

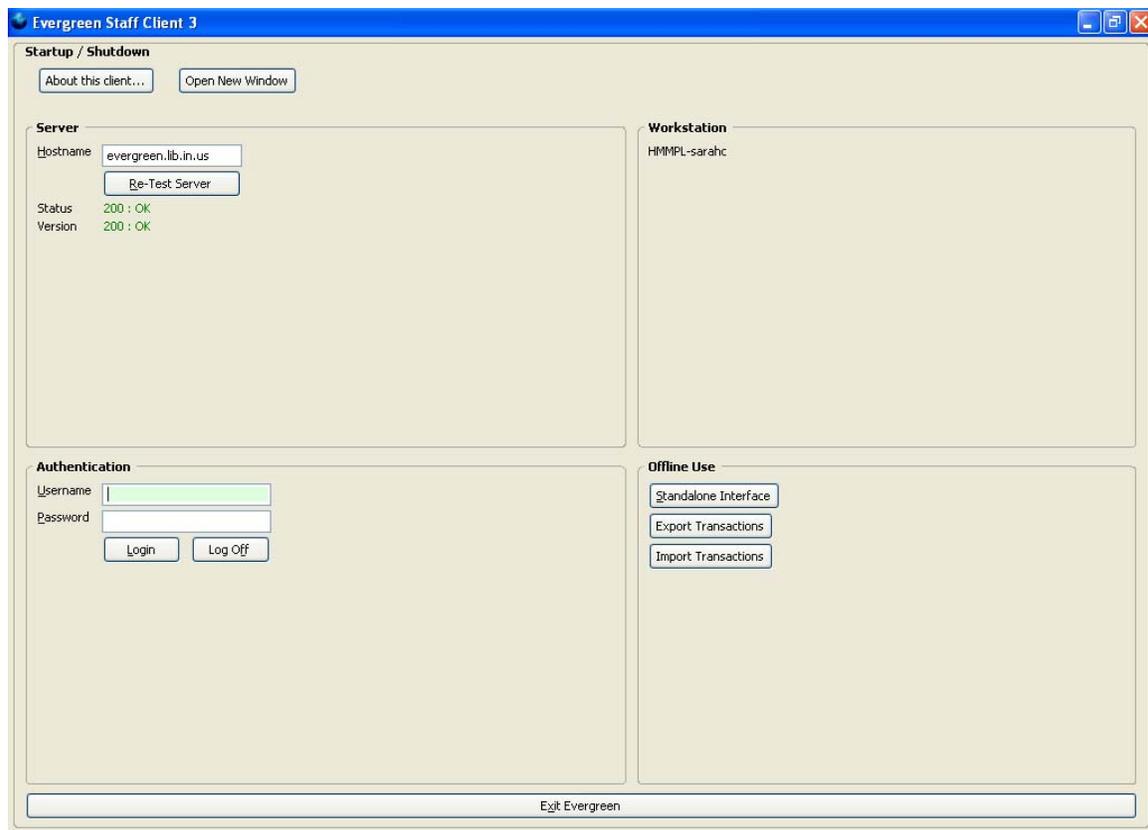
Chapter 1 -- Logging In, File Commands and Tabs

Logging In

Click on the Evergreen staff client icon located on your desktop:



The login screen opens:

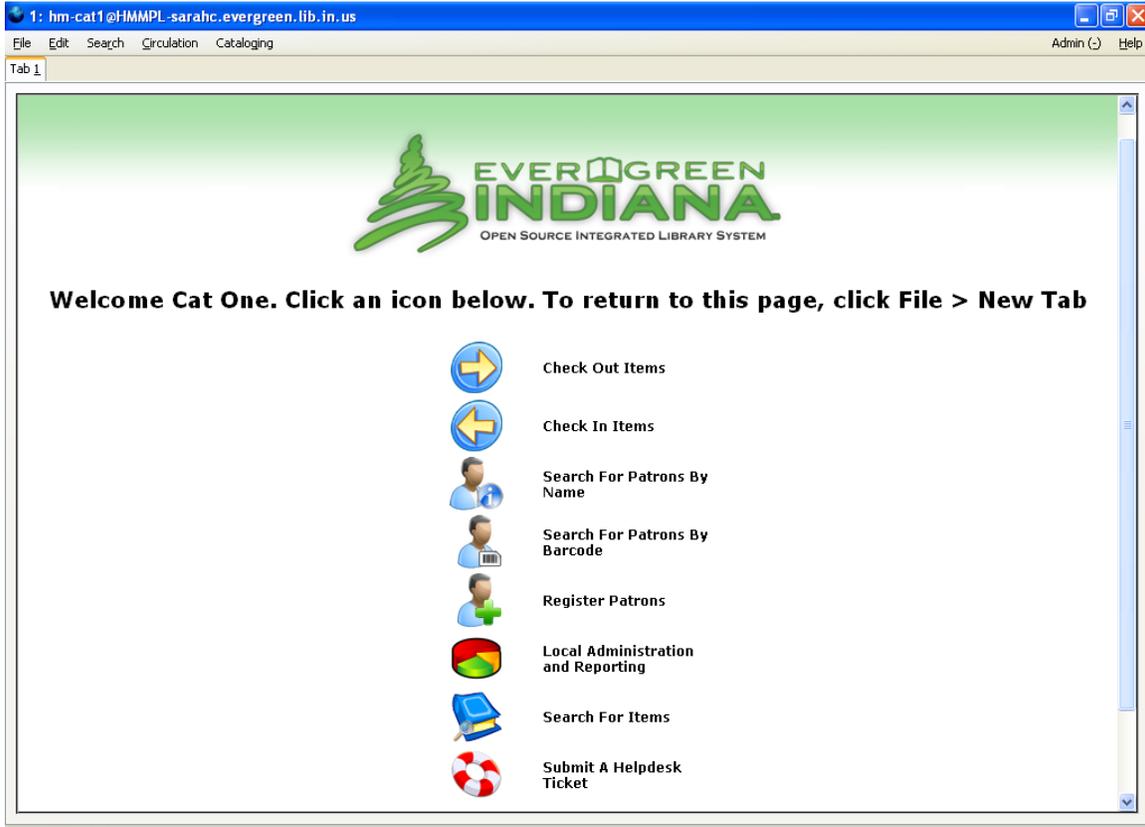


In the **Authentication** box, type your staff client user name in the box labeled **“Username.”** Then, type your staff client password in the box labeled **“Password.”** Note the **Open New Window** button in the top left.

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The Portal Page will open in a new window:



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

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Clicking on the icons on the Portal Page will open the desired function in a new tab, except for Submit a Helpdesk Ticket, which will open in the current tab, as shown:

The screenshot shows a web browser window with the address bar displaying "1: hm-cat1@HMMPL-sarahc.evergreen.lib.in.us". The browser's menu bar includes "File", "Edit", "Search", "Circulation", "Cataloging", "Admin (-)", and "Help". The page title is "Indiana State Library Inspire/Evergreen Helpdesk". On the left, a navigation menu lists "Home", "Submit a Request" (with a sub-link "Check on a Request"), "Knowledge Books", "Indiana-Migration", and "Listserv Archive". The main content area is titled "Submit a Request for Assistance" and contains the following text: "Please complete the form below detailing your request and a member of our support staff will respond as soon as possible." The form fields are: "Name:" (text input), "Email:" (text input), "Phone:" (text input), "Request Details" (section header), "Is this request urgent?" (dropdown menu with "No" selected), "This is what I DID:" (text area), "This is what I EXPECTED to happen:" (text area), and "This is what ACTUALLY happened:" (text area).

If you are experiencing a problem with Evergreen, submitting a Helpdesk ticket is the preferred way to request assistance. Do not submit cataloging questions to the Helpdesk, those should be directed to the Cataloging Listserv evergreen_indiana-catalog@lists.in.gov. For questions about how to use Evergreen or one of its functions, first consult your Cataloging Manual, then the Listserv. The Helpdesk should be used when the Evergreen Catalog is not functioning, you've gotten unexpected error messages, something is functioning differently than usual, etc.

Navigating with File Commands

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

In the upper left corner, note the File, Edit, Search, Circulation and Cataloging menus.

Function key prompts include:

- **F1 to checkout**
- **F2 to checkin,**
- **F3 to search the catalog**
- **F4 to search for patrons**
- **F5 to check item status**

Other keyboard shortcuts include:

CTRL + C: Copy
CTRL + X: Cut
CTRL + V: Paste
CTRL + Z: Undo
CTRL + B: Bold
CTRL + U: Underline
CTRL + I: Italic

Using Tabs

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

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

- Create a new tab by pressing **Ctrl + T** on the keyboard or selecting **New Tab** from the **File (Alt + F)** menu.
- Close a tab by pressing **Ctrl+W** on the keyboard or selecting **Close Tab** from the **File (Alt + F)** menu.

Note that when you select a new function from the Evergreen Menu or use the shortcut keys, this function will open in your active tab, replacing whatever function you currently had open in that tab. If you had work that had not been saved, you would lose it, so remember to open new tabs for new functions.