

# Intro to EVERGREEN™

*A beginner's guide for understanding and using the Evergreen staff-client.*



# The Library System and its Policies

- There are 38 libraries with 43 locations that make up The Westchester Library System.
- Each library in the system has its own culture and location-specific policies, but there are system-wide policies that are voted on by PLDA (public library directors association) and observed at each location, specifically relating to the ILS.
- A full list of System-wide observed policies for Circulation can be found on the [IT Wiki](#)

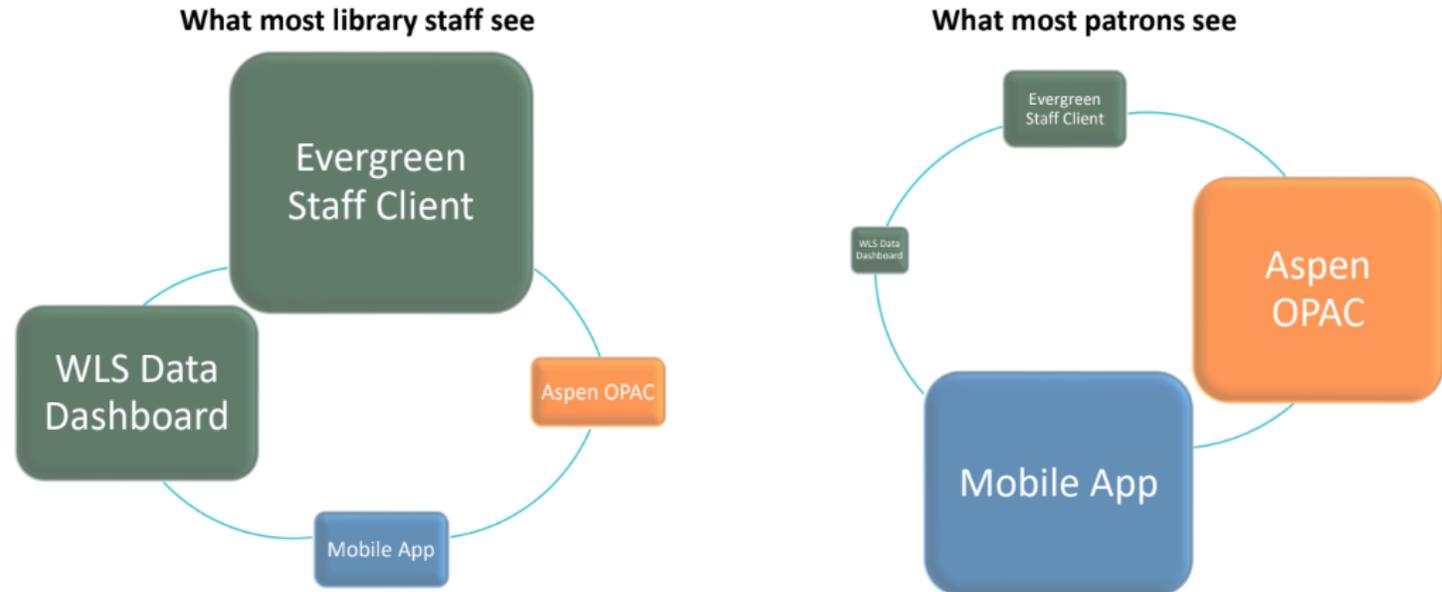
# What is Evergreen?

- Evergreen is an open-source library software that assists libraries in day-to-day operations such as checking out materials, keeping track of users (patrons), placing and filling holds, and linking/adding items to the catalog.
- Sometimes referred to as the Staff-client.

*(Open-source software means that Evergreen is a software that is utilized and developed by multiple library systems throughout the world. It's a group effort to maintain, build, and enhance this product – which is why some features need to be voted on by the Evergreen community before they can be implemented into the ILS.)*

# The ILS.... What is it?

- **I**ntegrated
- **L**ibrary
- **S**ystem



The Integrated Library System (ILS) is made up of multiple parts: The Evergreen Staff-client, The Aspen OPAC (Online Public Access Catalog), Mobile App, and WLS Data Dashboard.

# Staff Client vs. OPAC

## Staff Client:

- Refers to Evergreen and is used by staff in day-to-day workflows.
- It allows staff to search the staff catalog, place and manage holds, check-out and check-in items, register and edit patrons, add and edit items in the catalog, and run reports to collect data.

## OPAC:

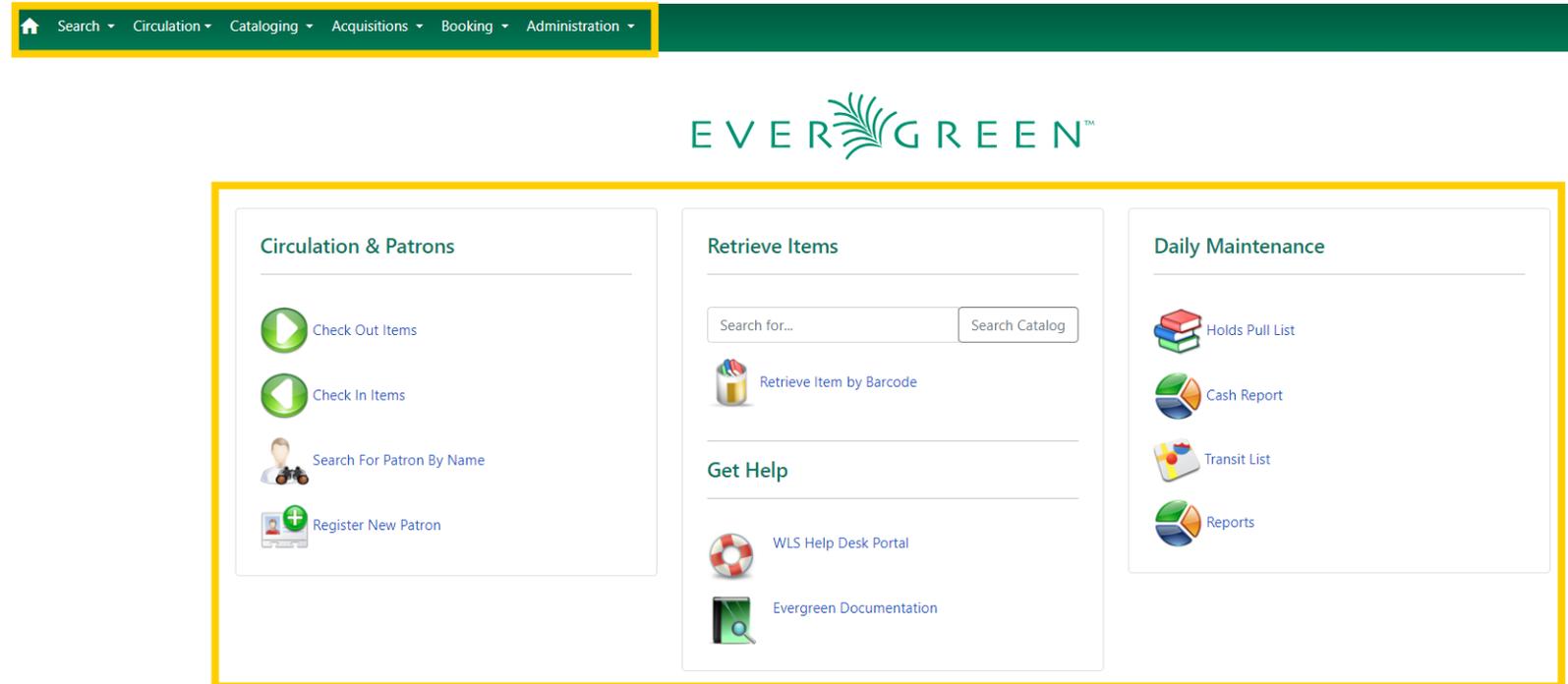
- (Online Public Access Catalog)
- Refers to the public, or patron catalog.
- Allows patrons to search the catalog, place and manage their holds, create reading lists, manage their reading history (if turned on).
- Each library in the system has a branded version of the OPAC.

# Evergreen Navigation

At the top of the Evergreen Homepage are dropdown menus for:

- Search
- Circulation
- Cataloging
- Administration

**Note:** Acquisitions and Booking are not typically used by most libraries.



The Quick-Start menus also have quick links for Circulation & Patrons, Retrieve Items, Daily Maintenance, and Get Help.

# Evergreen Navigation

## Evergreen Top Menu

- Search: Search the catalog, for patrons by name or phone number, or open Item Status to search by item barcode.
  - Circulation: Access all available circulation functions.
  - Cataloging: Search the Catalog, open Item Status, or access Item and Record Buckets.
  - Administration: Register or edit your workstation, access the Reporter feature, or open Local Administration.
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## Quick-Start Menus

- Circulation & Patrons: Check out, check in, search for patrons, or register new patrons.
- Retrieve Items: Search the catalog, or open Item Status by search for an item barcode.
- Daily Maintenance: Access the holds pull list, cash report, transit list, or reports.
- Get Help: Read Evergreen documentation created by the Evergreen Community or access the WLS IT Help Desk.

# Evergreen Workstations

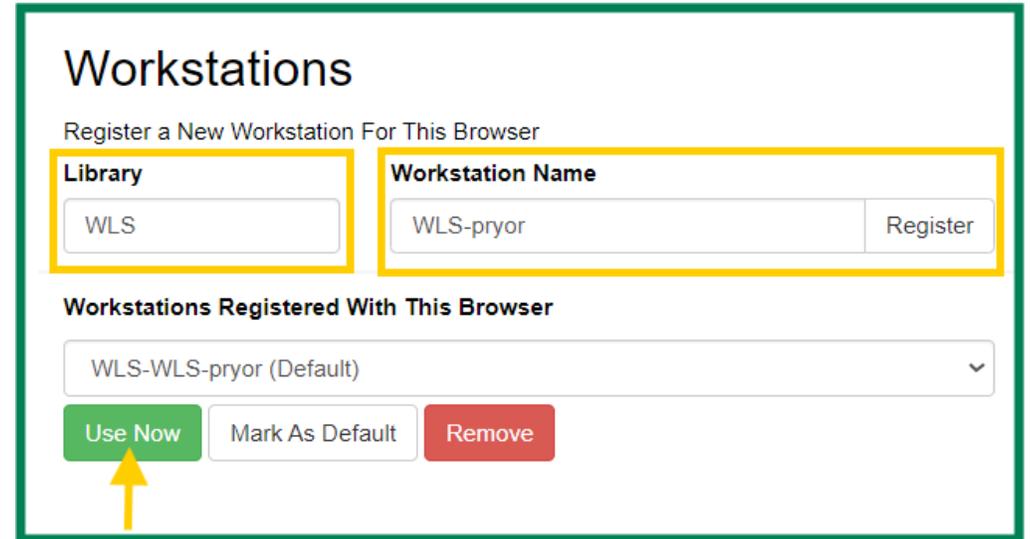
Every staff member that uses Evergreen is required to have a registered Evergreen Workstation for the location that they work at.

Workstations are unique to the user in that they will retain your column customizations, default preferences and will prioritize your location in all other workflows.

# Register Your Workstation

Register a workstation by opening the Administration drop-down menu > Workstation > Registered Workstations.

- Use the Library dropdown menu to choose your 3-letter library code. (Do NOT select a code that starts with S\_.)
- In the Workstation Name box, repeat your 3-letter library code-your last name. I.e., 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, I.e., for Alan Smith and Arlene Smith: BDH-smithal; BDH-smithar.
- Click Register.
- Click Use Now to continue to the Sign In screen.
- Verify that the Workstation name is registered with the browser.
- Enter your Username and Password and Sign in.



**Workstations**

Register a New Workstation For This Browser

**Library**  **Workstation Name**

**Workstations Registered With This Browser**

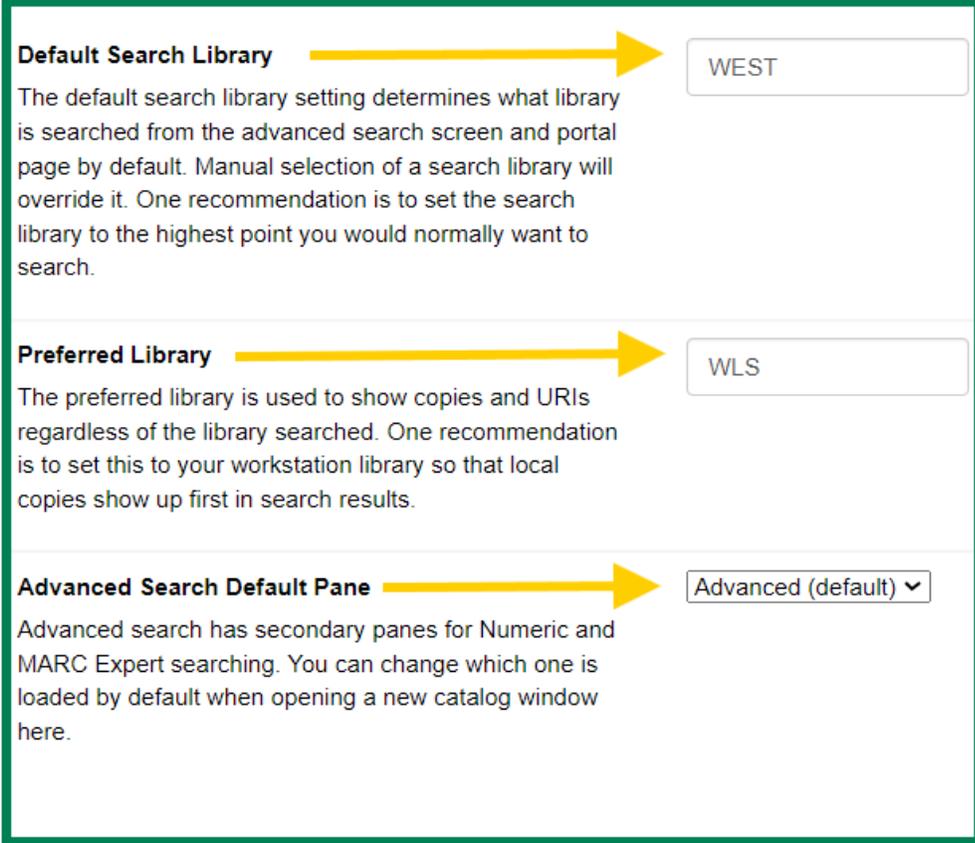
# Workstation: Set Library Defaults

Go to the Administration drop-down and select Workstation.

On the right-hand side of your screen, set your defaults:

- **Default Search Library:** Set to WEST. Default search will show all available titles and copies in the system when searching the catalog.
- **Preferred Library:** 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.
- **Advanced Search Default Pane:** Set to Advanced.

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



The screenshot shows three settings sections, each with a yellow arrow pointing to its corresponding dropdown menu:

- Default Search Library:** A dropdown menu set to "WEST". Below it is a text box explaining that this setting determines the default library for searches and that manual selection overrides it.
- Preferred Library:** A dropdown menu set to "WLS". Below it is a text box explaining that this library is used to display copies and URIs regardless of the search library.
- Advanced Search Default Pane:** A dropdown menu set to "Advanced (default)". Below it is a text box explaining that this pane is used for Numeric and MARC Expert searching.

# Workstation: Import Templates

There are multiple templates available in Evergreen.

Available Templates include:

- Print Templates (receipts and any printable page within Evergreen).
- Holdings Templates (Used in Tech. Services. Allows Staff to quickly link new items to the catalog).
- Spine Label Templates (Used in Tech. Services. Allows staff to quickly print spine labels without needing to reconfigure every time).

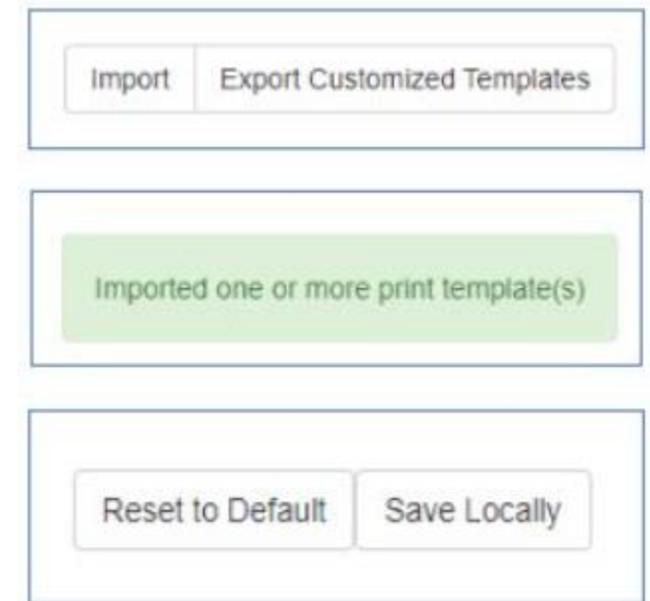
Templates allow staff at libraries to have access to the same format and information.

Templates are typically set up by one person at the library and exported to the library's share folder. New staff are expected to import any necessary templates they may need for their duties.

# Workstation: Import Templates

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

- To import Receipt templates, go to *Administration > Workstation > Print 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*.
- To import Holdings templates, go to *Administration > Local Administration > Holdings Template Editor*. Repeat steps 1 –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 1 –3.



# Workstation: Customize Your Columns

Patron Search Results

Add To Bucket Merge Patrons

Rows 100 Page 1

#	<input type="checkbox"/>	Home Library	Last Name	First Name	Card	Daytime Phone	Mailing: Street 1	Privilege Expiration Date
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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 after you register a workstation.

# Workstation: Customize Your Columns

## To Customize Columns

- Click the gear icon to the right of “page 1.”
- Open **Manage Columns**.
- Click **Sort Visible Columns To Top**.
- Choose columns:
  - Columns with a **green** checkmark will display.
  - Columns with an **orange X** are hidden.
  - *Sort Visible Columns to top* as needed.
- Use the **blue** arrows to move the columns up (to the left of the list) or down (to the right) until they are in the suggested order.
- When finished, **Close**.
- From the dropdown, click **Save Columns**.

The image shows a screenshot of a software interface. At the top right, there is a navigation bar with a gear icon circled in yellow. Below it, a dropdown menu is open, showing options: 'Manage Columns', 'Manage Column Widths', 'Save Columns', and 'Reset Columns'. The 'Manage Columns' option is highlighted with a yellow bar. Below the dropdown, a dialog box titled 'Grid Columns Configuration' is shown, also with a yellow border. It contains a table with columns: 'Visible', 'Column Name', 'Move Up', 'Move Down', 'First Visible', 'Last Visible', and 'Sort Priority'. The table lists various columns, some with green checkmarks and some with orange X's. A 'Sort Visible Columns To Top' button is visible in the top right of the dialog box. A 'Close' button is at the bottom right of the dialog box.

Visible	Column Name	Move Up	Move Down	First Visible	Last Visible	Sort Priority
<input checked="" type="checkbox"/>	Home Library	↑	↓	↕	↕	
<input checked="" type="checkbox"/>	Last Name	↑	↓	↕	↕	0
<input checked="" type="checkbox"/>	First Name	↑	↓	↕	↕	0
<input checked="" type="checkbox"/>	Card	↑	↓	↕	↕	
<input checked="" type="checkbox"/>	Daytime Phone	↑	↓	↕	↕	
<input checked="" type="checkbox"/>	Mailing:Street 1	↑	↓	↕	↕	
<input checked="" type="checkbox"/>	Privilege Expiration Date	↑	↓	↕	↕	
<input type="checkbox"/>	Billing:Zip	↑	↓	↕	↕	
<input type="checkbox"/>	Billing:State	↑	↓	↕	↕	
<input type="checkbox"/>	Billing:County	↑	↓	↕	↕	
<input type="checkbox"/>	Billing:City	↑	↓	↕	↕	
<input type="checkbox"/>	Billing:Street 2	↑	↓	↕	↕	
<input type="checkbox"/>	Billing:Street 4	↑	↓	↕	↕	

# Re-register Your Workstation

From time-to-time, you may have to re-register your workstation. This typically occurs if your Chrome profile is not synced, you update Chrome, or there was a software update for Evergreen. After signing in, if Evergreen prompts you to re-register your workstation:

- Enter the workstation name you have been using.
- An alert will display: “Workstation name already exists. Use it anyway?” Click OK/Continue.
- 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.

# Workstations for Staff Who Work at Multiple Libraries

Staff will need to set up a workstation for each library they work at.

- At the next library, log in with the *first* registered workstation information.
- Go to Administration > Workstation > Registered Workstations.
- From the drop-down, choose the 3-letter code of the other library you work at/are currently in at the time of registering.
- Enter the “new” workstation name in the same format as your other workstation names, i.e. ABC-lastname.
- Choose the new name from the *Workstations Registered With This Browser* dropdown.
- Click *Use Now*.
- Sign in to the “new” workstation.

Staff must pick the right workstation for their location every time they log in.

# Evergreen Account Vs. Staff Card

#	<input type="checkbox"/>	Home Library	Last Name	First Name	Daytime Phone	Card	Profile	Privilege Expiration Date
1	<input type="checkbox"/>	WLS	Pryor	Allison	914674-████	<a href="#">apryor</a>	Global Administrator	6/26/2033 12:21 PM
2	<input type="checkbox"/>	WLS	PRYOR	ALLISON	914231-████	<a href="#">210383000-████35</a>	STAFF	6/16/2025 2:13 PM
3	<input type="checkbox"/>	YRK	PRYOR	ALLISON	914231-████	<a href="#">210383000-████39</a>	ADULT	9/23/2027 3:59 PM

Anyone that lives, works, goes to school, or owns property in Westchester County is permitted ONE library card in the system. **However**, an exception is made for library staff!

Library staff can have a personal library card for their home library, and a staff card\* for the library that they work at.

If you were to look yourself up in Patron Search, you may find two to three entries listed. Take a look at the Card and Profile columns to see what kind of cards you may have. Clicking on the barcode will take you to the account page.

*\*Staff that work at multiple libraries are only permitted the one staff card.*

# Evergreen Account Vs. Staff Card

Booking ▾ Administration ▾ apryor @ WLS-WLS-pryor

Check Out Items Out Holds Bills Notes Edit Other ▾ Patron Search

Pryor First Name Middle Name Name Keywords Search

**Patron Search Results** Add To Bucket Merge Patrons Rows 100 Page 1

#	<input type="checkbox"/>	Home Library	Last Name	First Name	Daytime Phone	Card	Profile	Privilege Expiration Date
1	<input type="checkbox"/>	WLS	Pryor	Allison	914674-██████	<a href="#">apryor</a>	Global Administrator	6/26/2033 12:21 PM

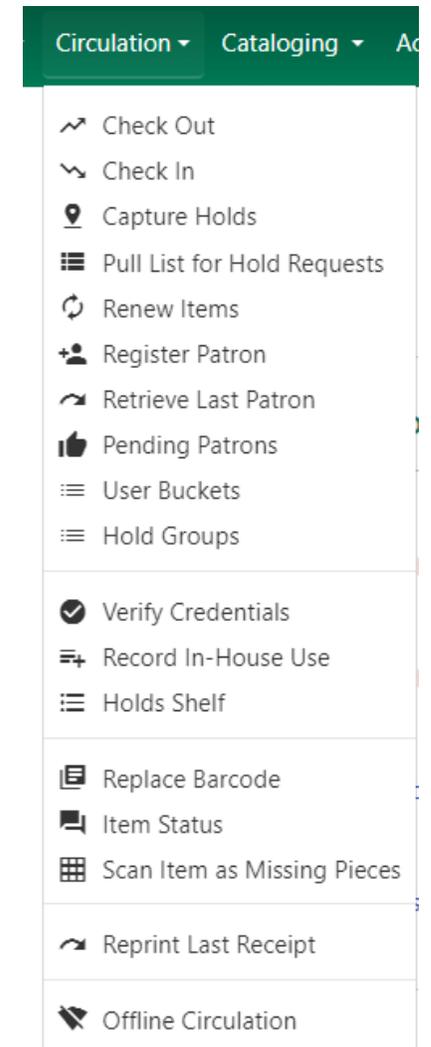
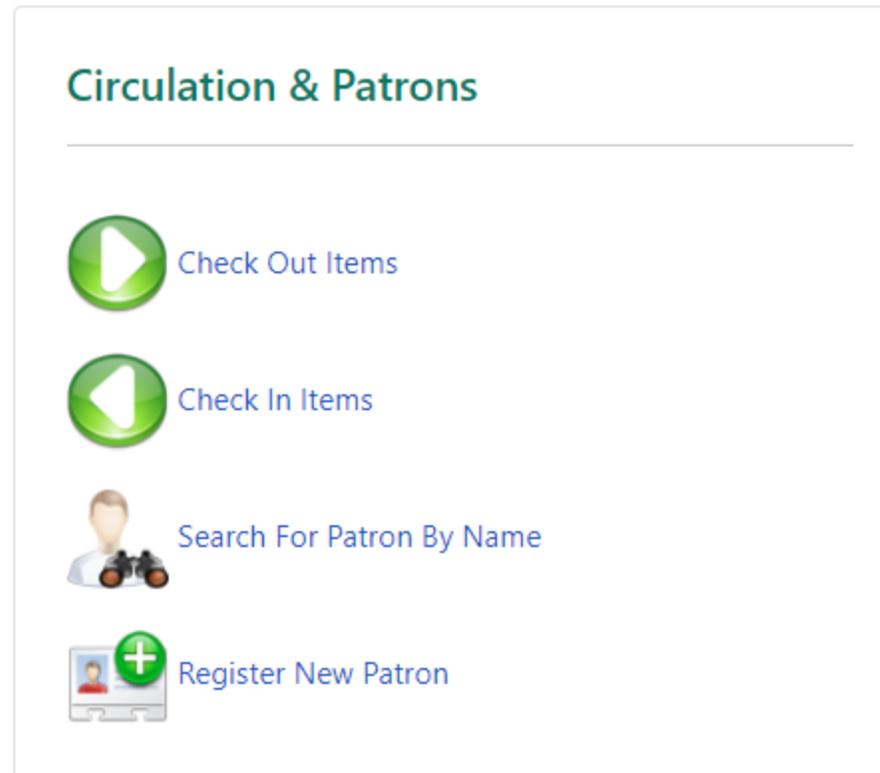
If you see a firstname.lastname formatted barcode, this is merely your Evergreen username and is not an actual user profile.

Do **NOT** use this profile for any workflows.

# Circulation in Evergreen

Circulation in Evergreen includes the following actions:

- Checkout
- Checkin
- Capture Holds
- Pull Lists for Hold Requests
- Renew Items
- Register Patrons
- User Buckets
- Hold Shelf
- Replace Barcode
- Item Status
- Scan Item As Missing Pieces
- Reprint Last Receipt



# Technical Services in Evergreen

Technical Services pertains to the linking, editing, deletion and general maintenance of items linked to your library's collection a part of the catalog.

## Scan Item

Submit OR Choose File No file chosen

Record Summary (MARC)

Title:	No good deeds	Edition:		TCN:	3165578
Author:	Lippman, Laura 1959-	Pub Date:	2006	Database ID:	3165578
Bib Call #:	813/.6	Record Owner:			

Quick Summary Recent Circ History Circ History List Holds / Transit Cataloging Info Triggered Events

Barcode: 3103850004653 Circ Library: WLS Call # Prefix:

Price: 17.99

Acquisition Cost:

ISBN: ["0060570733 (pbk. : 2007)"; "0060570725 (acid-free paper)"; "9780060570729 (acid-free paper)"]

Date Created: 1/16/2013 7:00 PM

Date Active: 3/5/2019 10:39 AM

Status Changed: 9/5/2024 2:59 PM

Item ID: 2025752

Circulate: true

Floating:

Record Summary Book

Laura Lippman	Title:	No good deeds	Edition:		TCN:	3165578	Created By:	equinox
No Good Deeds: A Tess Monaghan Novel	Author:	Lippman, Laura 1959-	Pubdate:	2006	Database ID:	3165578	Last Edited By:	equinox
Hardback	Bib Call #:	813/.6	Record Owner:		Created On:	3/2/19, 2:50 PM	Last Edited On:	3/2/19, 2:50 PM

Holdings Preferences

Batch Actions

Library	Classification	Call Number Label	Barcode	Item #	Part
WLS	Dewey (DDC)	MYSTERY LIPPMAN	3103850004653		

Templates: Apply Template Save Template Import Templates Export All Templates Delete Template

Identification	Location	Circulation	Miscellaneous	Statistics
Item Status	Shelving Location	Can Circulate	Add Item Alerts	Add Item Tags
Damaged 1 copy	Mystery (WEST) 1 copy	Yes 1 copy	Item Alerts	Item Tags
Barcode	Circulating Library	Is Holdable	Price	Add Item Notes
3103850004653 1 copy	WLS 1 copy	Yes 1 copy	\$17.99 1 copy	Item Notes

Cataloging Acquisitions Boo

Search the Catalog

Item Status

Record Buckets

Item Buckets

Retrieve Bib Record by ID

Retrieve Bib Record by TCN

Retrieve Last Bib Record

Create New MARC Record

Import Record from Z39.50

MARC Batch Import/Export

MARC Batch Edit

Link Checker

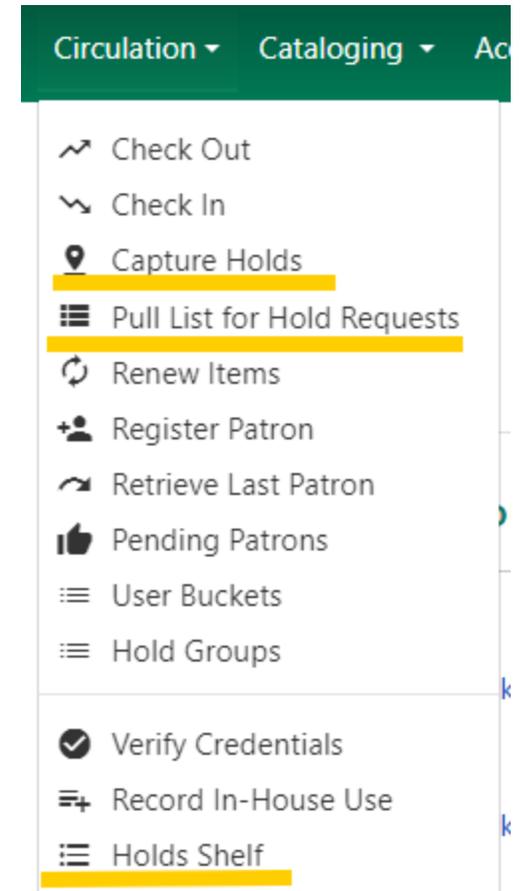
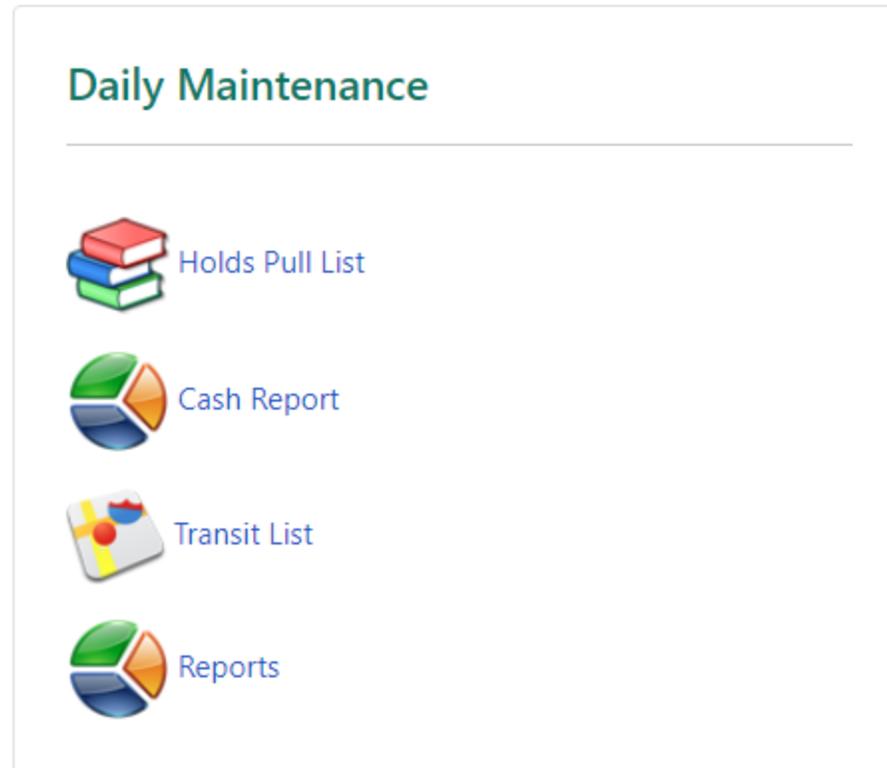
Manage Authorities

Retrieve Authority Record by ID

# Holds in Evergreen

Holds require daily maintenance and attention at your library. When maintaining holds, staff will regularly work with:

- Capture Holds
- Pull Lists for Hold Requests
- Hold Shelf
- Transit Lists
- Clearing Expired Holds
- Hopeless Holds



# Common Evergreen Terms

- **Backdated Check In** – Book-drop Checkin – to mark an item as checked in at an earlier date than the actual date. Most commonly used for checking in the morning book-drop items.
- **Bibliographic Records** – Describes the characteristics of the resources retrieved in the OPAC, such as format, title, author, edition, etc. MARC records are the basis of bibliographic records.
- **Capture a Hold** – Trap a hold – the physical act of scanning in the item and triggering a specific hold for a patron.
- **Call Number** – Typically an alphanumeric label indicating an item's subject matter and/or shelving location within the library. In Evergreen call number is also referred to as "Volume".
- **Circulation Library** – An item's current "home," Circulation Library defines where the item lives.
- **Circulation Modifiers** – Item Types or iTypes – allow you to group resources together by material type and can be used in the creation of circulation and holds policies.
- **Items** – Are individual barcoded items located at a specific call number within a specific library. They are sometimes referred to as "copies or holdings" in Evergreen.
- **Item Bucket** – Allows you to group individual items together for the purpose of batch processing and modification.
- **Item Holdings Editor** – In Cataloging, allows you to define item attributes. You can also create item templates that can be assigned to items with similar characteristics. Can be accessed through the "Edit Item" or "Edit Item Attributes" menu options.
- **Item Statuses** – define an item's current availability, such as checked out, missing, available, on hold shelf, etc.

- **Item Statuses** – define an item's current availability, such as checked out, missing, available, on hold shelf, etc.
- **Lost** – A status that the system assigns to an item when it is still checked out to a patron a specific number of days past the due date.
- **Missing** – A status that is manually assigned to an item by staff when an item is supposed to be in the library but cannot be found.
- **Owning Library** – The library recognized as the purchaser or owner of an item.
- **Permission Groups** – Also called Profiles – allow you to create groups of users and assign permissions to them. Permission groups can be patron types, such as Adult or Juvenile, or staff types, such as Circulation or Catalogers.
- **Pre-Cataloged Items** – "Pre-cats" – a temporary bibliographic record containing basic information, not viewable in the OPAC, so that users may check out the item before it has been fully cataloged.
- **Record Buckets** – Allow you to group and manage bibliographic records for the purpose of batch processing and modification.
- **Record ID** – The internal bibliographic identifier. Evergreen stores the Record ID in the MARC 901c field.
- **Shelving Location** – Home Location – defines the physical shelving locations in a library.
- **Workstation** – A staff user's digital "location" that is set up in Evergreen so that the system can track transactions and activity by library and user.

# Where to find help:

- [Evergreen Documentation](#) (Evergreen homepage)
- [IT Wiki](http://it.westchesterlibraries.org) (it.westchesterlibraries.org)
- [Support@wlsmail.org](mailto:Support@wlsmail.org) (WLS IT Help Desk)
- Your Supervisor!

