

Missouri Evergreen I

September, 2019

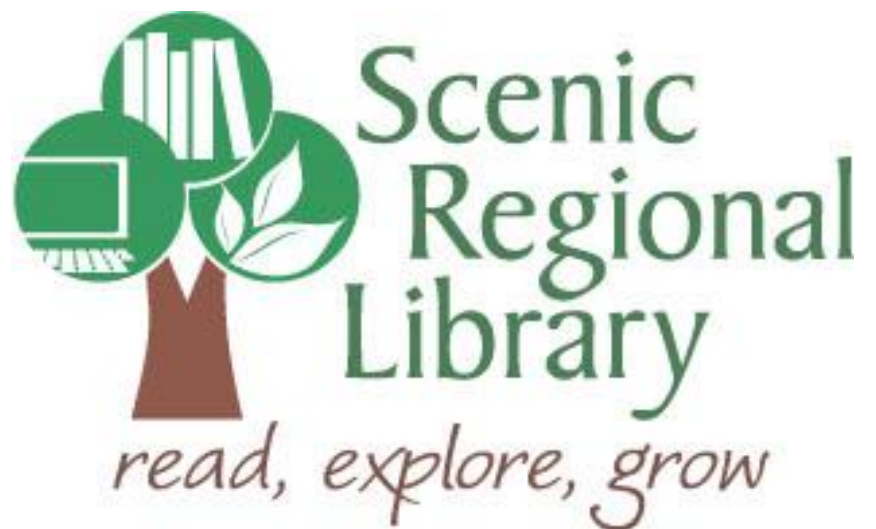


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Welcome to Scenic Regional Library!

The Scenic Regional Library System was formed on May 20, 1959, when the board members of the Franklin, Gasconade, and Warren County libraries signed an agreement to cooperate with one another to provide services to their residents. Currently, Scenic Regional Library is headquartered in Union. To date, our library system has nine physical branches in three counties, which are listed below. We also have a bookmobile that operates out of the Union Branch and has many stops throughout the area. The branches and their corresponding abbreviations are listed in the table below.

Branch	Abbreviation Code
Administration / Headquarters	HQ
Bookmobile	BK
Hermann	HR
New Haven	NH
Owensville	OW
Pacific	PC
St. Clair	SC
Sullivan	SN
Union	UN
Warrenton	WR
Wright City	WC

In addition to our system's branches, we have reciprocal borrowing agreements with many other library systems to offer our patrons the largest selection of resources. Our reciprocal libraries are listed below.

- Washington Public Library
- East Central College
- Heartland Regional Library System
- Missouri River Regional Library
- Ozark Regional Library
- Washington County Library
- Crawford County Library
- Jefferson County Library (Windsor, Fox, and Northwest School Districts)
- St. Charles City – County Library

Why is this information important for you to know? As you will see when we get into the features and functions of the Evergreen system, some of your duties will require a basic understanding of which branches are in the Scenic Regional Library system and which locations are partners of ours.

What is Evergreen?

At its most basic level, Evergreen is an ILS (Integrated Library System). In other words, it is a computer system used by libraries. There are two main interfaces of Evergreen used by Scenic Regional Library. One interface is used by Scenic Regional Library Staff and it is called the Staff Client program. The other is used by library patrons and is called the OPAC (Online Public Access Catalog).

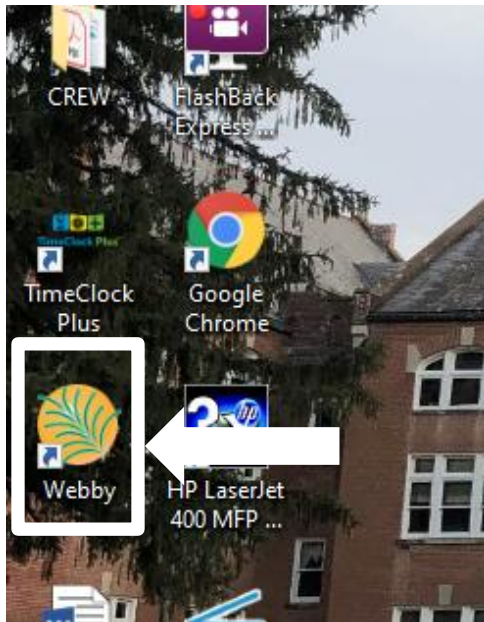
As of April of 2019, Scenic Regional Library began using an online version of Evergreen called Webby. Our training today will cover the Webby Evergreen interface used by Scenic Regional Library Staff, and more specifically, those functions of Evergreen used by Library Assistants to perform their daily responsibilities.

Note that management may sometimes refer to Evergreen as the consortium of libraries in Missouri that have partnered with one another and all use the Evergreen ILS. Scenic Regional Library is one of approximately 50 libraries that share resources through the Missouri Evergreen Consortium.

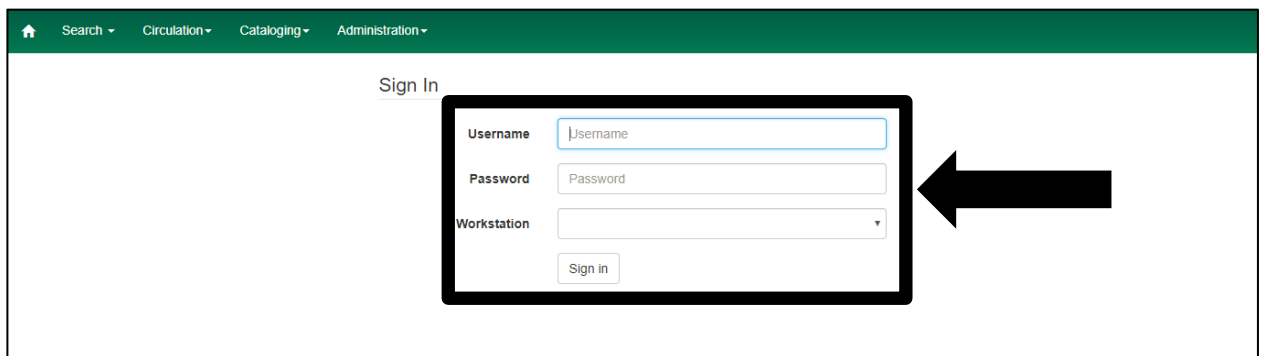
Logging into Evergreen

When you arrive at work, the circulation desk computers may already be logged into the Evergreen system. However, if they are not, follow the steps below to log into Evergreen.

1. Click on the Webby Evergreen icon to launch the log in process.



2. When the log in screen appears, enter the user name and password used at your branch, then click "Sign in" to access the system. The workstation field should already be prepopulated.

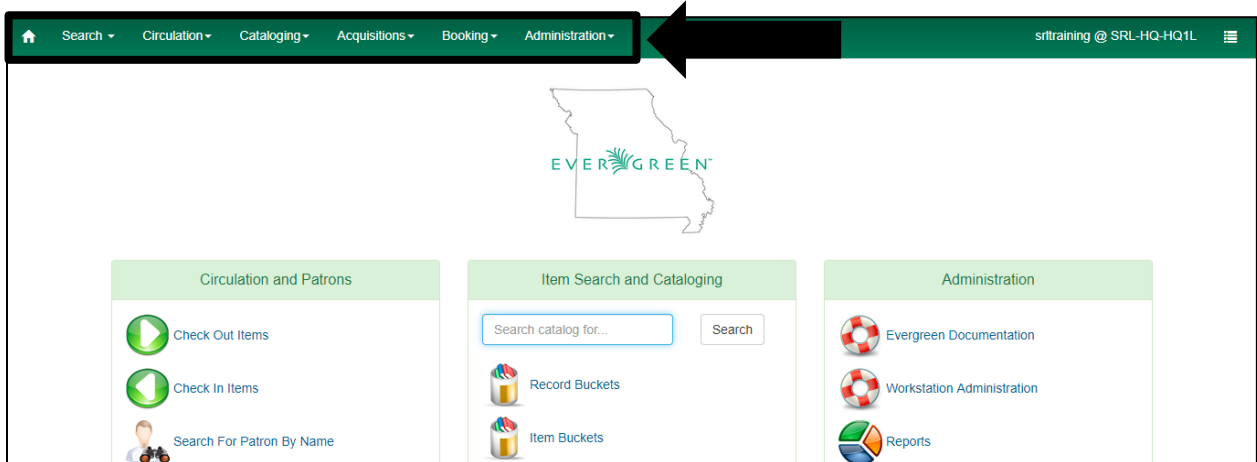
A screenshot of the Evergreen web application's sign-in page. The page has a green header with navigation links: Search, Circulation, Cataloging, and Administration. The main content area is titled "Sign In" and contains three input fields: "Username" with the placeholder text "Username", "Password" with the placeholder text "Password", and "Workstation" which is a dropdown menu. Below these fields is a "Sign in" button. A thick black rectangular box encloses the Username, Password, and Workstation fields. A large black arrow points from the right towards the Sign in button.

Evergreen Homepage

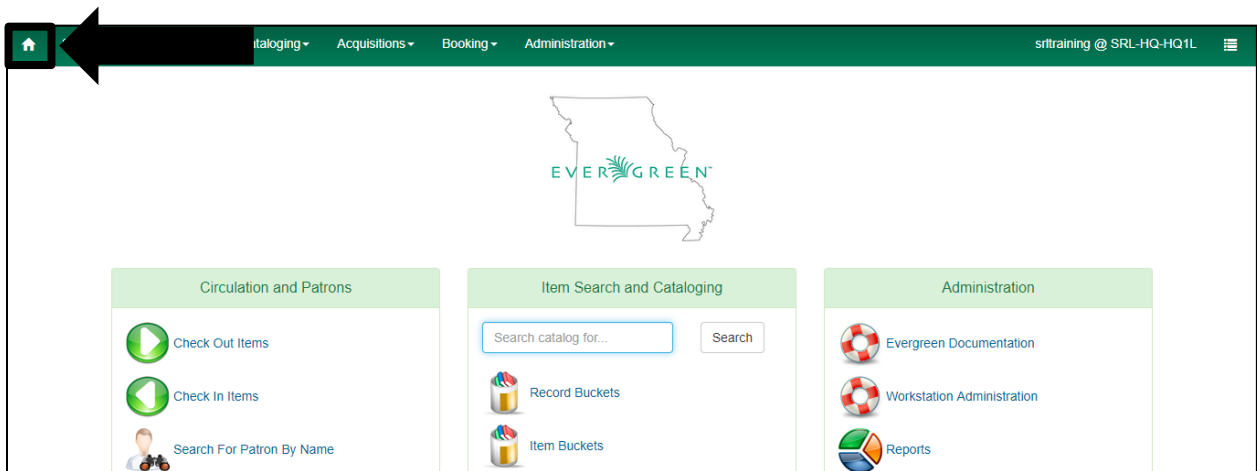
After entering your username and password, the Evergreen Web Client Homepage will appear.

The Menu Bar

The green menu bar at the top of the page contains many of the functions you will use in Evergreen.

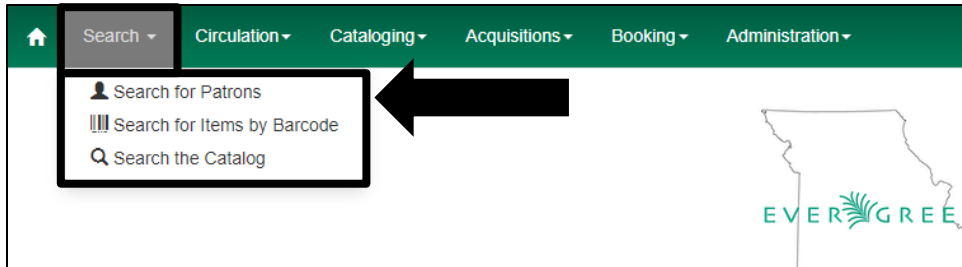


Home: Clicking here takes you to the home page.

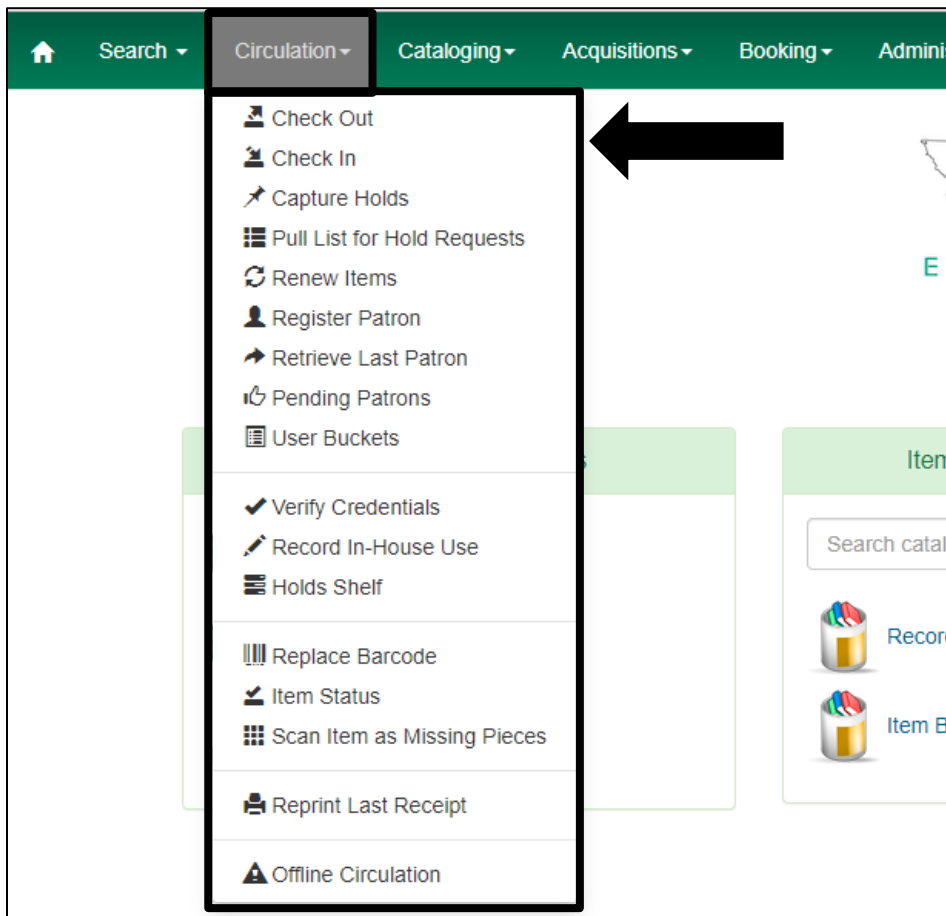


Evergreen Homepage, continued

Search: Clicking here reveals a drop down menu containing several search functions.

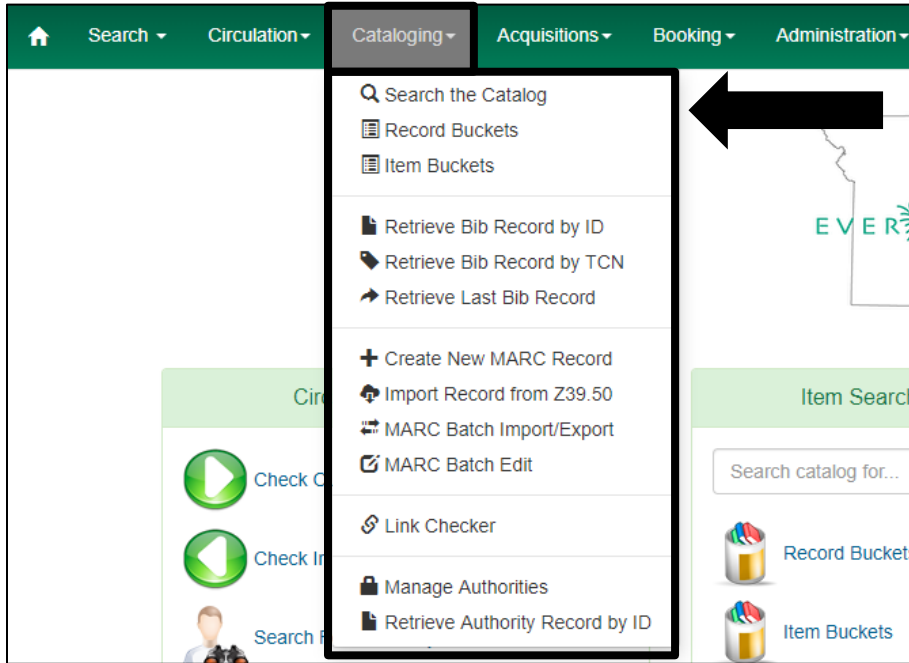


Circulation: Clicking here reveals a drop down menu containing numerous circulation functions primarily used by Library Assistants.

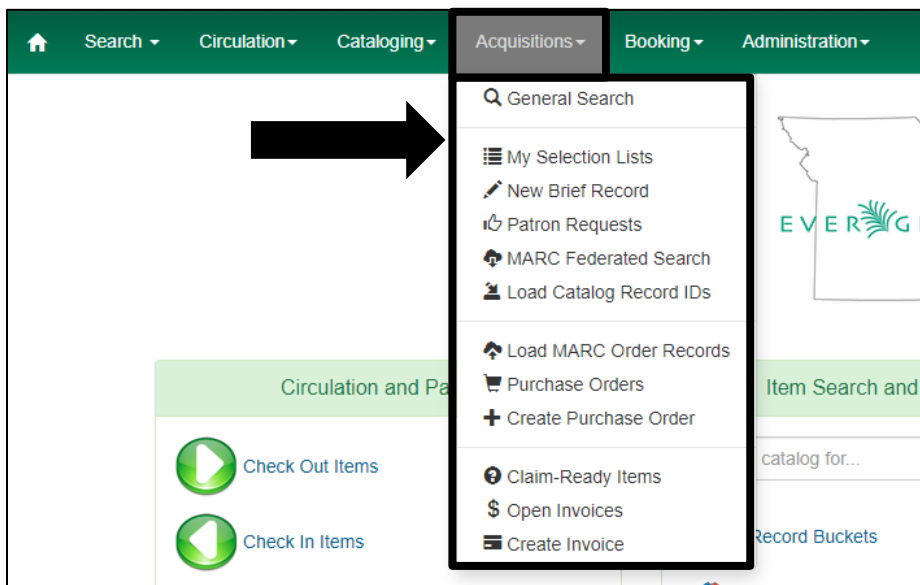


Evergreen Homepage, continued

Cataloging: Clicking here reveals a drop down menu containing numerous cataloging functions primarily used by the Tech Services department to assign items to branches and shelving locations within those branches.

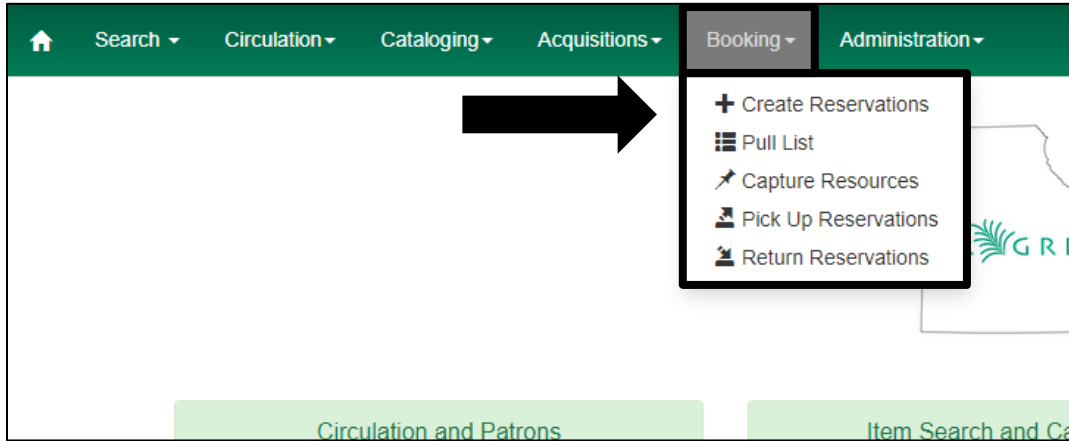


Acquisitions: Clicking on this reveals a drop down menu containing numerous acquisitions functions primarily used by the Tech Services Manager to track item purchases made for the library.

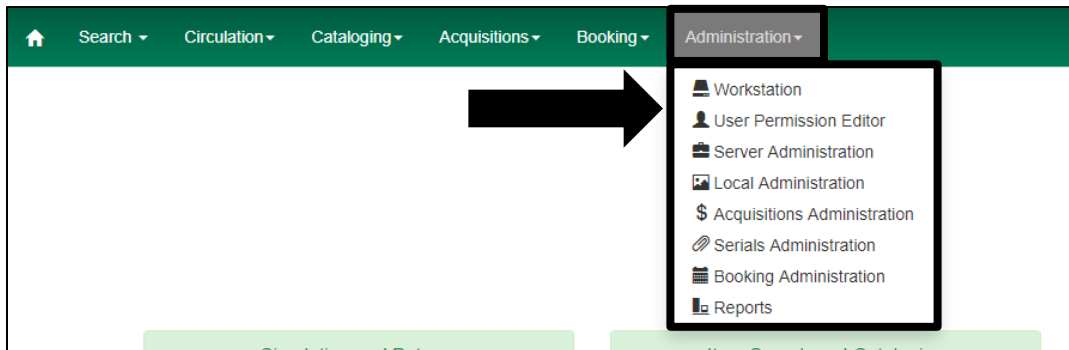


Evergreen Homepage, continued

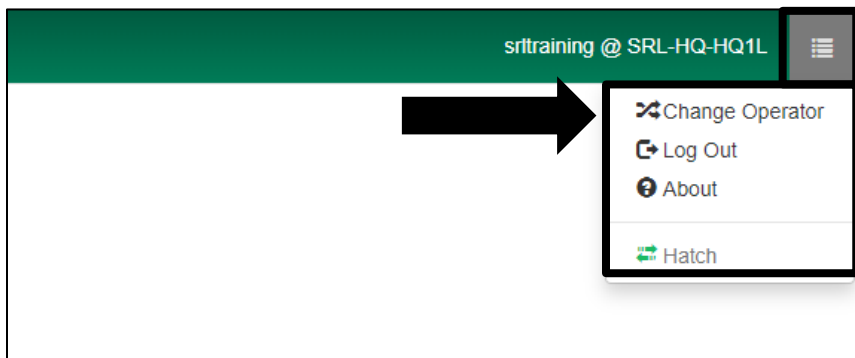
Booking: Clicking on this reveals a drop down menu containing numerous booking functions for items such as character costumes, tablecloths, and STEAM trunks.



Administration: Clicking on this reveals a drop down menu containing numerous administration functions that are mainly used to run reports and manage the system.

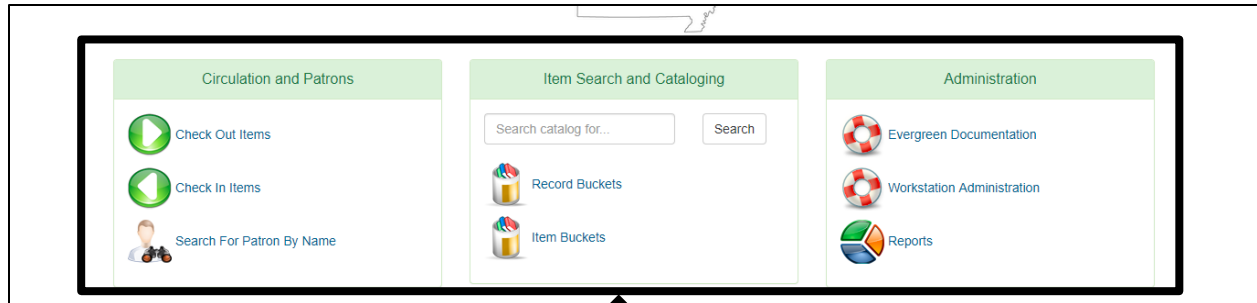


Menu: Clicking on this reveals a drop down that is primarily used to log out of Evergreen.



Evergreen Homepage, continued

Homepage Shortcuts: Clicking on any of these quickly takes you to those functions.



Patron Search

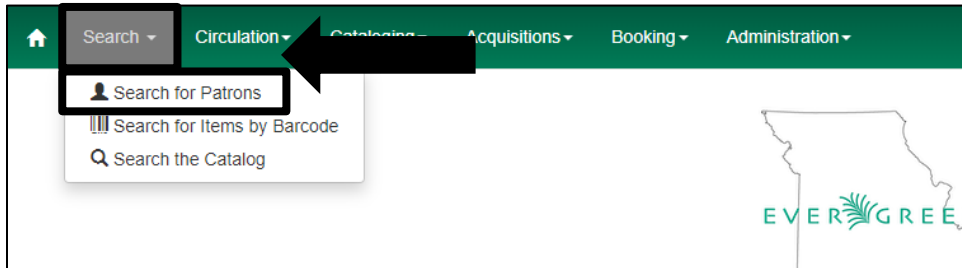
Library Assistants use this function most often for the following situations.

- A patron does not have his library card with him.
- A patron wants to sign up for a library card.
- A patron requests a guest pass to use the computers.

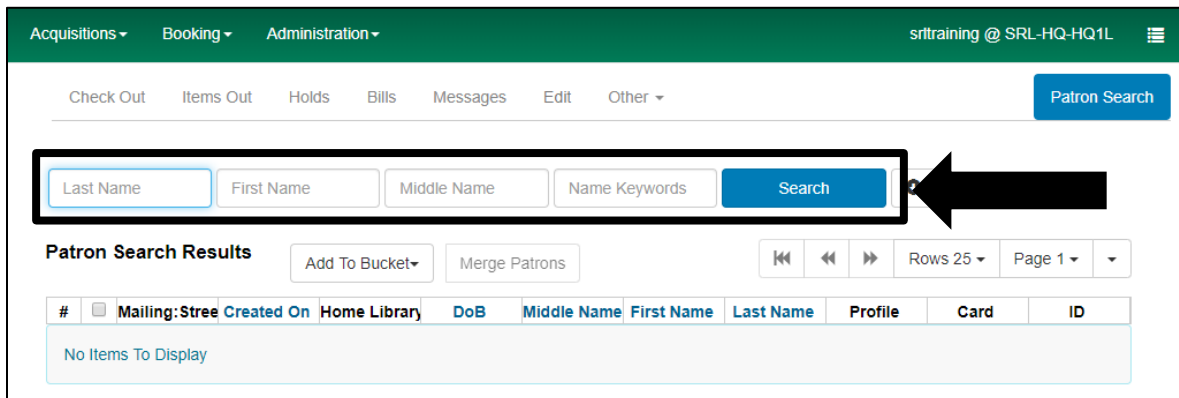
Please note that this is not an all-inclusive list. Library Assistants find a variety of situations in which the Patron Search function can be used effectively.

Follow these steps to perform a patron search.

1. Ask the patron for a photo ID.
2. Click “Search” and then “Search for Patrons.”

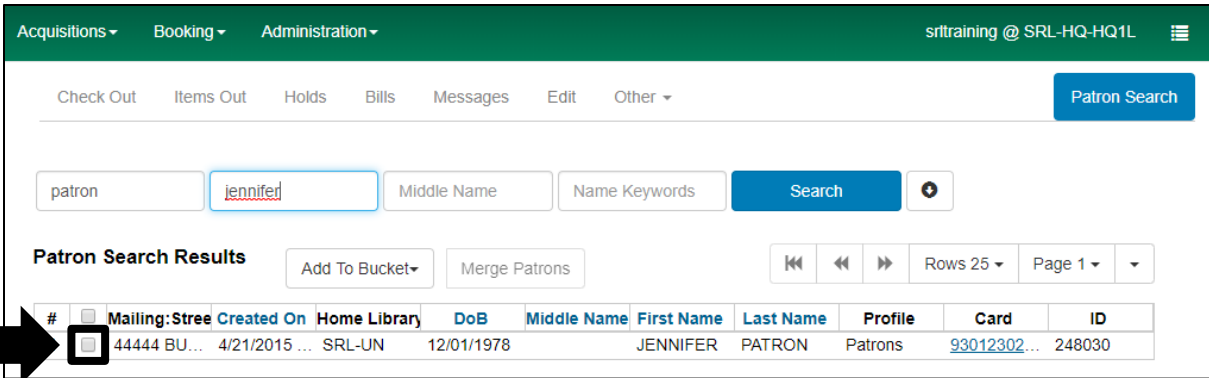


3. Enter the patron’s last and first names based on the photo ID.
4. Click “Search.”



Patron Search, continued

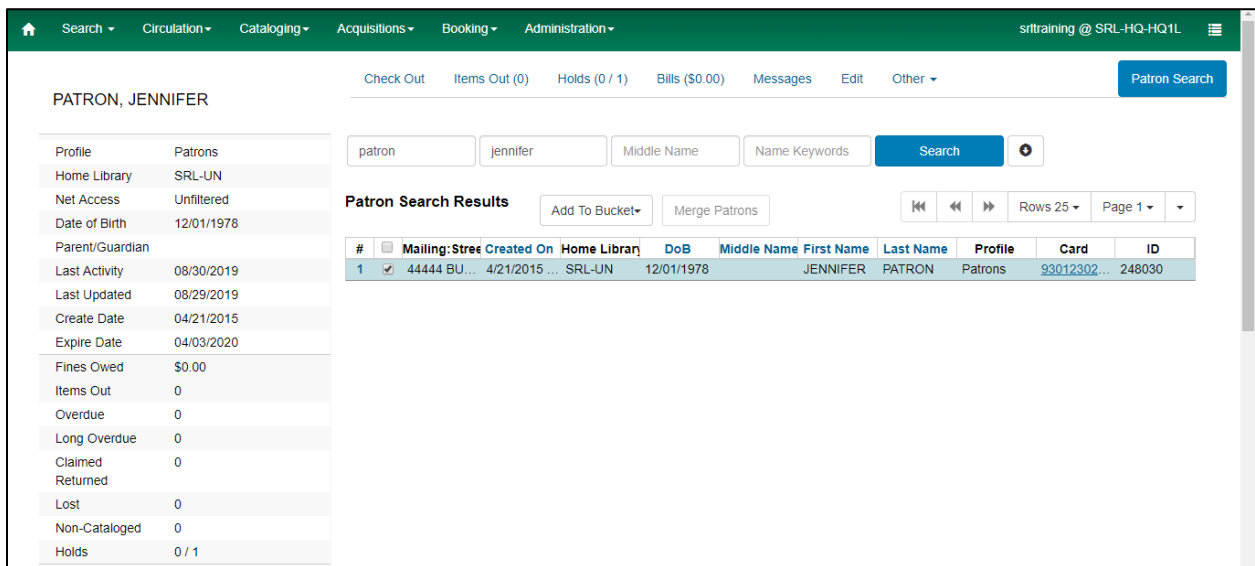
5. Click the box in the front of the patron's name to open the patron's account.



The screenshot shows the Patron Search interface. At the top, there are navigation tabs: Acquisitions, Booking, and Administration. Below these are links for Check Out, Items Out, Holds, Bills, Messages, Edit, and Other. A Patron Search button is visible. The search input fields contain 'patron' and 'jennifer'. A search button is also present. Below the search fields, there are buttons for 'Add To Bucket' and 'Merge Patrons'. The search results are displayed in a table with the following columns: #, Mailing:Stree, Created On, Home Library, DoB, Middle Name, First Name, Last Name, Profile, Card, and ID. The first row of results is highlighted, and a black arrow points to the checkbox in the first column of this row.

#	Mailing:Stree	Created On	Home Library	DoB	Middle Name	First Name	Last Name	Profile	Card	ID
1	44444 BU...	4/21/2015 ...	SRL-UN	12/01/1978		JENNIFER	PATRON	Patrons	93012302...	248030

After you have clicked the box, the patron's account will resemble the screenshot below.



The screenshot shows the Patron Account page for Jennifer. The page title is 'PATRON, JENNIFER'. On the left, there is a profile summary with the following information: Profile: Patrons, Home Library: SRL-UN, Net Access: Unfiltered, Date of Birth: 12/01/1978, Parent/Guardian, Last Activity: 08/30/2019, Last Updated: 08/29/2019, Create Date: 04/21/2015, Expire Date: 04/03/2020, Fines Owed: \$0.00, Items Out: 0, Overdue: 0, Long Overdue: 0, Claimed: 0, Returned: 0, Lost: 0, Non-Cataloged: 0, Holds: 0/1. On the right, there is a search input field with 'patron' and 'jennifer', and a search button. Below the search fields, there are buttons for 'Add To Bucket' and 'Merge Patrons'. The search results are displayed in a table with the following columns: #, Mailing:Stree, Created On, Home Library, DoB, Middle Name, First Name, Last Name, Profile, Card, and ID. The first row of results is highlighted.

#	Mailing:Stree	Created On	Home Library	DoB	Middle Name	First Name	Last Name	Profile	Card	ID
1	44444 BU...	4/21/2015 ...	SRL-UN	12/01/1978		JENNIFER	PATRON	Patrons	93012302...	248030

Note

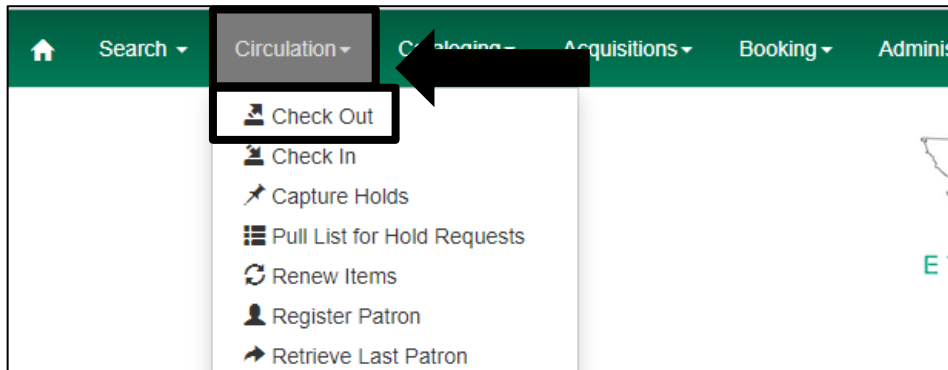
- If the patron does not have a photo ID, you can ask him for his name, conduct the patron search, and then ask him two questions to verify his identity. For example, you could ask him, "What is your birthdate?" and "What is your address?"

Checking Out Items

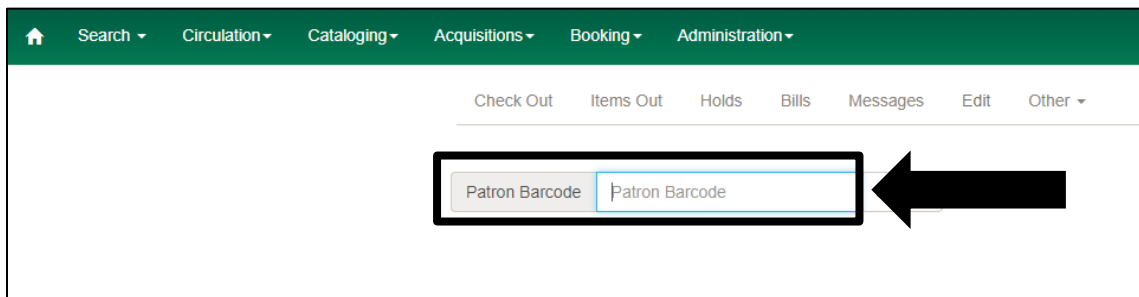
Patrons can check out 100 items at a time. All items are checked out for two weeks.

Follow the steps below to check out items.

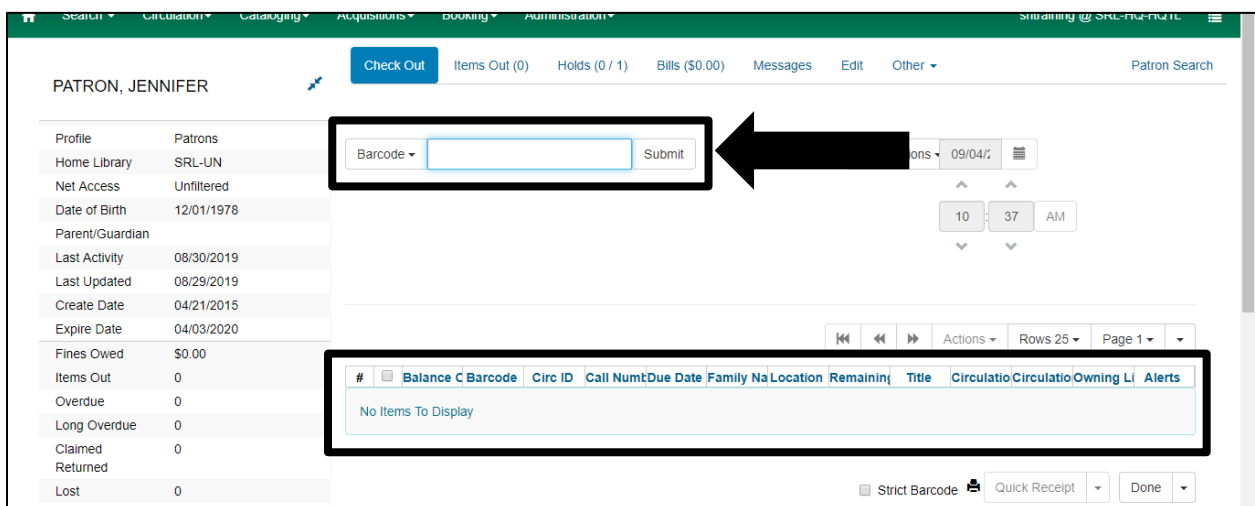
1. Click “Circulation” and then “Check Out.”



2. Scan the barcode on the patron’s library card.



3. Scan the barcodes on the items. As you are scanning items, they will replace the “No Items To Display” text.



Checking Out Items, continued

4. Click "Done."

The screenshot shows a library system interface for checking out items to a patron named Jennifer. The interface includes a navigation menu at the top with options like Search, Circulation, Cataloging, Acquisitions, Booking, and Administration. The main area displays the patron's profile on the left, including details like Home Library (SRL-UN), Date of Birth (12/01/1978), and Last Activity (08/30/2019). In the center, there is a 'Check Out' button and a 'Barcode' input field with a 'Submit' button. To the right, there are 'Date Options' set to 09/04/2019 at 10:37 AM. Below this, there is a table with columns for #, Balance, Barcode, Circ ID, Call Num, Due Date, Family Na, Location, Remaining, Title, Circulation, and Owning Library. The table currently shows 'No Items To Display'. At the bottom right, there is a 'Done' button highlighted with a red box and a red arrow pointing to it. Other buttons include 'Strict Barcode' and 'Quick Receipt'.

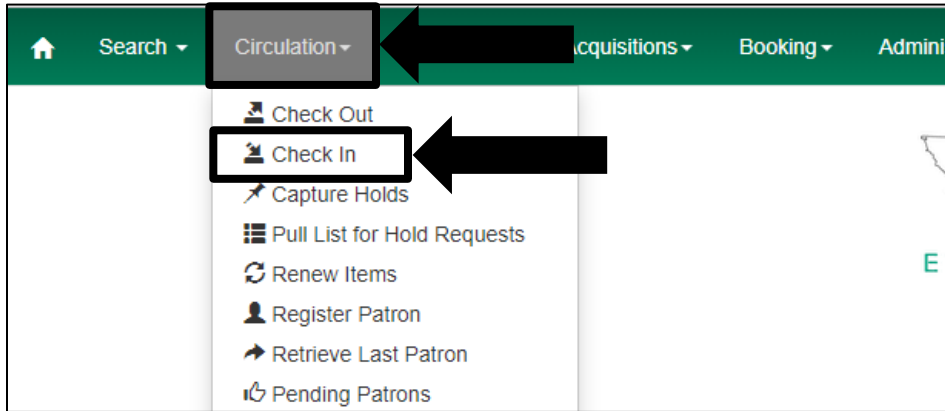
Notes

- After clicking "Done," click "OK" to print a receipt for the patron.
- Watch the screen as you scan the items to ensure the items scanned properly to the patron's account.
- Ask the patron if he found everything he wanted. If not, offer to search for the items he couldn't find to see if we can get them from another library or through an ILL.

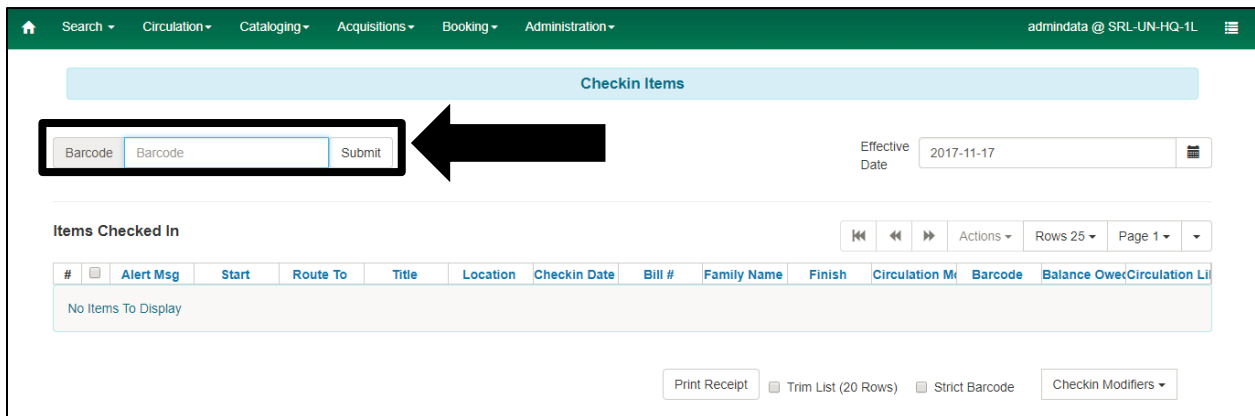
Checking In Items

Follow the steps below to check in items.

1. Click "Circulation" and then "Check In."



2. Scan the item's barcode.



Checking In Items

3. Stage the item according to where the item is headed.
 - If the item belongs in your branch, place the item in its proper shelving area.
 - If the item belongs to another Scenic Regional branch or to Washington Public Library, a pop up message will appear with the branch name to which it needs to be shipped. Print the ticket, place it securely in the item, and place the item in the SRL / HQ bag.
 - If the item belongs to a Missouri Evergreen library, a pop up message will appear. Print the ticket, put it securely in the item, and then place the item in the “Evergreen” bag.
 - If the item is going to be held for a patron at your branch, a pop up message will appear saying the item goes to the public hold shelf. Print out the ticket, rubber band it to the item, and then place the item in the appropriate hold area.

Checkin Items

Effective Date:

Items Checked In

#	Alert Msg	Start	Route To	Title	Location	Checkin Date	Bill #	Family Name	Finish	Circulation M	Barcode	Balance Owed	Circulation Li
1		11/17/2017 ...	NonFiction	They're pla...	NonFiction	11/17/2017 ...	9592932	PATRON	11/17/2017 ...	Books	300044046...	\$0.00	SRL-UN

Acquisitions >
Booking >
Administration >

Transit Slip

Destination **SRL-WR**

Scenic Regional-Warrenton
 912 S STATE HIGHWAY 47
 WARRENTON, MO 63383-2600
 P: 636-456-3321

Item Barcode: 3006717244
 Title: Paper wife
 Author: Ibrahim, Laila
 Call Number: FIC IBR

Hold for patron
 Patron Barcode:

Request Date: 03/21/2019
 Slip Date: 04/03/2019

Acquisitions >
Booking >
Administration >

Hold Slip

This item should be routed to the **Public Holds Shelf**

Item Barcode: 3006148288
 Title: Escape room
 Author: Avalee, Iris
 Call Number: DVD 791.43 ESC

Hold for patron
 Patron Barcode:
 Notify by text:

Request Date: 02/26/2019
 Request Notes:

Slip Date: 04/03/2019

Notes

- Watch the screen as you scan item barcodes to ensure that the reader actually scanned the item.
- Examine each item as you check it in for damage and/or missing pieces. Check with your branch manager if you find a damaged item to determine how it should be handled.
- When printed, the slips may look different to protect patron privacy.

Editing a Patron Record

When a patron visits the circulation desk or calls on the phone to edit their record, it typically involves a change of address or phone number. Follow the steps below to edit the patron's record.

1. Scan the patron's library card on the Check Out tab or follow the patron search steps to open the patron's account.
2. Click "Edit."
3. Modify any information that needs to be changed.
4. Click "Save."

The screenshot shows the 'Patron Edit' form for Jennifer Patron. The form is divided into several sections:

- Profile:** Patrons
- Home Library:** SRL-UN
- Net Access:** Unfiltered
- Date of Birth:** 12/01/1978
- Parent/Guardian:**
- Last Activity:** 08/30/2019
- Last Updated:** 08/29/2019
- Create Date:** 04/21/2015
- Expire Date:** 04/03/2020
- Fines Owed:** \$0.00
- Items Out:** 0
- Overdue:** 0
- Long Overdue:** 0
- Claimed:** 0
- Returned:**
- Lost:** 0
- Non-Cataloged:** 0
- Holds:** 0 / 1

The 'Patron Edit' form fields include:

- Barcode: 9301230216
- OPAC/Staff Client User Name: 9301230216
- Password: [Empty]
- Primary Name: [Empty]
- Preferred Name: [Empty]
- Prefix/Title: [Empty]
- First Name: JENNIFER
- Middle Name: [Empty]
- Last Name: PATRON
- Suffix: [Empty]
- Name Keywords: [Empty]
- OPAC/Staff Client Holds Alias: [Empty]

The 'Edit' button is highlighted with a red box and an arrow. The 'Save' button is also highlighted with a red box and an arrow. A large red box surrounds the entire form area.