

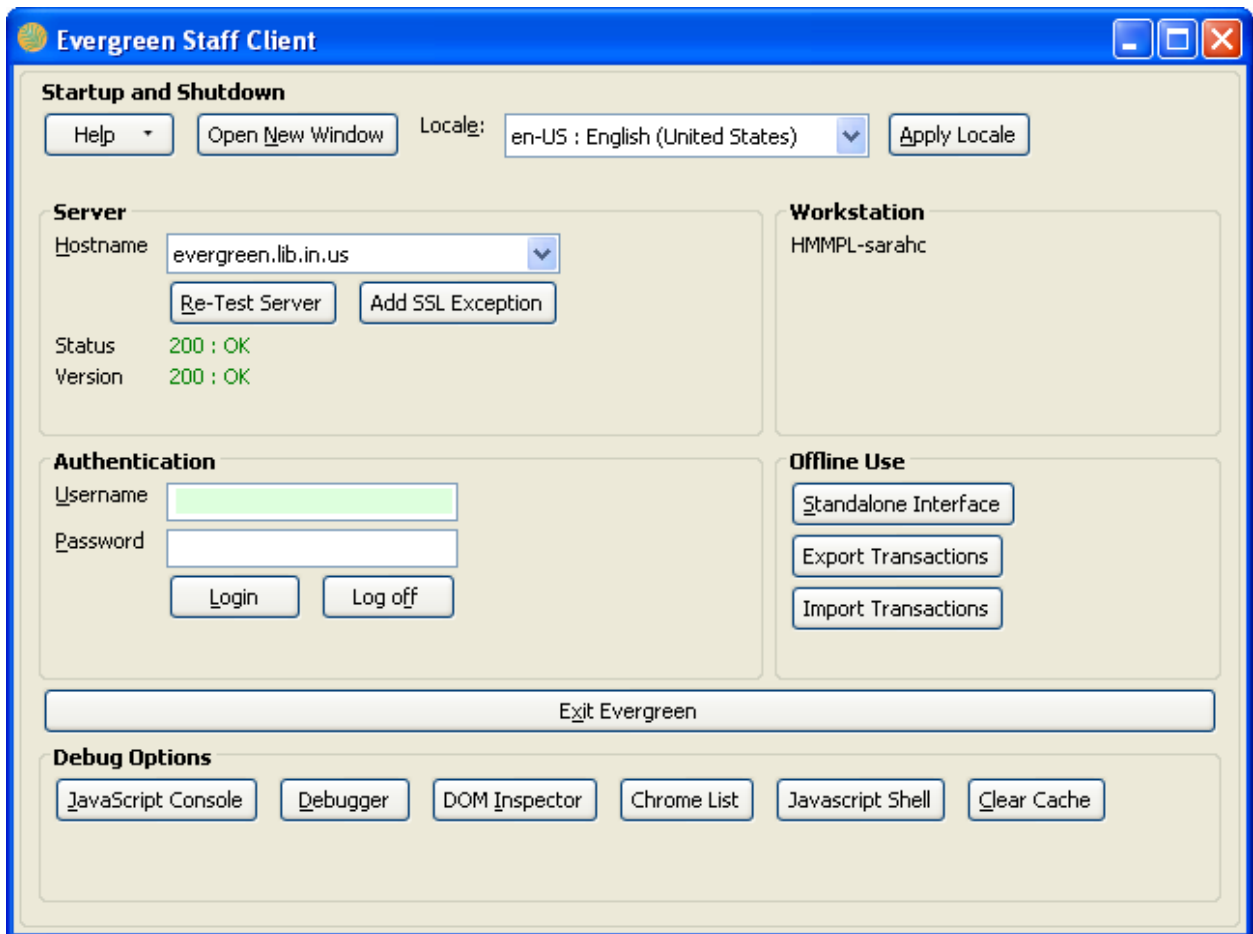
## Chapter 1 -- Getting Started, Getting Help

### Logging In

Click on the Evergreen staff client icon located on your desktop or select the Evergreen Staff Client from your Start menu:



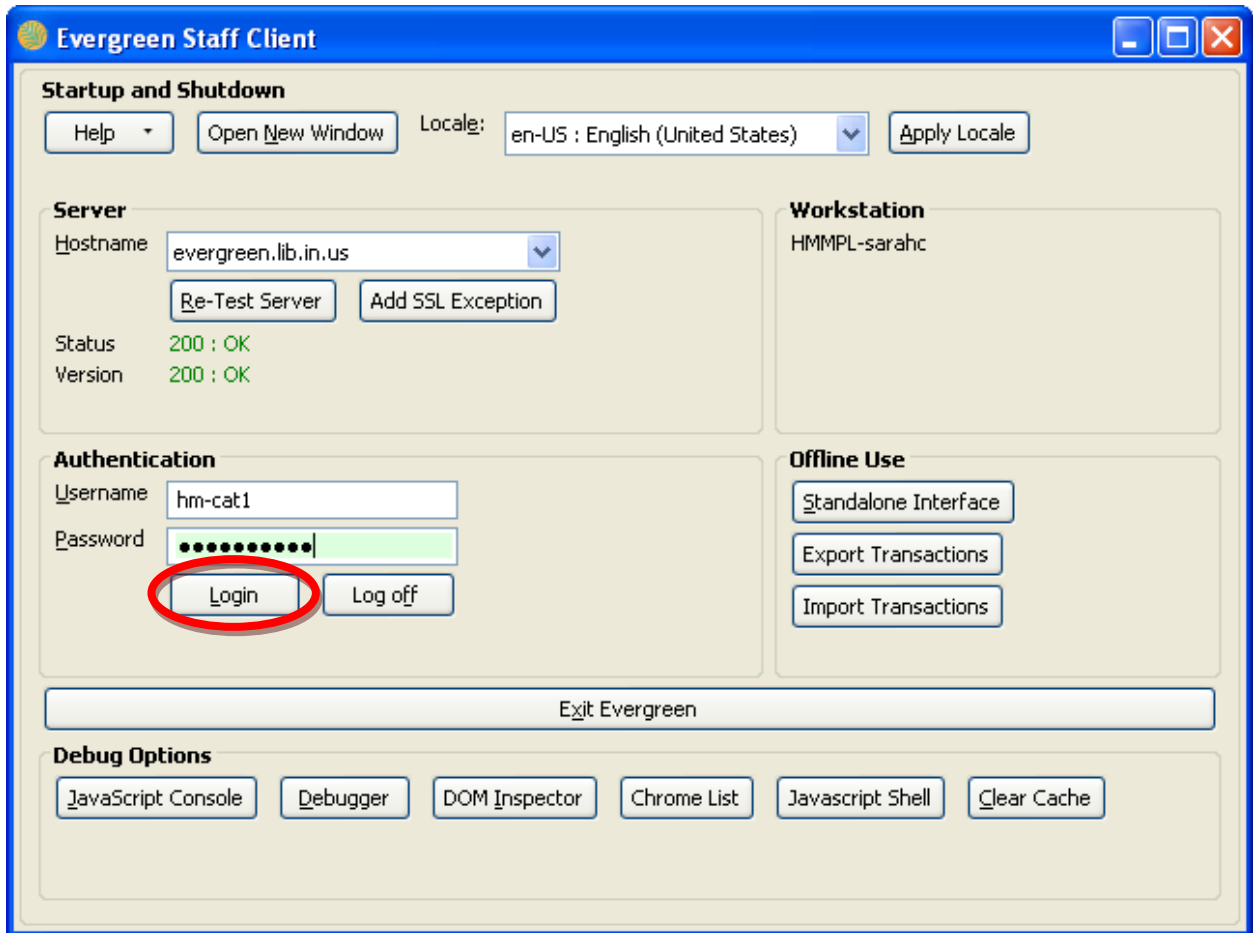
The login screen opens:

A screenshot of the Evergreen Staff Client application window. The window title is "Evergreen Staff Client". The interface is divided into several sections: "Startup and Shutdown" with buttons for "Help", "Open New Window", and "Apply Locale"; "Server" section with a "Hostname" dropdown set to "evergreen.lib.in.us", "Re-Test Server", and "Add SSL Exception" buttons, and "Status" and "Version" both showing "200 : OK"; "Workstation" section with the text "HMMPL-sarahc"; "Authentication" section with "Username" and "Password" input fields, "Login", and "Log off" buttons; "Offline Use" section with "Standalone Interface", "Export Transactions", and "Import Transactions" buttons; and "Debug Options" section with buttons for "JavaScript Console", "Debugger", "DOM Inspector", "Chrome List", "Javascript Shell", and "Clear Cache". A large "Exit Evergreen" button is located at the bottom of the main content area.

In the **Authentication** box, type your staff client user name in the box labeled **“Username.”** Then, type your staff client password in the box labeled **“Password.”**

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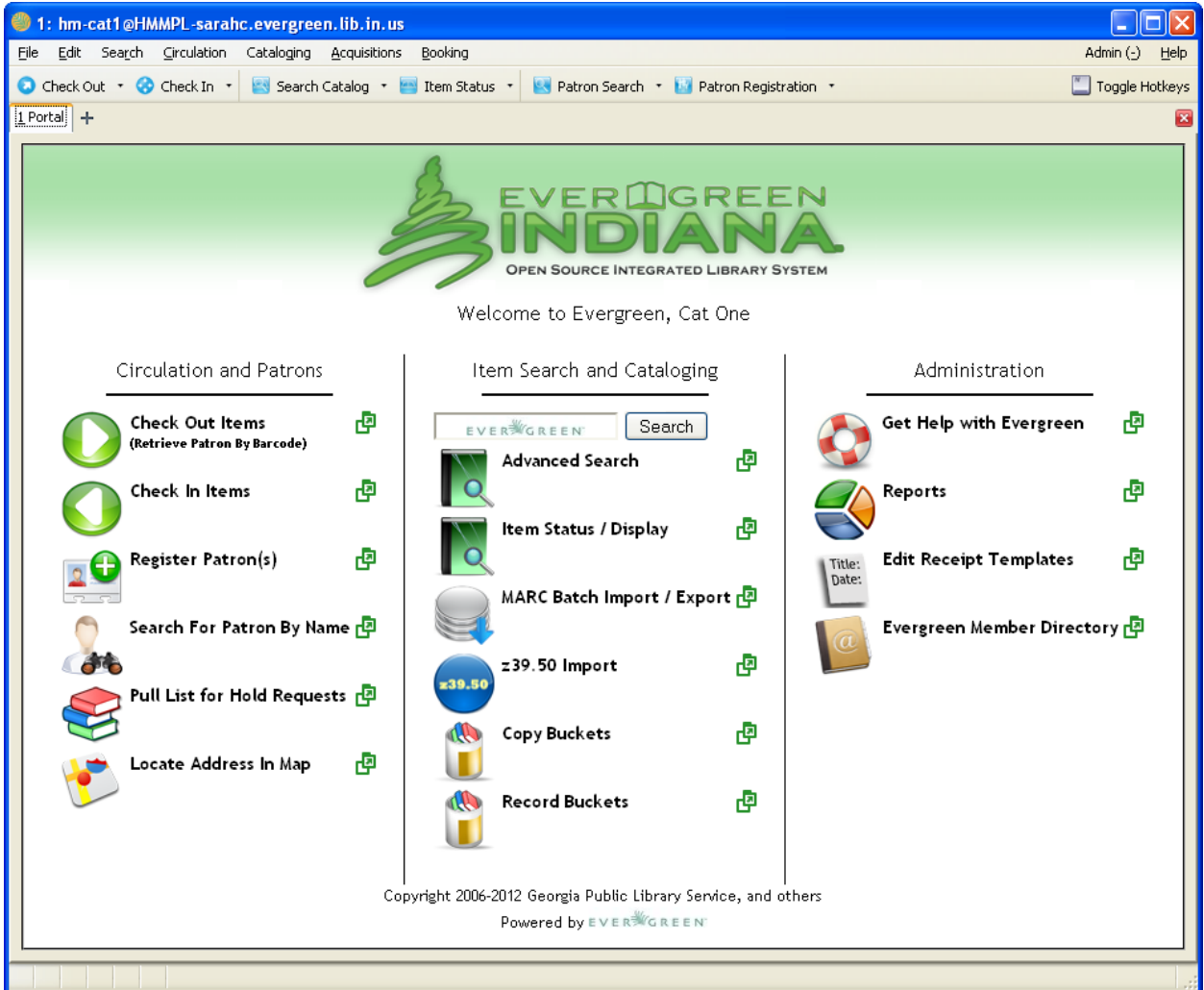
Once you've entered your Username and Password, click **Login**.

**NOTE:** Your local system administrator can assign Cat-2 level log-ins. You are eligible to receive a Cat-1 level log-in after you take the Evergreen Indiana Advanced Cataloging Class, and you will receive instructions on how to get it at that time.

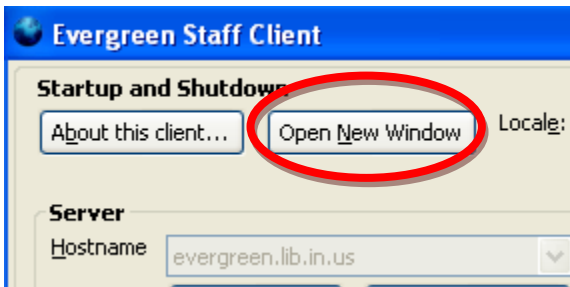
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The portal screen will open in a new window:



The log-in window will minimize, but it will not close. If you close it, you will close the Evergreen Staff Client, so you will have at least two Evergreen windows open when you use the Evergreen Staff Client. You can open additional Evergreen windows if you wish by going to the Log-in Window (labeled Evergreen Staff Client), and clicking the **Open New Window** button at top left. Your working windows will be labeled with your log-in name.

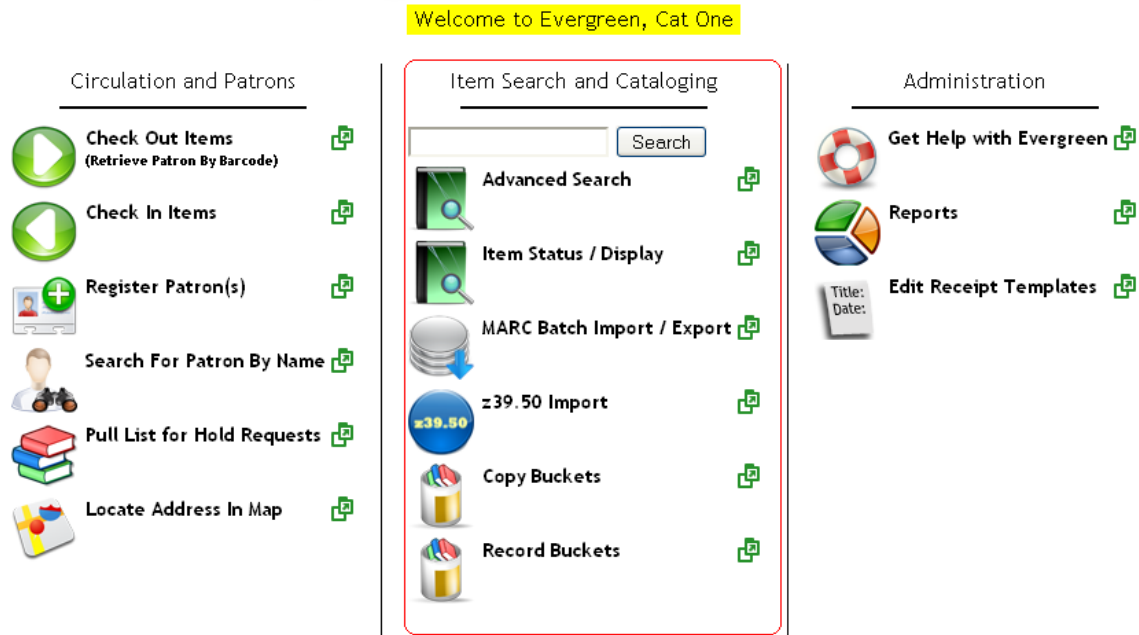


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## Portal Screen

The portal screen includes icons for most the common Evergreen functions. The Cataloging functions are found in the center column.

**NOTE:** The portal screen also welcomes the user by Account name, so you can see who is logged into the client from this screen.

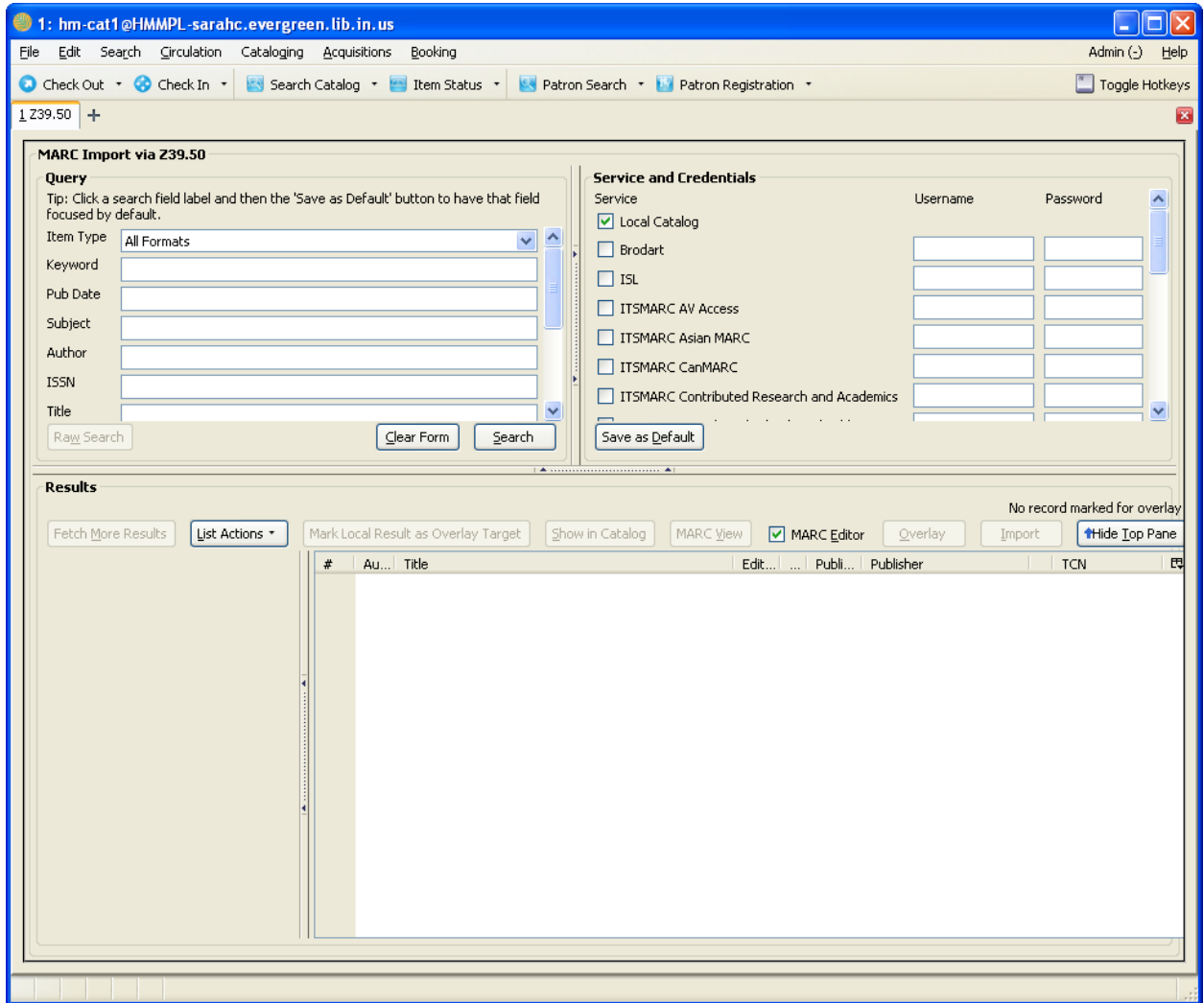


**TIP:** You can use the **Search box** in the middle column to do a keyword search of your default search location.

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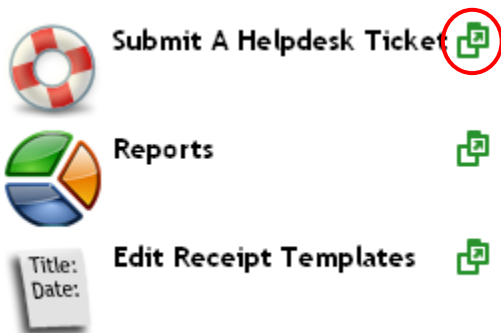
Clicking on the icons on the splash screen will open the desired function in the current tab, as seen below for Z39.50:



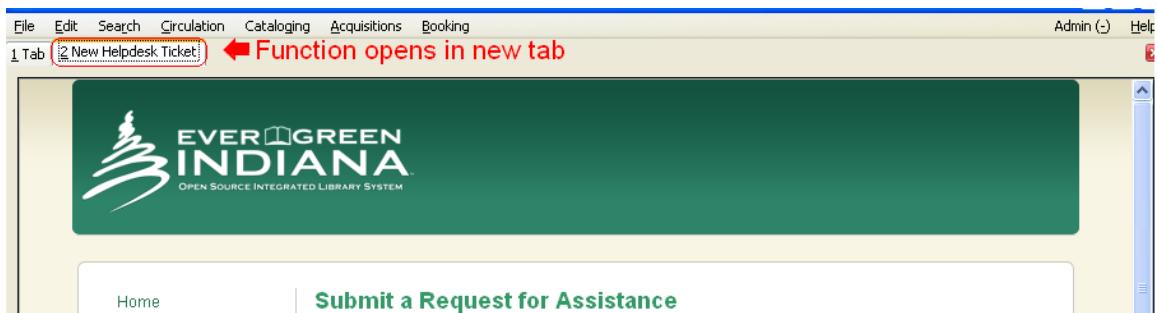
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Clicking on the green icons on the splash screen next to the function names will open the desired function in a new tab, as shown below for Submit Helpdesk Ticket.



The function opens in a new tab, while the splash screen remains open in the original tab:



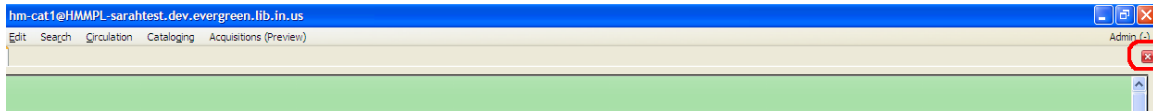
## Using Tabs

Evergreen uses a tabbed interface. Tabs allow you to have several pages open at the same time in a single window. You can easily switch between tabs in the same window.

The tabs appear below the menu bar in Evergreen with a descriptive title. Click on a tab to bring it to the front and view the page displayed in the tab. You can use tabs to have access to multiple things all at the same time: patron records and searches, bibliographic records and searches, circulation or cataloging interfaces—anything at all in Evergreen.

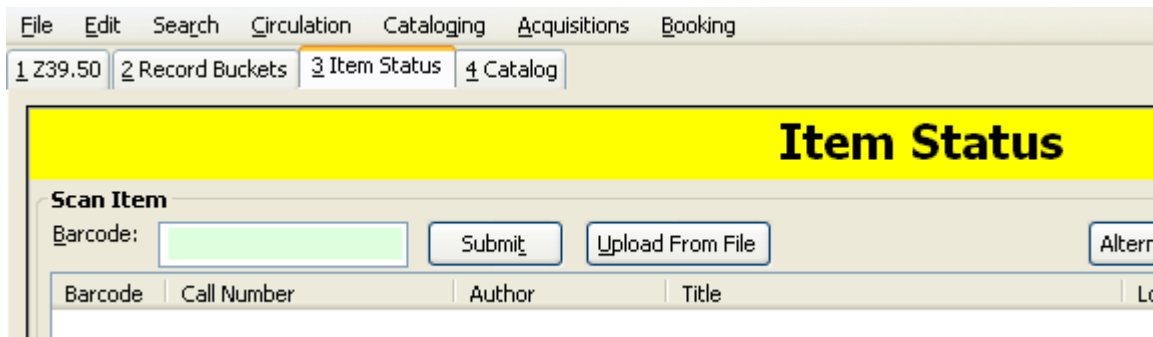
- Open a new tab by pressing **Ctrl + T** on the keyboard or selecting **New Tab** from the **File (Alt + F)** menu.
- Close a tab by pressing **Ctrl+W** on the keyboard or selecting **Close Tab** from the **File (Alt + F)** menu. You can also close the tab by clicking on the small red X in the top right hand corner of the Evergreen Window. You can close all tabs by pressing the Control Key while clicking the small X.

**NOTE:** Clicking on the slightly larger red X above it will close the entire window



**NOTE:** When you select a new function from the Evergreen Menu or use the shortcut keys, this function will open in your active tab, replacing whatever function you currently had open in that tab, so remember to open new tabs for new functions.

Tabs can help you to work more efficiently. You may wish to keep frequently used functions open in a certain tab. For instance, here is a tab configuration showing functions that might commonly be used by a cataloger:



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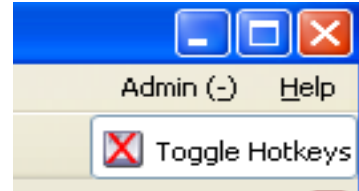
## ***Navigating with File Commands and Keyboard Shortcuts***

There are various ways to perform tasks in Evergreen. A combination of menus and function keys are used to access different tasks.

In the top left corner you will find the **File, Edit, Search, Circulation Cataloging, Acquisitions and Booking** menus. In the top right corner is the **Admin** menu.

Function key prompts include:

- **F1 to check out**
- **F2 to check in**
- **F3 to search the catalog**
- **F4 to search for patrons**
- **F5 to check item status**



**NOTE:** The hotkeys can be disabled or activated from the **Admin (Alt + -)** menu under **Workstation Administration (Alt + W)** and Hotkeys.

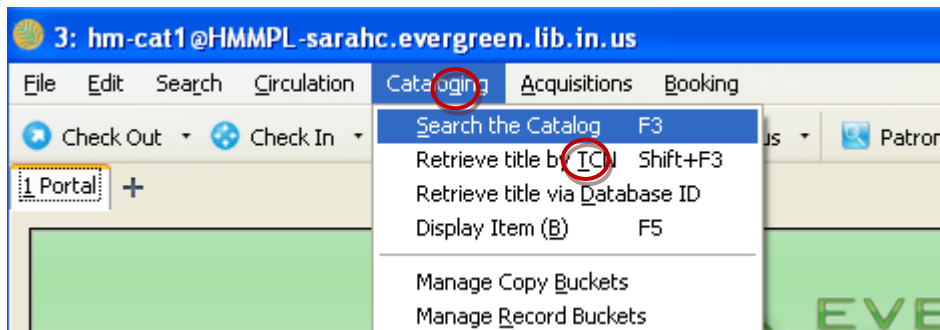
**TIP:** If you are using Toolbars, there is also a Hotkey Toggle button. If your function keys stop working, check to see if it has a red X, as seen above. Click it to reactivate your hotkeys. See page 1.9 for more information on toolbars

Other keyboard shortcuts include:

- CTRL + C: Copy**
- CTRL + X: Cut**
- CTRL + V: Paste**

**NOTE:** In most cases you cannot right-click to access copy and paste within Evergreen.

Many functions in Evergreen have keyboard shortcuts for specific functions. The shortcuts are indicated in Evergreen with underlined letters. Press the alt key and the underlined letter to access a menu or perform an action.



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In the previous picture, for example, you can see that **Alt + G** will access the **Cataloging Menu**. **Alt + T** will let you **Retrieve a title by TCN**.

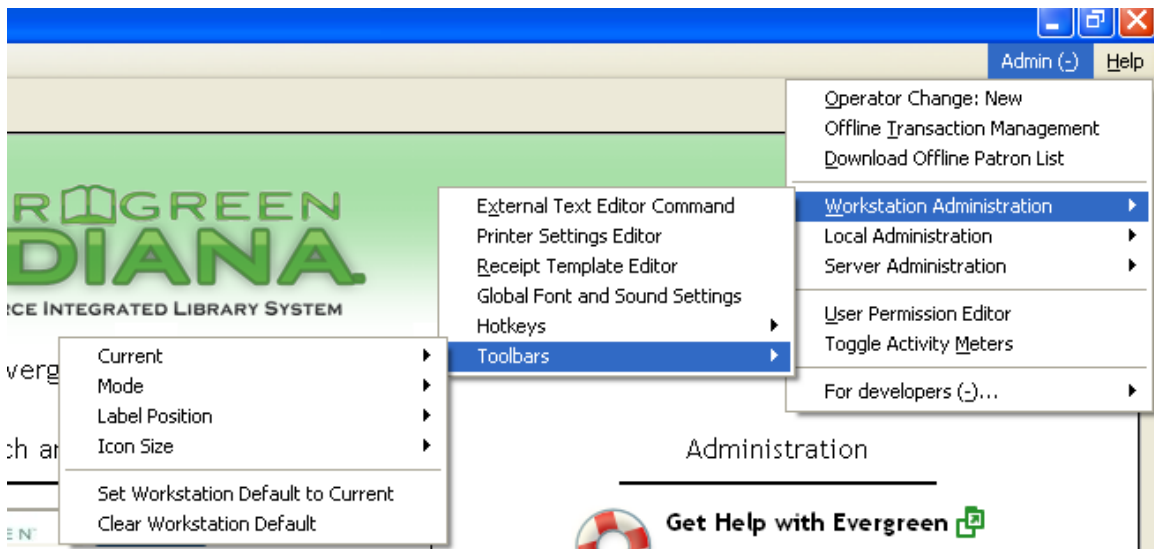
**NOTE:** To use a shortcut on one of the menus, you must first use the keyboard shortcut to access the menu. Continue pressing **Alt** as you press the desired shortcut key. In some cases the same letter is used twice on the same menu. If that is the case, the function will be highlighted and you must push the **Enter** key to access it.

Evergreen keyboard shortcuts are indicated in bold parenthesis after the function menu name like throughout this manual: “Open the **Cataloging (Alt + G)** Menu”

## Toolbars

You can also navigate using a Toolbar. There are two toolbar options, Circulation and Cataloging.

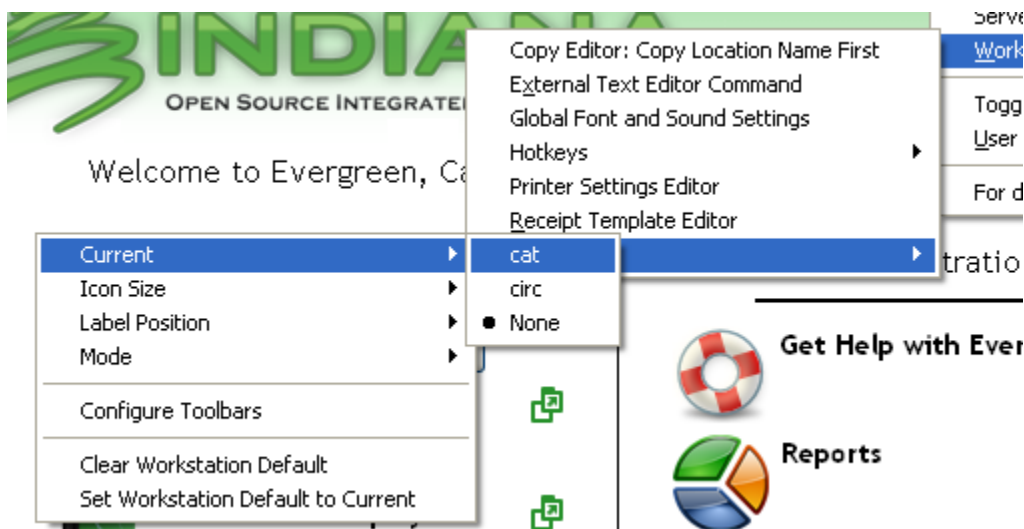
To set a Toolbar, click on the **Admin (Alt + -)** menu in the upper right hand corner of the screen. Then select **Workstation Administration (Alt + W)**. Select **Toolbars**.



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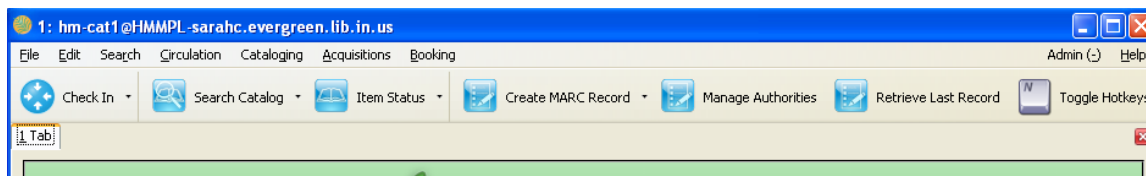
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From the **Toolbars Menu**, select **Current**.

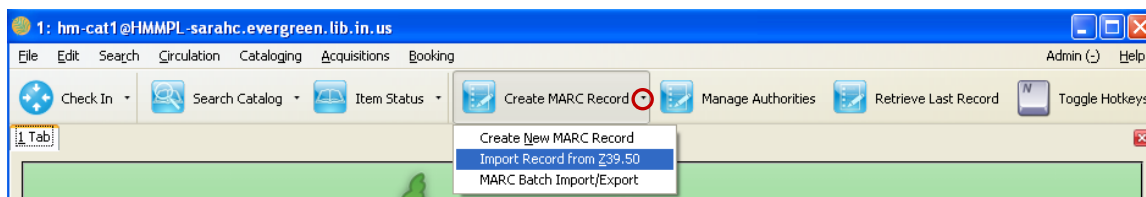


The default is **None**. Click on one of the options to turn on a **Toolbar**.

The toolbar will turn on and display beneath the menu bar. Below is the Cataloging toolbar:



You can click on any of the functions in the toolbar and it will be opened in the active tab. You can also click on the small down arrows for further options.

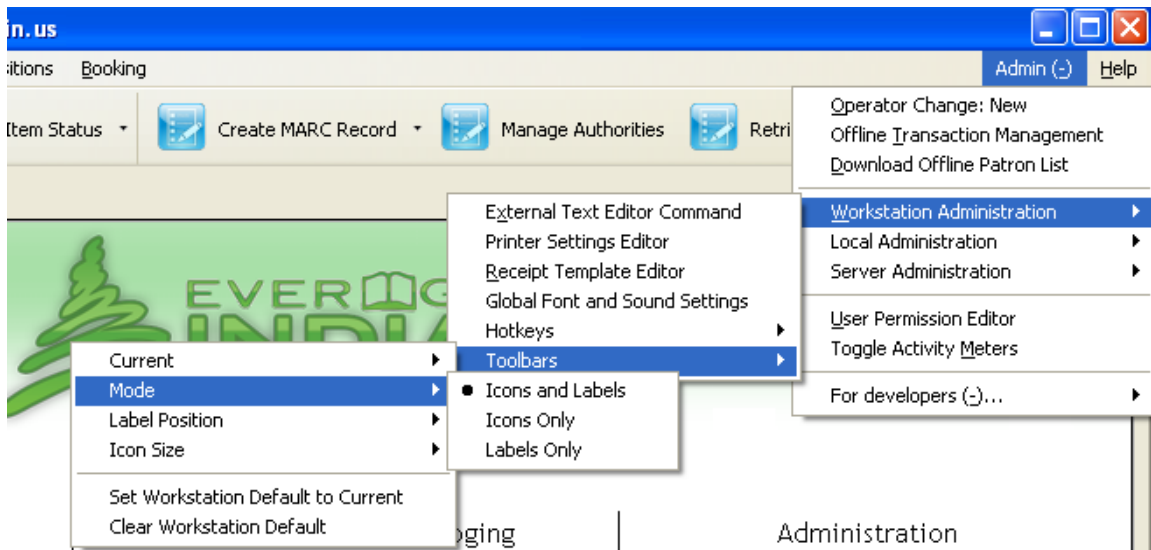


The toolbar menu also includes various configuration settings for the toolbar.

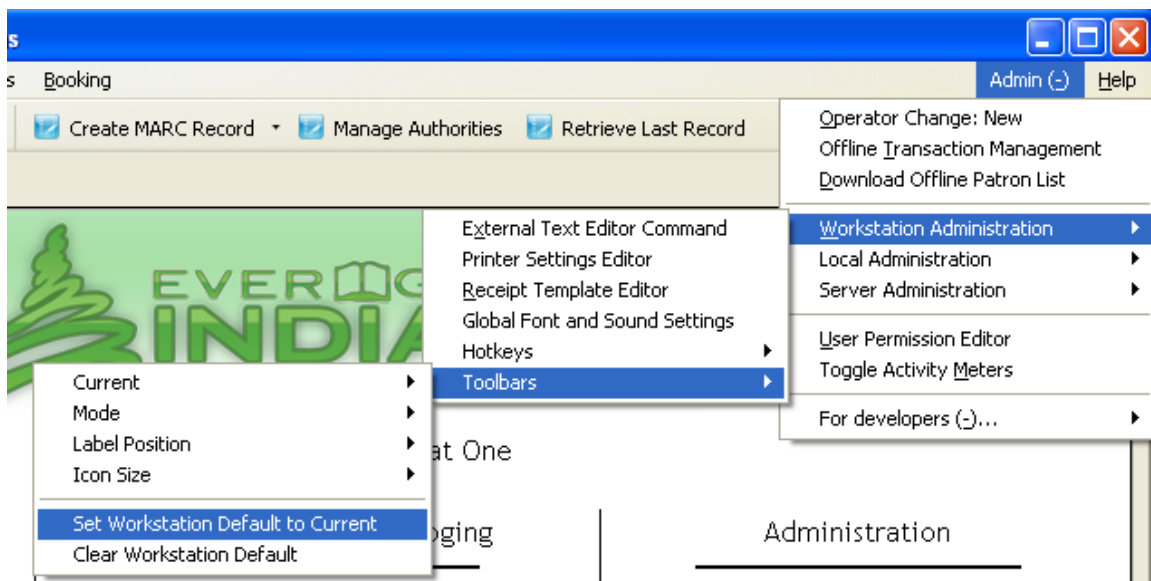
- Mode (Icons and labels, Icons only, or labels only)
- Label Position (Next to Icons or Under Icons)
- Icon Size (Large or small)

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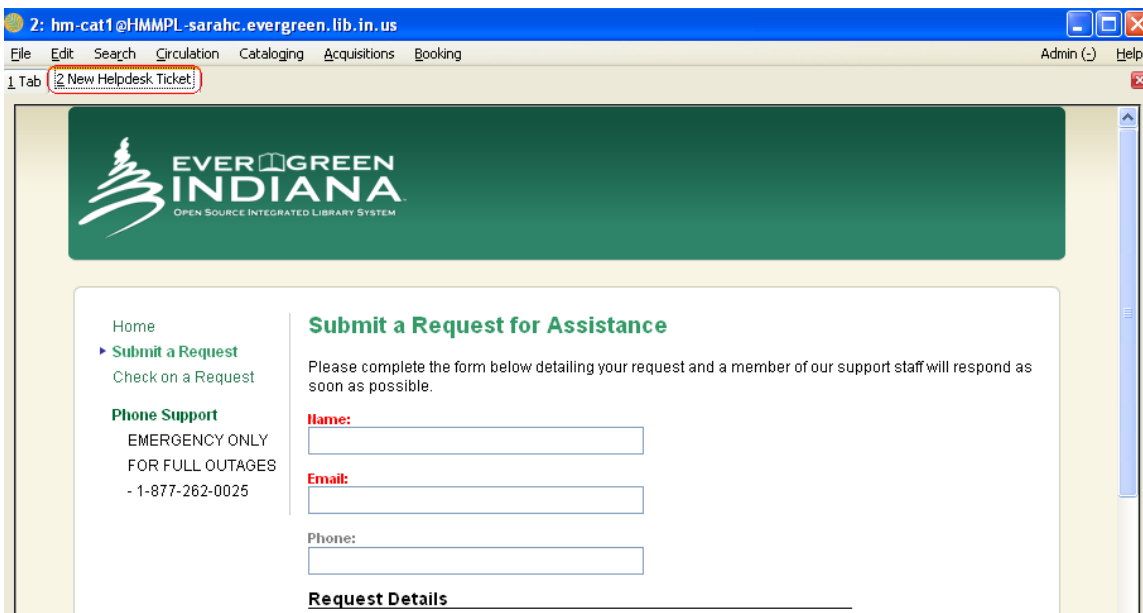


Once you have set your toolbar to the desired configuration, under **Admin (Alt + -)**, select **Workstation Administration (Alt + W)**, then select **Toolbars** and select **Set Workstation Default to Current** to save your setting. When the staff client is opened at that workstation, the chosen toolbar configuration will be displayed.

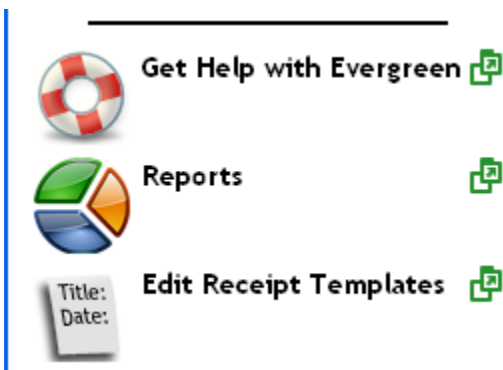


**NOTE:** The configuration is saved to the workstation, not the user log-in.

## Helpdesk Tickets



If you are experiencing a problem with Evergreen, submitting a Helpdesk ticket is the preferred way to request assistance. You can submit a ticket through the Staff Client, which you can access via the icon on the splash screen:



You can also submit a ticket via email to:

[helpdesk@apple.evergreen.lib.in.us](mailto:helpdesk@apple.evergreen.lib.in.us)

Or online at:

<http://help.evergreen.lib.in.us/helpspot/>

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Do not submit cataloging questions to the Helpdesk, those should be directed to the Cataloging Listserv *evergreen\_indiana-catalog@lists.in.gov*. For questions about how to use Evergreen or one of its functions, first consult your Cataloging Manual, then the Listserv.

Helpdesk tickets should be filed when Evergreen is not functioning, when you've gotten unexpected error messages, or when something is functioning differently than usual, etc.

Please be sure to include your full name, email address, library name, and phone number with your help-desk ticket, and provide as many specific details about the problem you are experiencing as possible.

Information to include in your ticket:

- When the problem you're experiencing started to occur
- Whether the problem is isolated to a specific record or item, or if it's general.
- If the problem is specific, include TCNs, record IDs, or item barcodes for the record or item
- Include the text from the error message or messages you're receiving
- Describe the problem fully. Remember that the helpdesk staffers are not catalogers. The helpdesk ticket asks what you expected to happen, so be sure to explain that, too. This may seem self-evident to you, but it's not necessarily self-evident to the person who is going to help you.
- It's possible to attach pictures to the ticket. Taking screenshots may be helpful. Sometimes a picture is worth a 1000 words.

After you have submitted your helpdesk ticket remember to monitor the Evergreen Indiana listservs. If your problem is affecting many users, information about it may be released via email.