



Web Client Exercises

Become familiar with the Web Client
before switching from using the XUL client.



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.

Sign In

Username

Password

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.

Please register a workstation.

Register a New Workstation For This Browser

SRL-UN ▼ Workstation Name

Workstations Registered With This Browser

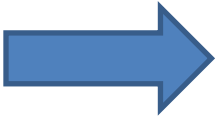
6. Your workstation is now registered and may be used by anyone with a valid username and password. You may click the green Use Now button to log in.

Register a New Workstation For This Browser

SRL-UN ▾	test	Register
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Workstations Registered With This Browser

SRL-UN-test (Default) ▾



Use Now	Mark As Default	Remove
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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

Password

Workstation

SRL-UN-test ▾

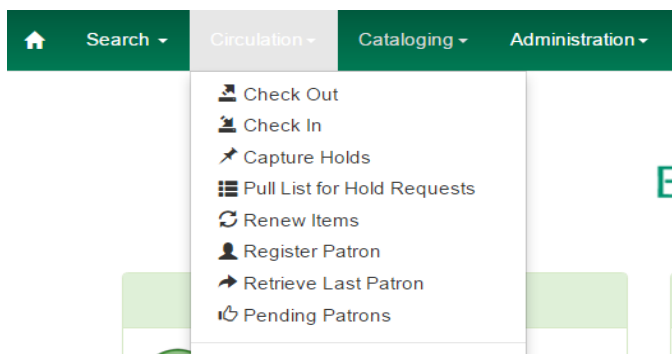
9. Clearing the cache/browsing history on the computer will make it necessary to register the workstation again. After you have performed this function a couple of times, you will be able to flip through it quickly.

Webby Exercise 2 – Creating a Basic Bookmark Toolbar

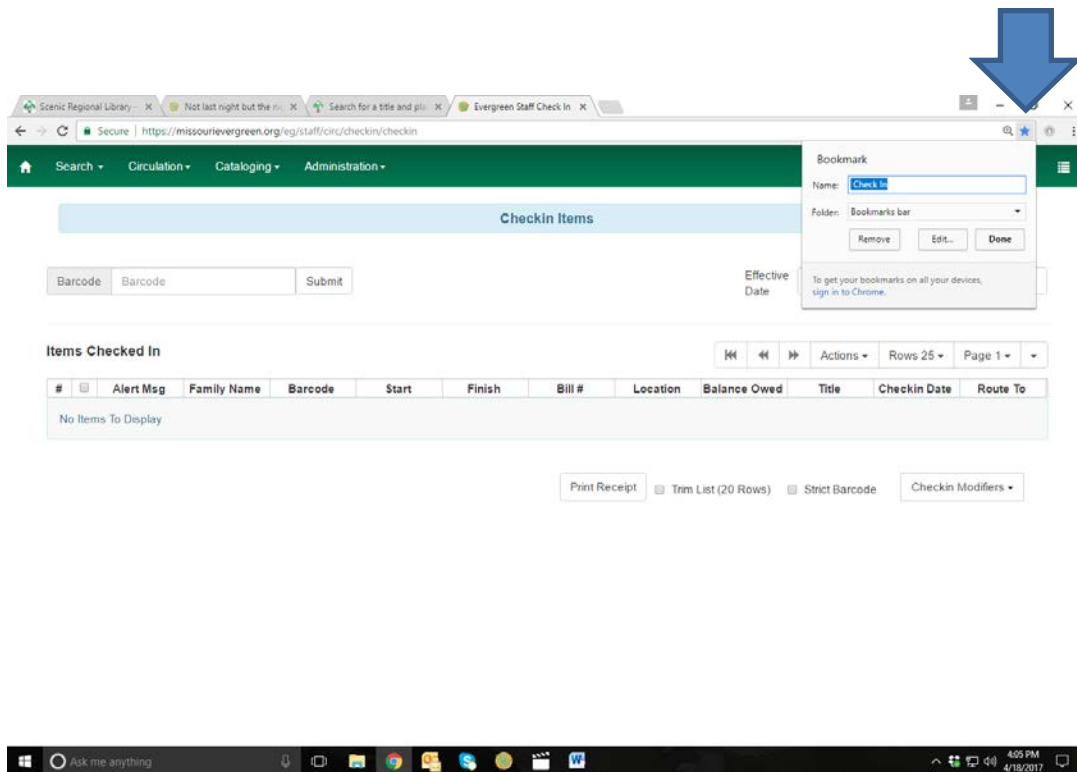
The Evergreen web client is a web site. Navigating around Webby is done the same way you navigate through any website. You may use the browser Back and Forward arrows. You will open sub-tabs and close them to return to the original screen. Anyone who has used the Internet to shop or find the latest scores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

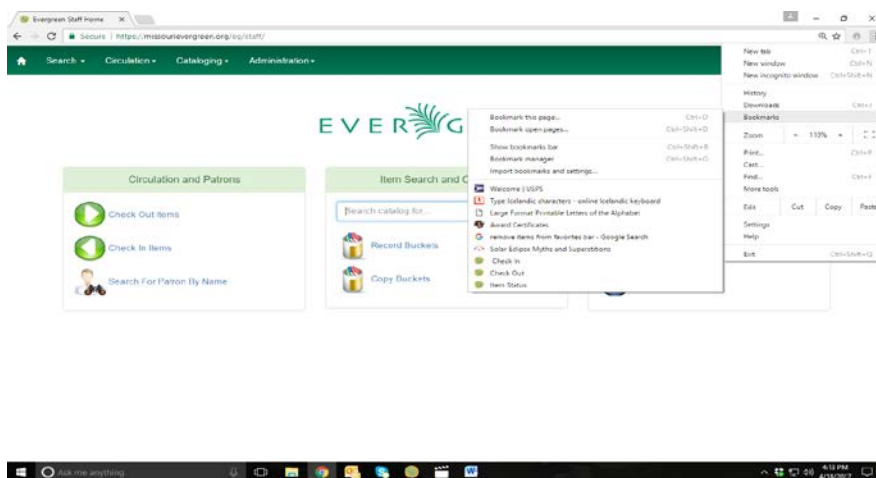
1. Log onto Webby through Google Chrome. The address is <https://missourievergreen.org/eg/staff/>.
2. Enter your username and password. Use the same username and password you currently use in XUL.
3. Go to Circulation → Check in.



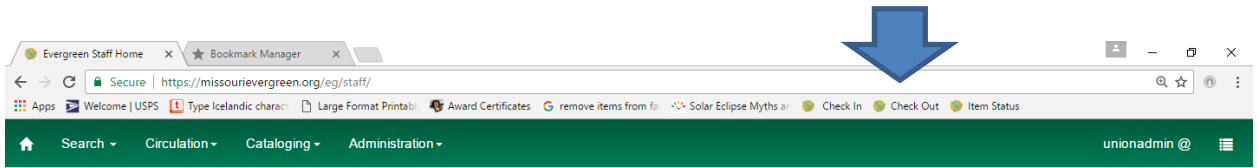
4. Click the STAR at the right end of the URL address bar to bookmark this page. The name of the bookmark may be changed before clicking Done.



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.



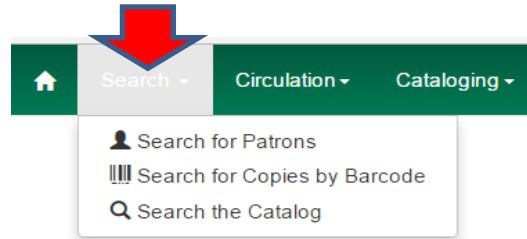
7. In the picture below, the tool bar IS showing. Check In, Check Out, and Item Status appear at the end of the tool bar. Now you will be able to navigate to Check In, Check Out, and Item Status as easily as you were able to by adding tabs in the XUL client.



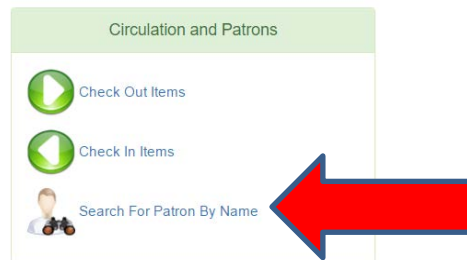
8. You only need to create bookmarks at each work station once. They will stick there until purposefully deleted.
9. Create as many bookmarks as you want to!

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.

Check Out Items Out Holds Bills Messages Edit Other ▾ Patron Search

Last Name	First Name	Middle Name	Search	Clear Form	⊕
Barcode	Alias	Username	Email	Identification	
Database ID	Phone	Street 1	Street 2	City	
State	Post Code	Profile Group ▾	ME ▾	<input checked="" type="checkbox"/> Include Inactive?	
DOB Year	DOB Month	DOB Day			

Patron Search Results Add To Bucket ▾ Merge Patrons ⏪ ⏩ Rows 25 ▾ Page 1 ▾

#	<input type="checkbox"/> Mailing:Street	Created On	Home Library	DoB	Middle Name	First Name	Last Name	Profile	Card	ID
No Items To Display										

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

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

Patron Search Results

Navigation: ⏪ ⏩ Rows 50 Page 1

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

LIBRARY, UNION

Check Out Items Out (1) Holds (13 / 0) Bills (\$0.00) Messages Edit Other + Patron Search

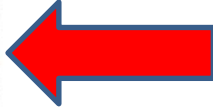
Profile: Staff Member
 Home Library: SRL-UN
 Net Access: Filtered
 Date of Birth: 1/15/14
 Last Activity: 4/27/17
 Last Updated: 2/14/17
 Create Date: 12/28/94
 Expire Date: 1/15/50
 Fines Owed: \$0.00
 Items Out: 1
 Overdue: 0
 Long Overdue: 0
 Claimed Returned: 0
 Lost: 0
 Non-Cataloged: 0
 Holds: 13 / 0
 Card: 9300021613
 Username: 9300021613
 Day Phone: 636-583-3224
 Evening:

Search: library First Name Middle Name Search Clear Form

Patron Search Results

Navigation: ⏪ ⏩ Rows 50 Page 1

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

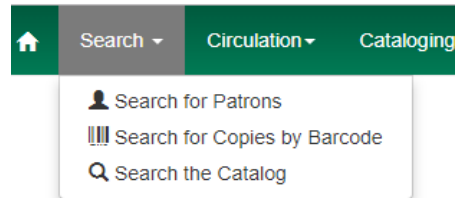


4. Use the function boxes along the top of the page to navigate to Check Out, Items Out, Holds, Bills, Messages, Edit, and Other. Click on the headings to view those pages.

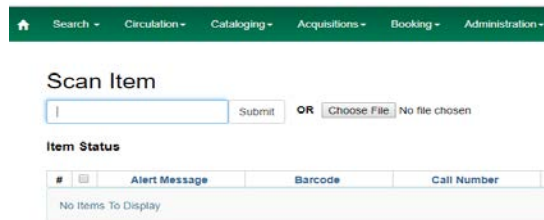
Please note: You may use the **browser navigation back and forward buttons** (the arrows to the left of the address bar) since Webby is a website.

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.

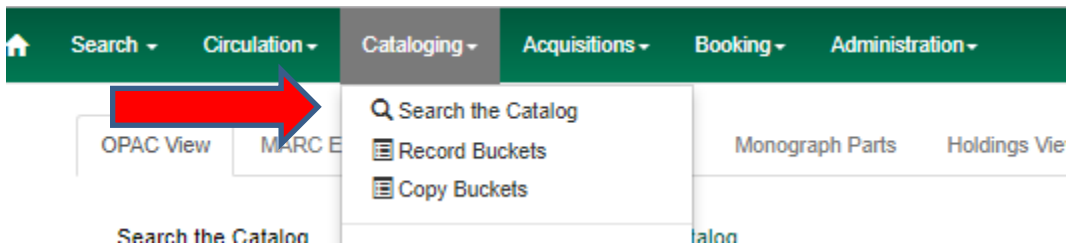
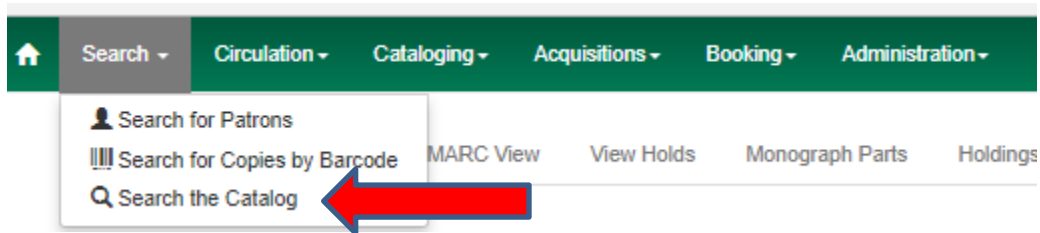


B. Search the Catalog

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



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



- What you will see after selecting Search the Catalog is shown below. Not much has changed here!

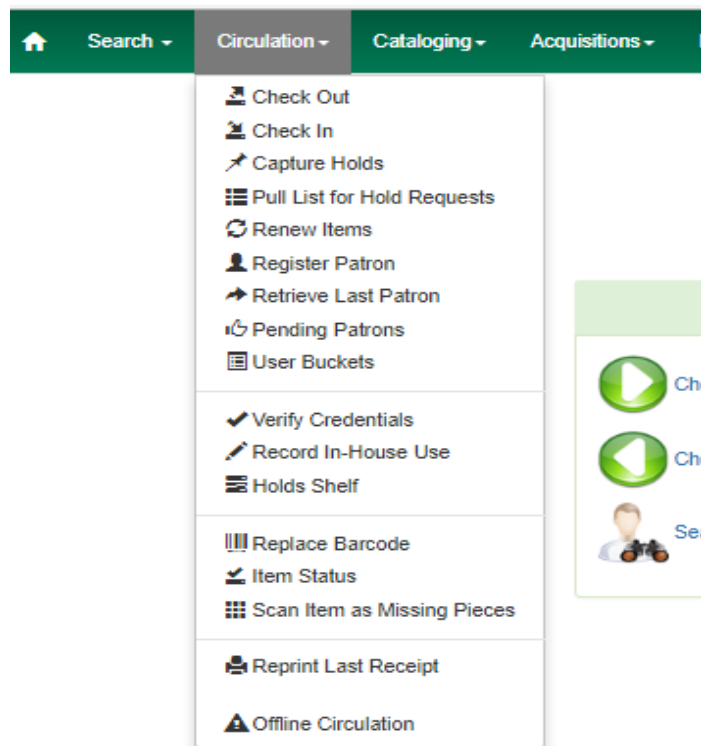
The screenshot displays the 'Search the Catalog' advanced search interface. At the top, there are tabs for 'Basic Search' and 'Browse the Catalog'. Below that, there are buttons for 'Advanced Search', 'Numeric Search', and 'Expert Search'. The 'Search Input' section has three rows of search criteria: Title, Author, and Keyword, each with a dropdown menu for the search type (set to 'Contains') and an input field. Below this are 'Search' and 'Clear Form' buttons. The 'Search Filters' section includes a note: 'If you would like to filter by shelving location, please select a branch from the "Search Library" dropdown below'. There are several filter dropdowns: Item Type (Audiobooks, Books, Electronic Resource, Kit), Item Form (Braille, Direct electronic, Electronic, Large print), Language (Abkhaz, Achinese, Acoli, Adangme), Audience (Adolescent, Adult, General, Juvenile), Video Format (8 mm., Beta), Bib Level (Collection, Integrating resource, Monograph/Item, Monographic component), Literary Form (Comic strips, Dramas, Essays, Fiction (not further specified)), and Shelving Location (Adult Compact Disc with, Adult DVD, Atlases, Biography). At the bottom, there is a 'Search Library' dropdown (set to 'Scenic Regional-Unic'), a 'Publication Year' field (set to '15'), and a 'Sort Results' dropdown (set to 'Sort by Relevance'). There are also checkboxes for 'Limit to Available', 'Exclude Electronic Resources', and 'Group Formats and Editions'.

Webby Exercise 5 – Check Out and Check in

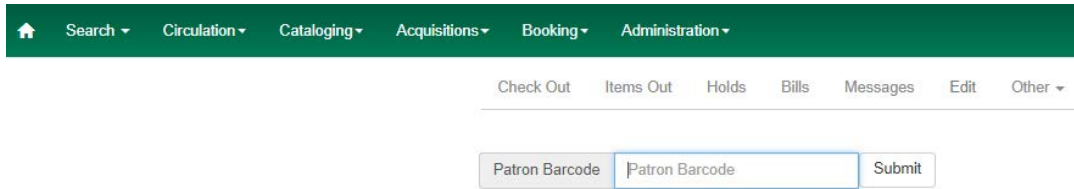
Before we look at the Circulation tab, let's look at the location of the Actions menu and the Column Picker. The Actions menu is easy to find. The Column Picker is now a solitary down arrow. These features function as they did in the XUL client.



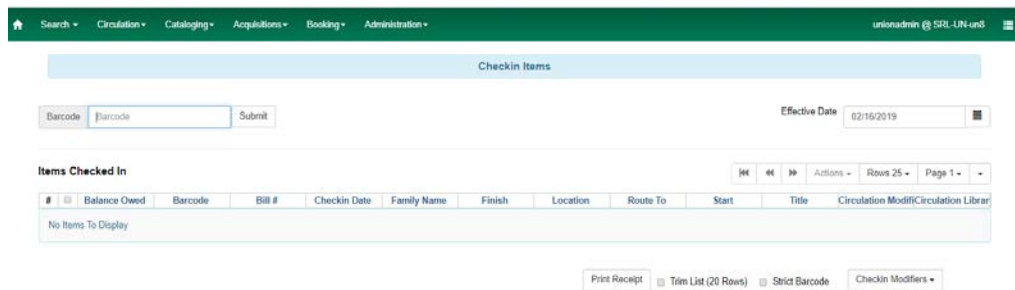
The Circulation menu is where all the circulation function reside, including some we don't use.



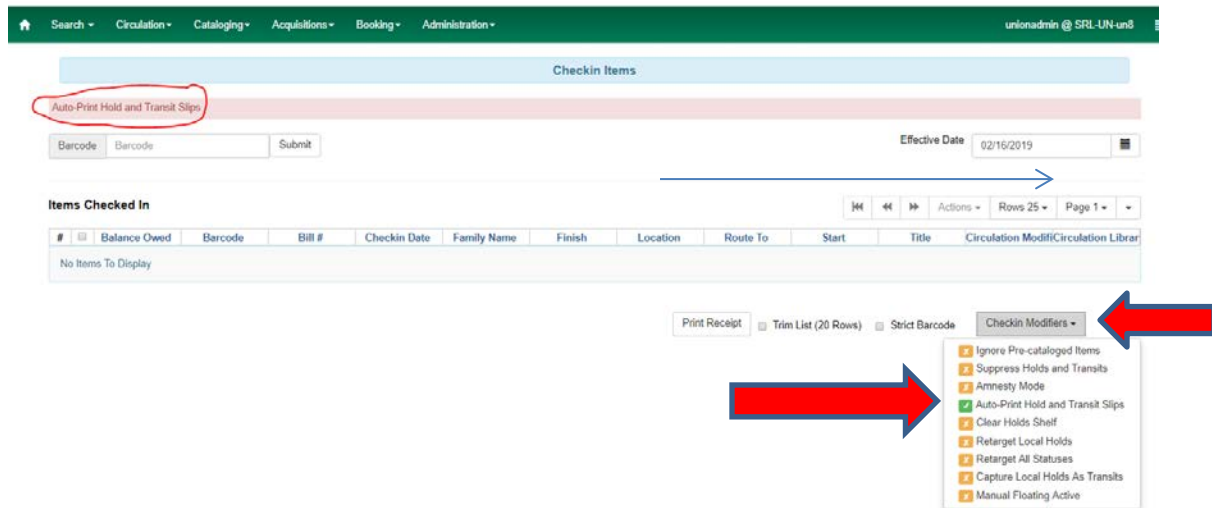
Check Out – Scan library cards or enter patron barcodes here.



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.

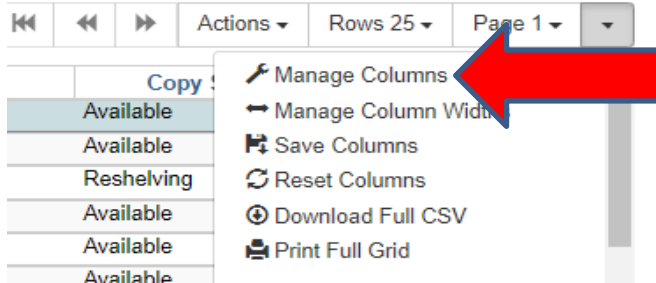


Capture Holds – We don't use this feature. It prints hold and transit slips automatically. We do that on the Check In screen.

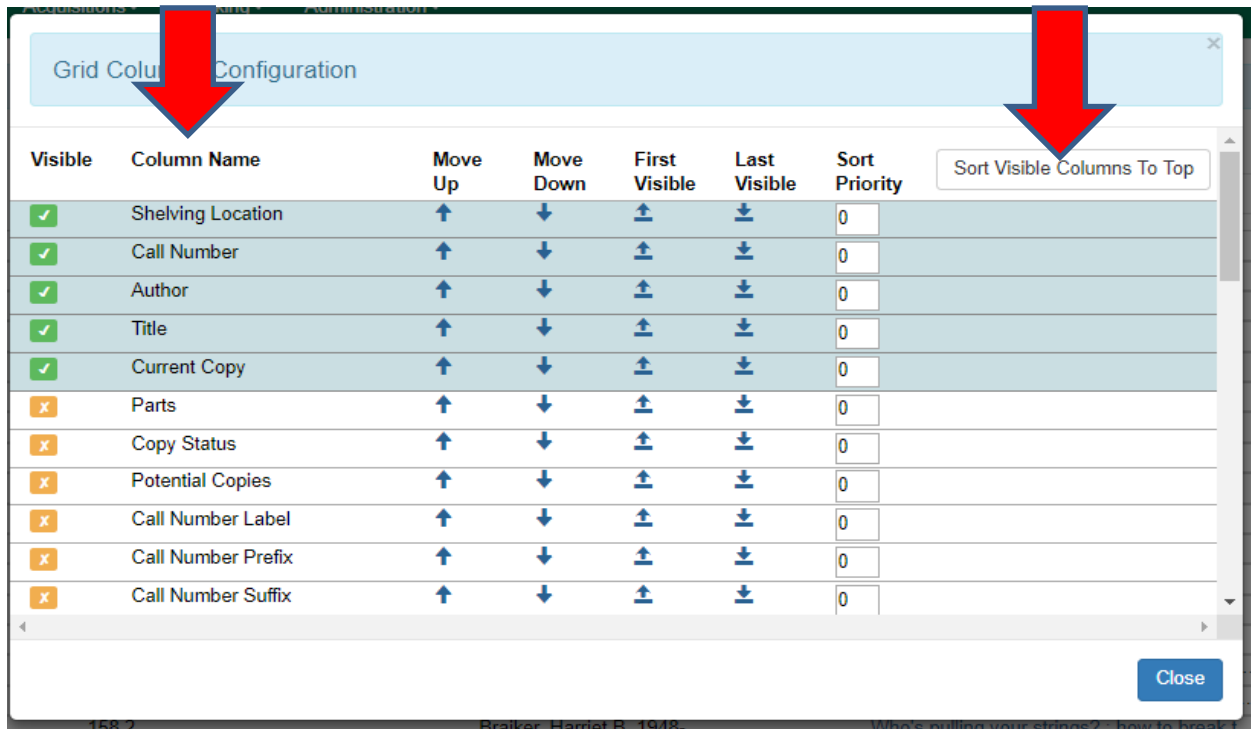
Webby Exercise 6 – Pull List and Renew Items

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.



A screenshot of the 'Grid Column Configuration' dialog box. The dialog has a title bar with a close button. Below the title bar is a table with columns: 'Visible', 'Column Name', 'Move Up', 'Move Down', 'First Visible', 'Last Visible', and 'Sort Priority'. There is also a 'Sort Visible Columns To Top' button. The table contains the following data:

Visible	Column Name	Move Up	Move Down	First Visible	Last Visible	Sort Priority
<input checked="" type="checkbox"/>	Shelving Location	↑	↓	⇅	⇅	0
<input checked="" type="checkbox"/>	Call Number	↑	↓	⇅	⇅	0
<input checked="" type="checkbox"/>	Author	↑	↓	⇅	⇅	0
<input checked="" type="checkbox"/>	Title	↑	↓	⇅	⇅	0
<input checked="" type="checkbox"/>	Current Copy	↑	↓	⇅	⇅	0
<input type="checkbox"/>	Parts	↑	↓	⇅	⇅	0
<input type="checkbox"/>	Copy Status	↑	↓	⇅	⇅	0
<input type="checkbox"/>	Potential Copies	↑	↓	⇅	⇅	0
<input type="checkbox"/>	Call Number Label	↑	↓	⇅	⇅	0
<input type="checkbox"/>	Call Number Prefix	↑	↓	⇅	⇅	0
<input type="checkbox"/>	Call Number Suffix	↑	↓	⇅	⇅	0

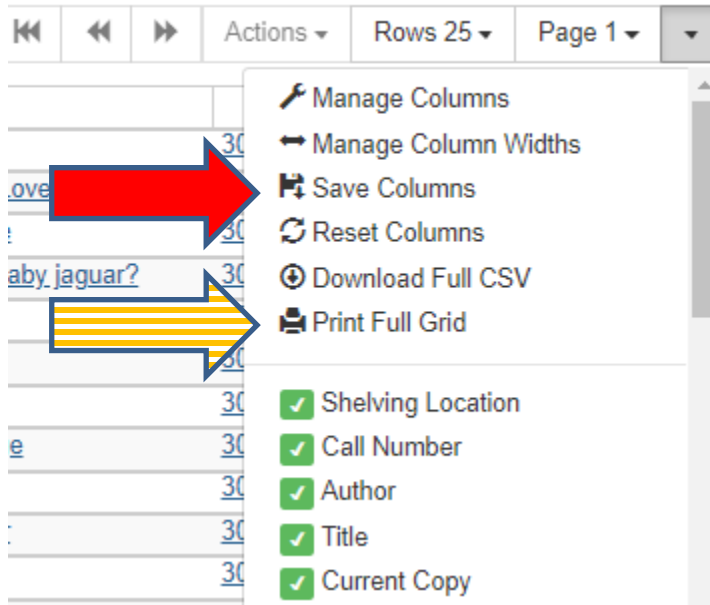
At the bottom right of the dialog is a 'Close' button. Two red arrows point to the 'Close' button and the 'Sort Visible Columns To Top' button.

158.2

Braiker, Harriet B. 1948-

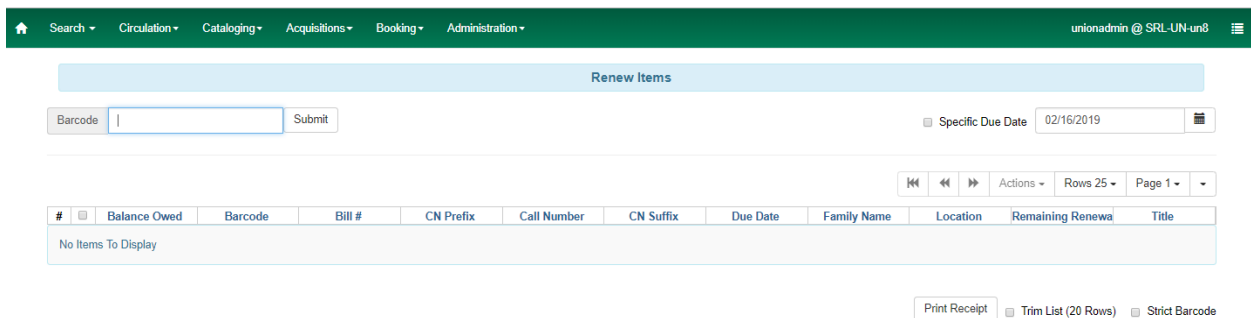
Who's pulling your strings? : how to break t...

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.

Register Patron

Show: Required Fields Suggested Fields All Fields

Print Save Save & Clone

Barcode

OPAC/Staff Client User Name

Password 3822 Generate Password

Prefix/Title

First Name

Middle Name

Last Name

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

Primary Identification

Secondary Identification Type

Secondary Identification

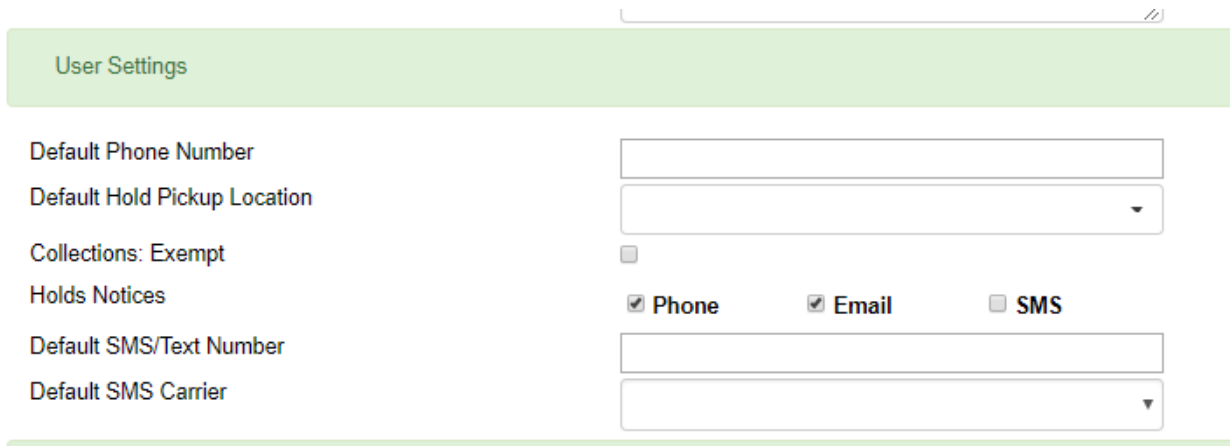
Primary Identification Type	Choose a type from the drop down menu
Primary Identification	If you choose other in the field above, enter the type of identification used. Use this field to enter the parent's name if card is for a juvenile (Parent – Jane Smith).
Secondary Identification Type	Leave blank 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.

Email Address

Email checkout receipts by default?

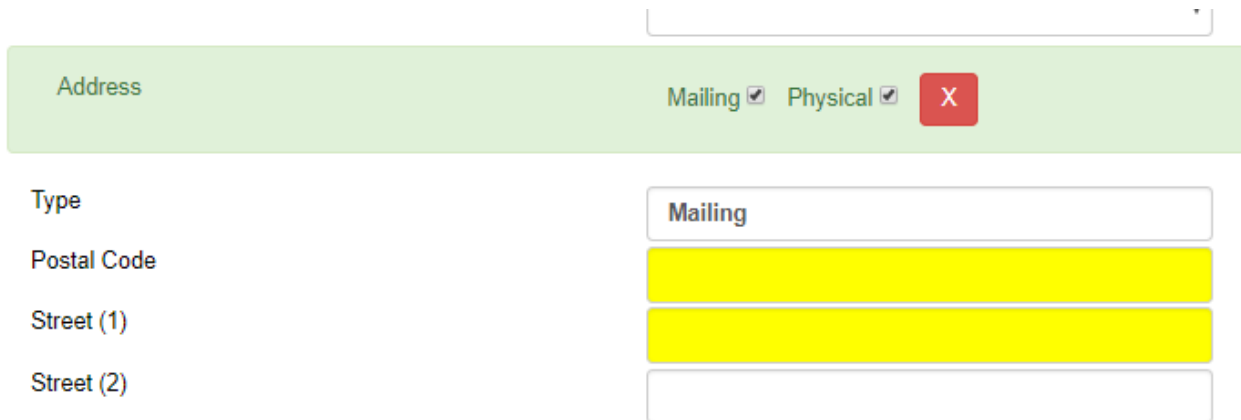
5. The order of the fields in User Settings is rearranged.



The screenshot shows a 'User Settings' form with the following fields and options:

- Default Phone Number: Text input field.
- Default Hold Pickup Location: Dropdown menu.
- Collections: Exempt: Checkbox (unchecked).
- Holds Notices: Radio buttons for Phone, Email, and SMS.
- Default SMS/Text Number: Text input field.
- Default SMS Carrier: Dropdown menu.

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



The screenshot shows an 'Address' form with the following elements:

- Address Type: Radio buttons for Mailing, Physical, and a red 'X' button.
- Type: Text input field containing 'Mailing'.
- Postal Code: Text input field (highlighted in yellow).
- Street (1): Text input field (highlighted in yellow).
- Street (2): Text input field.

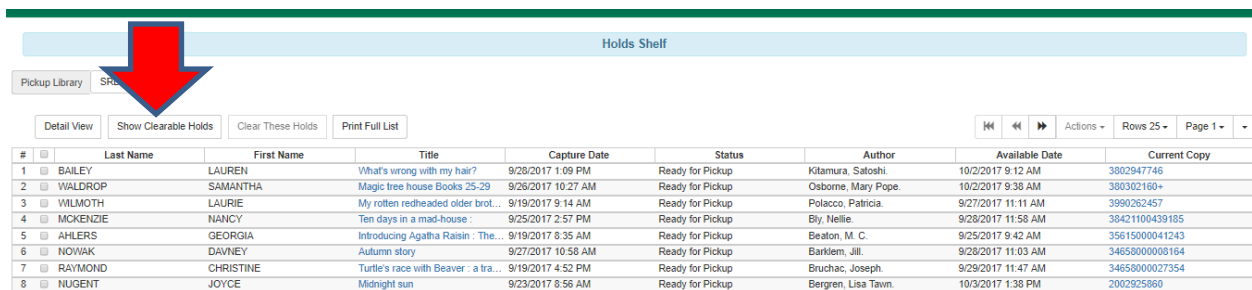
Retrieve Last Patron – To access the most recently used patron account, select Retrieve Last Patron. This is useful when a patron asks you to place a hold after you have completed a check out transaction and the library card is already back in the wallet.

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.



Hold Shelf

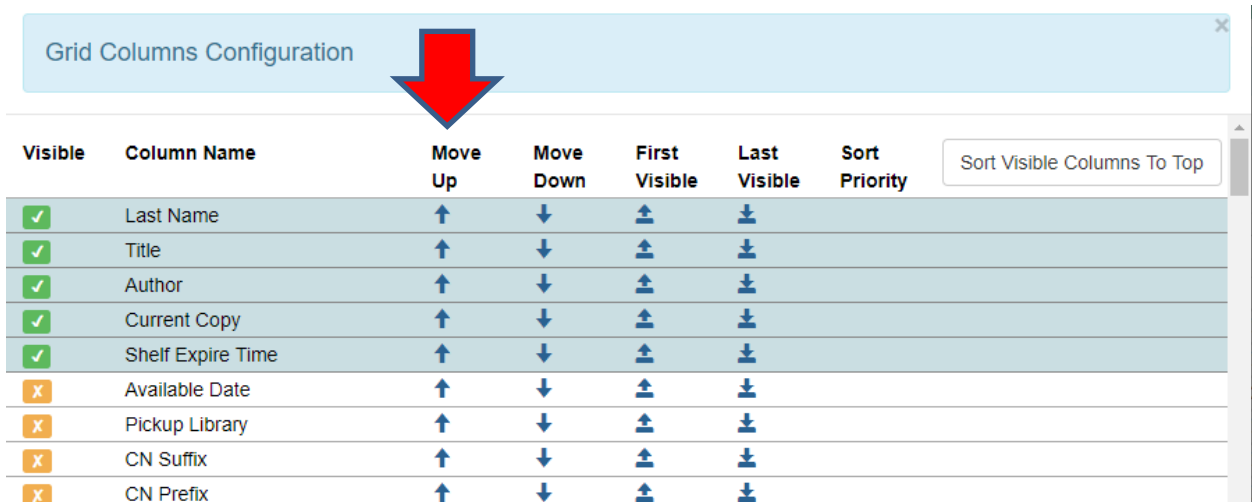
Pickup Library: SRB

Detail View | Show Clearable Holds | Clear These Holds | Print Full List

Actions - Rows 25 - Page 1 -

#	Last Name	First Name	Title	Capture Date	Status	Author	Available Date	Current Copy
1	BAILEY	LAUREN	What's wrong with my hair?	9/28/2017 1:09 PM	Ready for Pickup	Kitamura, Satoshi.	10/2/2017 9:12 AM	3802947746
2	WALDROP	SAMANTHA	Magic tree house Books 25-29	9/26/2017 10:27 AM	Ready for Pickup	Osborne, Mary Pope.	10/2/2017 9:38 AM	380302160+
3	WILMOTH	LAURIE	My rotten redheaded older brot...	9/19/2017 9:14 AM	Ready for Pickup	Polacco, Patricia.	9/27/2017 11:11 AM	3990262457
4	MCKENZIE	NANCY	Ten days in a mad-house :	9/25/2017 2:57 PM	Ready for Pickup	Bly, Nellie.	9/28/2017 11:58 AM	38421100439185
5	AHLERS	GEORGIA	Introducing Agatha Raisin : The...	9/19/2017 8:35 AM	Ready for Pickup	Beaton, M. C.	9/25/2017 9:42 AM	35615000041243
6	NOWAK	DAVNEY	Autumn story	9/27/2017 10:58 AM	Ready for Pickup	Barklem, Jill.	9/28/2017 11:03 AM	34658000008164
7	RAYMOND	CHRISTINE	Turtle's race with Beaver : a tra...	9/19/2017 4:52 PM	Ready for Pickup	Bruchac, Joseph.	9/29/2017 11:47 AM	346580000027354
8	NUGENT	JOYCE	Midnight sun	9/23/2017 8:56 AM	Ready for Pickup	Bergren, Lisa Tawn.	10/3/2017 1:38 PM	2002925860

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.



Grid Columns Configuration

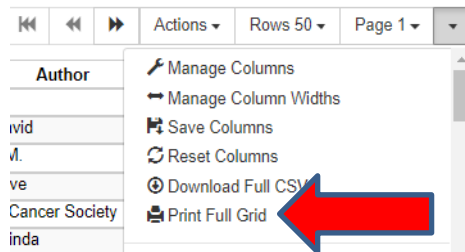
Visible	Column Name	Move Up	Move Down	First Visible	Last Visible	Sort Priority
<input checked="" type="checkbox"/>	Last Name	↑	↓	⬆	⬇	
<input checked="" type="checkbox"/>	Title	↑	↓	⬆	⬇	
<input checked="" type="checkbox"/>	Author	↑	↓	⬆	⬇	
<input checked="" type="checkbox"/>	Current Copy	↑	↓	⬆	⬇	
<input checked="" type="checkbox"/>	Shelf Expire Time	↑	↓	⬆	⬇	
<input type="checkbox"/>	Available Date	↑	↓	⬆	⬇	
<input type="checkbox"/>	Pickup Library	↑	↓	⬆	⬇	
<input type="checkbox"/>	CN Suffix	↑	↓	⬆	⬇	
<input type="checkbox"/>	CN Prefix	↑	↓	⬆	⬇	

Sort Visible Columns To Top

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	<input type="checkbox"/>	STAFF	ABC of America	Bellefontaine, Kim (Kim Anne)	3003217240	3/23/2019 10:08 AM
2	<input type="checkbox"/>	STAFF	VeggieTales A very veggie Easter vol...	Nawrocki, Michael.	3004613107	3/15/2019 2:41 PM
3	<input type="checkbox"/>	CRUMPECKER	The Dark Tower : the journey begins ...	David, Peter (Peter Allen)	3005537943	2/11/2019 11:59 PM
4	<input type="checkbox"/>	USER	The great alone	Hannah, Kristin	300575006+	2/16/2019 10:20 AM
5	<input type="checkbox"/>	USER	The great alone	Hannah, Kristin	3005766349	2/19/2019 11:59 PM
6	<input type="checkbox"/>	USER	The great alone	Hannah, Kristin	3005766357	2/19/2019 11:59 PM
7	<input type="checkbox"/>	USER	The great alone	Hannah, Kristin	3005777197	2/15/2019 4:46 PM
8	<input type="checkbox"/>	USER	The great alone	Hannah, Kristin	3005734706	2/15/2019 1:14 PM
9	<input type="checkbox"/>	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.

Pickup Library SRL-UN

Detail View Show All Holds Clear These Holds Print Full List

#		Last Name	Current Copy	Available Date	Title	Status
1	<input checked="" type="checkbox"/>	Chaffin	38420100787684	10/17/2018 11:31 AM	Smokey	dy for Pickup
2	<input type="checkbox"/>	ROBERTS	38420101077283	10/23/2018 1:05 PM	The American heritage series [DV...	dy for Pickup
3	<input type="checkbox"/>	ARMSTRONG	38420101181598	10/23/2018 1:17 PM	Toward the gleam	dy for Pickup
4	<input type="checkbox"/>	Russell	3801789624	10/24/2018 11:51 AM	Secret place	dy for Pickup
5	<input type="checkbox"/>	random	3990183471	10/16/2018 11:50 AM	Kicking butts : quit smoking and ta...	dy for Pickup
6	<input type="checkbox"/>	Morton	38421100419161	10/17/2018 10:59 AM	Dream man (Unabridged)	dy for Pickup

Actions dropdown menu options: Un-Set Top of Queue, Transfer To Marked Title, Mark Item Damaged, Mark Item Missing, Find Another Target, Cancel Hold.

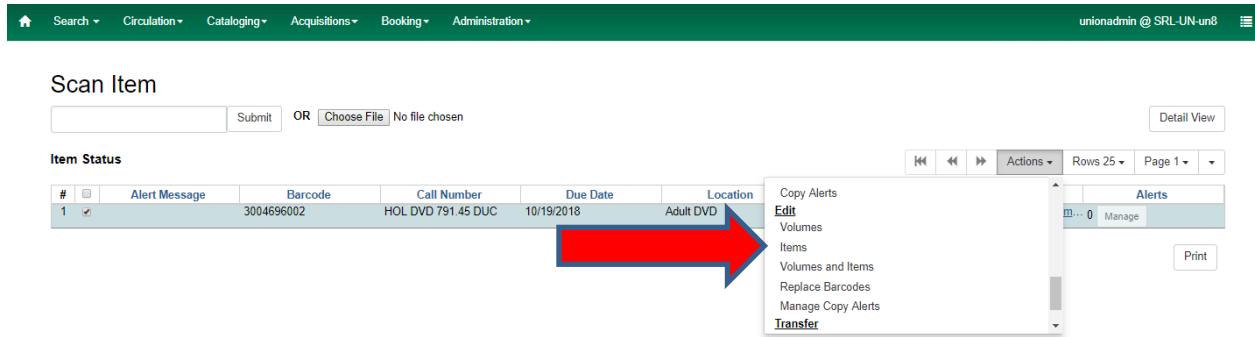
Webby Exercise 9 – Item Status

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

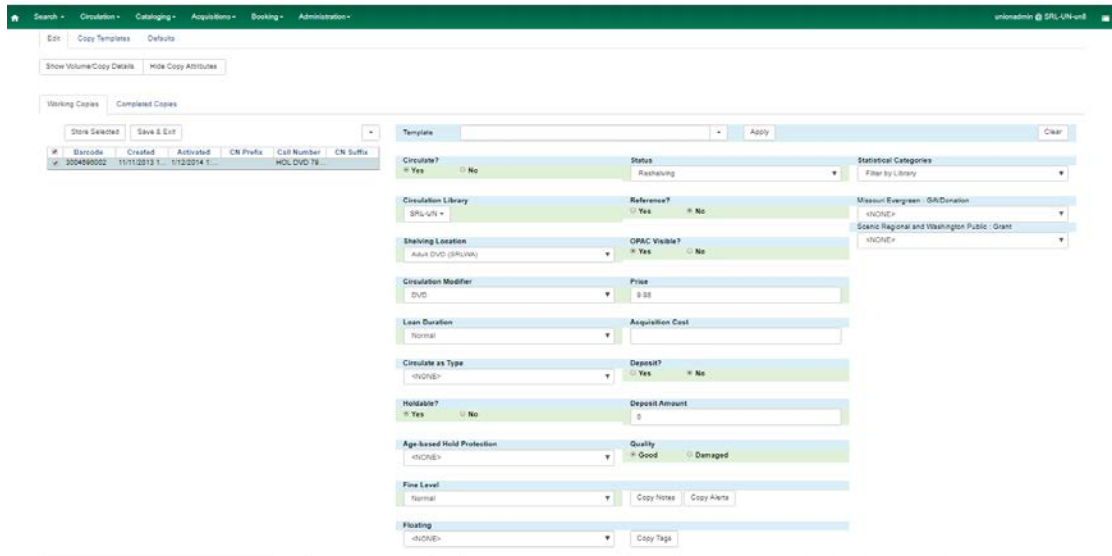
Detail View is no longer in the Actions menu. It has its own button. The Detail View looks like this.

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

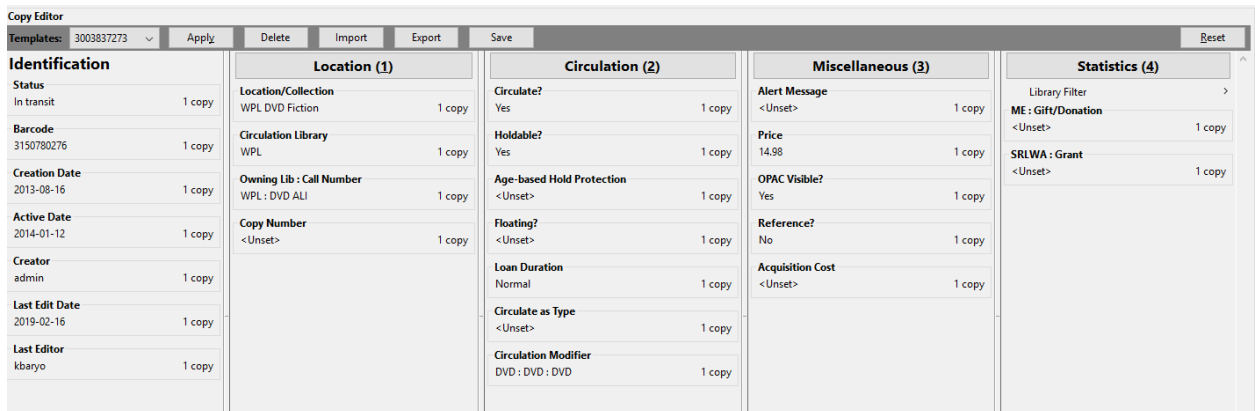
When you want to change a shelving location or floating status, scan the item barcode into Item Status and select Edit Items from the Actions menu.



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.)

Circulate? <input checked="" type="radio"/> Yes <input type="radio"/> No	Status Reshelving
Circulation Library SRL-UN	Reference? <input type="radio"/> Yes <input checked="" type="radio"/> No
Shelving Location Adult DVD (SRLWA)	OPAC Visible? <input checked="" type="radio"/> Yes <input type="radio"/> No
Circulation Modifier DVD	Price 9.98
Loan Duration Normal	Acquisition Cost
Circulate as Type <NONE>	Deposit? <input type="radio"/> Yes <input checked="" type="radio"/> No
Holdable? <input checked="" type="radio"/> Yes <input type="radio"/> No	Deposit Amount 0
Age-based Hold Protection <NONE>	Quality <input checked="" type="radio"/> Good <input type="radio"/> Damaged
Fine Level Normal	Copy Notes Copy Alerts
Floating <NONE>	Copy Tags

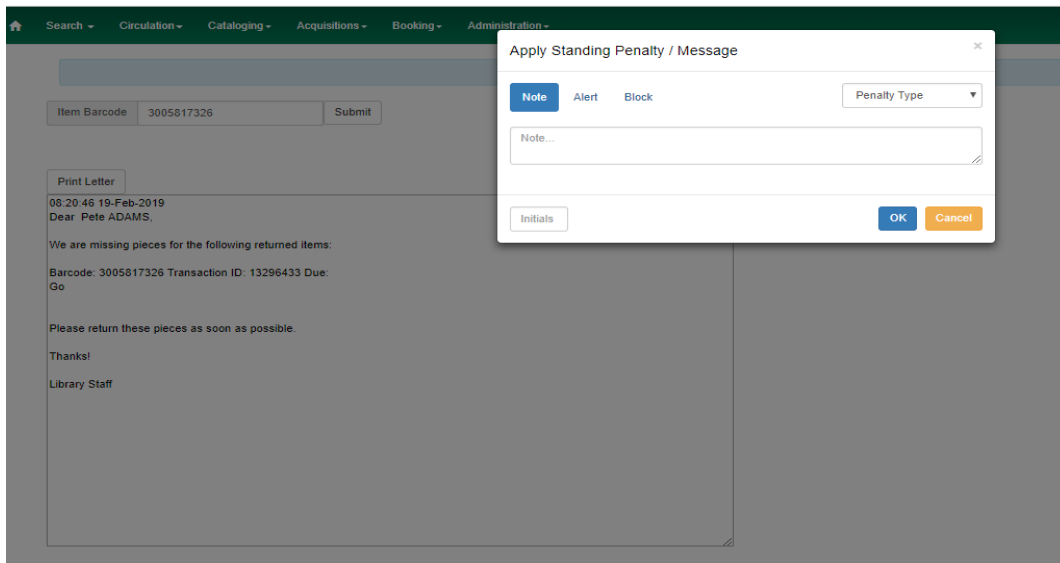
Then click Save and Exit to apply the changes.

Working Copies	Completed Copies														
<input type="button" value="Store Selected"/> <input type="button" value="Save & Exit"/>	<input type="button" value="Template"/>														
<table border="1"><thead><tr><th><input checked="" type="checkbox"/></th><th>Barcode</th><th>Created</th><th>Activated</th><th>CN Prefix</th><th>Call Number</th><th>CN Suffix</th></tr></thead><tbody><tr><td><input checked="" type="checkbox"/></td><td>30046960...</td><td>11/11/201...</td><td>1/12/2014...</td><td></td><td>HOL DVD...</td><td></td></tr></tbody></table>	<input checked="" type="checkbox"/>	Barcode	Created	Activated	CN Prefix	Call Number	CN Suffix	<input checked="" type="checkbox"/>	30046960...	11/11/201...	1/12/2014...		HOL DVD...		Circulate? <input checked="" type="radio"/> Yes <input type="radio"/> No Rest
<input checked="" type="checkbox"/>	Barcode	Created	Activated	CN Prefix	Call Number	CN Suffix									
<input checked="" type="checkbox"/>	30046960...	11/11/201...	1/12/2014...		HOL DVD...										
	Circulation Library SRL-UN Refere <input type="radio"/> Yes														

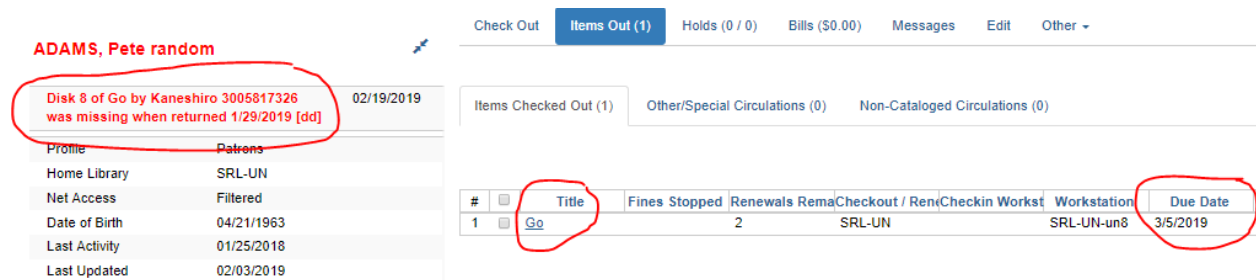
Webby Exercise 10 – Scan Item as Missing Pieces and Reprint Last Receipt

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 patron’s home page.

28420009923763, **Katie SUE**

returned with disk missing test [dd] 01/23/2019
 test test test [dd] 01/14/2019

Profile Patrons
 Home Library SRL-UN
 Net Access Unfiltered
 Date of Birth 10/31/1954
 Last Activity 10/25/2018
 Last Updated 02/02/2019
 Create Date 12/27/2005
 Expire Date 08/28/2019
 Fines Owed \$0.00
 Items Out 8
Overdue 8
 Long Overdue 0
 Claimed Returned 0
 Lost 0
 Non-Cataloged 0
 Holds 0 / 10
 Card 9300721798
 Username 9300721798
 Day Phone 636-221-0903
 Evening Phone
 Other Phone
 ID1 (Drivers License)
 ID2
 Email
 Patron Type Staff

Mailing (copy/print)
 Odessa Community Day Care Cent
 Steelville, MO 64535

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

STOP

Penalties

SRLWA	Alerting Note, no blocks returned with disk missing test [dd]	01/23/2019
SRLWA	Alerting Note, no blocks test test test [dd]	01/14/2019

Press a navigation button above (for example, Check Out) to clear this alert.

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

28420309923763, Katie SUE

returned with disk missing test [dd] 01/23/2019
test test test [dd] 01/14/2019

Barcode [] Submit

Date Options 02/17/2019

Profile Patrons
Home Library SRL-UN
Net Access Unfilled
Date of Birth 10/31/1954
Last Activity 10/25/2018
Last Updated 02/02/2019
Create Date 12/27/2005
Expire Date 08/28/2019
Fines Owed \$0.00
Items Out 8
Overdue 8

Balance Owed Barcode Circ ID Call Number Due Date Family Name Location Remaining Ri Title Circulation M Circulation L Owning Libra Alerts

No Items To Display

Strict Barcode Quick Receipt Done

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.

Barcode

Barcode

Adult Magazines

Fishing Rods

Juvenile Magazines

Paperback Book

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.


Date Options 02/17/2019


X Specific Due Date

X Use Specific Due Date Until Logout


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

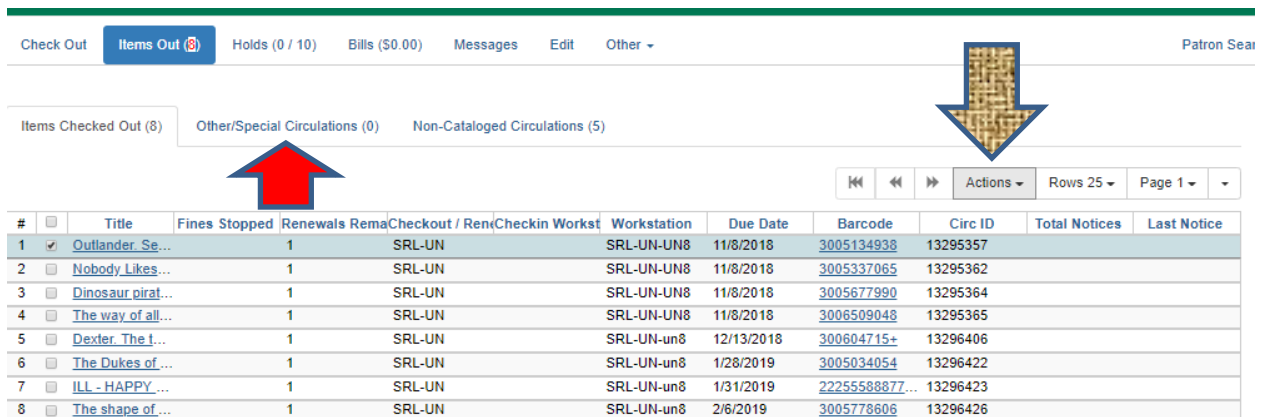
Items Out

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.)

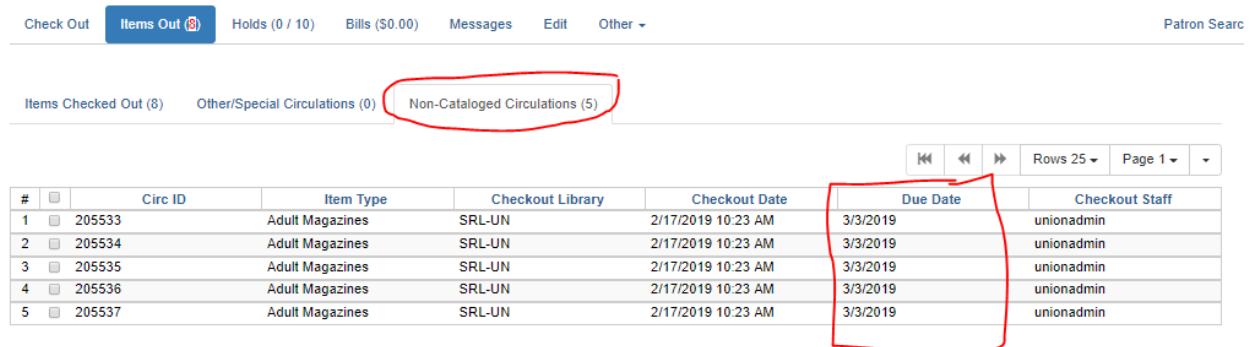


Check Out **Items Out (8)** Holds (0 / 10) Bills (\$0.00) Messages Edit Other ▾ Patron Search

Items Checked Out (8) Other/Special Circulations (0) Non-Cataloged Circulations (5)

#	<input type="checkbox"/>	Title	Fines Stopped	Renewals Rema	Checkout / Rent	Checkin Workst	Workstation	Due Date	Barcode	Circ ID	Total Notices	Last Notice
1	<input checked="" type="checkbox"/>	Outlander Se...		1	SRL-UN		SRL-UN-UN8	11/8/2018	3005134938	13295357		
2	<input type="checkbox"/>	Nobody Likes...		1	SRL-UN		SRL-UN-UN8	11/8/2018	3005337065	13295362		
3	<input type="checkbox"/>	Dinosaur pirat...		1	SRL-UN		SRL-UN-UN8	11/8/2018	3005677990	13295364		
4	<input type="checkbox"/>	The way of all...		1	SRL-UN		SRL-UN-UN8	11/8/2018	3006509048	13295365		
5	<input type="checkbox"/>	Dexter. The 1...		1	SRL-UN		SRL-UN-un8	12/13/2018	300604715+	13296406		
6	<input type="checkbox"/>	The Dukes of ...		1	SRL-UN		SRL-UN-un8	1/28/2019	3005034054	13296422		
7	<input type="checkbox"/>	ILL - HAPPY ...		1	SRL-UN		SRL-UN-un8	1/31/2019	22255588877...	13296423		
8	<input type="checkbox"/>	The shape of ...		1	SRL-UN		SRL-UN-un8	2/6/2019	3005778606	13296426		

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.



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

Items Checked Out (8) Other/Special Circulations (0) **Non-Cataloged Circulations (5)**

#	<input type="checkbox"/>	Circ ID	Item Type	Checkout Library	Checkout Date	Due Date	Checkout Staff
1	<input type="checkbox"/>	205533	Adult Magazines	SRL-UN	2/17/2019 10:23 AM	3/3/2019	unionadmin
2	<input type="checkbox"/>	205534	Adult Magazines	SRL-UN	2/17/2019 10:23 AM	3/3/2019	unionadmin
3	<input type="checkbox"/>	205535	Adult Magazines	SRL-UN	2/17/2019 10:23 AM	3/3/2019	unionadmin
4	<input type="checkbox"/>	205536	Adult Magazines	SRL-UN	2/17/2019 10:23 AM	3/3/2019	unionadmin
5	<input type="checkbox"/>	205537	Adult Magazines	SRL-UN	2/17/2019 10:23 AM	3/3/2019	unionadmin

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.

#	Hold ID	Current Copy	Request Date	Capture Date	Available Date	Hold Type	Pickup Library	Title	Author	Potential Copies	Status
1	1356269		10/7/2018 9:1...			C	SRL-UN	Lessons from...	McDonough, ...	1	Waiting for C...
2	1381701	33431000236...	11/16/2018 2:...			T	SRL-UN	Anne of Gree...	Montgomery, ...	4	Waiting for C...
3	1033414		1/25/2018 3:5...			T	SRL-UN	Train dreams	Johnson, Den...	0	Suspended
4	1033420		1/25/2018 4:0...			T	SRL-UN	Life after life...	Atkinson, Kat...	0	Suspended
5	1033421		1/25/2018 4:0...			T	SRL-UN	Homegoing _...	Gyasi, Yaa	0	Suspended
6	1033422		1/25/2018 4:0...			T	SRL-UN	The mirror thi...	Seay, Martin	0	Suspended
7	1033426		1/25/2018 4:0...			T	SRL-UN	The heart's in...	Boyne, John	0	Suspended
8	1033428		1/25/2018 4:0...			T	SRL-UN	Pachinko	Lee, Min Jin	0	Suspended
9	1033437		1/25/2018 4:0...			T	SRL-UN	4 3 2 1	Auster, Paul	0	Suspended
10	1033457		1/25/2018 4:1...			T	SRL-UN	The immortali...	Benjamin, Chl...	0	Suspended

A new feature is Detail View. Select a hold from the list, click Detail View and see details about the hold in tabular form.

Record Summary (MARC)

Title:	Lessons from the mountain : what I learned from Erin Walton	Edition:		TCN:	156034	Created By:	admin
Author:	McDonough, Mary Elizabeth.	Pub Date:	2011	Database ID:	156034	Last Edited By:	scenicat2
Bib Call #:	791.4302/8/092 B	Record Owner:		Last Edited On:	9/29/2016 2:57 PM		

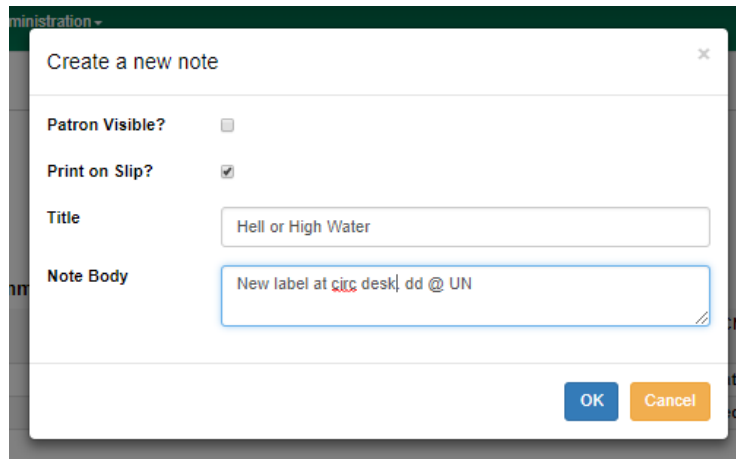
Hold Details

Request Date	10/7/2018 9:13 AM	Capture Date		Available On	
Hold Type	C	Current Copy		Call Number	B MCD
Pickup Lib	SRL-UN	Status	Waiting for Copy	Behind Desk	false
Current Shelf Lib		Current Copy Location		Force Copy Quality	true
Email Notify	false	Phone Notify		SMS Notify	6362210903
Cancel Cause		Cancel Time		Cancel Note	

Notes Staff Notifications

New Note

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.



administration -

Create a new note ✕

Patron Visible?

Print on Slip?

Title

Note Body

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	Pay Bill
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		

Payment Type

Check Number

Payment Received

Annotate

⏪ ⏩ Actions ▾ Rows 25 ▾ Page 1 ▾

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

Convert Change to Patron Credit
 Receipt On Payment
 # Copies

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

Payment Received:

Annotate Payment

Actions for Selected Transactions

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

Receipt Options ▾

Voided this session: 0.00	Change Due Upon Payment: 0.00	Pending:	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	Total:	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
		Checked:	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>		<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>

Convert Change to Patron Credit

Page 1 of 3 – Patron Screen / Bills

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.

Check Out Items Out (24) Holds (0 / 12) Bills (\$856.61) Messages Edit Other ▾ Patron Search

Total Owed:	\$856.61	Refunds Available:	\$0.00	Pay Bill
Total Billed:	\$856.61	Credit Available:	\$0.00	
Total Paid/Credited:	\$0.00	Session Voided:	\$0.00	

Owed for Selected:	\$18.08	Pending Payment:	\$0.00
Billed for Selected:	\$18.08	Pending Change:	\$0.00
Paid/Credited for Selected:	\$0.00		

Payment Type: ▾
 Check Number:
 Payment Received:
 Annotate:

Bill Patron History Check All Refunds

⏪ ⏩ Actions ▾ Rows 50 ▾ Page 1 ▾ ▾

#	<input type="checkbox"/>	Status	Payment Pe	Billing Loca	Barcode	Title	Last Billing	Shelving Lc	Owning Lib/	Call Numbe	Type	Total Paid	Total Billed	Start	Bill #	Balance Ow
1	<input type="checkbox"/>	?	\$0.00	SRL-UN	3005797...	Belle and...	Lost Mat...	Fiction	SRL-UN	FIC SAV	circulation	\$0.00	\$14.99	7/23/201...	12226079	\$14.99
2	<input type="checkbox"/>	?	\$0.00	SRL-UN	3005797...	Goldilock...	Lost Mat...	Fiction	SRL-UN	FIC SAV	circulation	\$0.00	\$12.99	7/23/201...	12226081	\$12.99
3	<input checked="" type="checkbox"/>	?	\$0.00	SRL-UN	3004128...	Catching...	Lost Mat...	Young Ad...	SRL-PC	YA FIC C...	circulation	\$0.00	\$18.08	7/23/201...	12226083	\$18.08

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	circulation	Total Billed	\$18.08	Title	Catching fire
Type	7/23/2018 10:27 AM	Total Paid/Credited	\$0.00	Checked Out	7/23/2018 10:27 AM
Start		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

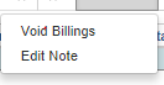
Billing Location	circulation	Total Billed	\$18.08	Title	Catching fire
Type	7/23/2018 10:27 AM	Total Paid/Credited	\$0.00	Checked Out	7/23/2018 10:27 AM
Start		Balance Due	\$18.08	Due Date	8/6/2018
Finish		Renewal?		Checked In	

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

#	<input type="checkbox"/>	Amount	Create Date	Billing Period	Billing Period	Legacy Billing	Legacy Billing	Billing ID	Note	Void Timesta	Void Billings	Staff	Transaction	Type
1	<input checked="" type="checkbox"/>	\$18.08	9/18/2018 ...				Lost Materi...	14799625	SYSTEM ...				12226083	

Payments

#	<input type="checkbox"/>	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.

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

Staff-Generated Penalties / Messages

Apply Penalty / Message

#	Note	Library	Label	Applied On
1	this is a test - Connie can you see this note!...	SRLWA		7/16/2018 7:56 AM
2	test test test [dd]	SRLWA		1/14/2019 11:41 AM
3	returned with disk missing test [dd]	SRLWA		1/23/2019 11:29 AM

Archived Penalties / Messages

Set Date Start: 02/17/2018 Set Date End: 02/17/2019

#	Note	Library	Label	Applied On
No Items To Display				

Administration -

Apply Standing Penalty / Message

Note Alert Block

Penalty Type

Note...

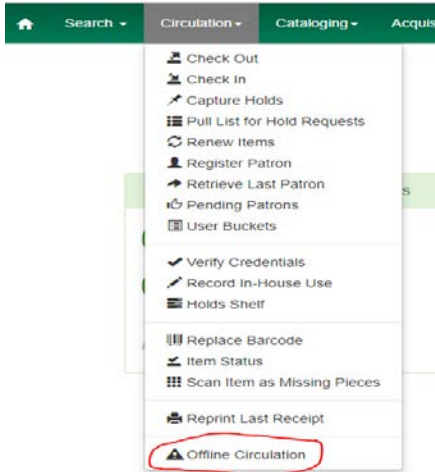
Initials

OK Cancel

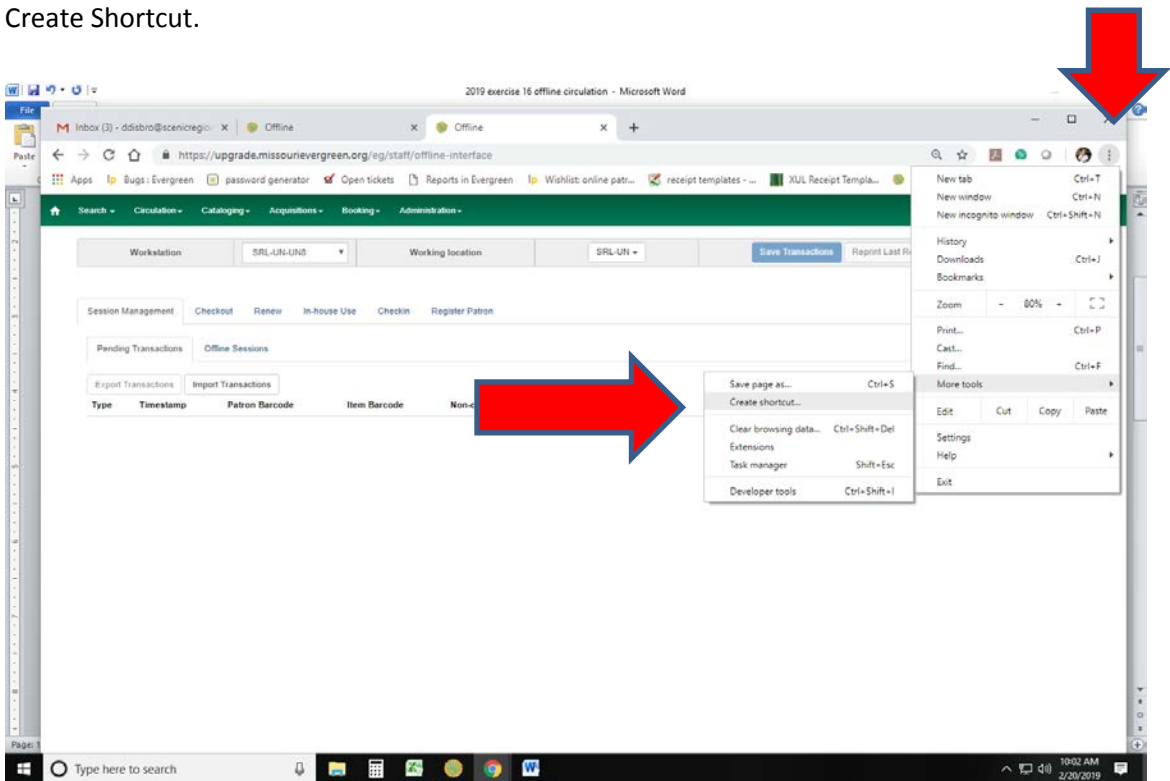
Webby Exercise 16 – Offline Circulation

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.

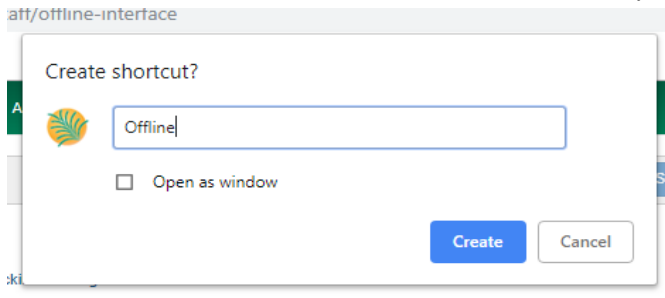
1. Open Offline Circulation in the Circulation tab.



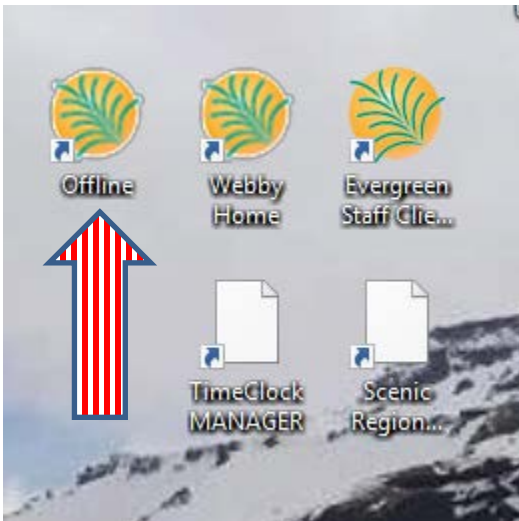
2. Use the three vertical dots to the far right of the browser address bar to access More Tools -> Create Shortcut.



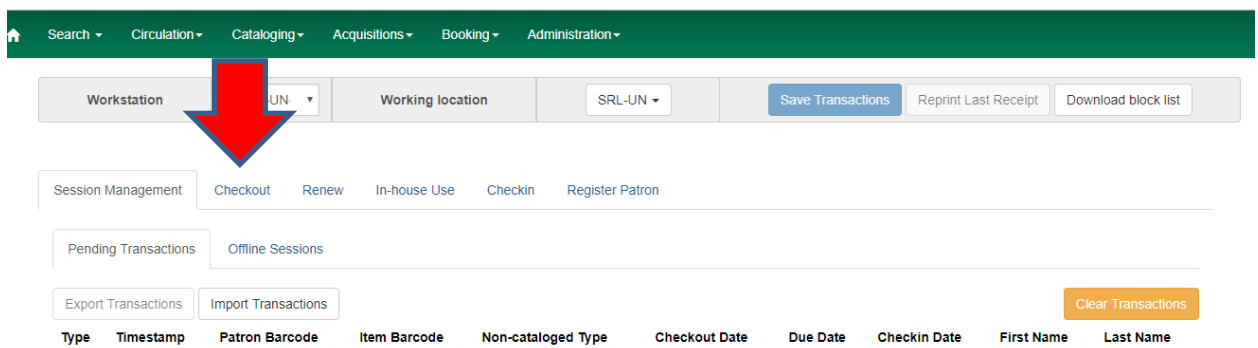
- The default name for the short cut is Offline. You may change the name if you want to.



- 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.

WorkstationSRL-UN ▾Working locationSRL-UN ▾Save Transactions

CheckoutRenewIn-house UseCheckinRegister Patron

Due Date: No Offset ▾

Patron barcode:

Item Barcode:

Non-cataloged Type: Select Non-cataloged Type ▾

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

Patron barcode

Item

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.

Page 3 of 6 – Offline Circulation

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.

Sign In

Username

Password


Workstation

Unprocessed offline transactions waiting for upload

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

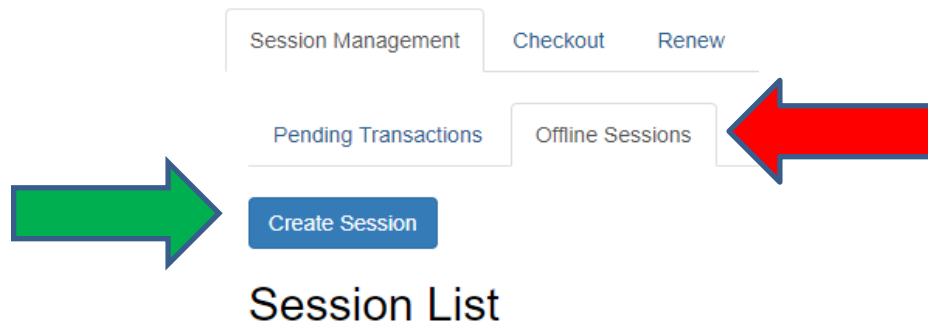
The page opens to Pending Transaction. Here you will see all transactions performed at that workstation while offline.

Workstation: SRL-UN Working location: SRL-UN



Type	Timestamp	Patron Barcode	Item Barcode	Non-cataloged Type	Checkout Date	Due Date	Checkin Date	First Name	Last Name
checkout	2/20/2019 9:30 AM	9300721798	3004686805		2/20/2019 9:30 AM	3/6/2019			
checkout	2/20/2019 9:30 AM	9300721798	3005196763		2/20/2019 9:30 AM	3/6/2019			
checkout	2/20/2019 9:30 AM	9300721798	3004696002		2/20/2019 9:30 AM	3/6/2019			

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.

Session List

Organization	Created By	Description	Date Created	Upload Count	Transactions Processed	Date Completed
SRL-UN	USER	test 2 20 2019	2/20/2019 9:45 AM	0	0	Upload Process

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.

Create Session

Refresh

Session List

Organization	Created By	Description	Date Created	Upload Count	Transactions Processed	Date Completed	Upload	Process
SRL-UN	USER	test 2 20 2019	2/20/2019 9:45 AM	3	3	2/20/2019 9:48 AM		

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