MISSOURI EVERGREEN

Web Client Exercises

Become familiar with the Web Client

before switching from using the XUL client.

Scenic Regional Library
read, explore, grow

February 2019

Webby Exercise 1 – Registering a Workstation

The first time you use the web client at a workstation and every time you clear the cache at a workstation, the workstation needs to be registered.

1. Enter the web client address in the Google Chrome browser address bar.

   https://upgrade.missourievergreen.org/eg/staff

   This is the address for the development server. The address for the **live server** doesn't contain "upgrade." It is https://missourievergreen.org/eg/staff

2. Enter your usual Missouri Evergreen username and password.
3. Click Sign in.

4. In the resulting screen, enter the name of your workstation. All workstations at Scenic have a name. It is the branch designation plus a number. For example, one station at Union is UN11.
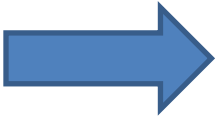5. Click Register.

6. Your workstation is now registered and may be used by anyone with a valid username and password. You may click the green Use Now button to log in.

Register a New Workstation For This Browser

SRL-UN ▾	test	Register

Workstations Registered With This Browser

SRL-UN-test (Default) ▾

[Use Now] [Mark As Default] [Remove]

7. When you click the green Use Now button, you will navigate back to the log in page. You will now see the workstation name which wasn't present before the workstation was registered.
8. Enter your username and password to begin working.

Sign In

| Username	Username
Password	Password
Workstation	SRL-UN-test ▾

[Sign in]

9. Clearing the cache/browsing history on the computer will make it necessary to register the workstation again. After you have performed this function a couple of times, you will be able to flip through it quickly.

**Webby Exercise 2 – Creating a Basic Bookmark Toolbar**

The Evergreen web client is a web site. Navigating around Webby is done the same way you navigate through any website. You may use the browser Back and Forward arrows. You will open sub-tabs and close them to return to the original screen. Anyone who has used the Internet to shop or find the latest scores for her favorite hockey team will be able to navigate through Webby.

If you are in the habit of using bookmarks for frequently visited web pages, you may create bookmarks in Webby to use the same way.

1. Log onto Webby through Google Chrome. The address is https://missourievergreen.org/eg/staff/.

2. Enter your username and password. Use the same username and password you currently use in XUL.

3. Go to Circulation → Check in.
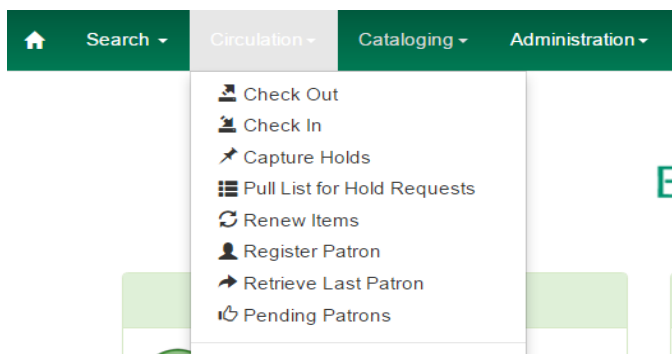
4. Click the STAR at the right end of the URL address bar to bookmark this page. The name of the bookmark may be changed before clicking Done.
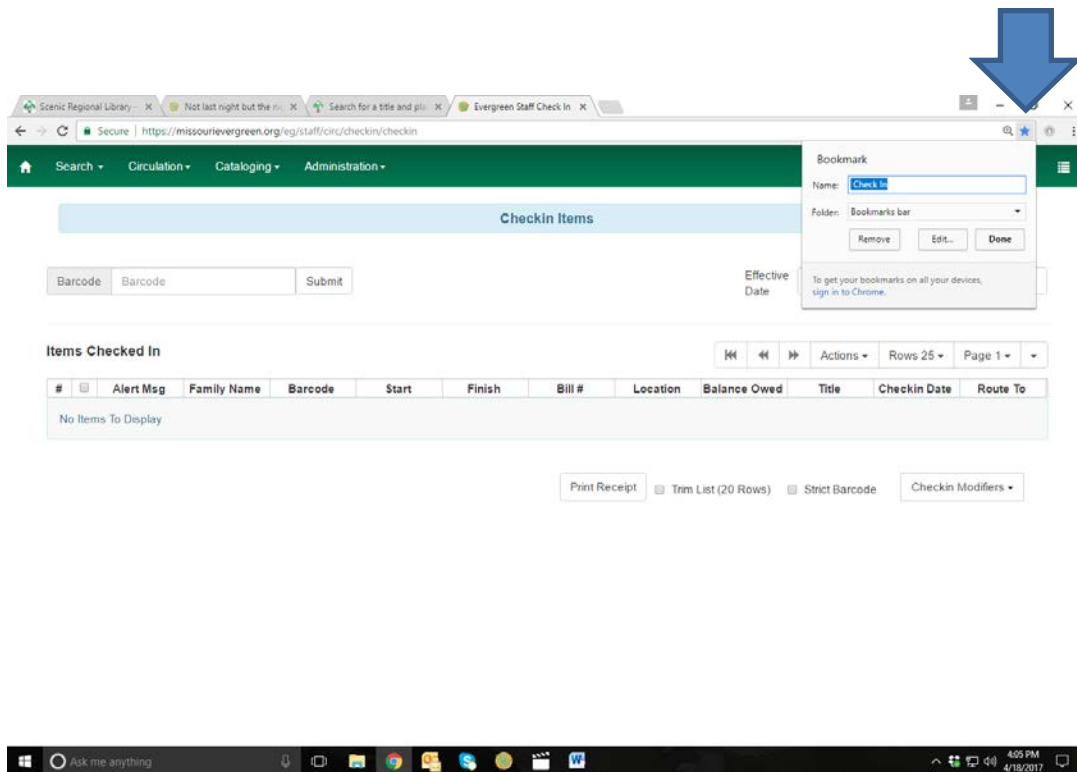
5. Repeat step 4 to create bookmarks for Check Out and Item Status.

6. If the bookmark bar isn't visible, you need to click on the three dots to the right of the star and choose Bookmarks -> Show Bookmarks Bar. In the picture below, the toolbar is NOT showing.


Page 2 of 3 – Creating a Basic Bookmark Toolbar
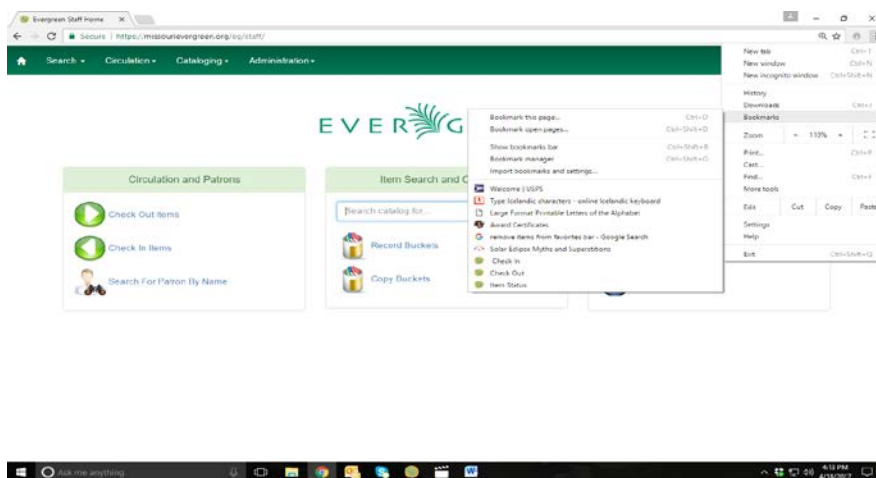
7. In the picture below, the tool bar IS showing. Check In, Check Out, and Item Status appear at the end of the tool bar. Now you will be able to navigate to Check In, Check Out, and Item Status as easily as you were able to by adding tabs in the XUL client.
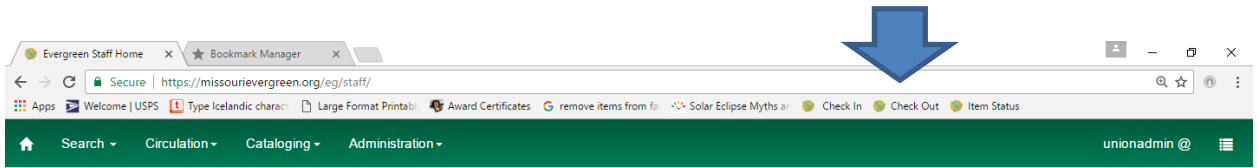
8. You only need to create bookmarks at each work station once. They will stick there until purposefully deleted.

9. Create as many bookmarks as you want to!

Webby Exercise 3 – Search for Patrons

Many of our patron transactions begin with searching for the patron's account. There are two avenues for performing a patron search. You may use the Search dropdown menu
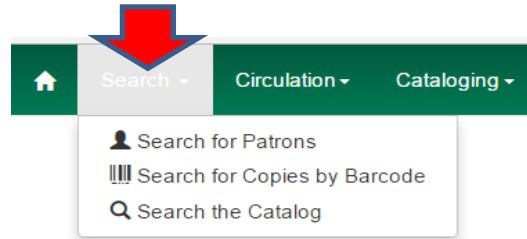
or the Search For Patrons By Name icon on the portal page.
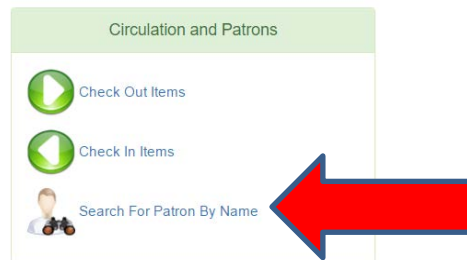
If you have **bookmarked** the Patron Search screen (see exercise 2), click on the bookmark.

1. On the Patron Search page, you are able to Show Fewer Fields/Show More Fields by clicking the small arrow next to the Clear Form button.

At Scenic Regional Library, we always check the **Include Inactive** patrons box when performing a patron search and search all of **ME.**

2. Enter you search information and click Search. I searched for the last name Library.

Patron Search Results

#		ID	Mailing:Street	Home Library	Profile	DoB	Middle Name	First Name	Last Name	Card
1	☐	149489	901 MAUPI...	SRL-NH	Staff Memb...			NEW HAVE...	LIBRARY	930018657...
2	☐	149465	107 N FIRS...	SRL-OW	Staff Memb...	8/8/59		OWENSVIL...	LIBRARY	930017013...
3	☐	149476	119 W ST L...	SRL-UN	Staff Memb...	1/17/57		PACIFIC	LIBRARY	930125349...
4	☐	149464	515 E SPRI...	SRL-SC	Staff Memb...			ST CLAIR	LIBRARY	930129270...
5	☐	149357	308 HAWTH..	SRL-UN	Staff Memb...	1/15/14		UNION	LIBRARY	930002161...
6	☐	149415	PO BOX 30...	SRL-WR	Staff Memb...	1/1/59		WARRENT...	LIBRARY	930002690...
7	☐	158098		WPL	Resident		Missing	Wrong	Library	931008067...
8	☐	157075	410 Lafayet...	WPL	Resident			Dobby	Library Elf	931024620...
9	☐	149424	601 MARKE...	SRL-HR	Staff Memb...	1/1/50		HERMANN	LIBRARY- O...	930002711...

3. Check the box next to the patron of your choice to see the patron information along the left of the screen.


4. Use the function boxes along the top of the page to navigate to Check Out, Items Out, Holds, Bills, Messages, Edit, and Other. Click on the headings to view those pages.

Please note: You may use the **browser navigation back and forward buttons** (the arrows to the left of the address bar) since Webby is a website.

Webby Exercise 4 – Search for Copies by Barcode and Search the Catalog

The Search drop down menu allows you to search for patrons (see exercise 3), to search for copies by barcode, and to search the catalog.
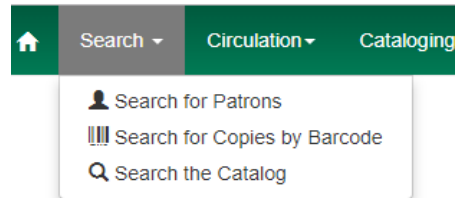
A. Selecting **Search for Copies by Barcode** takes you to the Item Status screen. Scan or manually enter the item barcode and click Submit to access information about the item. See Item Status in Exercise 9 for more information on Item Status.
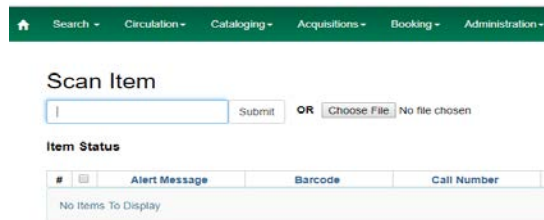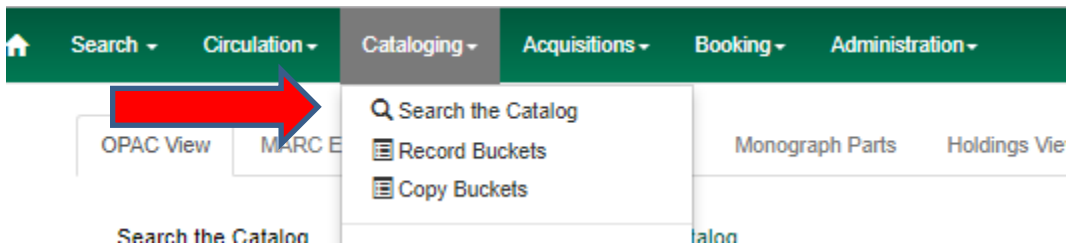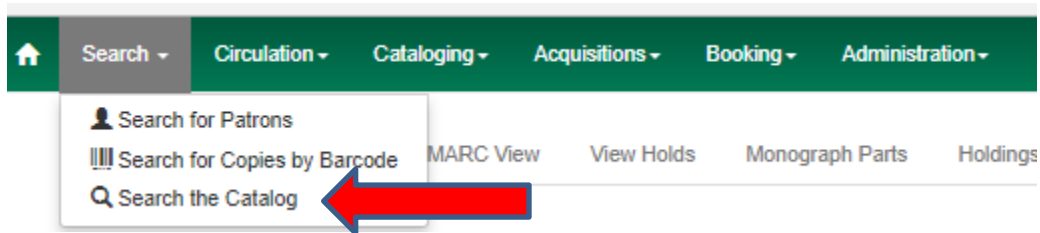

B. Search the Catalog
1. A basic search can be performed from the home portal.

2. An advanced search screen can be accessed from the Search tab or from the Cataloging tab.

3. What you will see after selecting Search the Catalog is shown below. Not much has changed here!
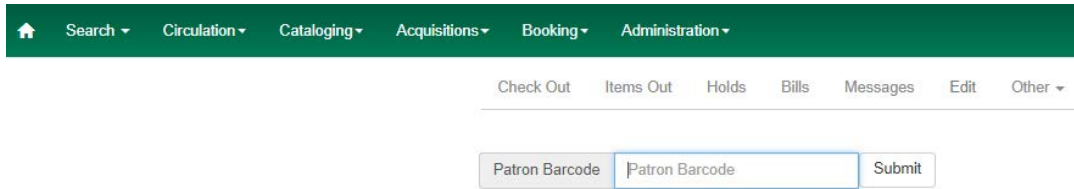
Webby Exercise 5 – Check Out and Check in

Before we look at the Circulation tab, let's look at the location of the Actions menu and the Column Picker. The Actions menu is easy to find. The Column Picker is now a solitary down arrow. These features function as they did in the XUL client.
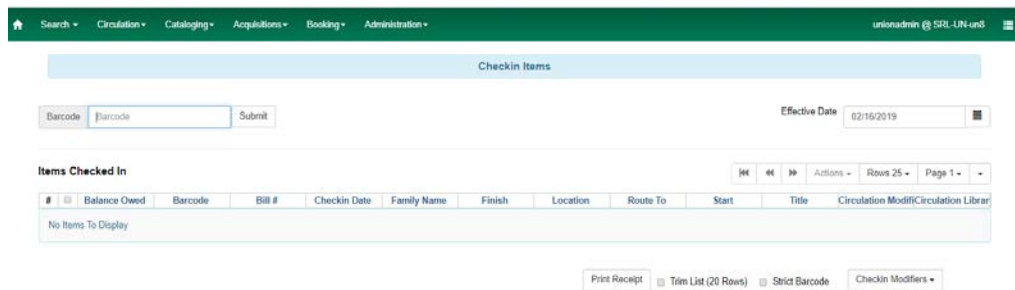

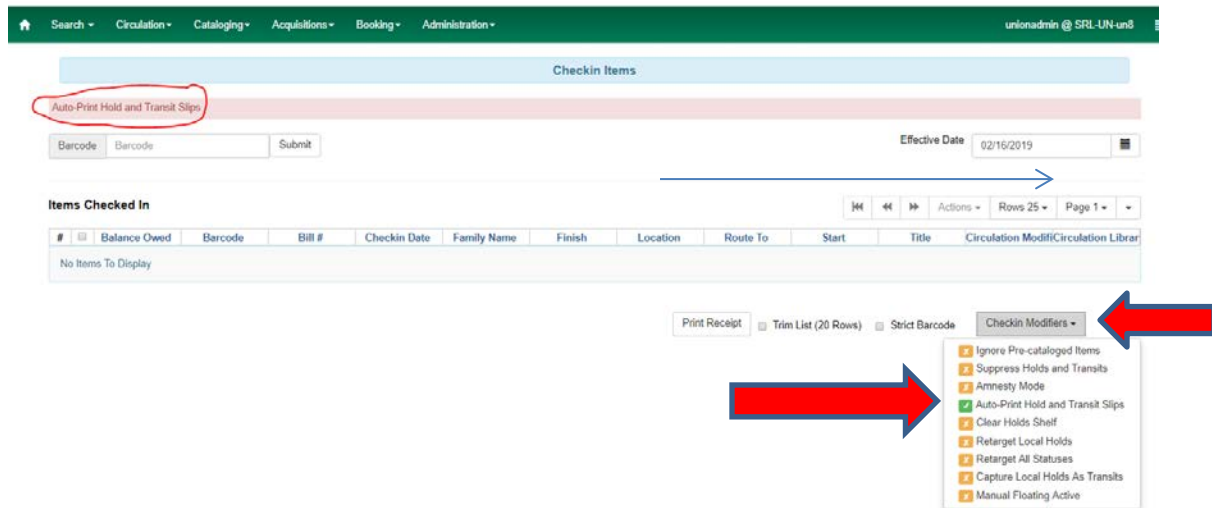The Circulation menu is where all the circulation function reside, including some we don't use.

Page 1 of 2 – Check Out and Check In
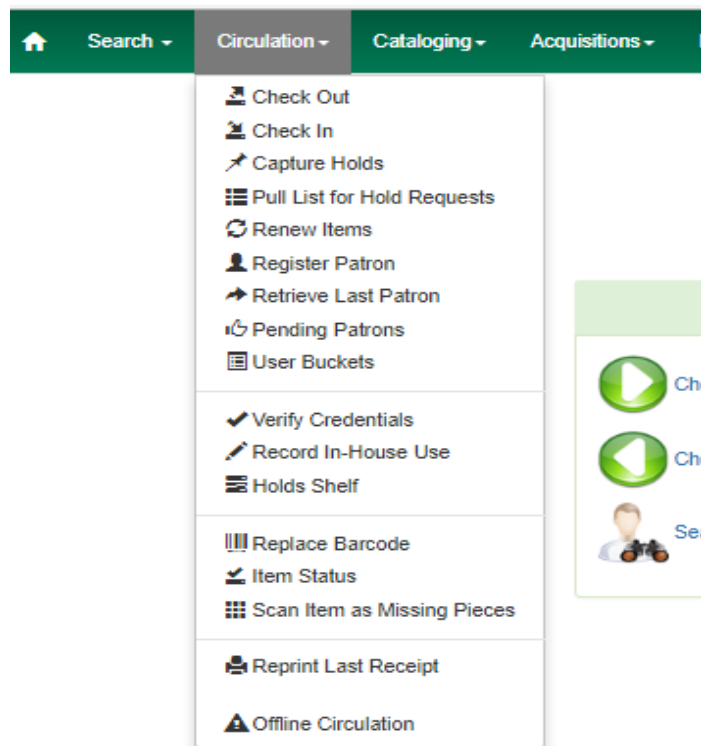
Check Out – Scan library cards or enter patron barcodes here.

Check In – Scan every item that enters your building as well as items lying around whose status you aren't 100% sure about.

If you want hold and transit slips to print automatically, make sure you enable that option in the Circulation Modifier dropdown. See below.
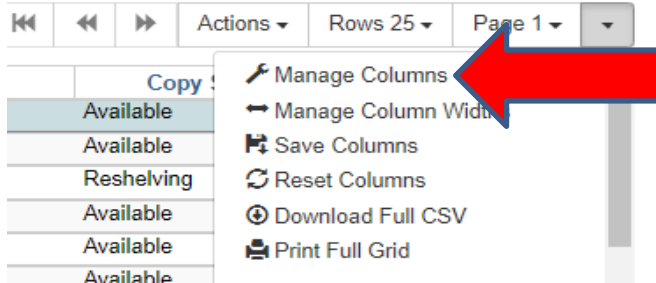

Capture Holds – We don't use this feature. It prints hold and transit slips automatically. We do that on the Check In screen.
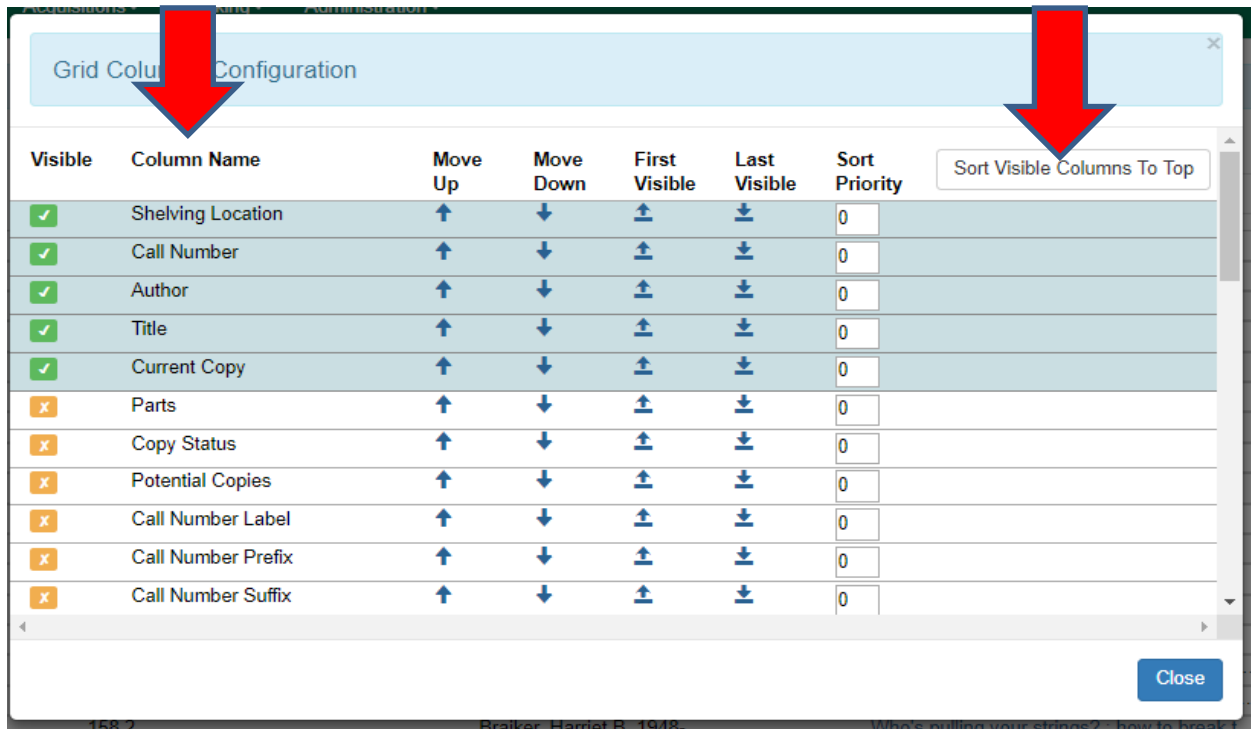
Webby Exercise 6 – Pull List and Renew Items

Pull List for Holds Requests – Follow these steps the first time you print the pull list from each workstation to sort the list the way you want it.

1. From the Column Picker, select Manage Columns.

2. Check the five columns shown in the snip below. Uncheck any other column names that are checked. Then click the Sort Visible Columns to Top button. Make sure the five columns are listed in this order.
3. Click Close.

4. Open the Column Picker again and click Save Columns.
5. To print the pull list, open the Column Picker and select Print Full Grid.
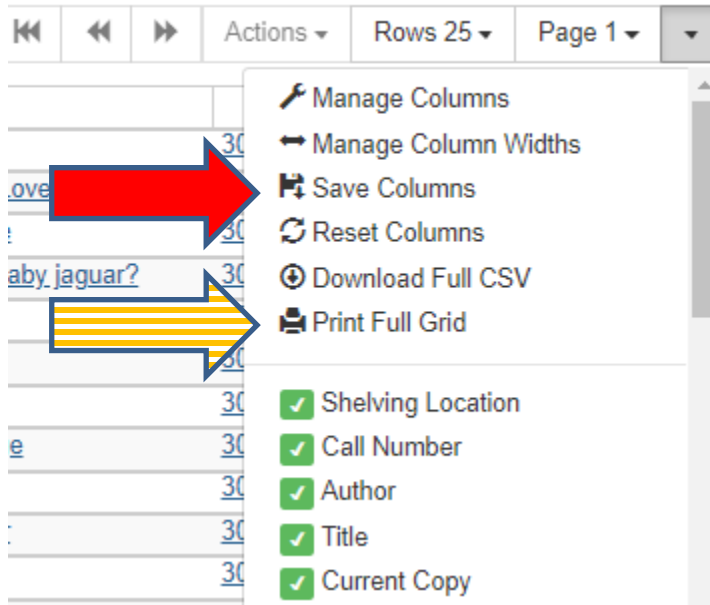
After you have followed these steps once on each workstation, all you will need to do to print the pull list in the future is open the column picker and select Print Full Grid. The pull list will print in the format that we are used to seeing.

Renew Items – Renew Items is, alas, no longer orange. Here, you may scan item barcodes to renew them without needing to access the patron's account first.
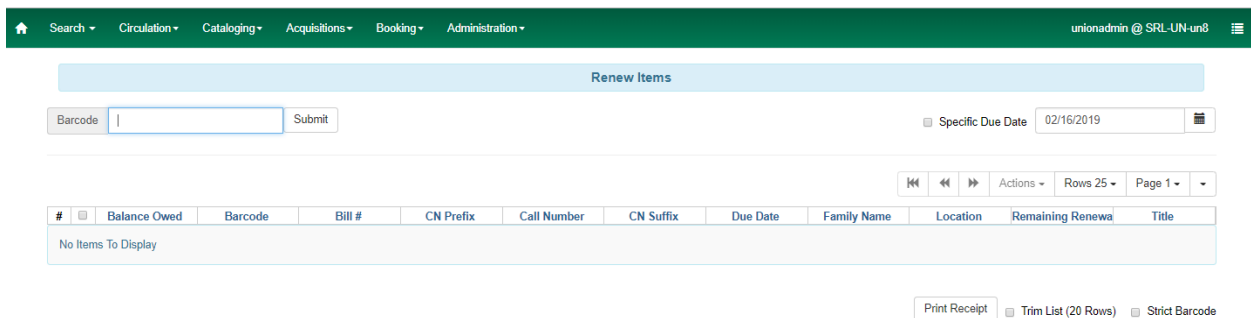
Webby Exercise 7 – Register Patron and Retrieve Last Patron

Register Patron – There are five changes to the registration page.

1. There is only one field for Password.
2. Date of birth must be entered in 2-2-4 format – mm/dd/yyyy.
3. There are more fields for explaining the type of verification that was used for identity and address.
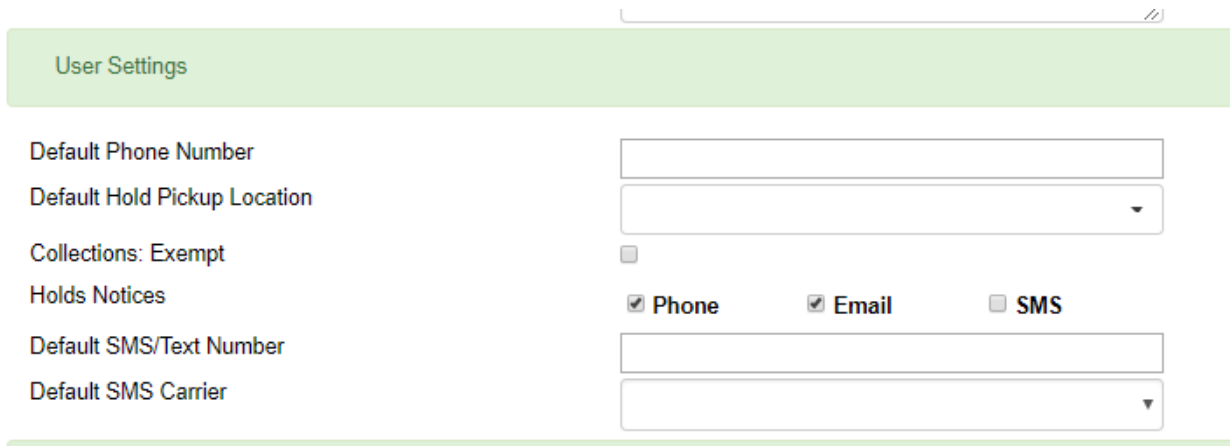

Primary Identification Type	Choose a type from the drop down menu
Primary Identification	If you choose other in the field above, enter the type of identification used. Use this field to enter the parent's name if card is for a juvenile (Parent – Jane Smith).
Secondary Identification Type	Leave blank or if the photo ID doesn't verify address, choose other here.
Secondary Identification	If you choose other in the field above, describe the address verification used here.

4. Below the email address field, is a box to check if the patron wants a receipt to be emailed to him when he checks out items.
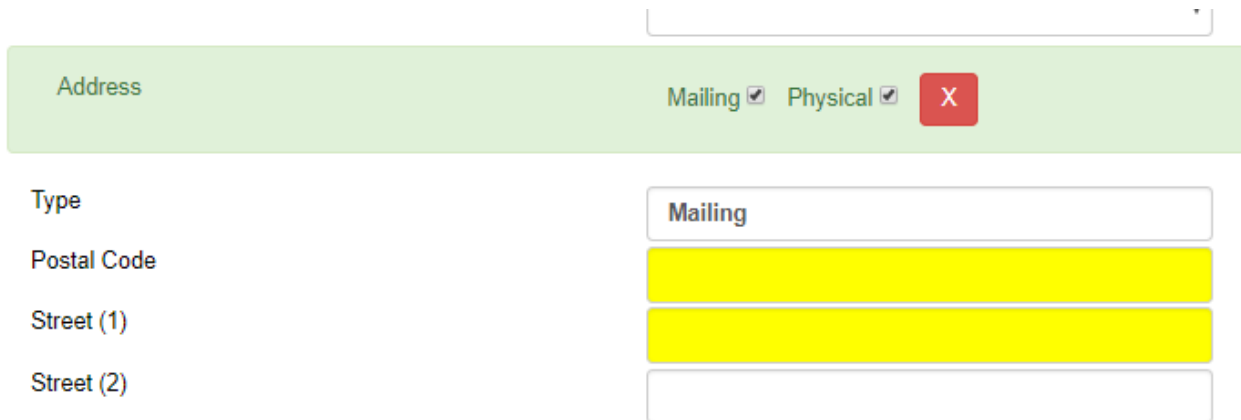
5. The order of the fields in User Settings is rearranged.

User Settings

Default Phone Number	
Default Hold Pickup Location	▾
Collections: Exempt	☐
Holds Notices	☑ Phone　　☑ Email　　☐ SMS
Default SMS/Text Number	
Default SMS Carrier	▾

6. The two kinds of addresses are now Mailing and Physical rather than Mailing and Billing

Address　　　　　　　　　　　Mailing ☑　Physical ☑　[X]

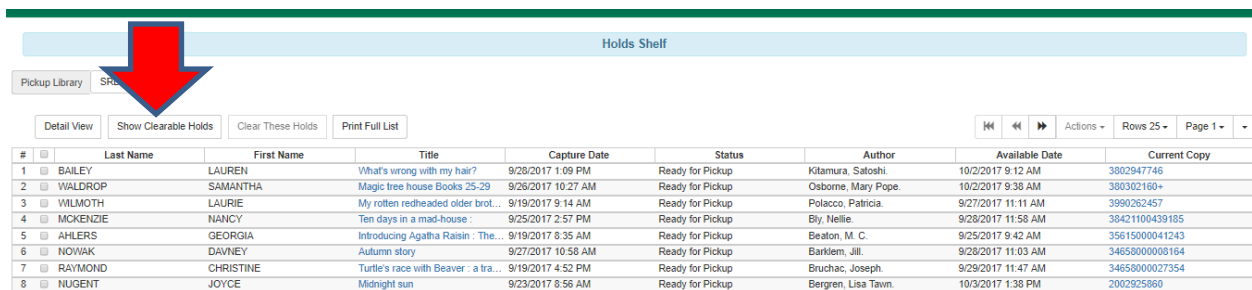|	
Type	Mailing
Postal Code	
Street (1)	
Street (2)	

Retrieve Last Patron – To access the most recently used patron account, select Retrieve Last Patron. This is useful when a patron asks you to place a hold after you have completed a check out transaction and the library card is already back in the wallet.

Webby Exercise 8 – Pending Patrons and Hold Shelf

Pending Patrons – This is where you find pending online applications for patrons who want Internet Only library accounts.

User Buckets, Verify Credentials, and Record In House Use – Not used by us.

Hold Shelf – This used to be named Browse Hold Shelf. Here you can see what is on the hold shelf. To limit the list to what has expired and needs to be removed from the hold shelf, click on Show Clearable Holds.
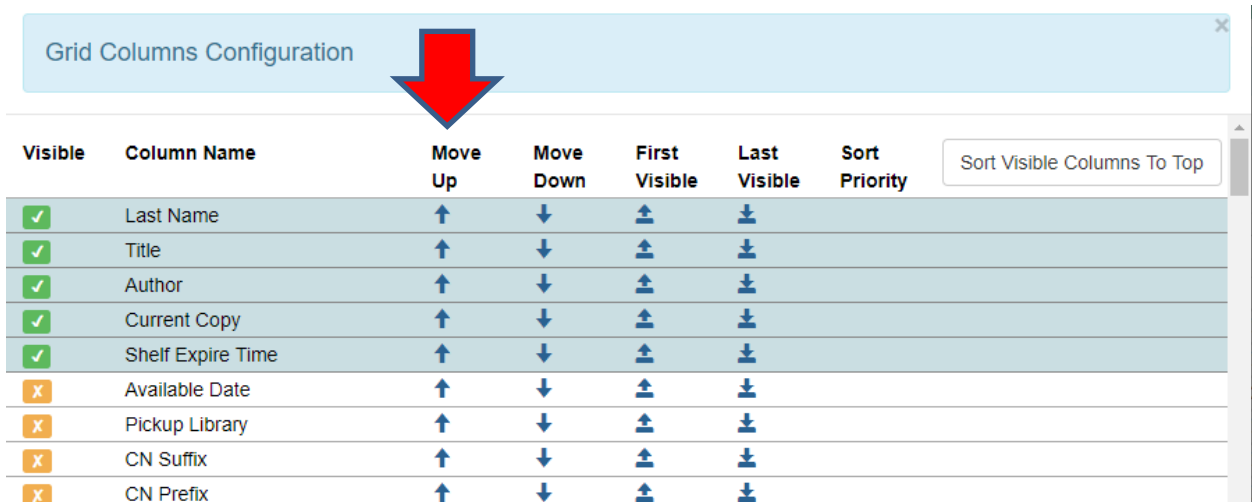

Remember how you sorted the Pull List by using the Column Picker -> Manage Columns feature? You can sort the Hold Shelf the same way. The Move Up arrow can be used to order the items in the report from left to right.

With the configuration above, the patron's last name will appear first in the report.

#		Last Name	Title	Author	Current Copy	Shelf Expire Time
1	☐	STAFF	ABC of America	Bellefontaine, Kim (Kim Anne)	3003217240	3/23/2019 10:08 AM
2	☐	STAFF	VeggieTales A very veggie Easter; vol…	Nawrocki, Michael.	3004613107	3/15/2019 2:41 PM
3	☐	CRUMPECKER	The Dark Tower : the journey begins …	David, Peter (Peter Allen)	3005537943	2/11/2019 11:59 PM
4	☐	USER	The great alone	Hannah, Kristin	300575006+	2/16/2019 10:20 AM
5	☐	USER	The great alone	Hannah, Kristin	3005766349	2/19/2019 11:59 PM
6	☐	USER	The great alone	Hannah, Kristin	3005766357	2/19/2019 11:59 PM
7	☐	USER	The great alone	Hannah, Kristin	3005777197	2/15/2019 4:46 PM
8	☐	USER	The great alone	Hannah, Kristin	3005734706	2/15/2019 1:14 PM
9	☐	STAFF	Rule	Goodlett, Ellen	30061060058035	3/11/2019 12:27 PM

Print the clearable holds list from the column picker Print Full Grid as you do when printing the Pull List.
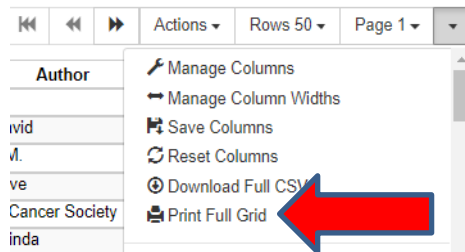
Look on your hold shelf for expired items. Click on the box at the right of each item found. Use the Actions dropdown to cancel the selected holds. After canceling the holds, don't forget to check the items in to find out where they need to go next.

Webby Exercise 9 – Item Status

Item Status – Item Status is the gateway to information about an item and to changing that information.

Detail View is no longer in the Actions menu. It has its own button. The Detail View looks like this.

The XUL Detail View looks like this. The same information is in both screens.

When you want to change a shelving location or floating status, scan the item barcode into Item Status and select Edit Items from the Actions menu.
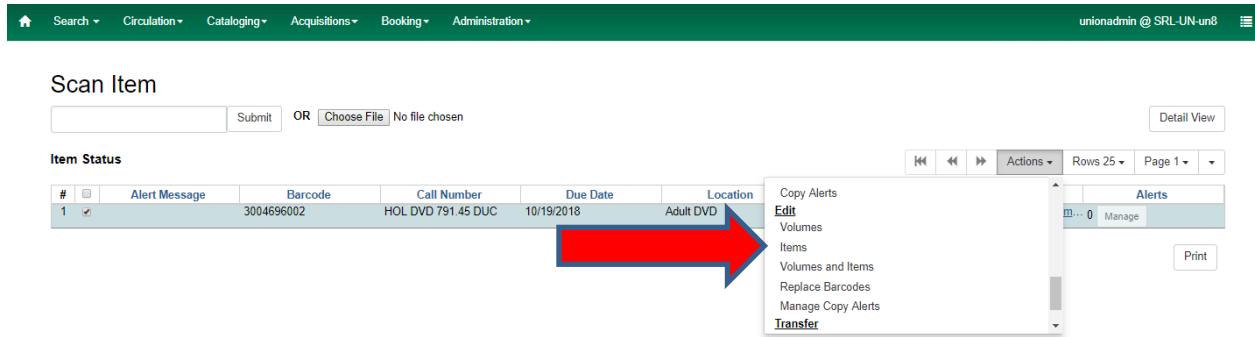
The web Copy Editor looks like this.
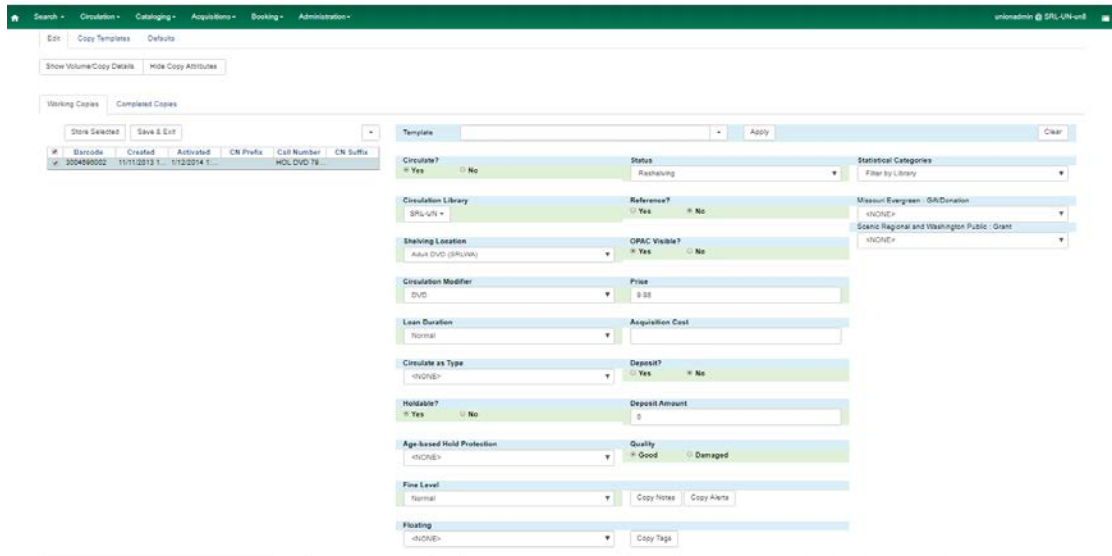
The XUL Copy Editor looks like this.
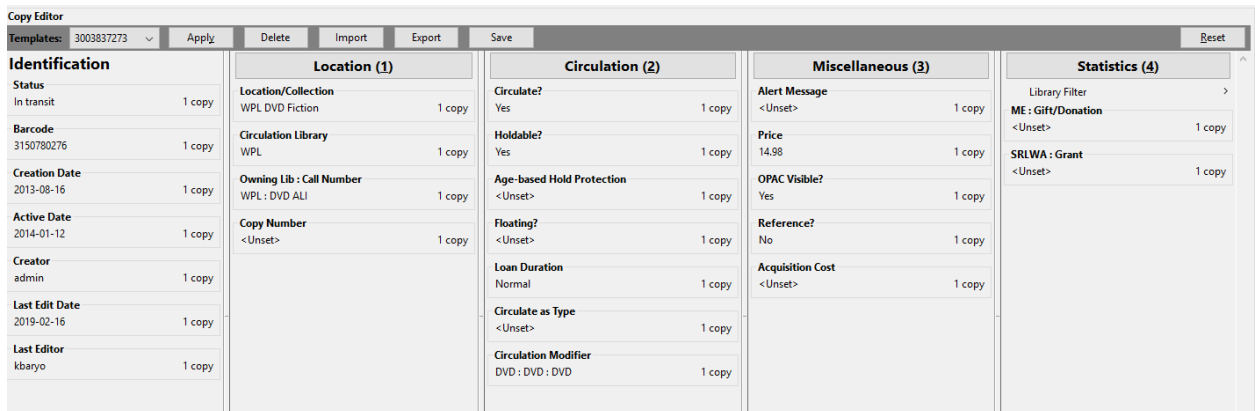
Change what you need to change. Add notes or alerts. (Alerts appear every time the item is scanned.)

Then click Save and Exit to apply the changes.

Webby Exercise 10 – Scan Item as Missing Pieces and Reprint Last Receipt

Scan Item as Missing Pieces

If an item is returned and a piece is missing, you may scan the item barcode here. The item will be checked out to the last patron. You will be given the option of printing a notice to send to the patron. You will be given the option of adding a Message to the patron's account. This is a good time to explain which piece of what is missing.
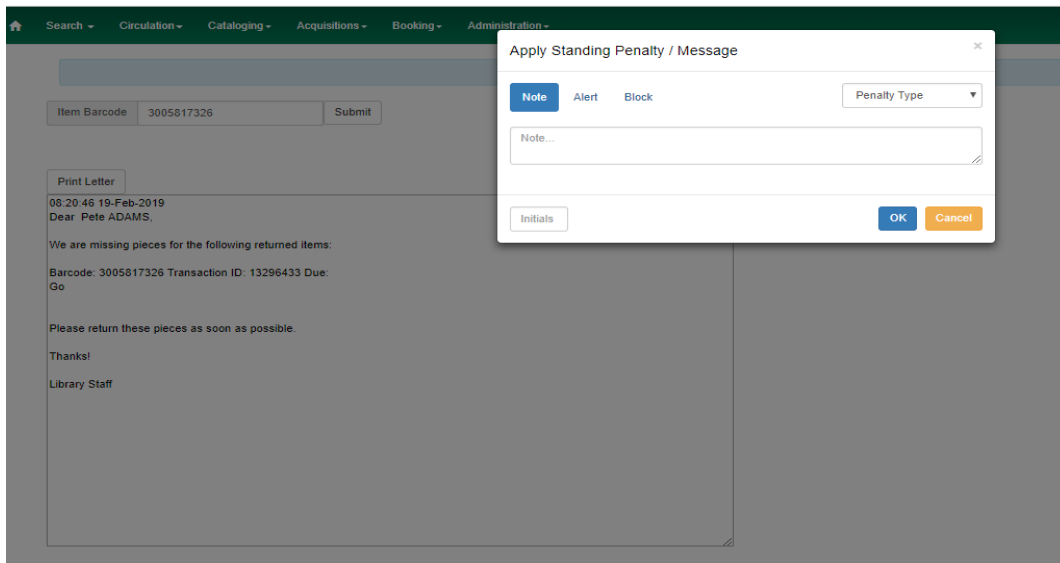
The status of the item is now DAMAGED. If you look at the patron's account, you will see it is checked out to him with a two week due date and the Message has been added to his account.
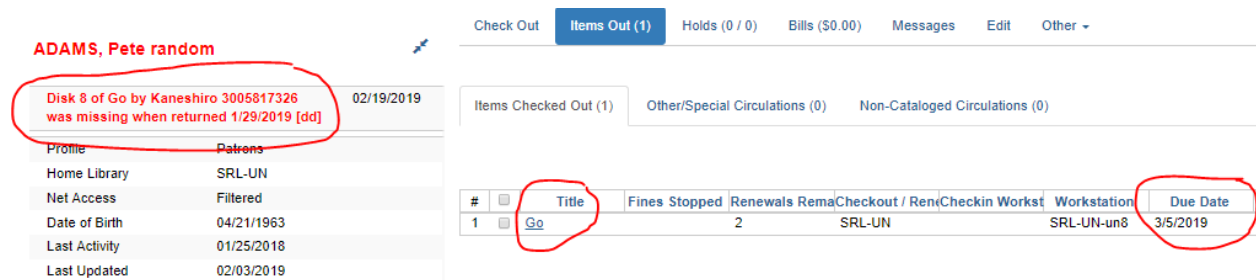
Reprint Last Receipt – Choose this function to print the most recent receipt or print job.

Webby Exercise 11 – Patron Screen – Basic Information and Check Out

Scan the patron's card, manually enter the barcode number, or search for the patron in Search for Patrons (see exercise 3) to retrieve the partron's home page.

This patron has two alert messages on her account. If she had a hold ready for pick up or bills, those alerts would also be on the home page.

The patron's name will be black if all is well with the account and red if something requires staff attention.

Note that the number of overdue items is listed in red in the patron information column on the left.

If the account is expired, this alert will appear below the STOP sign.

Patron account is EXPIRED.

Check Out

Use the Barcode drop down menu when checking out fishing rods and magazines as we do with the XUL client. No matter how many magazines you check out to a patron, only one entry will appear in the list of items being checked out. Don't worry. This is not a mistake.

If you want to change the due date of one item, check the Specific Due Date item box and change the date using the calendar next to the date field. DO NOT check Use Specific Due Date Until Logout. Everything checked out at that work station will be assigned the edited due date until the work station is closed.

There is a column picker on the Check Out page so that you can set up the columns you want to see when checking out items. See instructions for setting up columns in Pull List exercise 6.

Never check the Strict Barcode box on this or any other screen.

Date Options ▾ 02/17/2019

|◀◀ | ◀◀ | ▶▶ | Actions ▾ | Rows 25 ▾ | Page 1 ▾ | ▾ |

← Column Picker

n Library | Owning Library | Alerts

☐ Strict Barcode 🖨 Quick Receipt ▾ Done ▾

Webby Exercise 12 – Patron Screen –Items Out
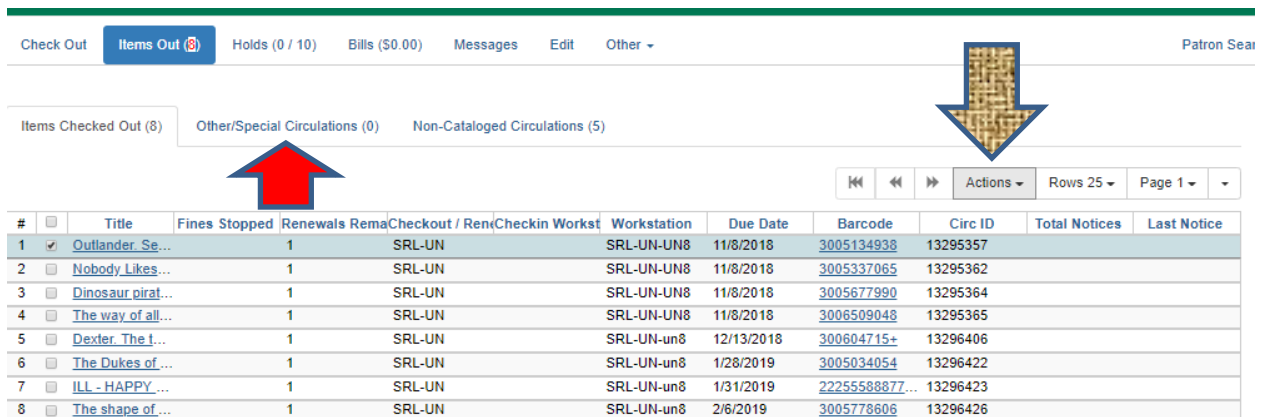
Items Out

There is a separate tab for **Other/Special Circulation**. This is where items appear that are more than six weeks overdue. These are the items that the patron has been billed for.

Again, you may set up columns on this screen.

Select any item in Items Checked Out whose status you need to change and choose the action you need from the Actions drop down menu. Renew and Edit Due Date as the most often used actions.

Everything in blue is clickable. You can click on the title to navigate to the catalog record for the item. Clicking on the item barcode will take you to its Detail View. (See Item Status exercise 9 for more about Detail View.)

Non-cataloged items can be seen in the **Non-Cataloged Circulation** screen. These items will disappear from the patron's account on the due date.

Webby Exercise 13 – Patron Screen –Holds

Holds

There are two tabs on the Holds page. One shows Open Hold Requests and one shows Recently Canceled Holds.

A new feature is Detail View. Select a hold from the list, click Detail View and see details about the hold in tabular form.
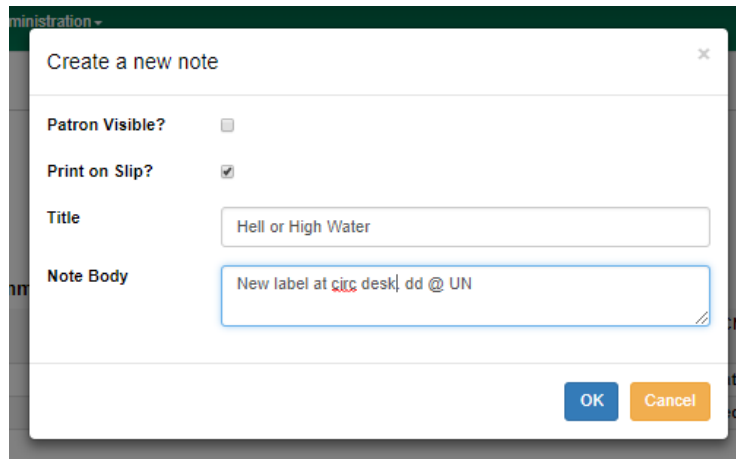
On the details page, you can add a note to the hold. If you placed the hold so that you can put a new label on it, check the cataloging, add it to a display, etc., put a note here.

Create a new note

Patron Visible?

Print on Slip?

Title

Hell or High Water

Note Body

New label at circ desk, dd @ UN

OK   Cancel

Click List View to get back to the previous screen where all holds are listed.

Place Hold, the Action menu, and the column picker are familiar features.

Webby Exercise 14 – Patron Screen –Bills

Bills

The bills screen looks different from the XUL bills screen but it contains the same information.

Webby---

Check Out	Items Out (8)	Holds (0 / 10)	**Bills ($0.00)**	Messages	Edit	Other ▾		Patron Search

Total Owed:	$0.00	Refunds Available:	$0.00		
Total Billed:	$0.00	Credit Available:	$0.00		
Total Paid/Credited:	$0.00	Session Voided:	$0.00		
Owed for Selected:	$0.00	Pending Payment:	$0.00		
Billed for Selected:	$0.00	Pending Change:	$0.00		
Paid/Credited for Selected:	$0.00				

Pay Bill

Payment Type	Cash ▾
Check Number	
Payment Received	
Annotate ☐	Apply Payment

Bill Patron	History	Check All Refunds		⏮ ◀◀ ▶▶ Actions ▾ Rows 25 ▾ Page 1 ▾ ▾

#	☐	Status	Payment Pe	Billing Loca	Barcode	Title	Last Billing	Shelving Lo	Owning Lib	Call Numbe	Type	Total Paid	Total Billed	Start	Bill #	Balance Ow
No Items To Display															

☐ Convert Change to Patron Credit ☐ Receipt On Payment # Copies 1

XUL ---

Refresh	Check Out	Items Out	Holds	**Bills**	Edit	Messages	Other ▾
			0	0/8	$ 0.00	

Current Bills

Total Owed:	**0.00**	**Refunds Available:**	**0.00**
Total Checked:	**0.00**	**Credit Available:**	**0.00**

Pay Bill

Payment Type	Cash ▾
Payment Received:	
☑ Annotate Payment	See Distribution Apply Payment!

Bill Patron	History		Actions for Selected Transactions

Balance Owed	Last Billing Note	Last Payment Note	Last Payment Type	Start	Total Billed	Total Paid	Type	Title

List Actions ▾	Check All	Uncheck All	Check All Refunds	Print Bills		Receipt Options ▾

Voided this session: 0.00

Change Due Upon Payment: 0.00

	Payment	Change		Owed	Billed	Paid
Pending:	0.00	0.00	Total:	0.00	0.00	0.00
			Checked:	0.00	0.00	0.00

☐ Convert Change to Patron Credit

I am happy to say that the default in Webby is NOT for all of the bills to be selected so that you have to deselect all of them and choose the one the patron wants to pay toward. In the web client, you have to select the bill you want to apply payment to. If you do open the bills page and find all of the bills selected, click the box at the left of the column names twice to deselect everything in the list.

This patron wants to pay for the third item in the list of bills. Check the box for the line item and it appears in the lines labeled Owed for Selected and Billed for Selected. When you apply the $18.08 payment you receive, it will be applied to the selected line item. Remember to annotate the payment. The check box isn't sticky so you will need to check it each time you accept payment.

To view details of a particular line item, select that line and choose Full Details from the Action menu. This is the same process we followed in the XUL client.

Transaction #12226083

Billing Location		Total Billed	$18.08	Title	Catching fire		
Type	circulation	Total Paid/Credited	$0.00	Checked Out	7/23/2018 10:27 AM		
Start	7/23/2018 10:27 AM	Balance Due	$18.08	Due Date	8/6/2018		
Finish		Renewal?		Checked In			

Item Summary

Barcode	3004128217	Location	Young Adult Fiction	Call Number	YA FIC COL	
Status	Lost	Circulate	true	Reference	false	
Holdable	true	OPAC Visible	true	Created	10/5/2009 12:00 AM	
Edited	9/18/2018 12:06 PM	Age Protect		Total Circulations	23	
Owning Library						

Statement   Details

Billing Statement

Type	Description	Amount	Balance
Billing	Lost Materials SYSTEM GENERATED 9/18/2018 12:06 PM	$18.08	$18.08
		Total Charges	$18.08
		Total Payments	-$0.00
		Balance Due	$18.08

To get to the place where you can Void Billings, click on the Details tab in the Full Details view. Here is where you can select the bill that will be voided. We void Processing Fees charged by some Missouri Evergreen libraries.

Transaction #12226083
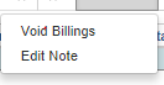
Billing Location		Total Billed	$18.08	Title	Catching fire		
Type	circulation	Total Paid/Credited	$0.00	Checked Out	7/23/2018 10:27 AM		
Start	7/23/2018 10:27 AM	Balance Due	$18.08	Due Date	8/6/2018		
Finish		Renewal?		Checked In			

Item Summary

Barcode	3004128217	Location	Young Adult Fiction	Call Number	YA FIC COL	
Status	Lost	Circulate	true	Reference	false	
Holdable	true	OPAC Visible	true	Created	10/5/2009 12:00 AM	
Edited	9/18/2018 12:06 PM	Age Protect		Total Circulations	23	
Owning Library						

Statement   Details

Bills

⏮ ◀◀ ▶▶   Actions ▾   Rows 10 ▾   Page 1 ▾   ▾

Void Billings
Edit Note

#		Amount	Create Date	Billing Period	Billing Period	Legacy Billing	Legacy Billing	Billing ID	Note	Void Timestamp		taff	Transaction	Type
1	☑	$18.08	9/18/2018 …			9/18/2018 …	Lost Materi…	14799625	SYSTEM …				12226083	

Payments

⏮ ◀◀ ▶▶   Actions ▾   Rows 10 ▾   Page 1 ▾   ▾

#		Cash Drawer	Accepting User	Amount	Payment ID	Note	Payment Date/Time	Payment Type	Billable Transaction	Voided?

No Items To Display

Webby Exercise 15 – Patron Screen –Messages

Messages

Messages continue to give us the option of adding a Note, Alert, or Block to a patron's account.

Existing messages can be viewed by clicking Messages in the menu at the top of the patron screen. Click Apply Penalty / Message to open the box where messages are entered.

Page 1 of 1 – Patron Screen / Messages

Webby Exercise 16 – Offline Circulation

Create a short cut to Offline Circulation on the desk top of all staff computers. A short cut needs to be used to access Evergreen when the Internet is down so the short cut needs to be created while the Internet is working.

1. Open Offline Circulation in the Circulation tab.
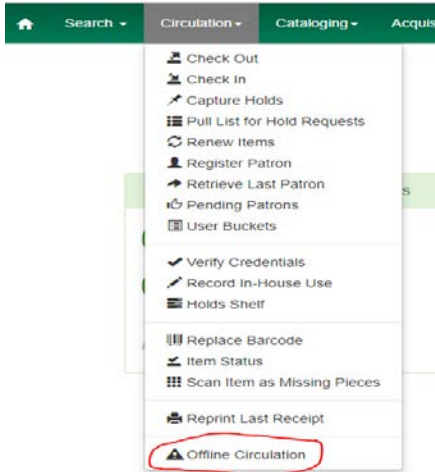
2. Use the three vertical dots to the far right of the browser address bar to access More Tools -> Create Shortcut.
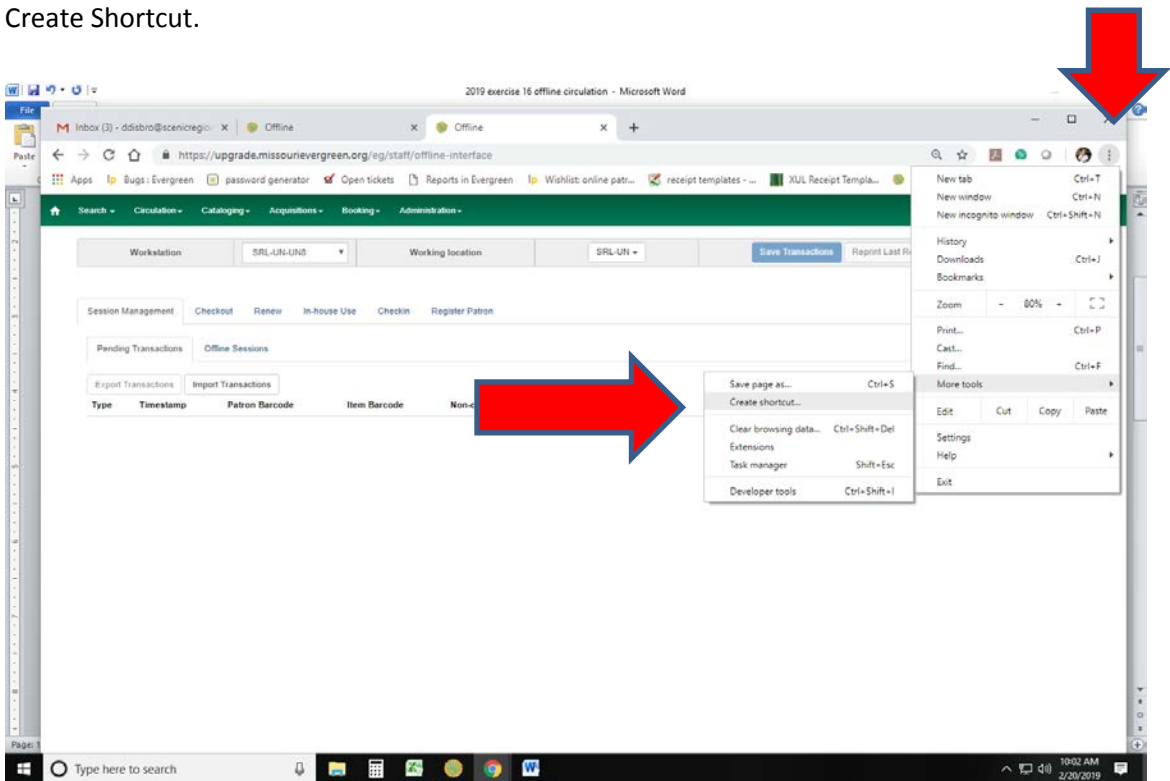
3. The default name for the short cut is Offline. You may change the name if you want to.
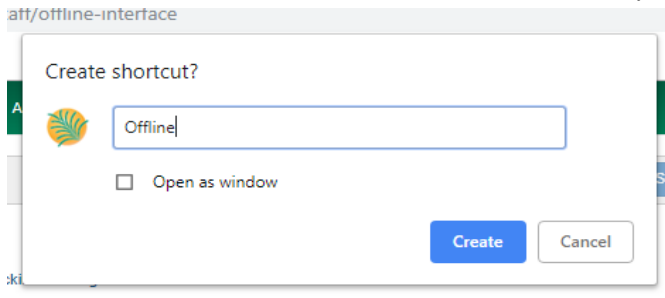
4. Click Create. The short cut will now be on your desk top.
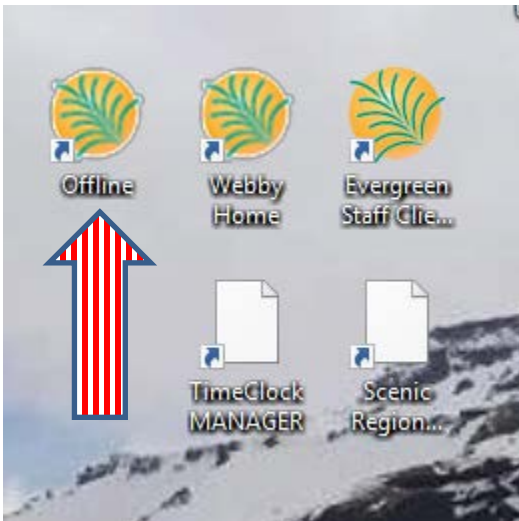
When the Internet is down, open the short cut. It will take you to the Offline Circ page. Open the Checkout tab. When offline, the only function we perform is checking out.

If you see this Warning, click Proceed.

Warning
You are about to enter offline mode. If you proceed, you will be logged out.

Proceed

Select a Due Date from the calendar or enter it manually. Make sure the Strict Barcode box isn't checked.

| Workstation | SRL-UN ▾ | Working location | SRL-UN ▾ | Save Transactions |

Checkout   Renew   In-house Use   Checkin   Register Patron

Due Date: 　　　　　　　　　　　📅   No Offset ▾   **Patron barcode**   **Item**

Patron barcode:

⦿ Item Barcode:

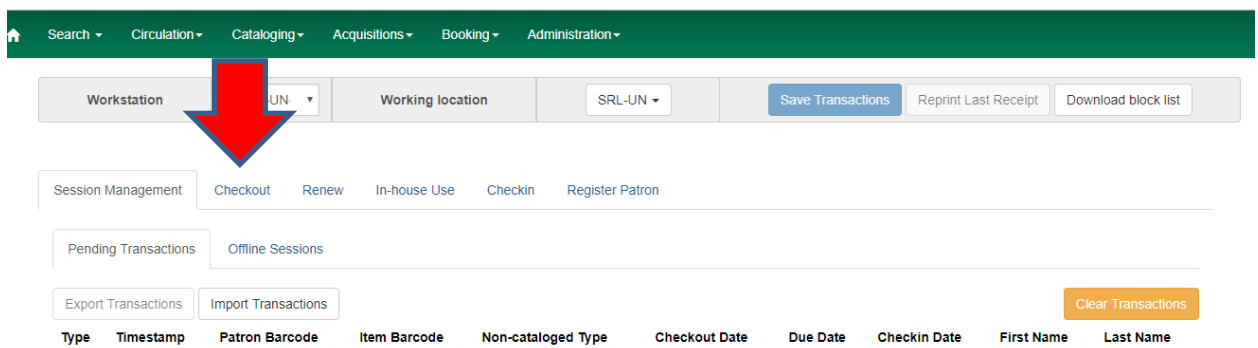◯ Non-cataloged Type: Select Non-cataloged Type ▾

Clear   ☐ **Strict Barcode**   ☐ **Print receipt**   Checkout

Scan the patron's barcode then scan the items to be checked out.

When you are finished with one patron, click Save Transactions (green arrow) so that you can begin helping the next patron.

When the Internet is back up, log in to Evergreen. You will see an orange banner telling you that there are offline transactions waiting for upload.
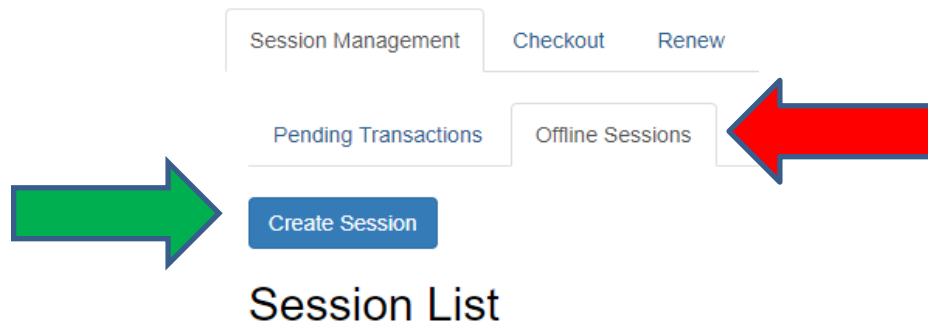

Open Offline Circulation in the Circulation tab. (See page 1.)

The page opens to Pending Transaction. Here you will see all transactions performed at that workstation while offline.

Open the Offline Sessions tab and **Create a Session**. The session name should include the date and the reason for the session, for example, "internet down 2/20/19."

After the session is created, transactions from all workstations used to check out items while the Internet was down need to be uploaded to that session. If you only use one workstation for offline circ, you save yourself the work of uploading from several workstations.

Open Offline Circulation at each workstation. Open Offline Sessions. Find the new offline session in the Session List.

You see that the Upload Count and Transactions Processed numbers are zero. Likewise, there is no Date Completed.

At each workstation used while the Internet was down, click the blue Upload button. The Upload column will then show the number of individual transactions that have been uploaded.

After the transactions have been uploaded from each workstation, click the orange Process button. This only needs to be done at one workstation. You will need to click the Refresh button after the transactions are processed. Then the number of transactions processed will appear in the Transactions Processed column.

Look at the bottom of the page for **Exceptions**.

Exception List

Workstation	Type	Timestamp	Event Name	Patron Barcode	Item Barcode	Non-cataloged Type	Checkout Date	Due Date	Checkin Date
SRL-UN-UN16	checkout	2/5/2019 9:20 AM	OPEN_CIRCULATION_EXISTS	9300719688	3006632230		2/5/2019 9:20 AM	2/18/2019	
SRL-UN-UN16	checkout	2/5/2019 9:20 AM	OPEN_CIRCULATION_EXISTS	9300719688	3006632230		2/5/2019 9:20 AM	2/18/2019	
SRL-UN-UN16	checkout	2/5/2019 9:20 AM	OPEN_CIRCULATION_EXISTS	9300719688	3006660501		2/5/2019 9:20 AM	2/18/2019	

These are transactions that did not get captured by the ILS. You need to manually fix the problems using the barcodes shown in the list. These are the exceptions that may appear in the list.

- ASSET_COPY_NOT_FOUND - Indicates the item barcode was mis-scanned/mis-typed.
- ACTOR_CARD_NOT_FOUND - Indicates the patron's library barcode was mis-scanned, mis-typed, or nonexistent.
- OPEN_CIRCULATION_EXISTS - Indicates a book was checked out that had never been checked in.
- MAX_RENEWALS_REACHED - Indicates the item has already been renewed the maximum times allowed.
- PATRON_ACCOUNT_EXPIRED
- COPY_IN_TRANSIT