Missouri Evergreen I

July 2022
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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. The branches and their corresponding abbreviations are listed in the table below.

<table>
<thead>
<tr>
<th>Branch</th>
<th>Abbreviation Code</th>
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<tr>
<td>Administration / Headquarters</td>
<td>HQ</td>
</tr>
<tr>
<td>Hermann</td>
<td>HR</td>
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<tr>
<td>New Haven</td>
<td>NH</td>
</tr>
<tr>
<td>Owensville</td>
<td>OW</td>
</tr>
<tr>
<td>Pacific</td>
<td>PC</td>
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<tr>
<td>St. Clair</td>
<td>SC</td>
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<tr>
<td>Sullivan</td>
<td>SN</td>
</tr>
<tr>
<td>Union</td>
<td>UN</td>
</tr>
<tr>
<td>Warrenton</td>
<td>WR</td>
</tr>
<tr>
<td>Wright City</td>
<td>WC</td>
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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. It is often referred to as Webby since it is a web-based program. The other is used by library patrons and is called the OPAC (Online Public Access Catalog).

Our training today will cover the Evergreen interface used by Scenic Regional Library Staff to perform their daily responsibilities.

Scenic Regional Library is one of approximately 60 libraries that share resources through the Missouri Evergreen Consortium. All of the member libraries use the Evergreen ILS through a shared catalog and patron database.
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 your user name and password, then click “Sign in” to access the system. The workstation field should already be prepopulated.
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.
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.

![Patron Search Interface]

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

![Patron Account Screenshot]

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. In Evergreen, click “Circulation.”

2. Click “Checkout.”

Note: Look for this blue and yellow box on the taskbar. If it is not there, ask a coworker for assistance.
Checking Out Items, continued

3. Scan the patron’s library card.

4. Lay the items on the RFID pad.
   - Note that you may need to fan the items out a bit for the pad to read them all.
   - Watch the screen to ensure that the pad scanned all the items.
Checking Out Items, continued

5. Click “Done.”
Checking In Items

Follow the steps below to check in items.

1. In Evergreen, click “Circulation.”

![Image of Evergreen interface]

2. Click “Check In.”

![Image of Evergreen interface showing Check In option]

Note: Look for this blue and yellow box on the taskbar. If it is not there, ask a coworker for assistance.
Checking In Items, continued

3. Lay the items on the RFID pad.
   - Note that you may need to fan the items out a bit for the pad to read them all.
   - Watch the screen to ensure that the pad scanned all the items.
   - Receipts will automatically print for items that need to transit to another library and that need to put on your hold shelf. Find the title or barcode on the slips and match them with the corresponding item in the stack.

4. 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, place the item in the “SRL / HQ” (yellow tag) bag.
   - If the item belongs to a Missouri Evergreen library, place the item in the “EV” (red tag) bag.
   - If the item is going to be held for a patron at your branch, place the item in the appropriate hold area.

Note

- 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.
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.”
Entering and Paying Bills for Copies and Faxes

Patrons often ask us to make copies and fax documents for them. We charge $.15 per page for copies and $1.00 per page for faxes. When we copy or fax something for them, we need to enter and pay a bill for the transaction in Evergreen.

Follow these steps to enter and pay a bill in Evergreen for copies or faxes.

Please note that a tab for your branch’s Walkin account may already be open in Evergreen. If a tab is already open in Evergreen, please click on it, click “Refresh” and skip to step 5. If a tab is not currently open, begin with step 1.

1. Click “Search” and then “Search for Patrons.”

2. Enter “Walkin” in the Last Name field and your full branch location in the First Name field and click “Search.”
Entering and Paying Bills for Copies and Faxes, continued

3. Click on the box in front of your branch’s Walkin account.

4. Click on “Bills.”
5. Click on “Bill Patron.”
Entering and Paying Bills for Copies and Faxes, continued

6. Click on the “Billing Type” field to reveal a drop down menu.
7. Click on the appropriate billing type, i.e. fax, copies, etc.

8. Enter the amount in the “Amount” field.
9. Enter your initials in the “Note” field.
10. Click “Submit Bill.”
Entering and Paying Bills for Copies and Faxes, continued

After creating the bill and accepting the patron’s payment, follow these steps to pay the bill in the Walkin account.

1. Click on the box in front of the bill you are paying.
2. Click on the “Payment Type” field to reveal a drop down menu.
3. Click on “Cash” or “Check.”

![Image of Walkin interface with bill pay options highlighted]

4. Enter the amount in the “Payment Received” field.
5. Check the “Annotate” box.
6. Click “Apply Payment.”

![Image of Walkin interface with annotation option highlighted]

7. Enter your initials into the annotation box that pops up and click “OK / Continue.”
Entering and Paying Bills for Copies and Faxes, continued

Notes

- As a best practice, leave a tab open for the Walkin account at all times.
- This process is also used for other things such as printouts from the public computers, mug purchases, and book bag purchases. If you are unsure as to whether to charge the “Walkin” account for a purchase, please ask your Branch Manager.