Adding new items to Evergreen

Set Search preferences

1.   Go to Administration → Workstation
2.   Set your preferences as below and then click *Save*
   - Default Search Library – Sitka
   - Preferred Library – Saanich School District
   - Advanced Search Default Pane – Advanced Search

Search for a record to add your item to

1) Search the catalogue by ISBN using the Numeric Search to see if there is an existing record in Sitka

2) Click on the title in the search results to open the bibliographic record

3) Compare the information on your item's title page and verso (back of the title page) with the information in the record

> **A good match has the same:**
>
> Title, author, edition, date, publisher, physical description (# of pages, height), format (book, CD, DVD)
>
> **Do not add or delete anything in the MARC record**

a) If you can't find a good record match, try searching Z39.50 for a record to import (see 'Importing Records using Z39.50 doc on the Hub')
b) If you still can't find a good record it may need to be originally catalogued. If you're not sure how to do it, send an email to jchristensen@sd63.bc.ca
   Include: item barcode, title, author, publisher, publishing year, place of publication, ISBN, # of pages

Adding a Volume and copies

1. You should now have a record that you found, imported, or created in Evergreen that matches your item.
2. When the record details are loaded, click **Holdings View**.
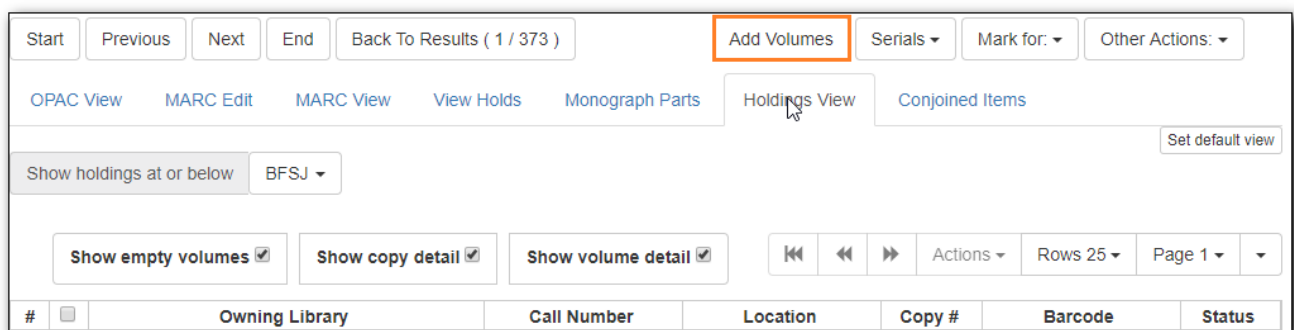
3. To add a new volume (also known as call number), click on **Add Volumes**, as shown in the above image.
4. The Volume Copy creator opens up in a new tab.

Make sure your browser allows Evergreen to open pop-ups.

Complete the required fields in both volume and copy records.

Once done, click on **Save & Exit**. The pop-up tab is closed. efresh the screen to see new items.

- By default, a new item has In Process status, unless you choose a different one when creating it. Item must be checked in to become Available. Item's **Active Date** will be filled when it leaves In Process status.

To create more than one copy for the same volume, use the arrow in the **Copies** column of the volume record.

- You can hide or display volume and copy details by coordinating the two Hide/Show buttons shown below.

Adding a copy to a pre-existing Volume

1. Open the Holdings View of the record you intend to add your copy to.

2. Select the volume you wish to add your copy to and right click on it.
3. In the pop-up menu select **Add > Copies**
4. The copy editor will open in a new tab with the volume information pre-populated.
5. Fill in the remaining relevant information for you copy
6. **Save & Exit**
7. The copy editor tab will close
8. Refresh the page to see your added item.