EVERGREEN REDIRECT CONVERSION PROJECT
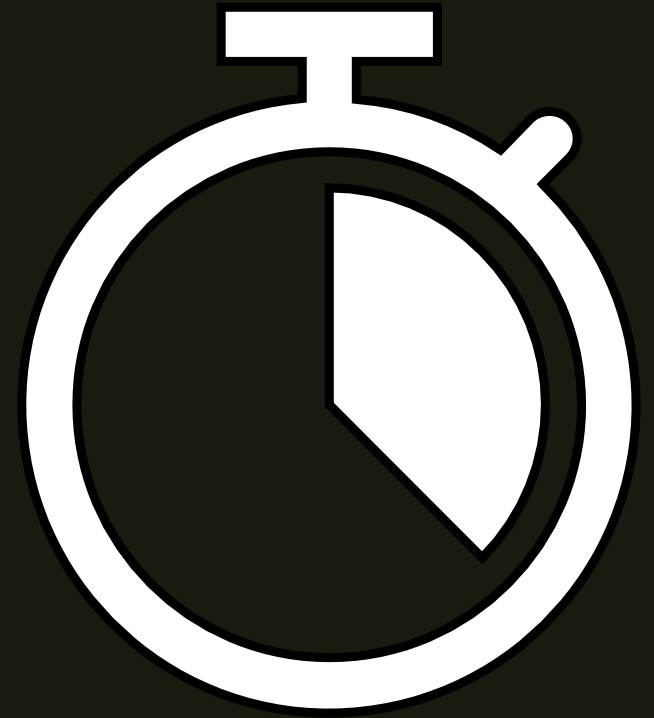
Agenda

WHY

WHAT

HOW

WHO

WHEN

WHY

The Evergreen redirect conversion
will resolve

- Staff login time issues
- Print driver load wait-time issues
- Evergreen workstation
  "re-registering" issues
- Browser permission issues
  ("Aw Snap!" errors)

WHAT

a project to convert and shift the location of files that are used by Evergreen staff accounts to a more efficient storage system

HOW

There are four main steps

1. WLS provides a project information session and a list of all current workstations and schedules project work with a library project contact.
2. Library staff reviews templates, backs up files, and uses the workstation list to identify one workstation for each staff person
3. WLS applies redirect conversion policies to shift file location.
4. Each library staff person logs into Chrome and Evergreen with their existing workstation name and imports template files from their library share.

HOW – Step 1

WLS reviews how to create template files and back up them up to the library share with library staff, provides a list of all current workstations, and schedules project work.
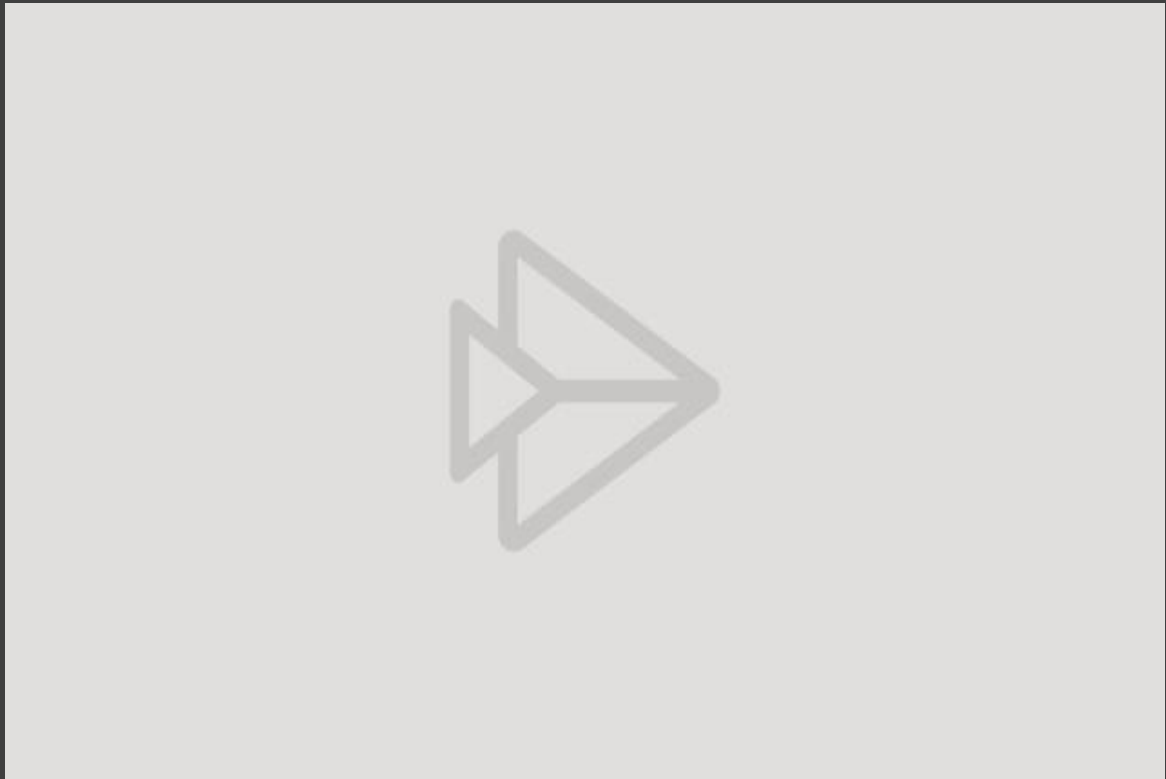
HOW TO Export and import receipt template files

If needed, log in with your Active Directory credentials in the format: firstname.lastname@westchesterlibraries.org

HOW TO Export and import item holdings and spine label template files

If needed, log in with your Active Directory credentials in the format: firstname.lastname@westchesterlibraries.org

HOW – Step 2

Library staff reviews templates, backs up file, reviews the workstation list (identifies the workstation name each staff person will use)

HOW – Step 3

WLS applies redirect conversion policy settings to shift file location.

HOW – Step 4

After conversion, each library staff person logs into Chrome and then Evergreen with their existing workstation name and imports template files from their library share.

Signing into Chrome and Evergreen the first time after conversion prevents future issues

Click to view steps

WHO

- WLS training staff to help and answer questions

- WLS IT staff to complete storage redirects

- A library staff person to complete preliminary setup and help other staff login and import template files

- All library staff who use Evergreen

WHEN

Date 8/26/2020	• Choose library staff lead and attend Information session
Date 8/27/2020	• Receive Workstation list from WLS and schedule project work (Step 1)
Date 9/2/2020	• Library completes template review, backups, and workstation naming (Step 2)
Date 9/2 evening	• WLS completes redirect conversion policies (Step 3)
Date 9/3/2020	• Library Staff logs in and imports files (Step 4) - or as library staff begin regularly scheduled shifts

THANK YOU

Find more information about workstations, print templates, item holding templates, and Evergreen at https://it.westchesterlibraries.org/help-and-faqs/evergreen-help-and-faq