Evergreen Workstation & Getting Started Essentials

Table of Contents

Where to Look for Help

- Search the WLS IT Wiki
  http://it.westchesterlibraries.org/
- Search Evergreen 3.2 Circulation Documentation
  http://docs.evergreen-ils.org/reorg/3.2/circulation/

Evergreen "Getting Started" Checklist

- ❏ Sign in to Evergreen (page 1)

- ❏ Register a workstation (page 2)

- ❏ Set your library defaults (page 2)

- ❏ Import templates; receipts, holdings, spine labels (page 4)

- ❏ Customize and save your columns (page 4)

Sign In

1. Log into your VDI session with your Active Directory (AD)
   credentials
   a. eg. Username: firstname.lastname
           Password: YourPassword!
   b. Wait for Windows to load.
2. Click the Evergreen Staff icon on the desktop.
3. Log into Chrome and sync your Chrome session
   (see Chrome Sync instructions on the IT Wiki)
4. Sign in to Evergreen with your Active Directory (AD) credentials
   eg. Username: firstname.lastname
    Password: YourPassword!
   DO NOT save the password
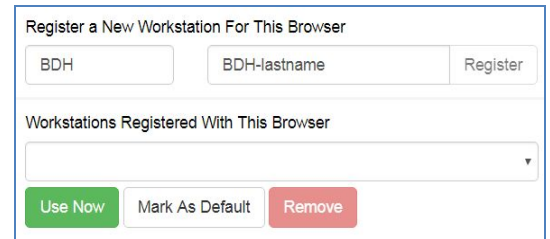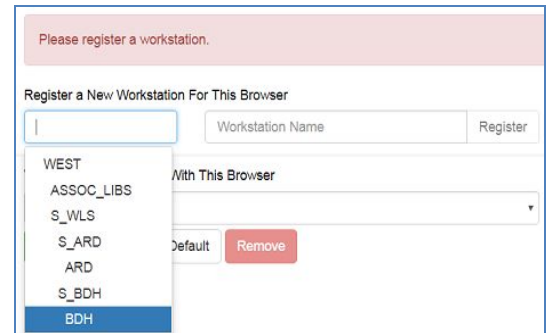   **You will see a "Please register a workstation" screen.**

If you receive a "Failed Login" message, clear your Chrome browser cache and history

1. In the Chrome browser, go to Settings> Privacy and Security>Clear browsing data
2. Set Time range to "Beginning of Time"
3. Click *Clear Data*
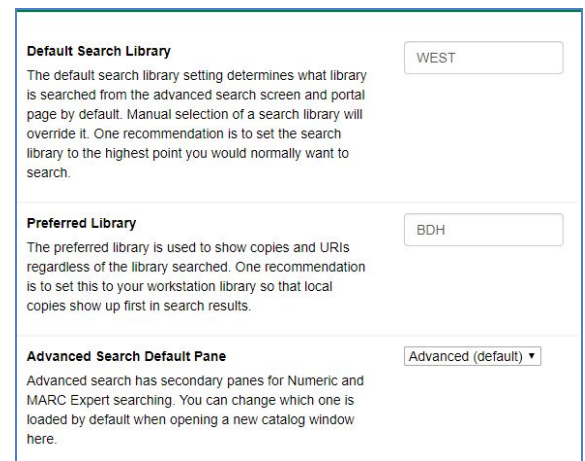4. Sign in to Evergreen again.

Register a Workstation

1. 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_.)

2. 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.

3. Click Register.

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

5. Verify that the Workstation name is registered with the browser.

6. Enter your Username and Password and Sign in.

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.

Staff Who Work at Multiple Libraries

Staff will need to set up a workstation for <u>each</u> 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,
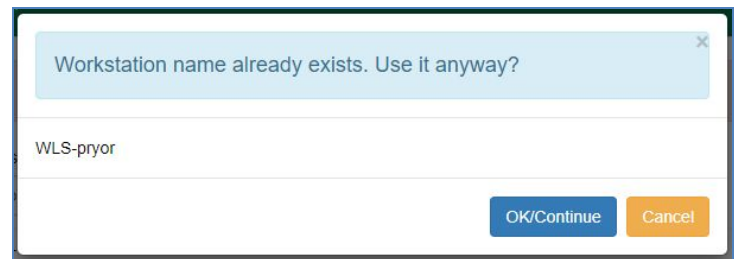
1. Enter the workstation name you have been using.
The following alert displays
"Workstation name already exists. Use it anyway?"
2. Click OK/Continue.
3. Continue to sign into Evergreen.
All of your defaults, columns and template will be available in your workstation.

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.

To Log Out

1. In the top-right corner of the window, click the menu button to the right of your user name

2. Select Log Out
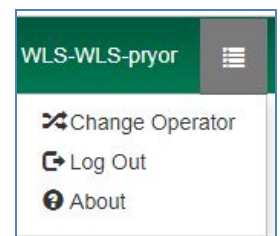
Import Templates

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. Your TechXpert will create "master copies" and save them to your library share so they can 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.

Work with your Library TechXpert to figure out which templates you will need for your workstation.

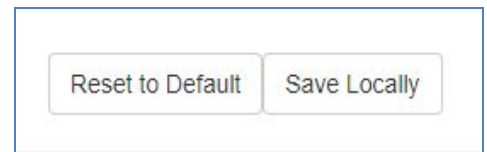1. To import Receipt templates, go to Administration > Workstation > Print Templates.

    a. 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*.
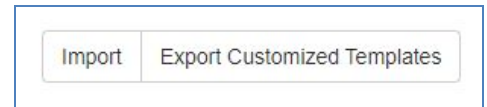
    b. A note will appear in the bottom right corner of your screen stating, " Imported one or more print template(s).
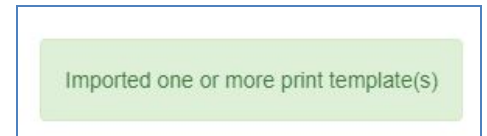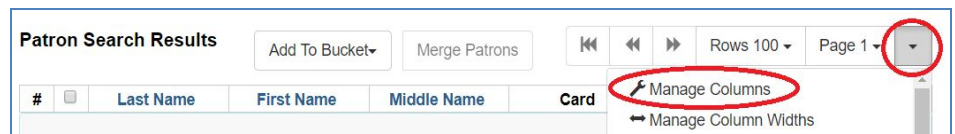
    c. Select *Save Locally*.

2. To import Holdings templates, go to Administration > Local Administration > Holdings Template Editor. Repeat steps A - C.

3. To import Spine Label templates, scan an item barcode into Item Status. Select the item and open the Actions drop-down menu. Repeat steps A - C.
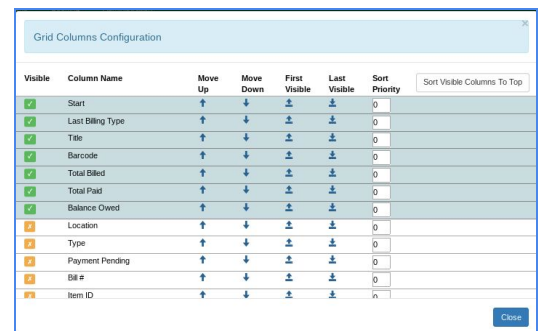

Customize Your Columns

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!

Evergreen Navigation

Evergreen Essential Guides

Evergreen documentation, printable guides, and FAQs are available on the IT wiki (it.westchesterlibraries.org).

Below are linked wiki pages/essential guides that will best acquaint you with the most common Evergreen workflows.

Circulation

- Evergreen Circulation Essentials *(checkout, checkin, renewal, patron search, patron registration, patron updates, lost card, card renewal, patron hold notifications)*

- Daily Maintenance Essentials *(processing the Holds Pull List, clearing the holds shelf, accessing lost notices)*

Tech. Services

- Tech Services Essentials *(adding, editing, and deleting items, printing labels, using items/holdings templates)*

- Catalog Search Essentials *(basic search, advanced search, keyword search tips, display and filtering options)*

Reference

- Catalog Search Essentials *(basic and advanced search, keyword search tips, display and filtering options, placing holds)*

- Evergreen Circulation Essentials *(checkout, checkin, renewal, patron search, patron registration, patron updates, lost card, card renewal, patron hold notifications)*

Department supervisors should be familiar with the corresponding essential guides listed above, as well as

- Local Administration Essentials *(holdings templates, cash reports, closed dates editor, transit lists)*

- Daily Maintenance Essentials *(processing the Holds Pull List, clearing the holds shelf, accessing lost notices)*

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 - or allows them - to complete tasks. Each library, through its director and/or TechXpert, lets WLS know to which group a user belongs. 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.**

Browser Setup

WLS has setup 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 or receipt and volume/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 for
  non-Evergreen work
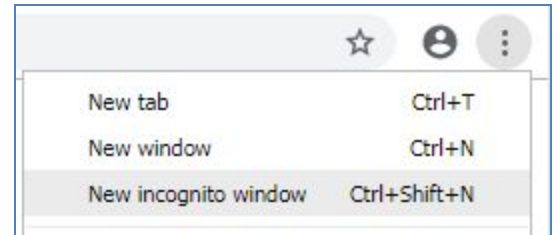
Reporting Web Client Bugs

Bug reports can be reported to your TechXpert who will pass them on to WLS. If you report a bug, 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.