possible entry for patron statistical categories
CREATE_PATRON_STAT_CAT_ENTRY_MAP	Allows user to link another user to a stat cat entry (i.e., specify the patron's entry for a given statistical category)
CREATE_PAYMENT	Allows user to record payments in the Billing Interface
CREATE_TITLE_NOTE	Allows user to create a new title note
CREATE_TRANSACTION	Allows user to create new billable transactions (these include checkouts and transactions created via the Bill Patron operation)
CREATE_TRANSIT	Allows user to place item in transit
CREATE_USER	Allows user to create another user
CREATE_USER_GROUP_LINK	Allows user to add other users to permission groups
CREATE_VOLUME	Allows user to create a volume
CREATE_VOLUME_NOTE	Allows user to create a new volume note
DELETE_CONTAINER	Allows user to delete containers (containers are Item Buckets, Volume Buckets, and Book Bags).
DELETE_CONTAINER_ITEM	Allows user to remove items from buckets and bookbags
DELETE_COPY	Allows user to delete a copy
DELETE_COPY_LOCATION	Allows user to delete a copy location
DELETE_COPY_NOTE	Allows user to delete copy notes

Permission Name	**Permission Description**
DELETE_COPY_STAT_CAT	Allows user to delete a copy statistical category
DELETE_COPY_STAT_CAT_ENTRY	Allows user to delete an entry for a copy statistical category
DELETE_COPY_STAT_CAT_ENTRY_MAP	Allows user to delete a copy stat cat entry map
DELETE_NON_CAT_TYPE	Allows user to delete a non cataloged type (the user still cannot deleted a non-cat type if any items of that type have circulated).
DELETE_PATRON_STAT_CAT	Allows user to delete a patron statistical category
DELETE_PATRON_STAT_CAT_ENTRY	Allows user to delete an entry for patron statistical categories
DELETE_PATRON_STAT_CAT_ENTRY_MAP	Allows user to remove a patron's entry for a given statistical category
DELETE_RECORD	Allows user to delete a bib record
DELETE_TITLE_NOTE	Allows user to delete title notes
DELETE_USER	Allows user to mark a user as deleted
DELETE_VOLUME	Allows user to delete a volume
DELETE_VOLUME_NOTE	Allows user to delete volume notes
DELETE_WORKSTATION	Allows user to remove an existing workstation so a new one can replace it
EVERYTHING	Every permssion is granted (for sysadmins and developers only!)
HOLD_EXISTS.override	Allows users to place multiple holds on a single copy/volume/title/metarecord (depending on hold type)
IMPORT_MARC	Allows user to import a MARC record via the z39.50 interface
ITEM_AGE_PROTECTED.override	Allows user to place a hold on an age-protected item
ITEM_ON_HOLDS_SHELF.override	Allows user to check out an item that is on holds shelf for a different patron
MAX_RENEWALS_REACHED.override	Allows user to renew an item past the maximun renewal count
MERGE_BIB_RECORDS	Allows user to merge bib records and their associated data regardless of their bib/volume/copy level perms (in theory - as of 1.2.2, users still must have VOLUME_UPDATE and UPDATE_VOLUME in order to merge records.
MR_HOLDS	Allows user to create a metarecord holds
OFFLINE_EXECUTE	Allows user to process an offline/standalone script batch
OFFLINE_UPLOAD	Allows user to upload an offline/standalone script
OFFLINE_VIEW	Allows user to view uploaded offline script information
OPAC_LOGIN	Allows user to login to the OPAC

Permission Name	**Permission Description**
patron_exceeds_checkout_count.override	Allow user to override checkout count failure
patron_exceeds_fines .override	Allow user to override fine amount checkout failure
patron_exceeds_overdue_count .override	Allow user to override overdue count failure
REGISTER_WORKSTATION	Allows user to register a new workstation
REMOTE_Z3950_QUERY	Allows user to perform z3950 queries against remote servers
REMOVE_USER_GROUP_LINK	Allows user to remove other users from permission groups
RENEW_CIRC	Allows user to renew items
RENEW_HOLD_OVERRIDE	Allows user to continue to renew an item even if it is required for a hold.
REQUEST_HOLDS	Allows user to create holds for another user (if true, we still check to make sure they have permission to make the type of hold they are requesting, e.g. COPY_HOLDS)
RUN_REPORTS	Allows user to view the Reports Interface, create templates, and run reports
SET_CIRC_CLAIMS_RETURNED	Allows user to mark an item as claimed returned
SET_CIRC_LOST	Allows user to mark an item as lost
SET_CIRC_MISSING	Allows user to mark an item as missing
SHARE_REPORT_FOLDER	Allows user to share Template/Report/Output folders via the Reporting Interface
STAFF_LOGIN	Allows user to login to the staff client
TITLE_HOLDS	Allows user to place a hold at the title level
UNBAR_PATRON	Allows user to un-bar a patron
UPDATE_BATCH_COPY	Allows user to edit copies in batch
UPDATE_CONTAINER	Allows user to update another users Buckets or Book Bags
UPDATE_COPY	Allows user to edit a copy
UPDATE_COPY_LOCATION	Allows user to edit a copy location
UPDATE_COPY_STAT_CAT	Allows user to change a copy statistical category
UPDATE_COPY_STAT_CAT_ENTRY	Allows user to change a copy statistical category entry
UPDATE_HOLD	Allows user to edit holds (such as change notification phone number or pickup library, as well as retarget the hold and capture an item for hold or pickup)
UPDATE_MARC	Allows user to edit a marc record
UPDATE_NON_CAT_TYPE	Allows user to update a non cataloged type
UPDATE_ORG_SETTING	Allows user to update an org unit setting
UPDATE_ORG_UNIT	Allows user to change org unit settings

Permission Name	**Permission Description**
UPDATE_PATRON_STAT_CAT	Allows user to change a patron statistical category (such as renaming the category)
UPDATE_PATRON_STAT_CAT_ENTRY	Allows user to change a patron stat cat entry(such as renaming the entry)
UPDATE_RECORD	Allows user to undelete a MARC record
UPDATE_USER	Allows user to edit a user's record
UPDATE_VOLUME	Allows user to edit volumes - needed for merging records. This is a duplicate of VOLUME_UPDATE; user must have both permissions at appropriate level to merge records.
VIEW_CIRCULATIONS	Allows user to see what another user has checked out
VIEW_CONTAINER	Allows user to view buckets and bookbags
VIEW_COPY_CHECKOUT_HISTORY	Allows user to view which users have checked out a given copy
VIEW_COPY_NOTES	Allows user to view notes attached to a copy
VIEW_HOLD	Allows user to view another user's holds
VIEW_HOLD_NOTIFICATION	Allows user to view notifications attached to a hold
VIEW_HOLD_PERMIT	Allows user to see if another user has permission to place a hold on a given copy
VIEW_PERM_GROUPS	Allows user to view permission groups.
VIEW_PERMISSION	Allows user to view user permissions within the user permissions editor
VIEW_PERMIT_CHECKOUT	Allows user to see if another user can check out an item (should be true for all staff)
VIEW_REPORT_OUTPUT	Allows user to view report output
VIEW_TITLE_NOTES	Allows user to view all notes attached to a title
VIEW_TRANSACTION	Allows user to see another users grocery/circ transactions in the Bills Interface
VIEW_USER	Allows user to view another user's Patron Record
VIEW_USER_FINES_SUMMARY	Allows user to view bill details
VIEW_USER_TRANSACTIONS	*same as VIEW_TRANSACTION (duplicate perm)
VIEW_VOLUME_NOTES	Allows user to view all notes attached to a volume
VIEW_ZIP_DATA	Allows user to query the zip code data method
VOID_BILLING	Allows user to void a bill
VOLUME_HOLDS	Allows user to place a volume level hold
actor.org_unit.closed_date.create	Allows user to create a new closed date for a location
actor.org_unit.closed_date.delete	Allows user to remove a closed date interval for a given location
actor.org_unit.closed_date.update	Allows user to update a closed date interval for a given location

Permission Name	Permission Description
group_application.user	Allows user to add/remove users to/from the User group
group_application.user.patron	Allows user to add/remove users to/from the Patron group
group_application.user.sip_client	Allows user to add/remove users to/from the SIP-Client group
group_application.user.staff	Allows user to add/remove users to/from the Staff group
group_application.user.staff.admin.global_admin	Allows user to add/remove users to/from the GlobalAdmin group
group_application.user.staff.admin.lib_manager	Allows user to add/remove users to/from the LibraryManager group
group_application.user.staff.admin.local_admin	Allows user to add/remove users to/from the LocalAdmin group
group_application.user.staff.cat	Allows user to add/remove users to/from the Cataloger group
group_application.user.staff.cat.cat1	Allows user to add/remove users to/from the Cat1 group
group_application.user.staff.circ	Allows user to add/remove users to/from the Circulator group
group_application.user.staff.supercat	Allows user to add/remove users to/from the Supercat group
group_application.user.vendor	Allows user to add/remove users to/from the Vendor group
money.collections_tracker.create	Allows user to put someone into collections
money.collections_tracker.delete	Allows user to take someone out of collections

Copy Status

To navigate to the copy status editor from the staff client menu, select Admin # Server Administration # Copy Statuses

The Copy Status Editor is used to Add, edit and delete statuses of copies in your system.

Evergreen comes pre-loaded with a number of copy statuses.

Table 1.3. Copy Status Table

ID	Name	Holdable - default setting	OPAC Visible - default setting
0	Available	true	true
1	Checked out	true	true
2	Bindery	false	false
3	Lost	false	false
4	Missing	false	false

ID	Name	Holdable - default setting	OPAC Visible - default setting
5	In process	false	true
6	In transit	true	true
7	Reshelving	true	true
8	On holds shelf	true	true
9	On order	true	true
10	ILL	true	false
11	Cataloging	true	false
12	Reserves	false	true
13	Discard/Weed	false	false
14	Damaged	false	false
15	On reservation shelf	true	false

It is possible to add, delete and edit copy statuses.

Procedure 1.13. Adding Copy Statuses

1. In the New Status field, enter the name of the new status you wish to add.
2. Click Add.
3. Locate you new status and check the *Holdable* check box if you wish to all users to place holds on items in this status. Check *OPAC Visble* if you wish for this status to appear in the public OPAC.
4. Click Save Changes at the bottum of the screen to save changes to the new status.

Procedure 1.14. Deleting Copy Statuses

1. Highlight the statuses you wish to delete. Hold the **Shift** to select more than one status.
2. Click Delete Selected.
3. Click OK to verify.

    ## Note

    You will not be able to delete statuses if copies currently exist with that status.

Procedure 1.15. Editing Copy Statuses

1. Double click on a status name to change its name and enter the new name.

   To change whether a status is visible in the OPAC, check or uncheck the *OPAC Visible* check box.

   To allow patrons the ability to hold items in that status, check the *Holdable* check box. To prevent users from holding items in that status, uncheck the *Holdable* check box.

2. Once you have finished editing the statuses, remember to click Save Changes.

Billing Types

The billing types editor is used for creating, editing and deleting billing types.

To navigate to the billing types editor from the staff client menu, select Admin # Server Administration # Billing Types

Procedure 1.16. Adding Billing Types

1. Click New Billing Type.

2. Enter the name of the billing type.

3. Select the *Org Unit* to use this billing type.

4. Enter the *Default Price*. This is only the default since the actual price of a specific billing can be adjusted when staff create a billing

5. Click Save to save the new billing type.

Procedure 1.17. Deleting Billing Types

1. Check the checkbox of the billing type(s) you wish to delete.

2. Click Delete Selected.

   Warning

   The selected billing types will be deleted without a verification alert.

Procedure 1.18. Editing Billing Types

1. Double click on a billing types to open the editing window.

2. Make desired changes to the *name*, *Org Unit* and *Default Price*.

3. Once you have finished editing, click Save.

Circulation Modifiers

The circulation modifier editor is used to create, edit and delete modifier categories to control circulation policies on specific groups of items.

To navigate to the circulation modifiers editor from the staff client menu, select Admin # Server Administration # Circulation Modifiers.

Procedure 1.19. Adding Circulation Modifiers

1. Click New Circ Modifier.

2. Enter a *Code*, *Name* and *Description*.

3. Select the *SIP 2 Media Type*.

4. Check the Magnetic Media check box if the item is magnetic media such as a casette tape.

5. Click Save to save the new circulation modifier.

Procedure 1.20. Deleting Circulation Modifiers

1. Check the check box(es) next to the circulation modifiers(s) you wish to delete.

2. Click Delete Selected near the top of the page.

Warning

The selected circulation modifiers will be deleted without a verification alert.

Procedure 1.21. Editing Circulation Modifiers

1. Double click on the row of the cirlation modifier you wish to edit.

2. Make desired changes.

3. Once you have finished editing, click Save.

Cataloging Templates

Cataloging templates are essential for making the cataloguing process more efficient. Templates are used that that the basic structure of specific types of cataloguing records can loaded when the cataloguer adds a new record

Procedure 1.22. Adding Cataloging Templates

1. Create a marc template in the directory `/openils/var/templates/marc/`. It should be in xml format. Here is an example file `k_video.xml`:

```
<record>
  <leader>00620cam a2200205Ka 4500</leader>
  <controlfield tag="008">070101s eng d
  </controlfield>
  <datafield tag="010" ind1="" ind2="">
    <subfield code="a"></subfield>
  </datafield>
  <datafield tag="020" ind1="" ind2="">
    <subfield code="a"></subfield>
  </datafield>
  <datafield tag="082" ind1="0" ind2="4">
    <subfield code="a"></subfield>
  </datafield>
  <datafield tag="092" ind1="" ind2="">
    <subfield code="a"></subfield>
  </datafield>
  <datafield tag="100" ind1="" ind2="">
    <subfield code="a"></subfield>
  </datafield>
  <datafield tag="245" ind1="" ind2="">
    <subfield code="a"></subfield>
    <subfield code="b"></subfield>
    <subfield code="c"></subfield>
  </datafield>
  <datafield tag="260" ind1="" ind2="">
    <subfield code="a"></subfield>
    <subfield code="b"></subfield>
    <subfield code="c"></subfield>
  </datafield>
  <datafield tag="300" ind1="" ind2="">
    <subfield code="a"></subfield>
    <subfield code="b"></subfield>
    <subfield code="c"></subfield>
  </datafield>
  <datafield tag="500" ind1="" ind2="">
    <subfield code="a"></subfield>
  </datafield>
  <datafield tag="650" ind1="" ind2="">
    <subfield code="a"></subfield>
    <subfield code="v"></subfield>
  </datafield>
  <datafield tag="650" ind1="" ind2="">
    <subfield code="a"></subfield>
  </datafield>
</record>
```

2. Add the template to the to the *marctemplates* list in the open-ils.cat section of the evergreen configuration file `opensrf.xml`

3. Restart perl services for changes to take effect.

   ```
   /openils/bin/osrf_ctl.sh -l -a restart_perl
   ```