Local Admin. Essentials Guide
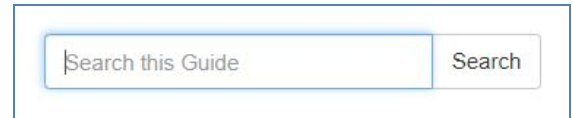
Table of Contents

The essential guide for library TechXperts

Where to look for help
- Search the WLS IT Wiki
  http://it.westchesterlibraries.org/

  - Evergreen Q&A
  - Evergreen Issues & Observations Google Form

Browser Setup
- **WLS has set up the Chrome browser**

  ➔ Evergreen is the Home Page

  ➔ Pop-ups are allowed

  ➔ Cookies will not be cleared so that staff don't lose login information, receipt and item/copy templates

- **DO NOT use incognito mode for Evergreen**

  ➔ DO NOT clear cookies or browser data

  ➔ To search or work outside Evergreen so that data can be deleted, use another browser (Firefox is recommended) or

  ➔ go to Customize Google> New incognito window

- **Set up Gmail to open a compose window when a mail link is selected**

  ➔ At the end of the address bar, click the double diamonds.

  ➔ Click Allow and Done.
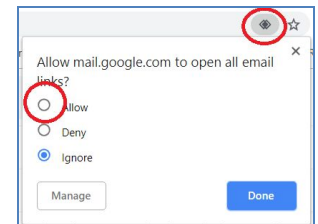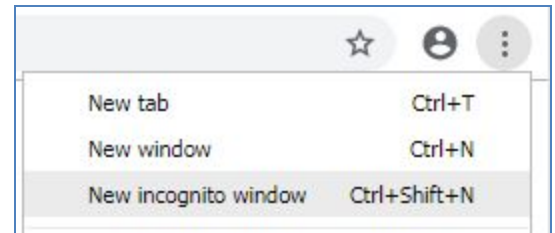
History/Browsing Data

Each workstation, once set up, will retain its settings until changed or the **browser (Chrome)** history is cleared. **In Chrome, a user should *never* select clear "Cookies and other site data."**

Staff *can* clear the following types of browsing data without affecting workstation settings and offline transactions:

- Browsing history
- Download history
- Cached images and files
- Passwords
- Autofill form data
- Hosted app data
- Media licenses

If the browser cookies are cleared, contact the WLS Helpdesk to help you reset the workstation. You can also:

- Import copy (item) and receipts templates using backup file
- Re-configure column display for commonly used screens such as Check In and Items Out.
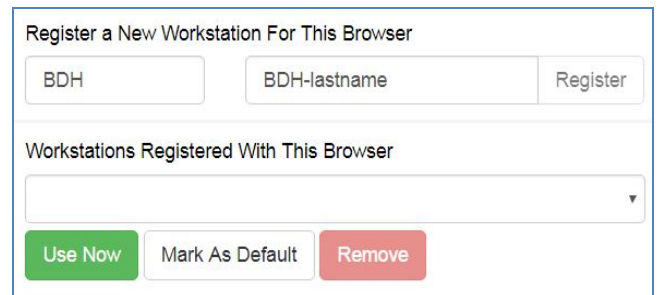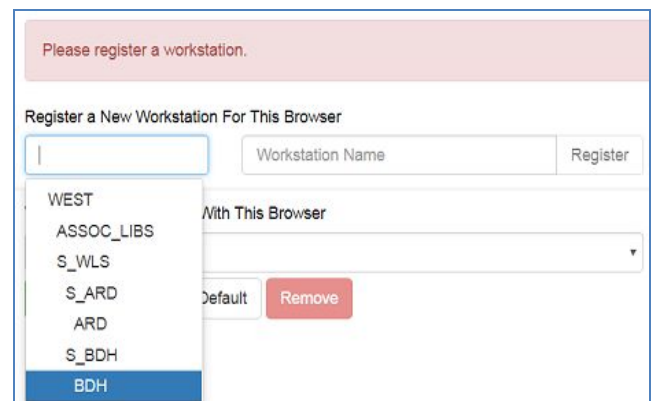

Evergreen Workstation Checklist (pages 3 - 5)

❏ Make sure staff are informed about browser storage and know that they should not clear cookies

❏ Register the workstation for the user

❏ Set the Workstation Defaults

❏ Configure column display for commonly used screens such as Check In and Check Out

❏ Review, customize and export/import receipt templates.

❏ Create and export/import a general set of holdings templates for use.

❏ Workflow for re-registering workstations

Register a Workstation

Each computer browser needs to have an Evergreen workstation registered on it in order to log in. If no workstation is registered at login, you will see this screen. Go to the server URL for your Evergreen system.

Use the dropdown menu on the left side of the registration line to choose your 3-letter library code. (Do NOT select a code that starts with S_.)

1. In the Workstation Name box, enter
   your 3-letter library code-your last name as follows
   BDH-smith
   **If multiple staff at your library have the same last name,
   add letters from the first names until the workstation name is unique, eg. for Alan Smith and Arlene Smith, BDH-smithal; BDH-smithar.

2. Click Register.

3. Click Use Now to continue to the Sign In screen.

4. Verify that the Workstation name is registered with the browser.
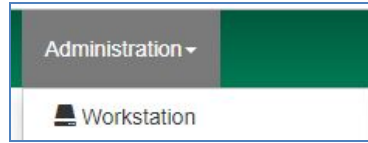
5. Sign in to the "new" workstation

Recommended: Log in to Chrome when setting up the workstation. A Save Password pop-up may appear. If so, select Never to prevent the pop-up from reappearing in the future.

Workstation Setup

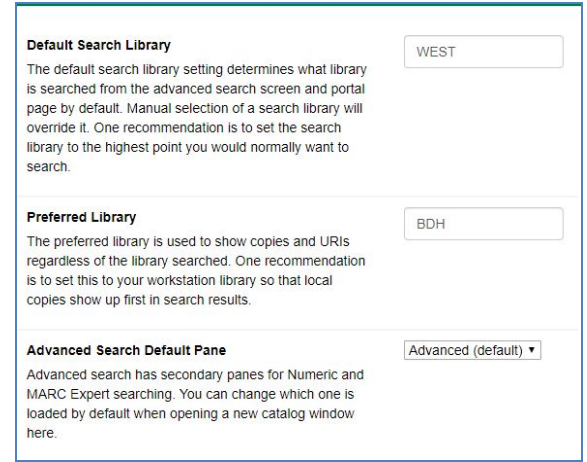## Set Library Defaults

1. Go to the Administration drop-down.

2. Select Workstation

3. On the right-hand side of your screen, Set your defaults.

    a. The Default Search library should be set to WEST. *Default search will show all available titles and copies in the system when searching the catalog.*

    b. The Preferred library should be set your library 3-letter code. *The Preferred library will always display your library at the top of the detailed summary screen if your library owns copies.*

    c. Advanced Search Default Pane should be set to Advanced

4. You do not need to "Save" these defaults. These settings will stay when you exit the page.

Column Configuration

From Patron Search to Item Status, Evergreen will have columns as part of the display. The default columns often display random and irrelevant information. Because it makes the Evergreen experience easier to use and understand, customizing the columns to display relevant information is an essential part of the "Getting Started" process.
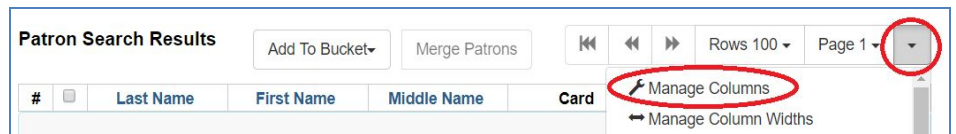
Check out the Column Configuration guide (linked) for easy access on choosing the right columns for each screen.
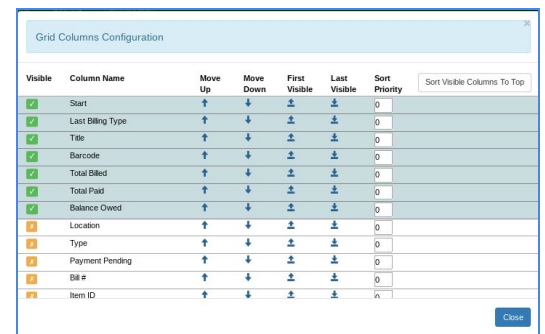
Click here for a helpful Change Columns in a List video Thanks to Greenburgh's Genie Contrata!

Staff Who Work at Multiple Libraries

Staff will need to set up a workstation for each library at which they work. After they log in and set up a workstation for the first time,

1. At the next library, log in with the *first* workstation information

2. Go to Administration > Workstation > Registered Workstations

3. Choose the "new" 3-LETTER CODE from the dropdown

4. Enter the "new" workstation name, ABC-lastname

5. Choose it from the *Workstations Registered With This Browser* dropdown

6. Click *Use Now*

7. Sign in to the "new" workstation
   Staff must pick the right workstation for their location every time they log in.

After your workstation is registered, follow the rest of the steps on the checklist on page 1.

Re-Register a Workstation

It is not uncommon to have to re-register your workstation from time to time. After signing in, if Evergreen prompts you to register your workstation,

1. Enter the workstation name you have been
   using.
   The following alert displays
   "Workstation name already exists. Use it
   anyway?"
2. Click OK/Continue.
3. Continue to sign into Evergreen.
   All of your defaults, columns and template will be available in your workstation.
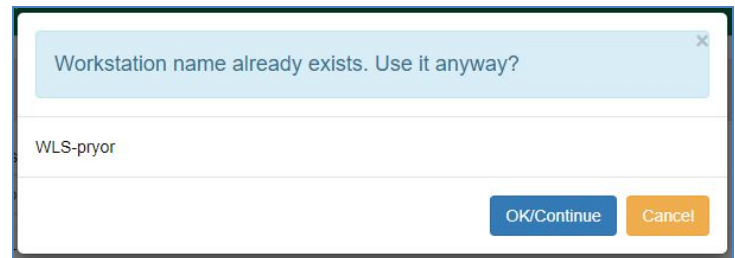
Note: If you do not see the above alert message when re-registering your workstation, this indicates that you entered the workstation name incorrectly. Try again until you see that message. If the issue persists, contact the helpdesk.
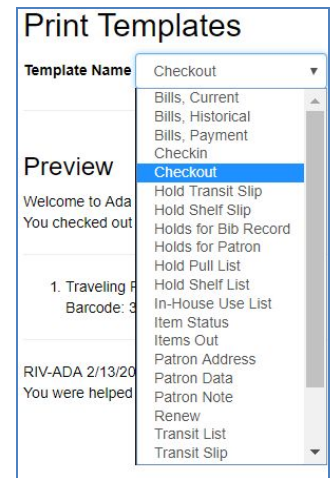
Receipt templates

Default receipt templates are available in Evergreen. Receipt templates and volume/copy templates that have your library's customizations are stored in the web browser. As the department supervisor or TechXpert, you will create "master copies" and save them to your library share. Templates can then be imported to quickly re-create templates when the library makes changes, acquires new staff computers, or if the web browser history on a staff computer is cleared.

Go to Administration > Workstation > Print templates
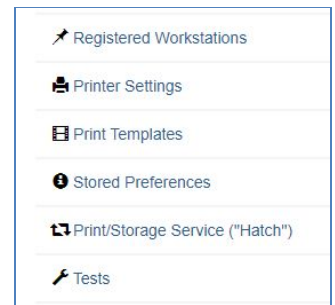
   A.   **Customize all the receipts at one workstation**.

1. Choose a receipt template from the drop-down menu

2. Edit the html to make changes to the receipt. Preview displays on the left hand side

3. Click Save locally

4. Repeat for other templates in the dropdown

 B. **Export Customized Templates**

1. Click Export Customized Receipts

2. Save to the *Evergreen* folder on your library share.
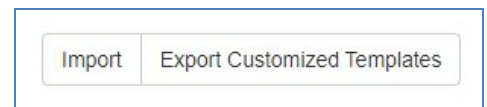
C. **Import Customized Templates**

1. Open the Import button in the top right corner of your screen. Your Library Share drive will open allowing you to access the correct with the saved receipt template file. Select the file and click *Open*.
2. A note will appear in the bottom right corner of your screen stating, " Imported one or more print template(s).
3. Select *Save Locally*.
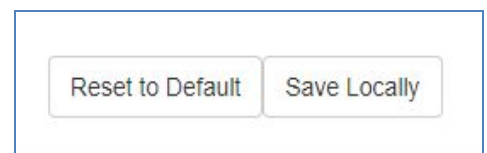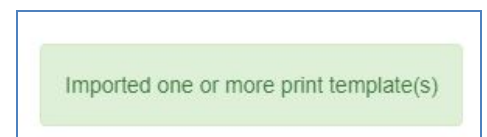
   D. **Optional**

- To view (and borrow) other library's receipt codes, visit the *Evergreen Receipts and Slips* page on the IT wiki.

- For more information, go to: http://docs.evergreen-ils.org/3.0/_receipt_template_editor.html

- For customization help, including html help, go to: https://pines.georgialibraries.org/dokuwiki/doku.php?id=admin:workstations:receipts

Local Administration

Evergreen Maintenance Checklist (pages 6 - 13)

- ❏ Create item holdings templates

- ❏ Export templates

- ❏ Closed dates editor

- ❏ Cash reports

- ❏ Transit lists

- ❏ Warnings and permission error

Creating and Using Item/Holdings Templates

Item templates allow you to easily populate your item records with pre-defined fields.

- ● Using item templates helps you to streamline cataloging and item maintenance workflows.

- ● Item templates are saved to the browser in which they are created and can be used by anyone who logs in to that browser.

- ● They can be exported and imported on other workstations for consistent linking across the library.

Setting Up Item/Holdings Templates

1. If creating a new template, add a template name in the text box.

2. Edit fields as needed for shared properties:

❏ Circulation Library	❏ Circulation Modifier	❏ Status	❏ OPAC Visible?
❏ Shelving Location	❏ Holdable?	❏ Reference?	❏ Price

3. Statistical Categories

   a. Set the Statistical Categories dropdown to WEST so that you have the same choices as all other libraries

   b. To match each kind of item, select
      one statistical category for Monthly Reports
      one statistical category for State Reports
      Central Library Funds (as applicable)

4. Click **Save**.

5. Repeat Steps 1-7 for each template.

6. Export to the library share Evergreen folder. Rename the file to include the date it was exported.

Leased Materials	
Migration	
Monthly Report - Adult Materials	Item Cat1
Monthly Report - Central Library Funds	Item Cat1
Monthly Report - Juvenile Materials	Item Cat1
Monthly Report - Mixed Audience Materials	Item Cat1
Monthly Report - Young Adult Materials	Item Cat1
State Report - Adult Materials	Item Cat2
State Report - Juvenile Materials	Item Cat2
State Report - Mixed Audience Materials	Item Cat2

Share Item Templates

Item templates are saved to the workstation in which they were created. Item templates can be shared by exporting them to the library share folder. After they are exported, the templates can then be imported on a different workstation.

Export Templates

1. Click **Export** in the Item Templates interface. Your computer will prompt you to save the file. Choose a name for the file and save it to the library share folder. Note: This action will export **all** of your item templates.

Import	Export Customized Templates
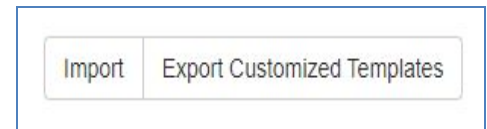
Import Templates

1. Click **Import** in the Item Templates interface. Your Library Share drive will open allowing you to access the saved receipt template file. Select the file and click *Open*.
2. The new template names will appear in the Template drop down menu. A note will appear in the bottom-right corner stating, "Imported one or more print template(s).
3. Click **Save** to save the new templates to your browser.

Imported one or more print template(s)

Reset to Default	Save Locally
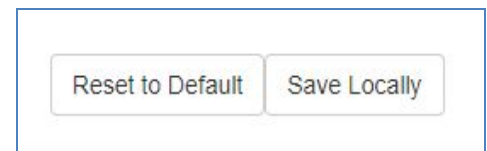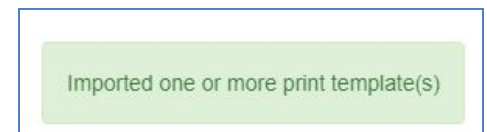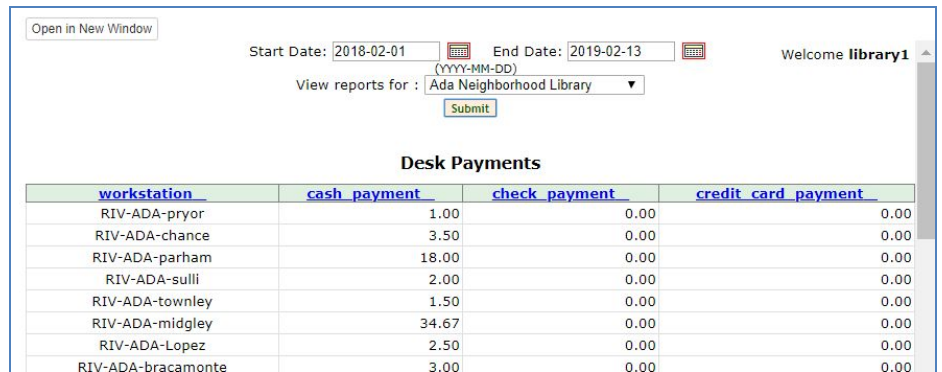
Apply an Item Template

1. The item templates that you create or import in the Admin module will appear in the Item Editor when you add or edit items in your catalog. To apply an item template to an item, choose a template from the drop down menu, and click **Apply**.

2. The Item (Holdings) Editor screen can be accessed through the following screens:

   ● Check In→ Actions → Edit Holdings

   ● Item Buckets→ Actions→ Edit Selected items

   ● Item Status→ Actions → Edit Items or Edit Call Numbers and Items

Cash Reports

Cash reports are useful for quickly getting information about money that your library has collected from patrons. This can be helpful in a few different scenarios, such as:

A. Reconciling a cash drawer at the end of the day.

B. Seeing how popular a specific payment type is (perhaps when evaluating a food-for-fines program).

workstation	cash_payment	check_payment	credit_card_payment
RIV-ADA-pryor	1.00	0.00	0.00
RIV-ADA-chance	3.50	0.00	0.00
RIV-ADA-parham	18.00	0.00	0.00
RIV-ADA-sulli	2.00	0.00	0.00
RIV-ADA-townley	1.50	0.00	0.00
RIV-ADA-midgley	34.67	0.00	0.00
RIV-ADA-Lopez	2.50	0.00	0.00
RIV-ADA-bracamonte	3.00	0.00	0.00

To use the cash reports,

1. Go to Administration > Local Administration > Cash Reports.

2. Select the time period and library you are interested in. Click *Submit*.

Note: If a staff member works at two different locations, the home library on their account seems to display on that library's cash report even though the staff is at another location.
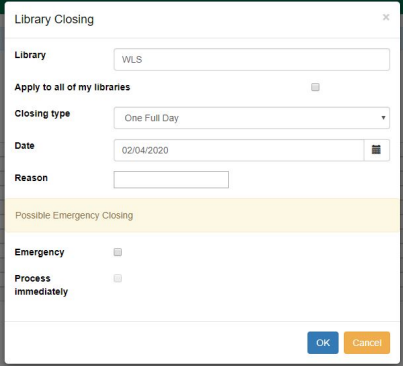
Closed Dates Editor

A closed date will not be used by the system as a due date or a hold pickup date. Within the closed dates editor screen, scheduled closed dates are listed and can be scoped by date.

#	Closing Start	Closing End	Reason for Closing
1	5/25/2020	5/25/2020	Memorial Day
2	7/4/2020	7/4/2020	Independence Day
3	9/7/2020	9/7/2020	Labor Day
4	10/12/2020	10/12/2020	Columbus Day
5	11/11/2020	11/11/2020	Veterans' Day
6	11/26/2020	11/26/2020	Thanksgiving
7	12/25/2020	12/25/2020	Christmas
8	1/1/2021	1/1/2021	New Year's Day

To edit existing or add scheduled closed dates,

1. Go to *Administration → Local Administration → Closed Dates Editor*

2. Click *Add closing*

3. Choose a *Closing Type*
   For a single closed date, choose *One Full Day*. Select a date from the calendar.

   For multiple days, choose *Multiple Days*. Select a Start **and** End Date.

4. Enter a reason (recommended)

5. Click *OK*.

Emergency Closings

If a date is chosen that is nearer in time than the end of the longest configured circulation period,

- A **Possible Emergency Closing** message displays in the pop-up and in the bottom right-hand corner of the screen.

- Below the Possible Emergency Closing message, two checkboxes display: **Emergency** and **Process Immediately**.

1. Enter a reason (recommended)

2. Manually select the **Emergency** and **Process Immediately** checkboxes

3. Click *OK*.
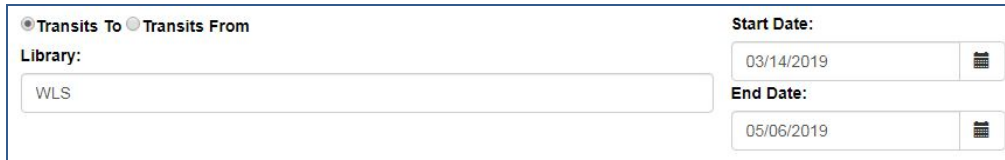
An animated "working on it" bar will display while Evergreen processes open transactions. The number of open transactions determines how long the process takes.

If the original closure period needs to be extended, add a new closing and proceed as above for an Emergency Closing. This ensures that all due dates that fall after the end of the original emergency closure are updated. **Do not edit** the original emergency closed dates entry.

To add or edit library hours and closed days of the week, such as every Sunday, send a help desk request to helpdesk@wlsmail.org.

Transit Lists

The transit list is used to track items that have been in the delivery longer than expected; the process includes canceling transits, marking items missing, and retargeting holds. Best practice is to check the list month.

1. Go to *Administration → Local Administration → Transit List*. Your library will already be selected.
2. Sort Your List by column header
   - Shelving Location to check shelves
   - Send Date/Time column header to sort the list by oldest transit date to newest.
   - Barcode column header if you would like to sort your library's items first.
3. Print the Transit List using the Print Full Grid option found in the drop-down menu to the right of the page sorter.
4. Check your shelves for any items on the list.

For your items

1. If found, select the items and choose *Cancel Transit* to change the transit status. This action prevents patron holds from lingering indefinitely.
   A confirmation pop-up displays that indicates if there are holds associated with the transit and will re-target those holds
   Click *Cancel Transit*. The transits disappear from the list and the copy status changes to "Canceled Transit"
2. If not found, Cancel the transits as above. Then add the items to a bucket.
   Go to *Cataloging > Item Buckets*. Choose your bucket and edit the status of the items to Missing (permissions may be needed to change the item status).

The first time you check your library's Transit List,

1. Set the Start Date to March 14, 2019
2. Set the End Date to six weeks prior to today
3. Configure your columns to display *Title, Author (Localized), Shelving Location, Call Number Label, Barcode, Destination Library, Source Library, Send Date/Time, Last Name,* and *Patron Barcode*. Remember to Save.
   (Note: # of available items is not an available column option.)

For another library's item

1. If found and meant to fill a hold at your library, go to the patron record to verify the hold.
   Check the item in to change the hold status for Ready For Pickup
2. If not found and meant to fill a hold at your library, open the title link in a new tab
   On the View Holds tab, select the item and go to *Actions>Find a new target*. This will prompt the system to look again for another copy.

Common Evergreen Terms

In Evergreen	In SirsiDynix Workflows
● **Check in/Check out**	● Check in/Check out
● **Backdated Check In**	● Bookdrop Checkin
● **Amnesty Mode**	● Fine Free Checkin
● **Shelving Location**	● Home Location
● **Item Status**	● Most similar to Current Location
● **Circulation Modifier**	● Item Type or iType
● **Owning Library**	● Item Library
● **Statistical Category (Item or Patron)**	● Item Category or User Category
● **Penalties**	● Blocks
● **Place a Hold**	● Place a hold
● **Suspend a Hold**	● Suspend a Hold
● **Activate a Hold**	● Unsuspend a Hold
● **Title Level Hold**	● Title Hold
● **Item Level Hold**	● Copy Level Hold
● **Pull List For Holds Requests**	● OnShelf Hold List
● **Holds Capture**	● Trap a hold
● **Non-Cataloged Item**	● Ephemeral charge/in-house use count
● **Holdings or Call Number/Item Editor**	● Call Number & Item Maintenance
● **OPAC Visible**	● Shadowed
● **Workstation**	● Client/computer
● **Password (still the last 4-digits of the phone number!)**	● PIN

Evergreen Hotkeys (Keyboard Shortcuts)

Many of Evergreen's features can be activated by a keyboard shortcut (also called a "hotkey" in some documentation.) The following is a list of keyboard shortcuts currently supported in Evergreen.

Keyboard Shortcut/Hotkey	Action
F1	Check out
F2	Check in
F3	Search catalog
F4	Search patrons
F5	Item status
F8	Retrieve last patron
F9	Reprint last receipt
Shift+F1	Register patron
Shift+F2	Capture holds
Shift+F8	Retrieve last record
Ctrl+F2	Renew

Common Internet Browser shortcuts

Ctrl+N	New browser
Ctrl+T	New browser tab
Ctrl+W	Close browser tab
Ctrl+F5	Refresh/Reload page
Home	Go to top of page
End	Go to bottom of page

Warning Messages and Permission Errors

In Evergreen, each user belongs to a group that gives them permission to complete tasks. Library directors and/or TechXpert, lets WLS know which group each user belongs to. There are over 500 permissions used to allow work to be completed.

- A permission error occurs when the group to which a user belongs does not have the permission needed to complete a task.

- A warning message occurs when Evergreen sees that a questionable action is about to be taken so that staff confirms the action.

Permission Denied: UPDATE_VOLUME   Permission Denied: COPY_DELETE_WARNING.override

For a warning message, change the column display to help clarify why the action is questionable.

For example, when deleting an item, you see the popup **Permission denied: COPY_DELETE_WARNING.override**.

Add Copy Status to the columns display so that you can determine if the copy is

- available and allowed to be deleted or

- lost or checked out and not be eligible to be removed from the system.

With this added information, you can click OK/Continue to confirm the action or Cancel to not complete it.

For a permission error, you will not not be able to complete the task without a supervisor login.

For example, when transferring an item from one title to another, you see the popup **Permission denied: UPDATE_VOLUME** If a supervisor also cannot complete the task, they should contact the helpdesk so that the permission can be added. Please include:

- the text of the error and a description of what you were trying to do when you got it

a screenshot of the error message you received, **preferably by using the Snipping tool.**

Reporting Web Client Bugs

It is crucial that issues with the web staff client be reported so that Equinox and the Evergreen community knows about them and can work on fixing them. Bug reports can be reported to support@equinoxinitiative.org and on Launchpad (https://bugs.launchpad.net/evergreen).

When reporting an issue to Equinox, please specify:

- Verify whether the issue has occurred more than once

- Which web browser you are using

- Examples of record(s) that are affected by the problem

- The approximate time that the problem last occurred

- Any error messages received

- Pastes or screenshots from the web browser's error console are also very helpful. Hitting F12 will bring up that console for Chrome.

If you report a bug to Launchpad, remember to redact or obscure any information that might personally identify a patron whose record might otherwise be referenced in the attached bug report or screenshots.