

# Sitka's Evergreen Web Client Tip Sheet

Evergreen 3.0 features a new, modern staff client that runs in the web browser and can be used on desktop and mobile devices. We strongly recommend that you use the Google Chrome Web Browser. <u>Google Chrome Download & Help</u>

# Accessing the Web Client

1. In your web browser [Google Chrome] go to https://catalogue.libraries.coop/eg/staff/

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A	Sea	rch 👻	Circulation -	Cataloging <del>-</del>	Acquisitions -	Booking <del>-</del>	Administration -	
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- 2. Enter your Evergreen username and password (same info you currently use to login)
- 3. If this is your first login you will need to register your workstation. Enter any unique Name to identify your workstation and choose your branch from the drop down list

gister a N	lew Workstation For This Browser	
3NSP -	Workstation Name	Register
3NSP +	Workstation Name	Registe

- 4. Click OK on the Registration successful message.
- 5. Re-enter your password in the Password field and click Login to complete the registration and login process
- 6. On the next login you will only need to enter the username and password once.

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		Sign In				
		Username				
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		Sign in				

7. You may repeat this registration process on as many computers as you like

## Popups

Your browser must allow popups from https://catalogue.libraries.coop. You should see a small icon or message when a popup is triggered, but if you do not, you may follow these steps to ensure that popups are allowed.

#### Allow Popups In Chrome

- 1. Click on the menu icon (three vertical dots in the upper-right corner).
- 2. Select Settings.
- 3. Scroll to the bottom and click Advanced.
- 4. Under "Privacy and Security" click "Content settings."
- 5. Click on Popups.
- 6. Click the Add button next to Allow.
- 7. Type in https://catalogue.libraries.coop and click Add.

## **Bookmarks and Profiles**

The web client allows you to bookmark the pages that you use the most, and to use your browser's existing functionality to build your own custom toolbars and even to use browser profiles for different activities.

## **Search Preferences**

Whether you prefer your catalog searches from within the staff client to default to all of Sitka, to SD63, or to a specific branch, you may set your preference on the Workstations page.

- 1. Click on Administration.
- 2. Click on Workstation.
- 3. Select using the Default Search Library Dropdown. = BSD
- 4. Select using the Preferred Library Dropdown = Your branch
- 5. (There is no Save button, it will automatically save your preferences when you make the selection.)

Search - Circulati	ion - Cataloging -	Acquisitions - Bo	ooking - Administration -	ssisaBKI @ BKI-CBWork
<ul> <li>Registered Worksta</li> <li>Printer Settings</li> <li>Print Templates</li> <li>Stored Preferences</li> </ul>	tions		Default Search Library The default search library setting determines what library is searched from the advanced search screen and portal page by default. Manual selection of a search library will override It. One recommendation is to set the search library to the highest point you would normally want to search.	BSD •
Disable Sounds?	te ("Hatch") Test: Success Εποτ	Info Warning	Preferred Library The preferred library is used to show copies and URIs regardless of the library searched. One recommendation is to set this to your workstation library so that local copies show first in search results.	BVIK •
			Advanced Search Default Pane Advanced search has secondary panes for Numeric and MARC Expert searching. You c change which one is loaded by default when opening a new catalog window here.	Advanced (default)

# **Column Configuration**

Various search results tables may not default to the most useful columns. For instance, the patron search results page may be easier to use if you change the columns to Card, Last Name, First Name, Middle Name, Dob, and Primary Identification, and you may wish to have the results sort by Last Name, then by First Name.

#### To customize your columns:

- 1. Click on the dropdown arrow at the top-right of the results table.
- 2. Select the desired columns.
- 3. Click 'Save Columns' (on the dropdown list).
- 4. Click 'Configure columns' (on the dropdown list).
- 5. Use Expand and Shrink to change column sizes.
- 6. Use Left and Right to change the column order.
- 7. Use the sort options to prioritize how sorting should work. (A negative number will sort the column in reverse order.)
- 8. Click 'Save columns.'

## **Documentation**

- Sitka Docs coming soon
- Evergreen community Docs
  - http://docs.evergreen-ils.org/