Introduction to the Evergreen ILS for New Staff

(revised 2/26/2015 from CWMars materials)
Preparation (for trainers)

Here are some things you’ll want to prepare prior to training.

- **Real item barcodes**
  Have a list of real barcodes handy so that staff can practice checking items in and out. You can even get the actual items off the shelf so they can be scanned instead of typed. Just remember however, that there are very few copy records loaded on the Evergreen test server (sage.eou.edu), so not just any items will do. For a list of your library’s items that are on the test server, please contact Beth or Brent. If you give us a list of barcodes of items that you’d like to use, we can make sure they are in the test server for training purposes.

- **Unused item barcodes**
  Have a few unused item barcodes available so staff can practice checking out a “pre-cataloged” item.

- **Unused patron barcodes**
  Have some unused patron barcodes available for staff to use when practicing patron registration.

Preamble

- Familiarize your staff with the location of the Evergreen icon(s) on the Desktop.

- Create Links to the staff client(s) that are on the Desktop and have purpose driven names:

  eg: *Circ-Evergreen Staff Client, Admin – Evergreen Staff Client, Cataloging – Evergreen Staff Client,* etc…

- Create Links in Web Browser (Firefox) to:
  - Sage Wiki
  - Sage Blog
  - Public OPAC
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Logging In & the Evergreen Interface

Provide staff what their Evergreen username is. What functions are they preforming on Evergreen in their staff position These were most likely created by your director or Beth Longwell when you came onto Evergreen. If you do not have login information for your staff and do not know how to create it, please contact Brent Mills (brent@hoodriverlibrary.org) or Beth Longwell (longweb@eou.edu).

Features to point out

- Note the Offline Use menu, specifically the Standalone Interface button. This is where staff will go to circulate offline if the system is down or your library is experiencing connectivity issues. More information on circulating offline is included later in this document.

Once logged in, show staff how to log out without closing the program (Admin>Operator Change: New). If your staff each have a unique user name, they can do this any time they leave their workstation and the next person who uses it will have to sign in with their own user name and password.

Tabbed Interface

New tabs can be opened to accomplish new tasks, while keeping other tabs open so that staff can go back quickly and easily to a previous task. Examples of when this is especially useful include: Check In and Check Out modes can be kept open simultaneously, accessing a patron record to retrieve the barcode while keeping your place in the PAC to place a hold, comparing patron and copy records, etc.

Shortcuts

Discuss the various shortcuts available to access functions. Circ functions can be accessed via the icons on the Evergreen home screen, the shortcut buttons along the top of the screen, or by clicking the menu option at the very top (e.g. Circulation>Register a Patron).

Features to point out

- To create a new tab, go to File>New Tab, or just type Ctrl+T.
- When closing tabs, it is common for staff to accidentally close the entire Evergreen window accidentally. When this happens, you are still logged in. On the Evergreen client (login interface), just click Open New Window.
- There are a number of “hotkey” keyboard shortcuts, all listed next to their associated function in the Circulation menu. To turn off hotkey functionality, click the Toggle Hotkeys button in the upper right corner of the screen.
- The circulation shortcut buttons can be changed to cataloging or removed all together by going to Admin>Workstation Administration>Toolbars>Current.

Possible Questions
How many tabs can be used at once? There is no limit to how many tabs can be open at once.

Can we add an icon or shortcut button? There is development underway to allow for more individual customization of the shortcut buttons and home screen icons, but for now these cannot be changed.

Is there a “home” button somewhere? There is development underway to add a “home” button to your shortcuts, but currently the only way to access the Evergreen home screen is to open a new tab.

PATRONS

Patron Registration

Show staff the patron registration screen. Note the form-like format and the highlighted fields which indicate that those fields are required. Have staff register a fictional patron using a new patron barcode.

Fields of Interest:

OPAC/Staff Client User Name – This field will default to the assigned barcode. It can be changed to a user name of the patron’s choice and they can use that user name to log into their PAC account. Although staff can do this for the patron at the time of registration, the patron can also change it themselves once they log in.

Password – The system will assign the last four digits of the patron’s telephone number as the password. You can give the patron this 4 digit password or you can enter one of their choice. Either way, this password is temporary and they will only use it the first time they log into the PAC. At that time they’ll be prompted to create their own, more complex password.

OPAC/Staff Client Holds Alias – This field is meant for libraries that have a public holdshelf. Anything entered in this field will print on the patron’s holdshelf slips instead of their name. If staff retrieve patrons’ holds for them you will probably not want to use this field.

Date of Birth – The birth date must be entered in the example format, i.e. x/xx/xxxx or 2/07/1950.

Primary Identification – This field is available for ID numbers if that is helpful. Do not enter social security #s in this box. An acceptable use of this field might be a school ID number, for example.

Email Address – If a valid email address is entered, the patron will receive email overdue notices, pickup notices, etc. Make sure that it’s ….@google.com instead of …@google.co for example

Home Library – The home library should still reflect the patron’s residence, but make sure to use the library name, not the town name.

Main (Profile) Permission Group – The majority of patrons should be assigned as “Full Privileges”. This is the generic patron account. If you’re assigning staff members new accounts contact Beth or Brent.
Possible Questions

Can we add more than one name to a patron record? No.

Typing in the zip code brings up the wrong town name. Because some towns share a zip code, there may be rare instances when filling in the Postal Code field fills the City field incorrectly. You can simply click in the City field and type in the correct city or town.

Searching for a Patron

Have staff search for the patron that they just created in Patron Search. All fields listed can be used to search, but be sure to point out that searches must be exact matches for fields like Email and Phone. For example, if a patron’s phone number is entered 617-123-4567, searching for “617123” will not yield any results.

   Features to point out

- Clicking on any of the results on the right shows you the brief patron record on the left. To get back to the search screen, click Search Form in the upper right.
- You can double click on a patron name to access the full record. Once you’ve clicked on a patron, you can also click Retrieve Patron to open the full record.
- It is possible to limit your search to your region or just your library using the Limit results to patrons in dropdown menu, but be sure to let staff know that this change will stick for the remainder of the session. When doing subsequent searches, this option should be changed back to Sage Library System.
- Can’t see enough of the search fields? Click and drag the window pane (just to the right of the scroll bar) to enlarge it.
- The column picker (located to the far right of the column headings) can be used to display or remove any fields desired. Click the Save Columns button at the bottom and the selected columns will be saved for that user.

Possible Questions

My list of results stops before the patron I want. Are there additional pages of results? No. If you do not find the patron you are looking for, you must refine your search.

I know I’m searching correctly and that my patron exists. Why aren’t they showing up? Double check that you did not type anything in any other field accidentally. For example, searching for Last Name “Smith” with a stray “7” in the ZIP field will yield no results.
**Viewing and Editing the Patron Record**

Allow staff to explore the patron record interface. Note the different function buttons at the top and the Items Out, Holds, and Bills counts that are immediately visible. Note the brief record information to the left, the color coding of the name and the notes underneath the name. The practice patrons they just created probably won’t have any of these, so you can show them a patron with more activity, such as 27447000011066.

**Features to point out**

- If staff entered an Alert Message at the time of registration, it will appear when they first open the patron record. Click any function button to clear it.
- Clicking once on the library card number in the brief patron record will copy it to the clipboard.

Show staff the Edit screen. It is almost identical to the patron registration screen. You can have staff add or change patron information if you think they need more practice. Try adding a new address, or playing with the Claims Returned/Claims Never Checked Out fields.

**Features to point out**

- If a patron has more than one barcode, they can be seen by clicking the See All button next to the barcode field.
- When changing a patron’s password, you must click Save before the patron can log in with it.
- **Statistical Categories** can be customized for your library. If you want something that’s not there, or vice versa, contact Brent or Beth for now, although we can set it up so that the administrative user can have control over these as well. Assuming the stat cats have been customized to your liking, make sure staff know that these fields must be filled.
- If a patron has a middle initial entered in the Innovative system, it will migrate to the First Name field in Evergreen. As patrons come in after migration, you may want to have staff remove the middle initial from the First Name field and place it in the Middle Name field.

**Possible Questions**

**Why is/isn’t this statistical category listed?** Statistical categories can be customized for your library, so if the staff is confused about one and you are too, please contact Brent or Beth to have the desired statistical categories added or removed.

**How do I delete a patron record?** Go to Other > Delete Patron Account.

**Checking Out**
Go to Checkout mode and practice checking items out. Note the autoprint check box in the lower right. When checked, a checkout receipt will print automatically when the Done button is clicked, but not if you just close the tab.

Features to point out

- The **Specific Due Date** feature must be checked before checkout. If this step is skipped, the due date can be changed elsewhere.
- Many different columns can be displayed by clicking the *column picker* at the far right of the column headings. Click **Save Columns** at the bottom of the screen to save the selected columns for that user.
- After checkout is complete, clicking the Done button will bring you back to the Retrieve Patron (by barcode) screen, which is a more streamlined process than closing the tab and starting over.

**Pre-Cataloged Checkout**

Step staff through the process of checking out a pre-cataloged item by having them check out a new item barcode that is not attached to any item. Pre-cataloged items will disappear once checked back in at the owning location. Staff will get a “route to cataloging” message at the time of checkin.

**Non-Cataloged Checkout**

Changing the Barcode dropdown box to one of the listed formats will enable staff to perform a non-cataloged checkout. This may be a paperback, periodical or pamphlet that will never be cataloged, but circulation statistics need to be kept. Non-cataloged items clear off the patron record when the due date passes.

**Possible Questions**

**I wanted to assign a specific due date to an item but forgot.** Once checked out, an item’s due date cannot be changed on the Check Out screen. Due dates can be modified from the Items Out screen.

**Will a pre-cataloged item disappear if checked in at another library?** No. If a pre-cataloged item is checked in at a non-owning library, it will be routed to the owning library. The record will only disappear once it has been checked in at the owning library.

**Will a patron receive overdue notices for non-cataloged items?** No. Non-cataloged items are automatically checked in on the due date. If an item is not cataloged and you want to make sure you get it back, do a pre-cataloged checkout.

**Items Out**
Familiarize staff with the Items Out screen. To access all the functions, you can right click on a specific item or select an item and then click **Actions for Selected Items**. Feel free to play with the checked out items (renewing, changing due date, checking in, etc.), it will have no effect on the production server.

**Features to point out**

- In the column headings, **Checkout or Renewal Library** is the library where the item was checked out or last renewed. **Circulation Library** is the owning library.
- **Fines Stopped** will tell you why fines have stopped accruing on an overdue item. Usually this will say “Returned”, meaning that the item was returned, or “Max Fines”, meaning that the maximum overdue fine has been reached.
- Like on other screens, the columns displayed can be customized with the column picker. To save the selected columns, go to Actions for Selected Items>Save Columns.
- The **Renew All** option will always attempt to renew *all* items out. To renew one item, select the item, right click and select **Renew**. To renew multiple but not all items, select each item using Ctrl+click, then right click and select **Renew**.
- The **Check In** option is very close to the **Renew** options. Be careful not to select **Check In** accidentally. You will be prompted to confirm check in, but after that the action cannot be undone.

**Checking In**

Open a new tab and go to the Check In screen. Allow staff to check in the items that they just checked out. They can opt to play with the **Effective Date** at the top of the screen, or the **Checkin Modifiers** at the bottom of the screen. Note that there are **Actions for Selected Items** and as always, displayed columns can be customized with the column picker.

Try making items overdue and then checking them in. You’ll see that a fine tally is kept as you check in a patron’s overdue material. You can then click the link and be brought to the Bills section of the patron’s record. This is useful when the patron hands you overdue items and wants to pay the fine immediately.

**Features to point out**

- Change the **Effective Date** to “back date” the check in to a previous date.
- Apply **Amnesty Mode** under **Checkin Modifiers** to waive all fines for items being checked in. Click **Amnesty Mode** again to turn it off.
- New and useful features under Actions for Selected Items include Backdate Post-Checkin, Mark Item Missing Pieces, Abort Transit, Retrieve Last Patron and Show Last Few Circulations.
Bills

Have staff go back to their practice patron records and access the Bills function. They probably do not have any overdue fines accrued, but they can add a manual fine and collect it for practice.

On the left side of the screen, click Bill Patron. Enter any amount and be sure to stress the importance of adding a note. To submit the manual fine click Submit this Bill.

To collect money, click the bill that is going to be paid. Choose the payment type in the upper right, enter the amount being collected and click Apply Payment.

Features to point out

- Right click on a bill and select Full Details to get lots of detailed information about that bill.
- To waive a bill from this screen, right click on it and select Void Billing.
- In the upper left, click History to get details on the patron’s paid and voided bills.

Holds

Placing Holds

Direct staff to the Holds function in the patron record and click Place Hold. The quickest way to start practicing placing holds is to search for a specific barcode. If you’ve requested a list of your library’s items that are on the Evergreen test server, you can simply select a barcode form this list. Attempting keyword searches may be sluggish and ultimately produce no results, even for broad searches like “dogs” or “Harry Potter”. To search for a specific barcode, change the Quick Search option on the left to Barcode.

When staff have found the item they’d like to place a hold on, have them click the Place Hold button at the top right of the Record Summary. They can try modifying the Pickup Location or Expiration Date for practice. The pickup location should always be the library name where the user will get their title. When done click Place Hold.

Managing Holds

Bring staff back to the patron’s hold list by clicking the Holds button at the top again. Note the difference between Request Date (date hold was placed), Capture Date (date item was checked in to fill hold) and Available Date (date item was checked in at pickup location).

The Actions for Selected Items menu has many options for modifying the holds. Please contact Beth or Brent if you have questions about any of this functionality.

Features to point out
- Columns can once again be customized and saved.
- **Show Cancelled Holds** will do just that. You must click **Show Un-Cancelled Holds** to go back.
- Click **Detail View** to get more information about a selected item and the hold.

**Suspending holds** – In Evergreen, it is possible to suspend a hold so that it remains in the hold queue but will not be filled. An example of when this might be useful is if a patron does not want their hold to arrive while they are on vacation. Staff can suspend the hold and it will continue to move up the priority list, but if it reaches the top it will not be filled. When the patron returns the hold can be activated again and if they have reached the top of the list it will be filled with the next available copy.

For now, only staff can suspend and activate holds, but eventually patrons will be able to do this themselves.

**Possible Questions**

In the list of holds, what does “No Copy” mean? That means that the system has not targeted a specific copy to fill the hold, most likely because there is a queue of holds at the title level (like Hold Copy Returned Soonest in Innovative).

If a hold is not getting filled, how do we transfer it? You do not need to pick a new target item to transfer to like in Innovative. Simply go to **Actions for Selected Items** and click **Find Another Target**. Evergreen will find another available copy for you.

**Pull List for Hold Requests**

From the Evergreen home screen, click **Pull List for Hold Requests**. This produces an up to the minute list of your items on hold. As with other screens, the displayed columns can be customized via the column picker and then saved for the current user. There is development under way to allow sorting of multiple fields and printing of the holds exactly as you’ve customized the display. Currently though, the best option for printing is **Print Full Full Pull List**. There are other options that you can try out to your liking as well.

**Features to point out**

- **Actions for Selected Items** is almost identical to the hold screen in the patron record, but several options become more useful here such as **Find Another Target** or **Mark Item Missing**.
- Holds do not disappear from this screen until they are filled, moved or canceled. If you miss an item on your pull list, it will be on the list again the next day.

**Browse Holdshelf (Clear Holdshelf)**

Here you can view the items on your holdshelf. To clear expired holds, simply check the **View Shelf-Expired Holds** box. **STOP**. Be sure to look at your results and print now if you want a copy of this list. When you are ready to clear the expired holds, click **Clear these Holds**. After this step the holds have been cancelled. The action cannot be undone and you cannot access this list of cleared holds again.
Note that under **Actions for Selected Items**, there is an option to **Edit Shelf Expire Time** if there is a hold you do not wish to clear.