



Getting Started with Sitka's Evergreen

Evergreen Basics

Training video Playlist - <https://goo.gl/JgdCP3>

Logging into Evergreen

An account with library staff permissions is required to log in to the Evergreen staff client.

More details can be found in Sitka's Evergreen Training Manual - <http://docs.sitka.bclibraries.ca/Sitka/current/html/login-staff-client.html>

Set Search Preferences

You can choose to set up a default search library and preferred library for a workstation.

1. Admin → Workstation Administration → Set Search Preferences.
 - For Circulators : Default Search Library = 'Your Library or Library Federation'
 - For Cataloguers : Default Search Library = 'Sitka'

The preferred search library determines which library's results show up at the top of the search results list.

More details can be found in Sitka's Evergreen Training Manual - http://docs.sitka.bclibraries.ca/Sitka/current/html/intro_start_workstation_admin.html#intro-start-workstation-admin-search-preference

Configure Toolbars

1. Admin → Workstation Administration → Toolbars → Current.
 - Circ – Circulation Toolbar
 - Cat – Cataloguing Toolbar
2. Admin → Workstation Administration → Toolbars → Select Set Workstation Default to Current
 - The selected toolbar group is set as default for this workstation.

More details can be found in Sitka's Evergreen Training Manual - http://docs.sitka.bclibraries.ca/Sitka/current/html/intro_start_workstation_admin.html#intro-start-workstation-admin-button-bar

Reset your Password

1. Use the [Forgot Your Password?](#) link in the OPAC

More details can be found in Sitka's Evergreen Training Manual - <http://docs.sitka.bclibraries.ca/Sitka/current/html/profiles-password-reset.html>



Getting Started with Sitka's Evergreen Circulation

We strongly recommend that you complete the **Circulation Practice exercises**.

You can find these here - <http://bc.libraries.coop/support/sitka-training-server/>

Staff Client Navigation

The staff client is menu driven and functions like a browser in that it opens tabs and you can have multiple tabs open at the same time.

More details can be found in Sitka's Evergreen Training Manual - <http://docs.sitka.bclibraries.ca/Sitka/current/html/navigate-eg.html>

Patron Search

Two ways to retrieve a patron:

1. Search -> Search for Patrons [F4] : only searches patrons that belong to your library or have opted in to your library
2. Search -> Search for Patron by Barcode [F1] : searches the entire database

More details can be found in Sitka's Evergreen Training Manual - <http://docs.sitka.bclibraries.ca/Sitka/current/html/searching-patrons.html>

Account Status by Colour Code

Patron Account status is indicated by coloured box around the patron name.

More details can be found in Sitka's Evergreen Training Manual - <http://docs.sitka.bclibraries.ca/Sitka/current/html/patron-status-colour.html>

Check Out

<http://docs.sitka.bclibraries.ca/Sitka/current/html/circulation-check-out.html>

Check In

<http://docs.sitka.bclibraries.ca/Sitka/current/html/circ-check-in.html>

Holds

<http://docs.sitka.bclibraries.ca/Sitka/current/html/hold.html>

Bills and Payments

<http://docs.sitka.bclibraries.ca/Sitka/current/html/bills.html>



Getting Started with Sitka's Evergreen Cataloguing

Cataloguing Video playlist - <https://goo.gl/GQJPRj>

We strongly recommend that you complete the **Cataloguing Practice exercises**.

You can find these here - <http://bc.libraries.coop/support/sitka-training-server/>

Sitka's Evergreen Cataloguing Policy - <http://docs.sitka.bclibraries.ca/Policy/current/html/>

Searching the Catalogue

It is critical to search the database before adding titles, volumes, or copies. Good practice is to assume the item you are adding already exists, and to do an exhaustive search for the item before cataloguing it.

More details can be found in Sitka's Evergreen Training Manual -

<http://docs.sitka.bclibraries.ca/Sitka/current/html/search.html>

Adding Volumes

<http://docs.sitka.bclibraries.ca/Sitka/current/html/add.html>

Characteristics of a "Best" MARC Record in the Sitka Database

<http://docs.sitka.bclibraries.ca/Policy/current/html/policy-cat-procedures.html#policy-cat-best>

Library of Congress MARC format for Bibliographic Data

<https://www.loc.gov/marc/bibliographic/>

Copy Editor

<http://docs.sitka.bclibraries.ca/Sitka/current/html/cat-copy-editor.html>

Fixed Fields

A chart showing which fixed field characters are used to determine which icon can be found in the Sitka Evergreen Manual <http://docs.sitka.bclibraries.ca/Sitka/current/html/marcedit-formatfilter-icons.html>

Cooperatively Cataloguing in a Consortium

<https://bc.libraries.coop/wp-content/uploads/2014/11/Handout-CooperativelyCataloguinginaConsortium.pdf>