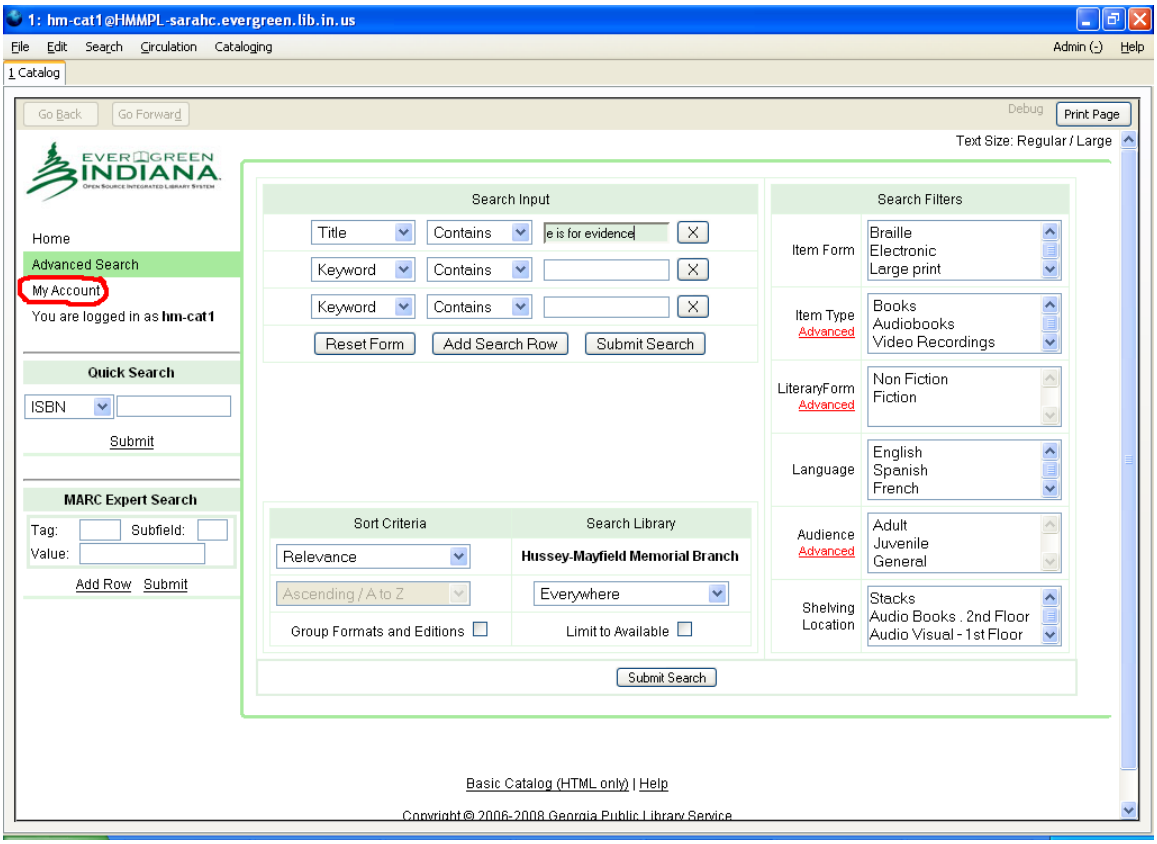
Chapter 6 - Searching the OPAC

The home page for the Evergreen catalog allows you to search for books and other items at your library or libraries.

The home page contains a single search box for you to enter search terms. You can get to the home page at any time by selecting the Home link from the left-hand sidebar in Evergreen, or you can enter a search anywhere you see a search box in Evergreen.

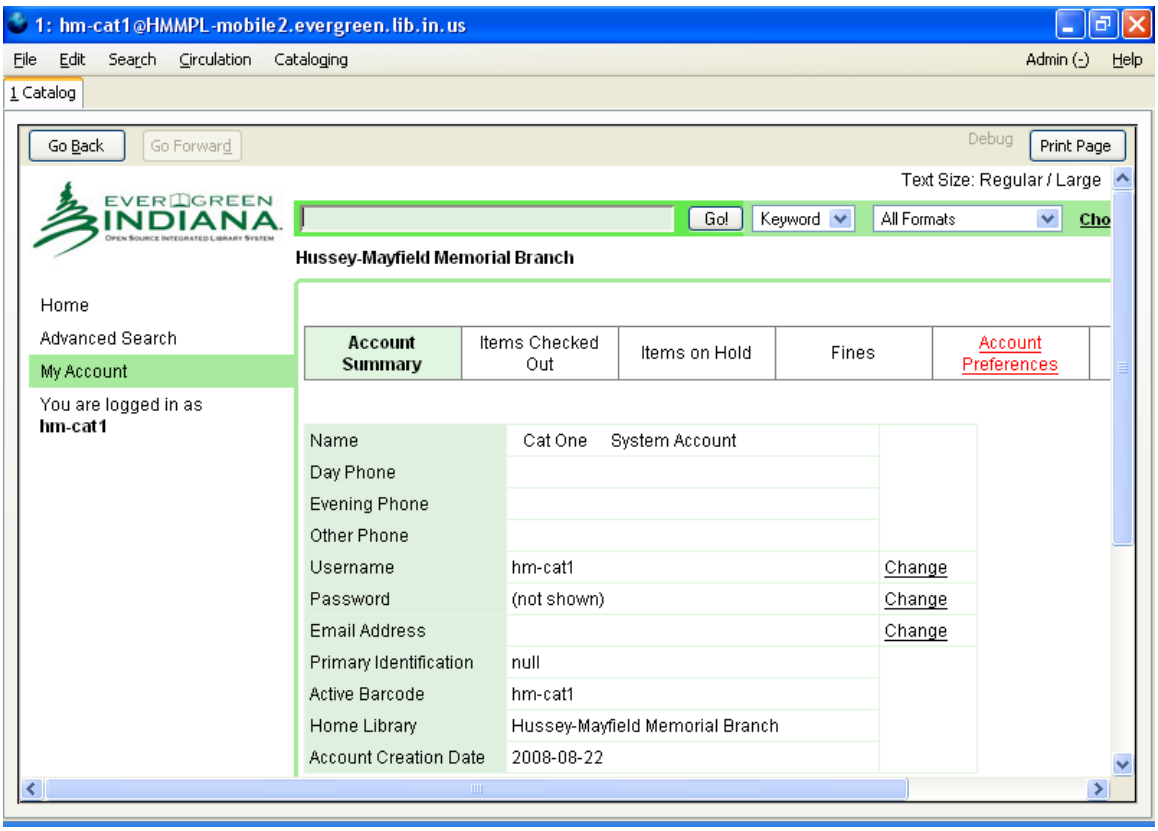
Push the **F3** key to bring up the Catalog search screen. You can also click on the **Search** menu or use the keyboard shortcut **Alt + R** and choose **the Catalog (Alt + C)** on the drop-down list or go to **Cataloging (Alt + G)** and choose **Search the Catalog (Alt + S)**. Likely you will find **F3** to be the quickest.



Setting User Account Preferences to Search All of Evergreen Indiana

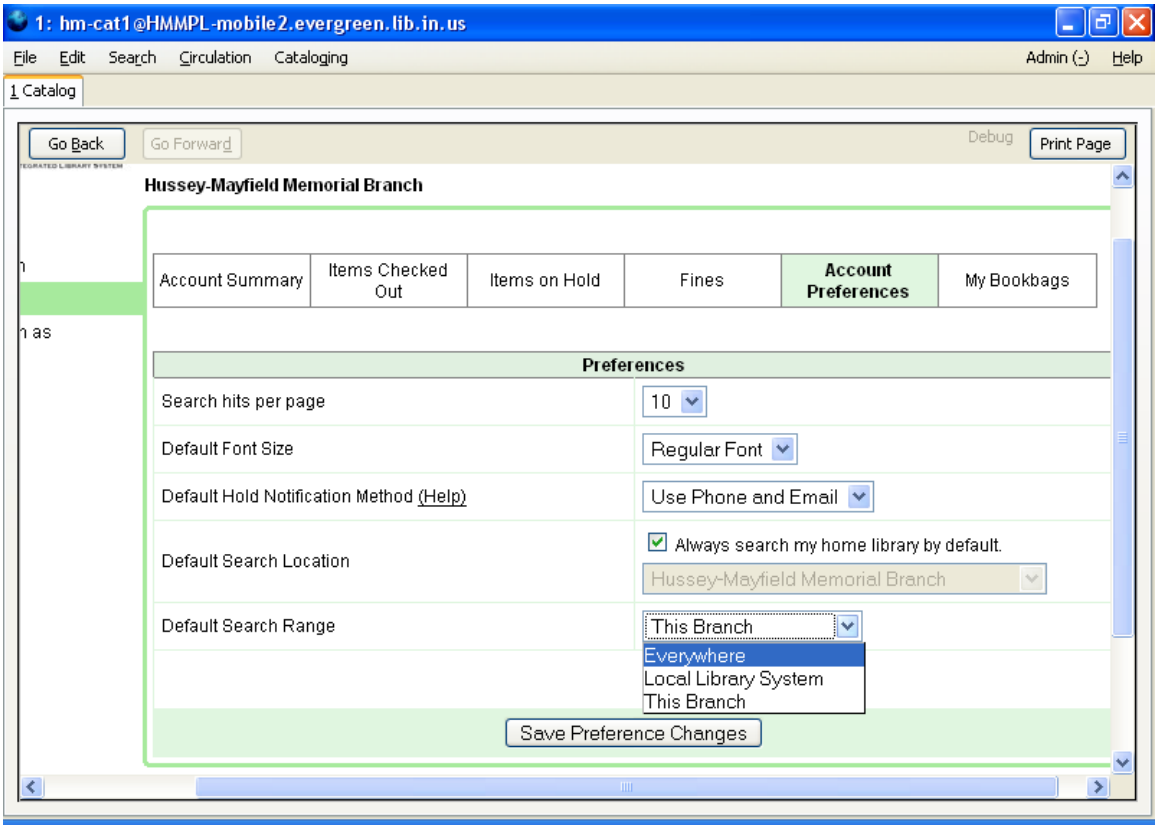
Note that under Search Library you can select whether to search a particular branch or to search all of Evergreen. As a cataloger, you will generally need to search all of Evergreen. If the default for the drop down list under Search Library is not "Everywhere," you will want to change it so that you do not have to select it each time you search. To do this, click on **My Account**, under the Evergreen logo on the top left part of the screen, shown circled above.

The Account Summary screen will appear. It will show how you are logged in. This is for your staff user account, not your personal account.



Click on **Account Preferences**. It will turn red when you point to it, as shown above.

From the Preferences screen, you can change various default settings for your user account.



If you wish to change the number of search results displayed per page, select a different number in the box labeled "**Search hits per page**."

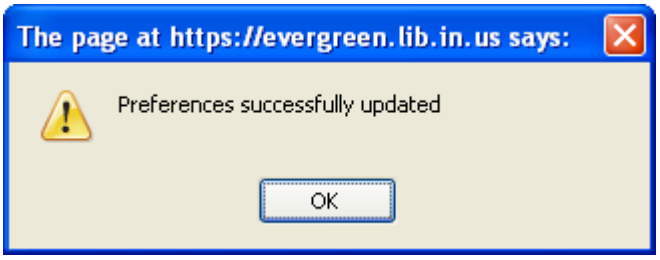
If desired, you can also change your **Default Font Size** from Regular Font to Large Font.

If you place holds using this account, you can also change your **Default Hold Notification Method.**

Note that the box next to **Always search my home library by default** is checked. Unchecking this box does not set the default search to Everywhere, rather it allows you to change the default for the Home Library searches. If you uncheck the box you can change the **Default Search Location** to a different library.

Select **Everywhere** from the drop down list next to **Default Search Range**. When **Everywhere** is displayed in the search range box, click **Save Preference Changes.**

A dialog box will appear, telling you your preferences have been updated:



Click **OK** or press **Enter.** Your default settings will remain until you change them again.

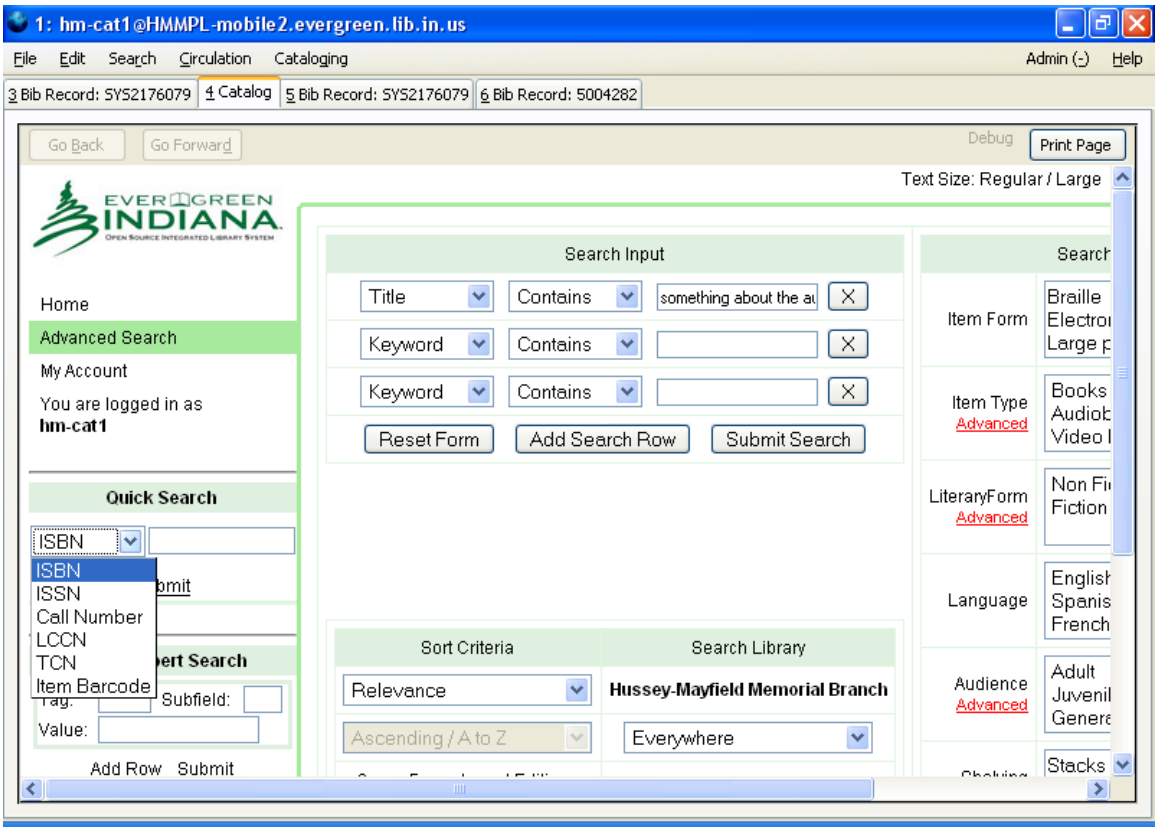
Note that if you have set the **Default Search Range**, and you return to the Preferences screen to make other changes, you will have to set the search range to **Everywhere** again, or it will return to the default setting of This Branch.

Click **Advanced Search** or press **F3** to return to the search screen.

Quick Search

Many kinds of searches can be performed from the **Advance Search** screen. Catalogers will frequently use the **Quick Search** function to search by ISBN.

You can see from the drop down list below, that Quick Search also allows you to search by ISSN (International Standard Serial Number), Call Number, LCCN (Library of Congress Card Number), TCN (Title Control Number), and Item Barcode.



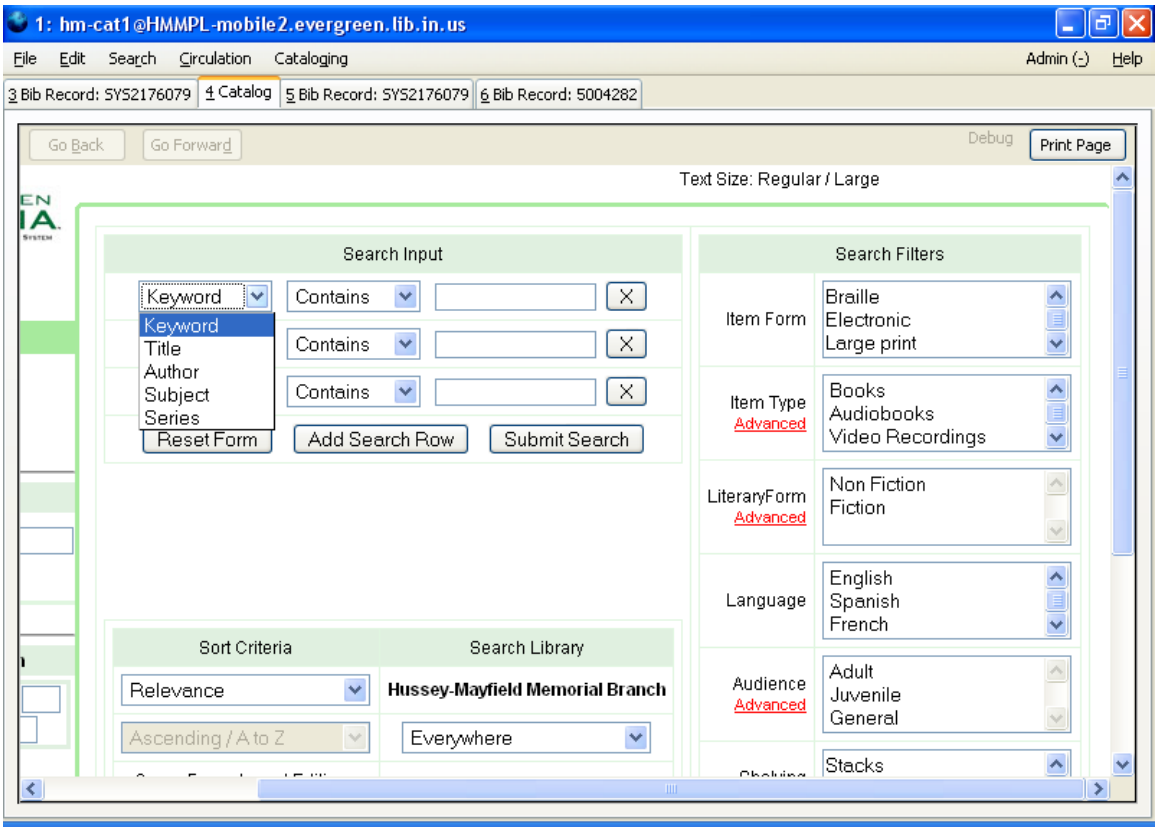
When using Quick Search, only that field is used for the search. Anything entered in other search fields does not affect your search, and the other fields will not be cleared after a Quick Search is performed. The Quick Search function cannot be limited to your local library. A Quick Search searches all of Evergreen Indiana by default.

Advanced Search: Using Search Input

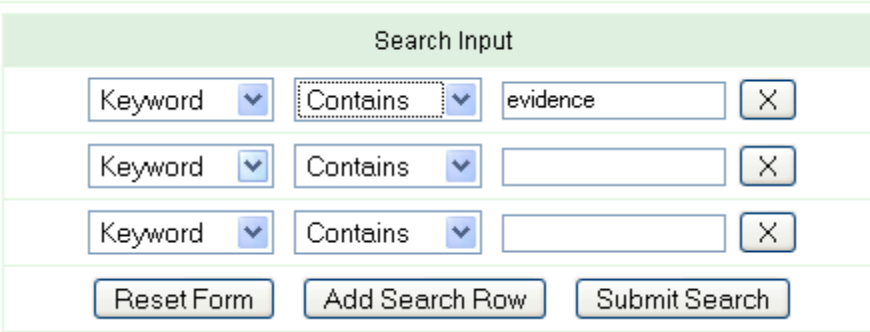
The Search Input boxes allow you to search by Keyword, Title, Author, Subject, and Series, and to combine these searches to narrow your results.

The default setting displays three boxes for keyword searches. You can click on the down arrows to select Title, Author, Subject or Series as well. If desired, you can use different searches in the different boxes. For instance, you can enter the title of a book in one box, and the author in another.

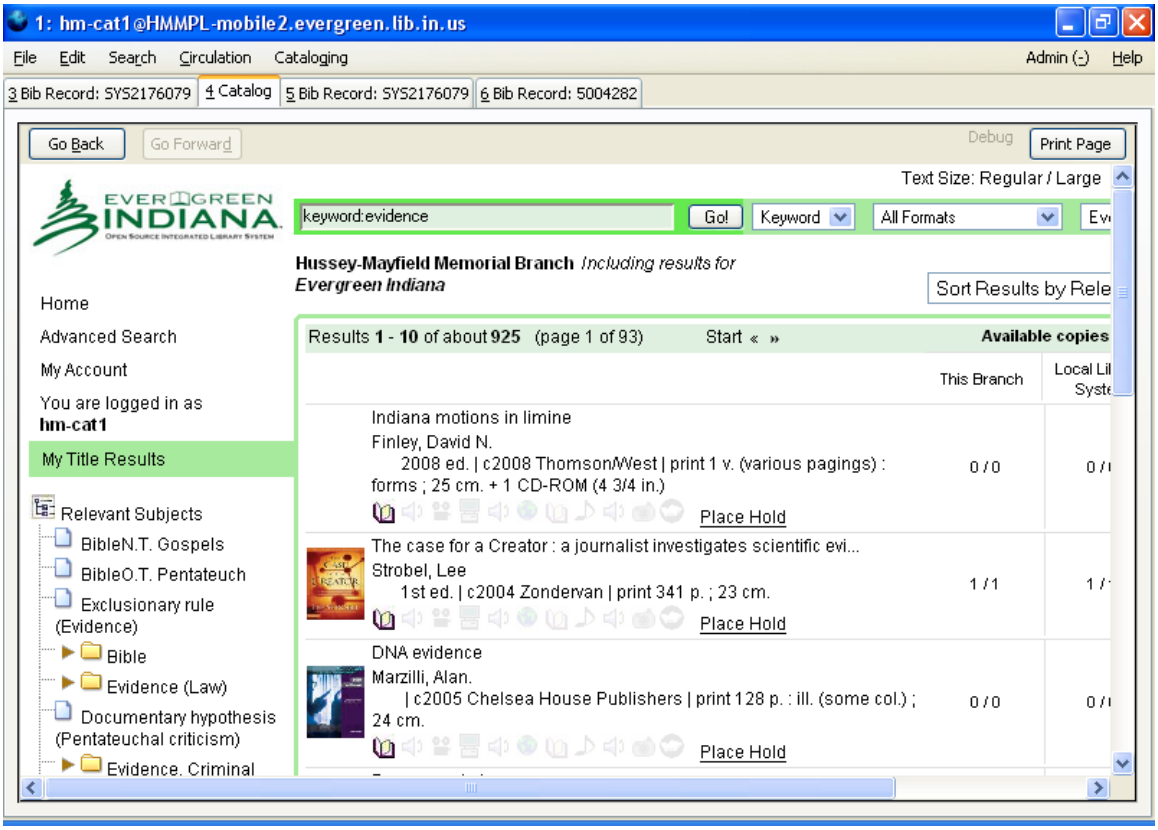
More search rows may be added by clicking the **Add Search Row** button. You can delete search rows by clicking the **X** button next to the search row.



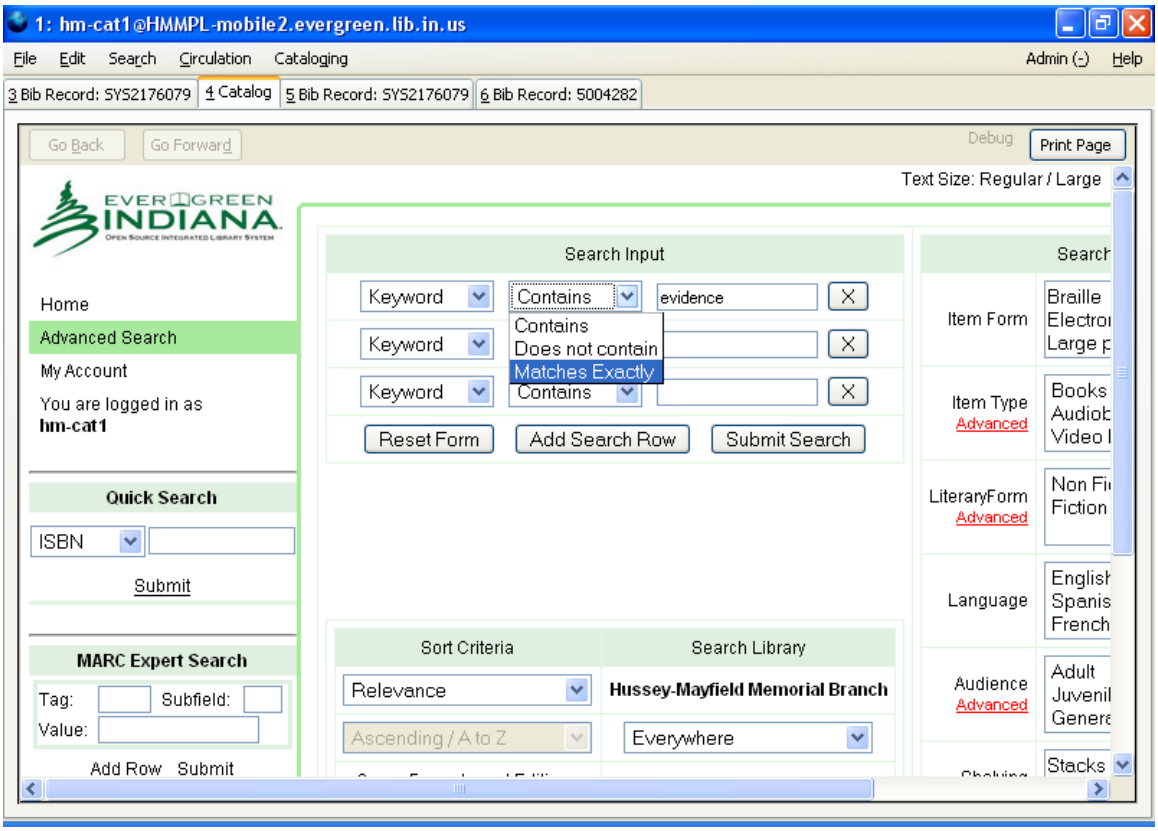
Keyword searches are very general and will give you many results. For instance, try a keyword search for the word "evidence."



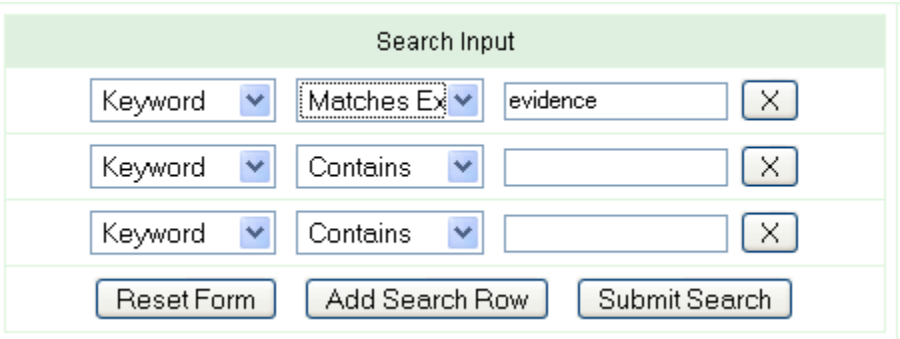
Notice the large number of results:



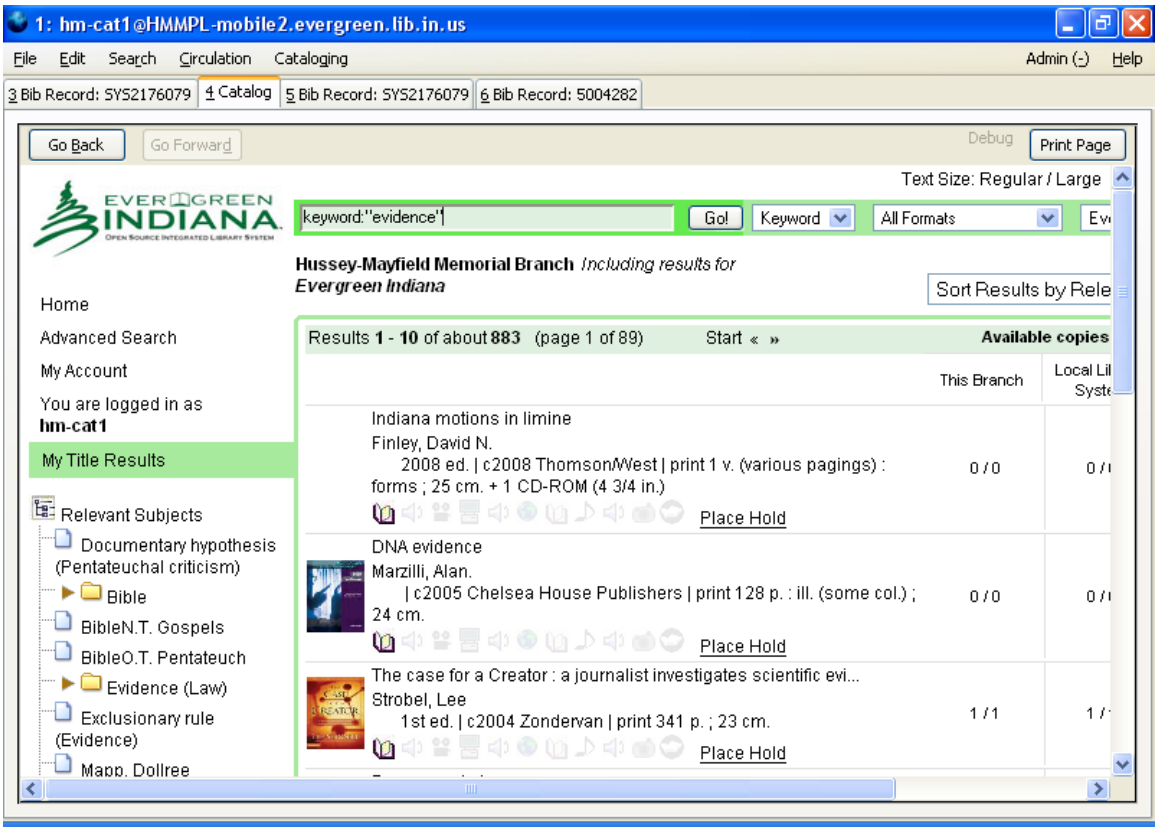
You can also adjust your searches by changing your selection from Contains to Matches Exactly or Does not contain.



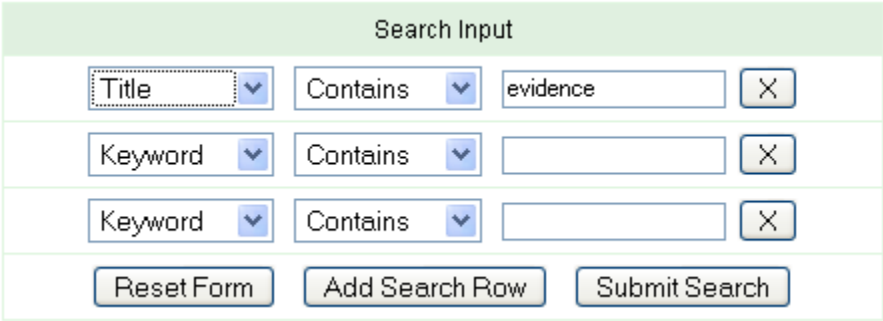
Try limiting your Keyword search for “evidence” to Matches Exactly:

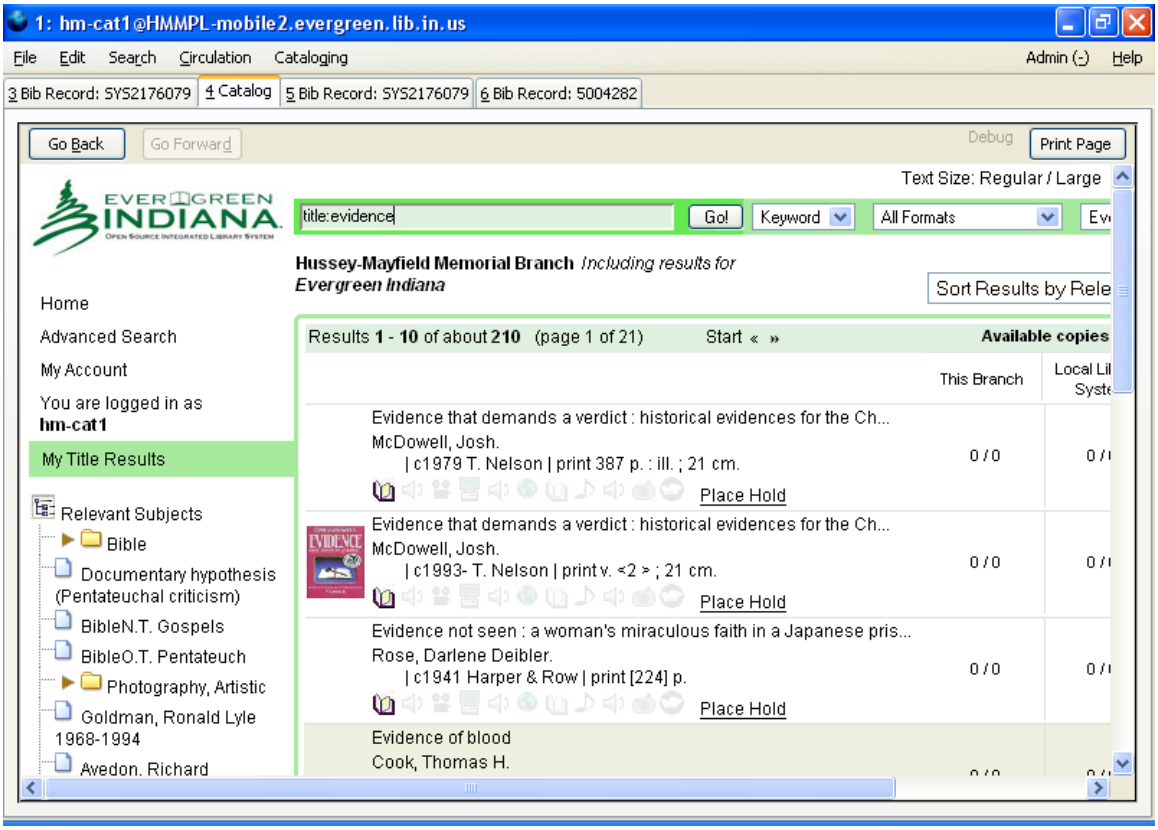


This will limit your search to only records that contain the exact character string “evidence”. Since Evergreen uses stem searching, doing a Keyword search with Contains will give you results with words related to “evidence”, such as “evidently”. Matches Exactly will not omit search results for words such as “evidenced” because it still contains the exact search string.



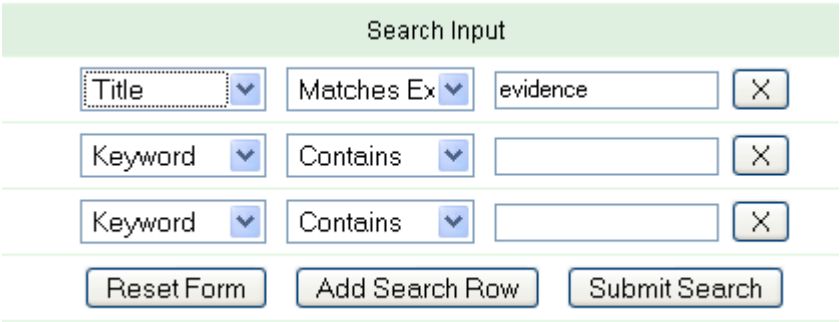
Try a Title search for “evidence“.



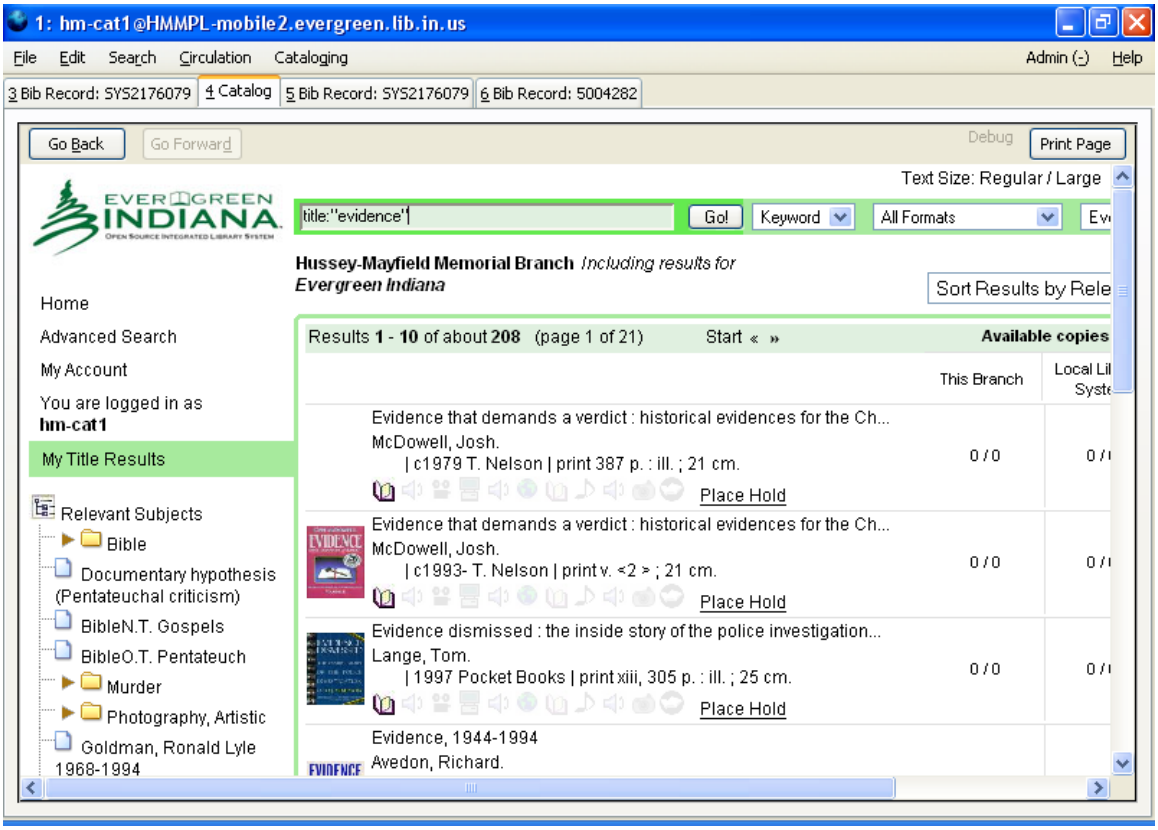


This will limit your search to records with words related to “evidence” in the title. Unless you use Matches Exactly, records with titles containing related words such as “evidently” will be included.

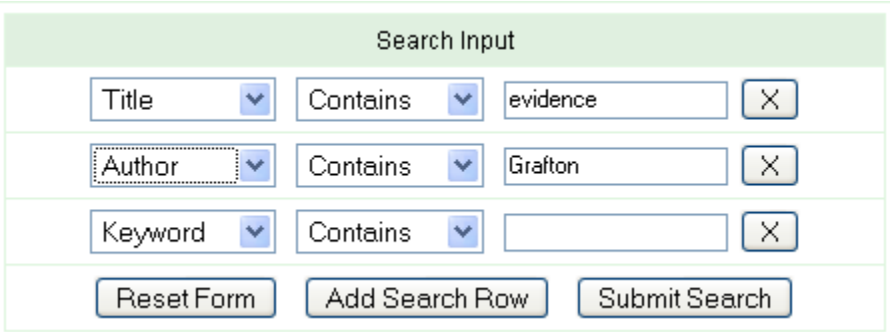
Note that limiting your title search to Matches Exactly will not limit to titles that contain nothing but your search string, but rather titles that *contain* your exact search string.



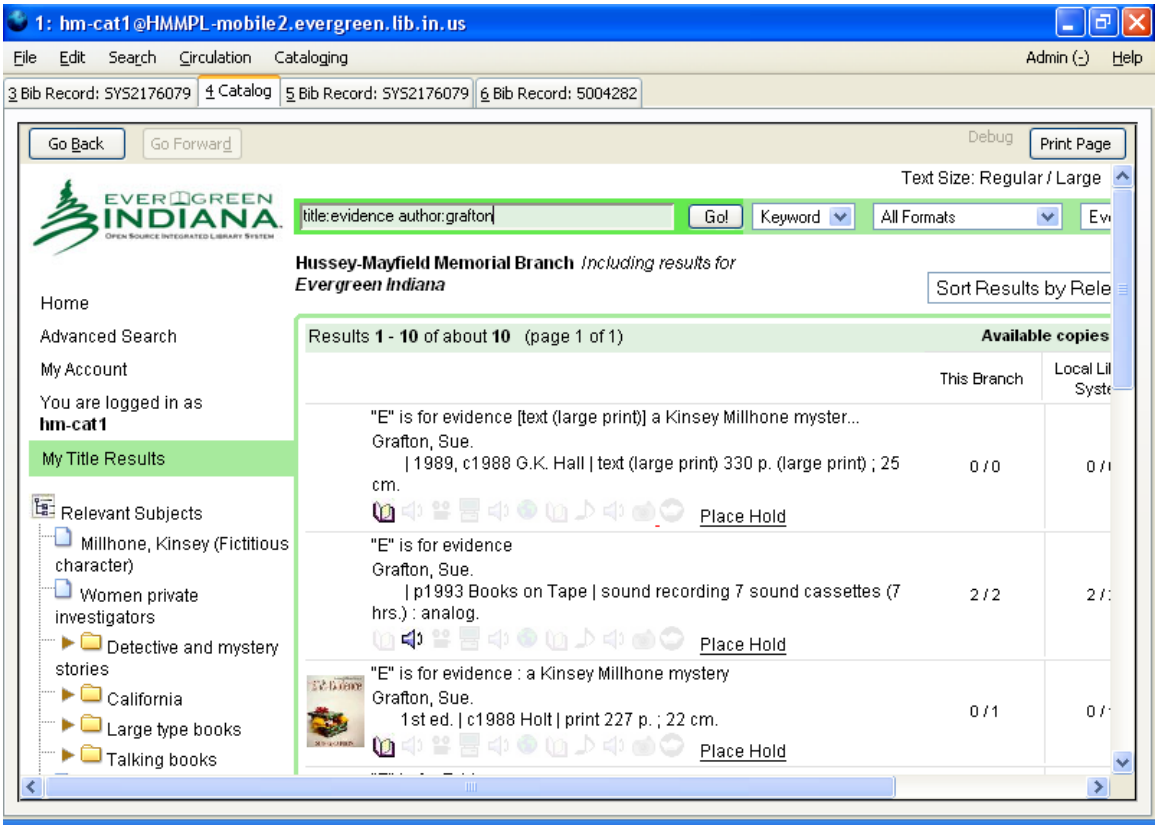
Thus, using Matches Exactly may not significantly reduce your search results, as seen below:



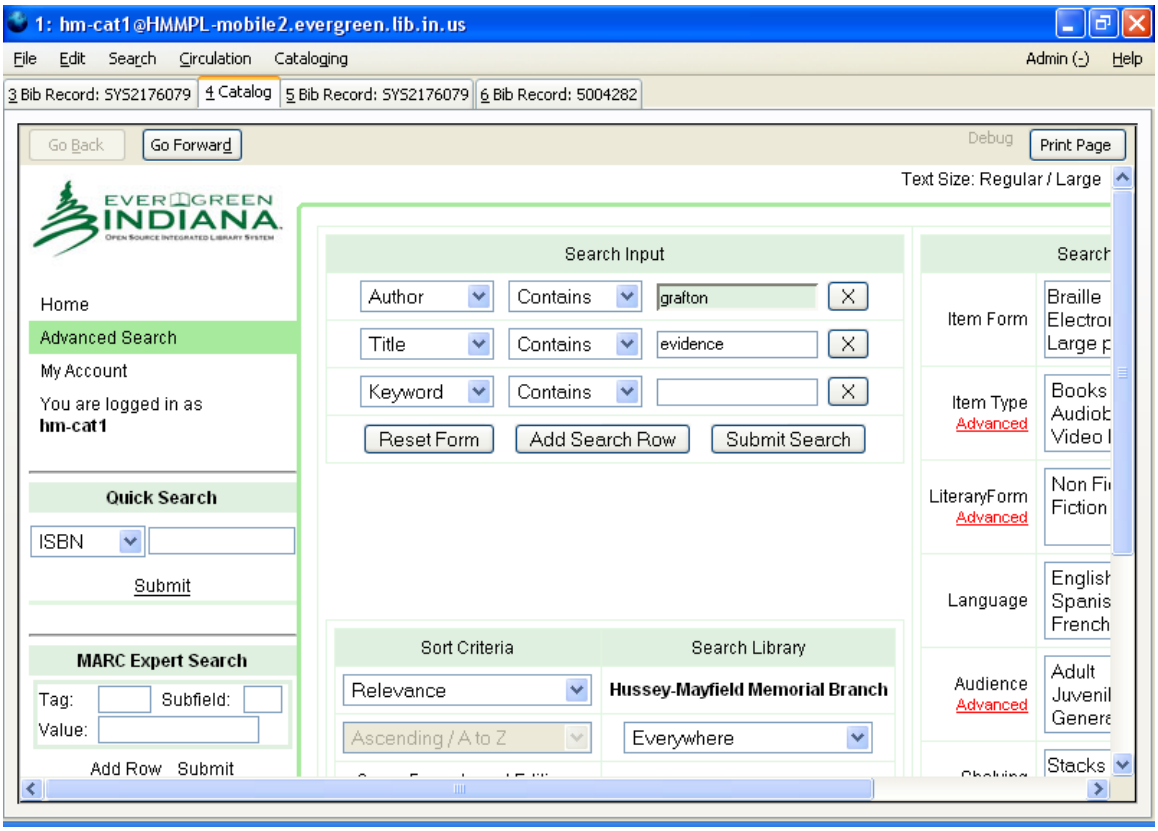
When doing searches for one word titles, it is extremely useful to limit by author as well. Try limiting your search by adding an author search for Grafton.



This should reduce your search results to a manageable number:



Note that if you go back to the search screen, your last search will be retained. However, the display reorders the search categories. Author will be displayed on the top.

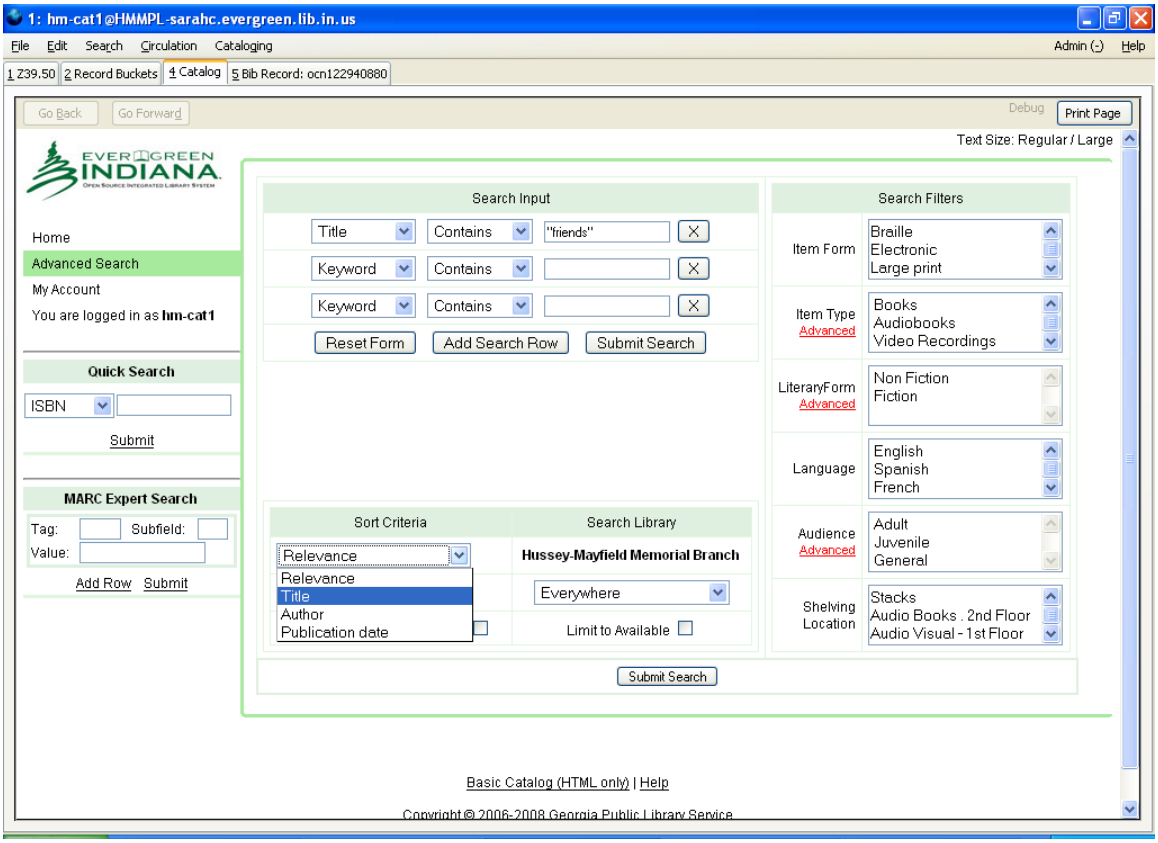


Advanced Search: Sort Criteria

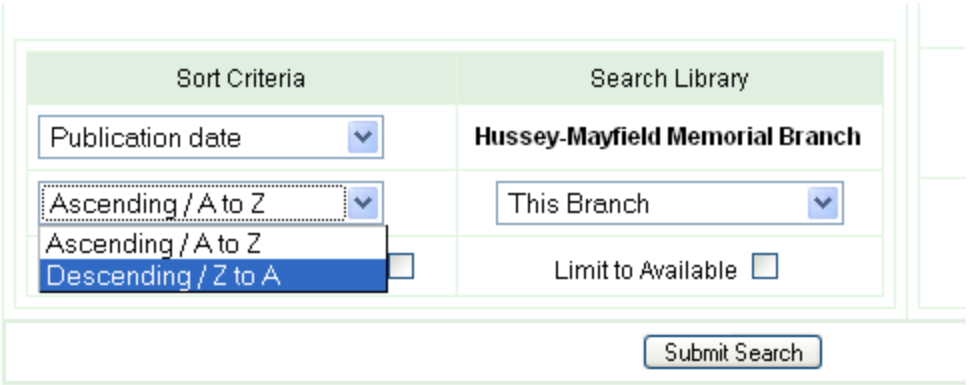
Below the Search Input box are the Sort Criteria and Search Library boxes. The Sort Criteria box is on the left, and it allows you to change the way your search results are sorted.

The default Sort Criteria is by Relevance. Generally items are considered more relevant the more often your search terms show up within a bibliographic record.

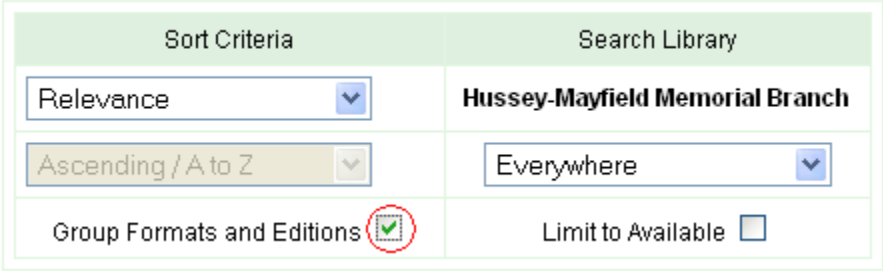
You can also choose to sort your results alphabetically by author or title, or chronologically by publication date:



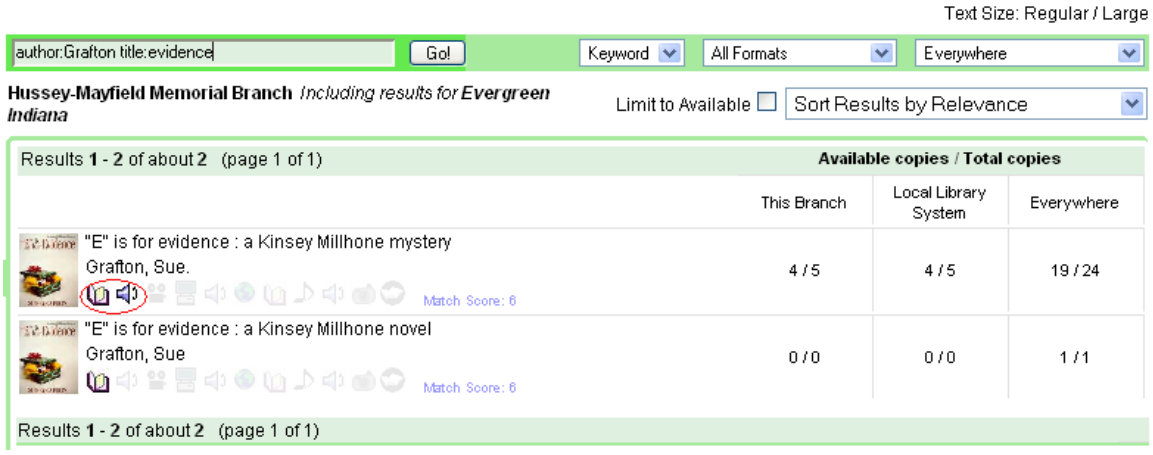
When you select Title, Author or Publication Date, the drop down box below becomes active. You can then select Ascending / A to Z or Descending / Z to A. Note that for Publication Date, selecting Ascending give you the oldest works first, and Descending will give you the most recent works first.



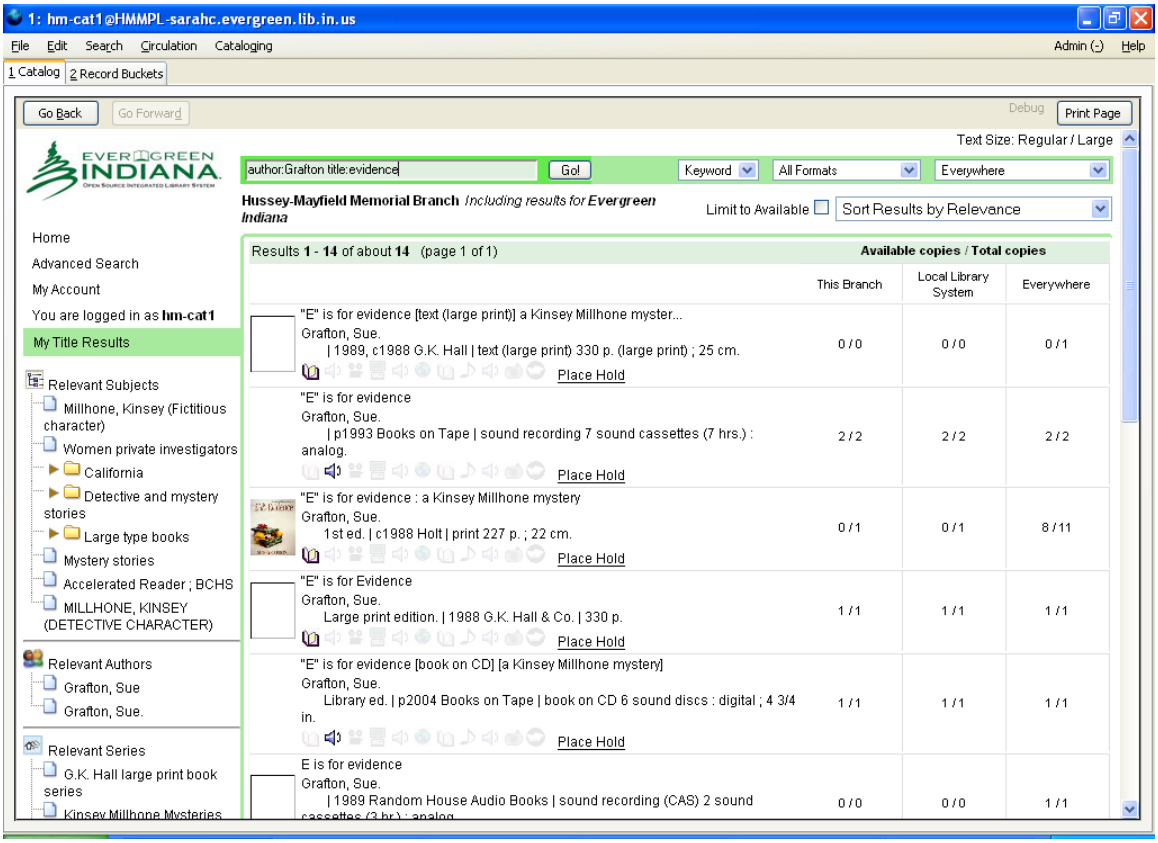
The Sort Criteria box also allows you to group titles and formats, so that they all display on one line in your search results.



Note the box labeled Group Formats and Editions. When this line is selected, most manifestations of a work will be grouped together in one line in your search results. Note below the first line includes both print and sound recordings



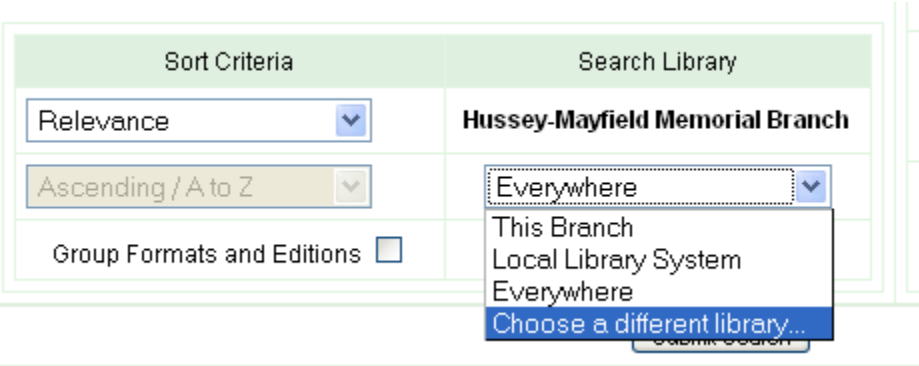
When the same search is performed with out the box checked, the results show 14 different records including various manifestations, as well as some records which probably need to be merged.



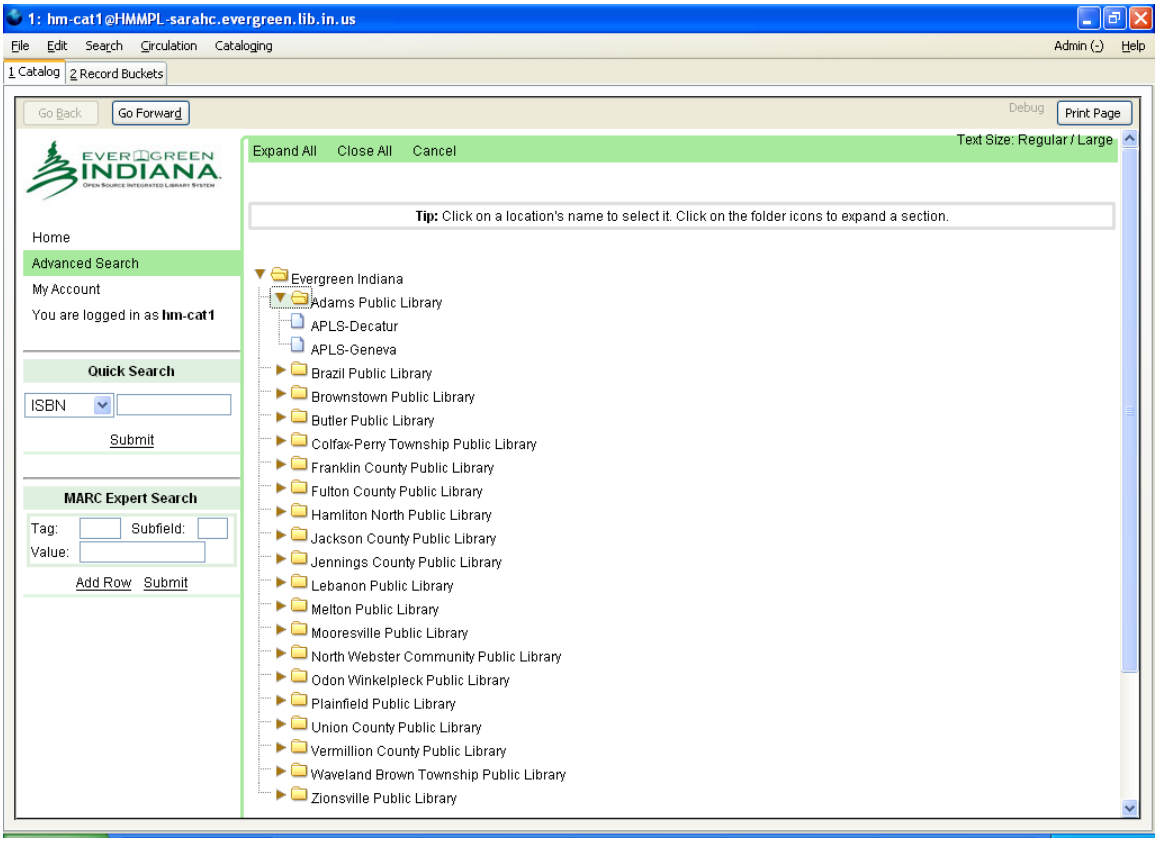
The Group Formats and Editions will remain checked or unchecked until you change it again.

Advanced Search: Search Library

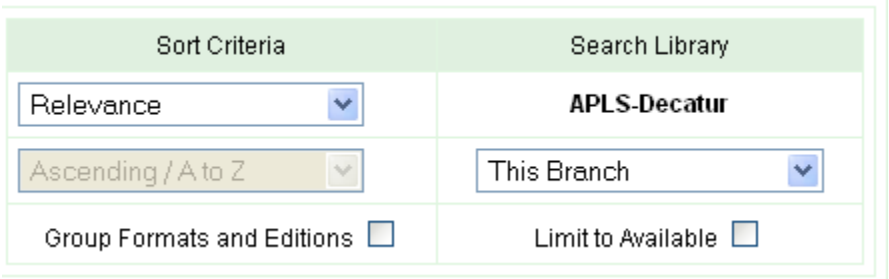
The Search Library box allows you to change the search range, and to limit searches to available items.



In addition to changing the search range to your branch, your local library system, or all of Evergreen Indiana, you can limit your search to a particular library other than your home library. When you select **Choose a different library** a list of libraries in Evergreen Indiana appears.

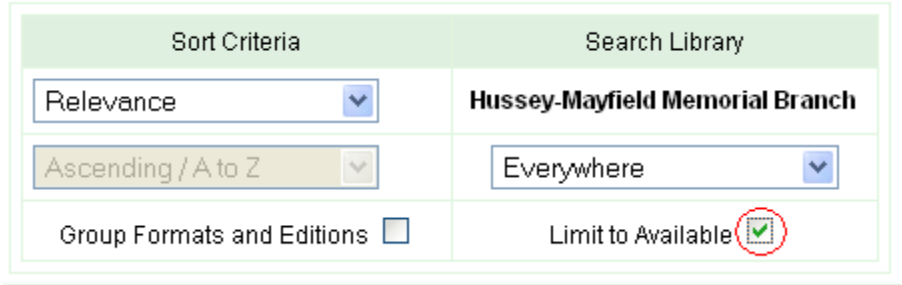


You can click on the library system name on the list, or click the arrow next to the system name to choose a particular branch, as shown with Adams Public Library above. When you select a name from the list, you will return to the search screen and that library will show in the Search Library box, as seen below.

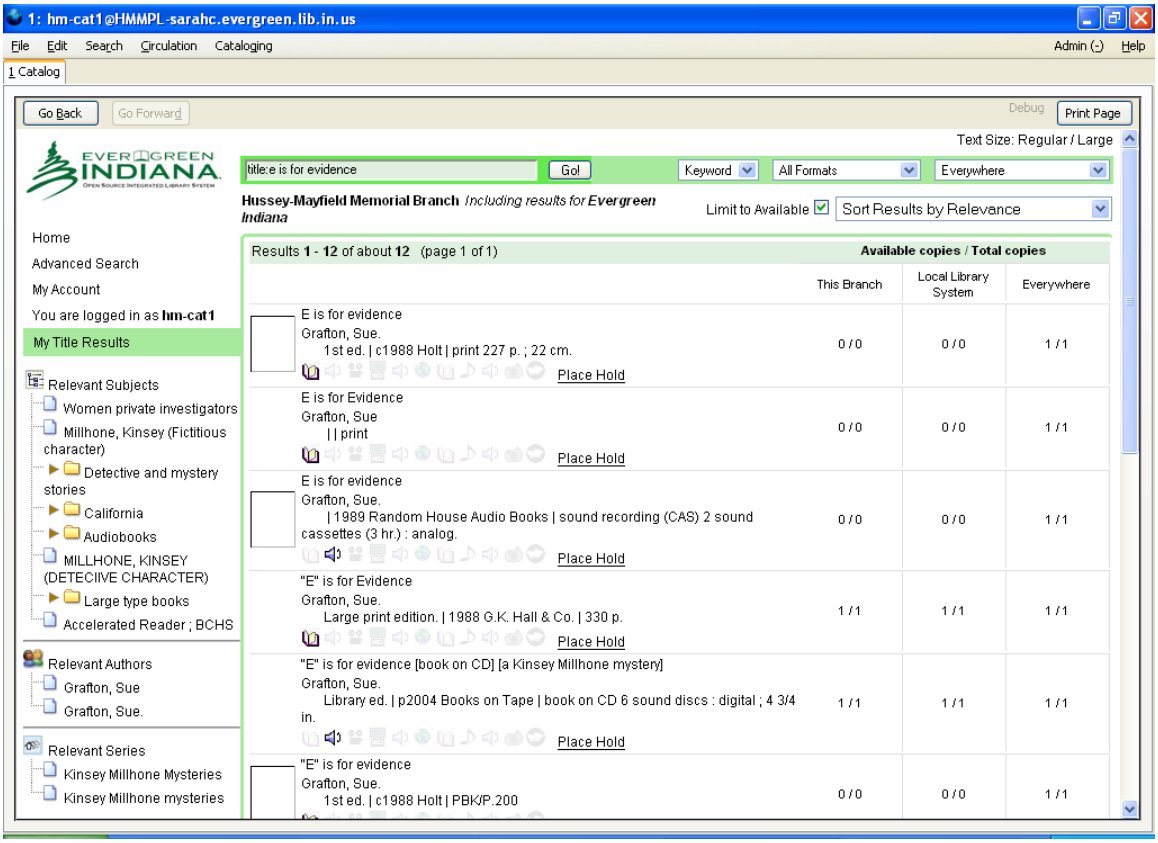


After you have performed a search, if you press F3 or select catalog search from on of the menus, you will return to your Default. Clicking Advanced Search or Go Back will retain the search range you have selected.

The search library box also allows you to limit your search to items that are available for checkout. Place a check mark in the **Limit to Available** box:



Note that if your search range is Everywhere, then the items just have to be available at one location. Below you can see in the Everywhere column that all of these items are available:



If you use the Limit to Available function and limit your search range to a particular branch, your results will include only items from available at that branch. The Limit to Available selection will clear if you use the **F3** key, but will remain selected if you use **Go Back** or click **Advanced Search**.

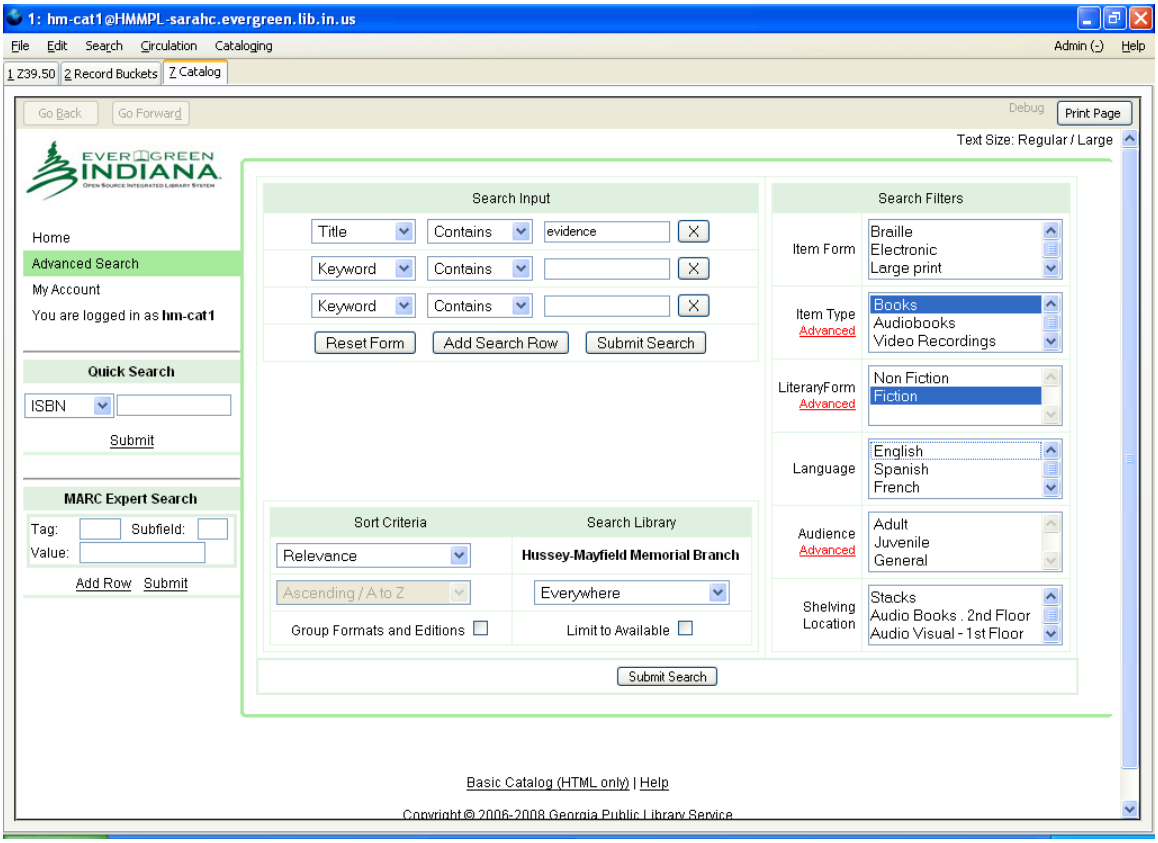
Advanced Search: Using Search Filters

Another way to limit your search results is to use Search Filters. You can limit by Item Form, Item Type, Literary Form, Language, Audience, and Shelving Location. All of these searches except for Shelving Location are based on data from the MARC record fixed fields.

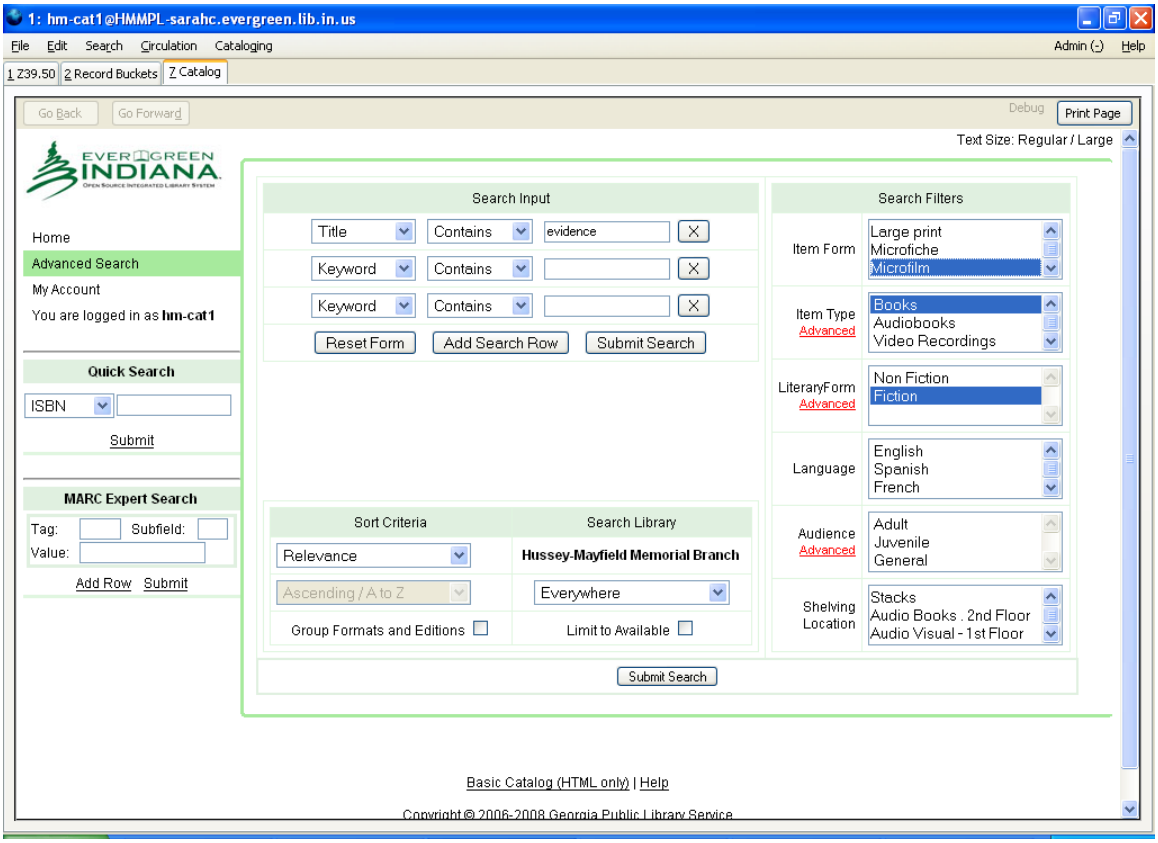
This is why it is very important to ensure that the fixed fields are accurate. If the fields are incorrect or not filled in, the search filters will be much less effective. When adding holdings, it is best not to use the search filters, so that poor records may be found and replaced rather than having duplicate records added to the system.

Note that only the shelving locations for your library are displayed in the Shelving Location box, so limiting by Shelving Location will limit the search to your library only.

To limit your search, simply click on your choices to highlight them in blue. Your search results will include only records which are coded to your choices. Click on Books, and Fiction to highlight them.



Note that where there are blue arrows on the left side of the boxes, you can scroll up and down on to see more choices by clicking the up and down arrows. Scroll down to select Microfilm


1: hm-cat1@HMMPL-sarahc.evergreen.lib.in.us
File Edit Search Circulation Cataloging
Admin (-) Help
1 Z39.50 2 Record Buckets 7 Catalog
Go Back Go Forward
Debug Print Page
Text Size: Regular / Large
EVERGREEN INDIANA
Home
Advanced Search
My Account
You are logged in as hm-cat1
Quick Search
ISBN
Submit
MARC Expert Search
Tag: Subfield:
Value:
Add Row Submit
Search Input
Title Contains evidence
Keyword Contains
Keyword Contains
Reset Form Add Search Row Submit Search
Search Filters
Item Form
Large print
Microfiche
Microfilm
Item Type
Advanced
Books
Audiobooks
Video Recordings
LiteraryForm
Advanced
Non Fiction
Fiction
Language
English
Spanish
French
Audience
Advanced
Adult
Juvenile
General
Shelving Location
Stacks
Audio Books . 2nd Floor
Audio Visual - 1st Floor
Sort Criteria
Relevance
Ascending / A to Z
Group Formats and Editions
Search Library
Hussey-Mayfield Memorial Branch
Everywhere
Limit to Available
Submit Search
Basic Catalog (HTML only) | Help
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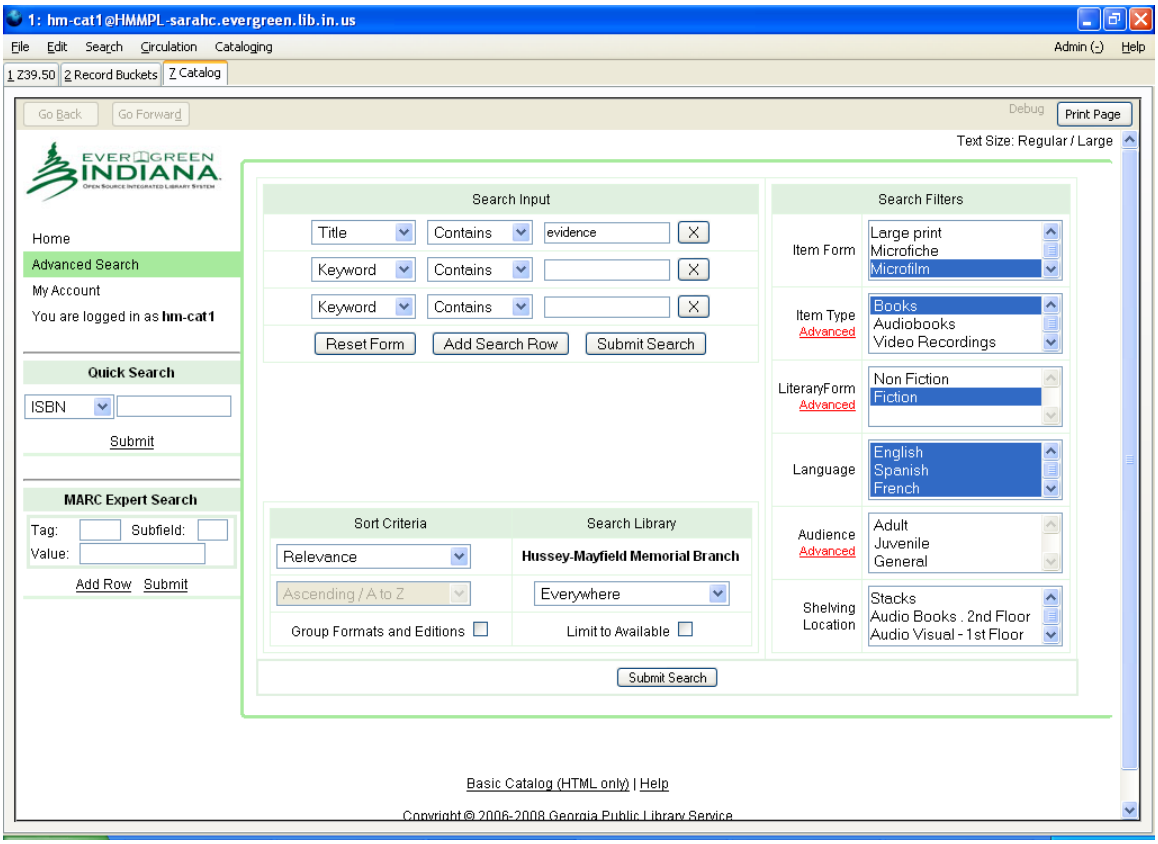
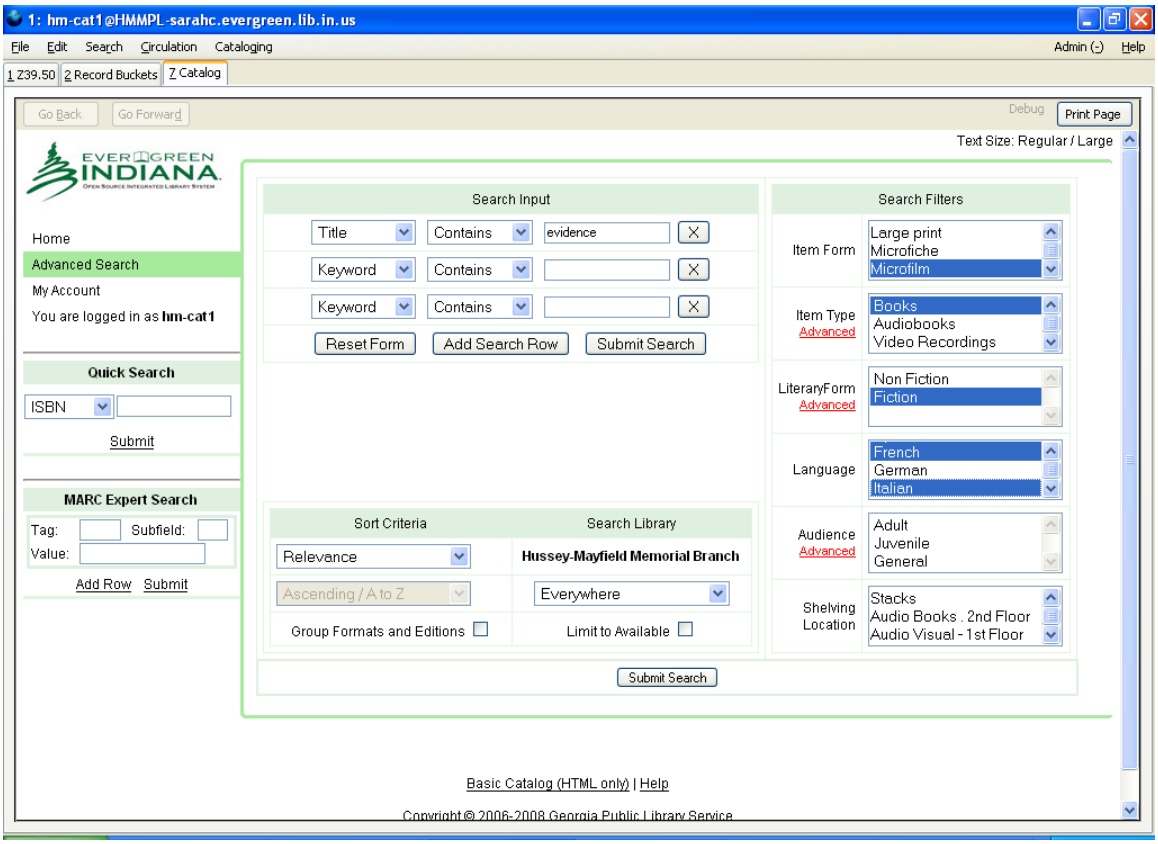
You can also select multiple items in the same box. To select items which are all in a row, click the first item you wish to select, then press the **Shift** key while clicking the bottom item. Click on English, then press **Shift** while clicking French.



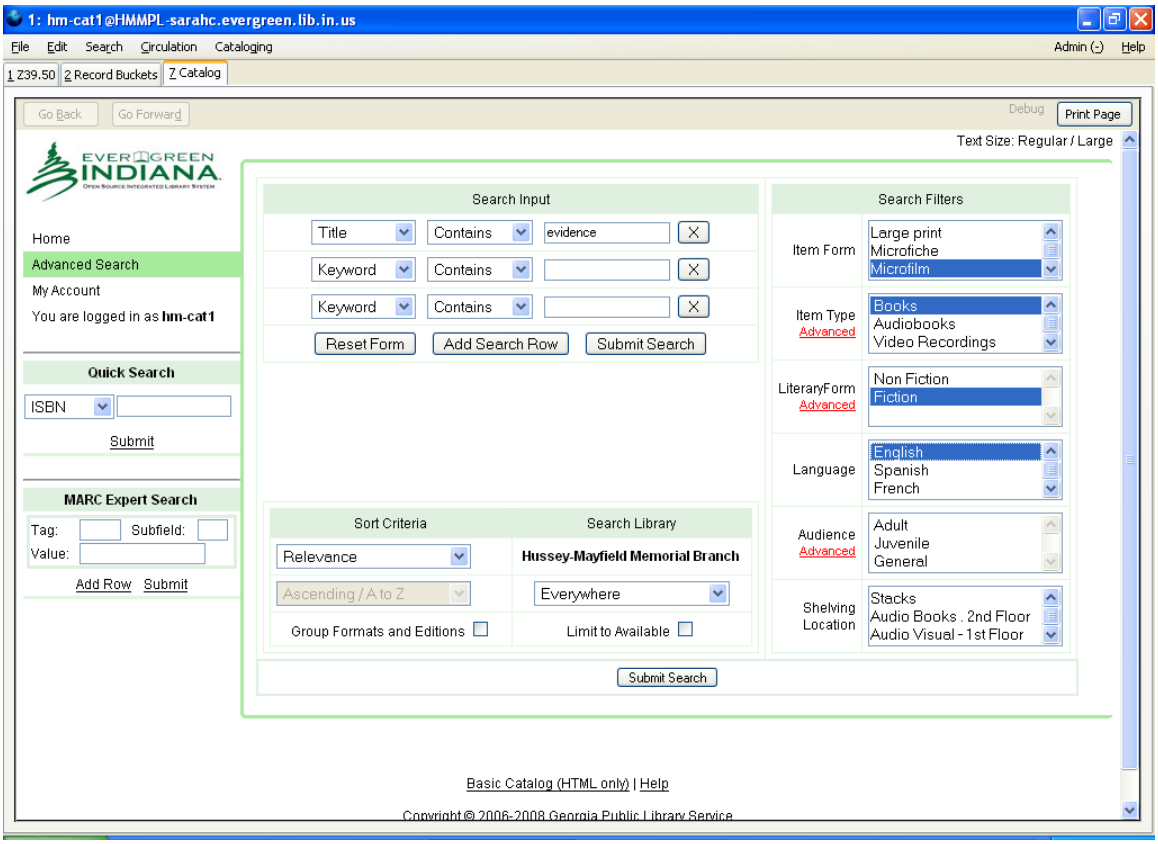
English, Spanish, and French will all be selected.

To select items which are not in a row, press the **Ctrl** key while clicking on the items you wish to select. If you do not press the **Ctrl** key, any previous selections will be unselected when you click something new. Scroll down, press the **Ctrl** key, and click on Italian.



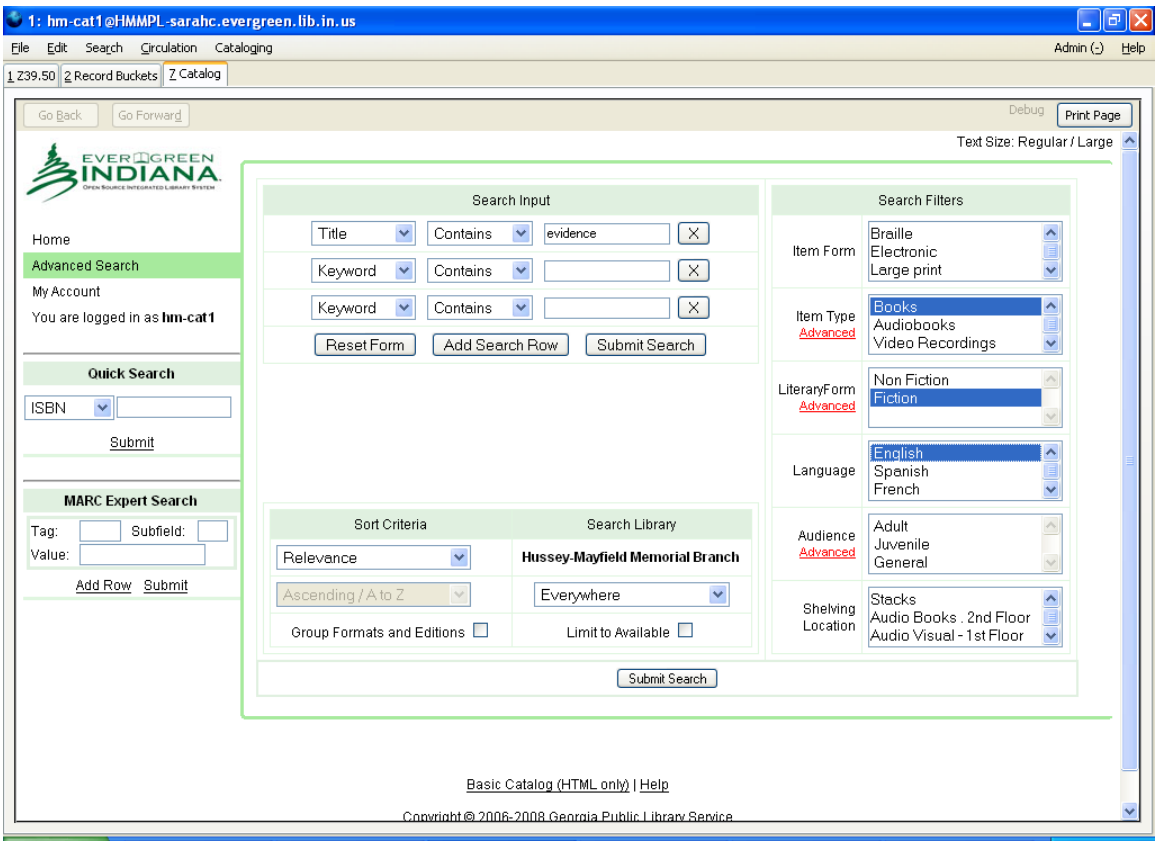
Now English, Spanish, French, and Italian are all selected.

To change your selection, you can click a line in the box to remove any other selections. Click on English to remove your selections for the other languages, and search for English-language items only.



To unselect something you have highlighted, when you do not want to select anything from that box, press the **Ctrl** key while clicking on that selection. Note that clicking **Reset Form** under Search Input will not reset your search filters. You can unset the filters individually, or hit F3 to start a new search.

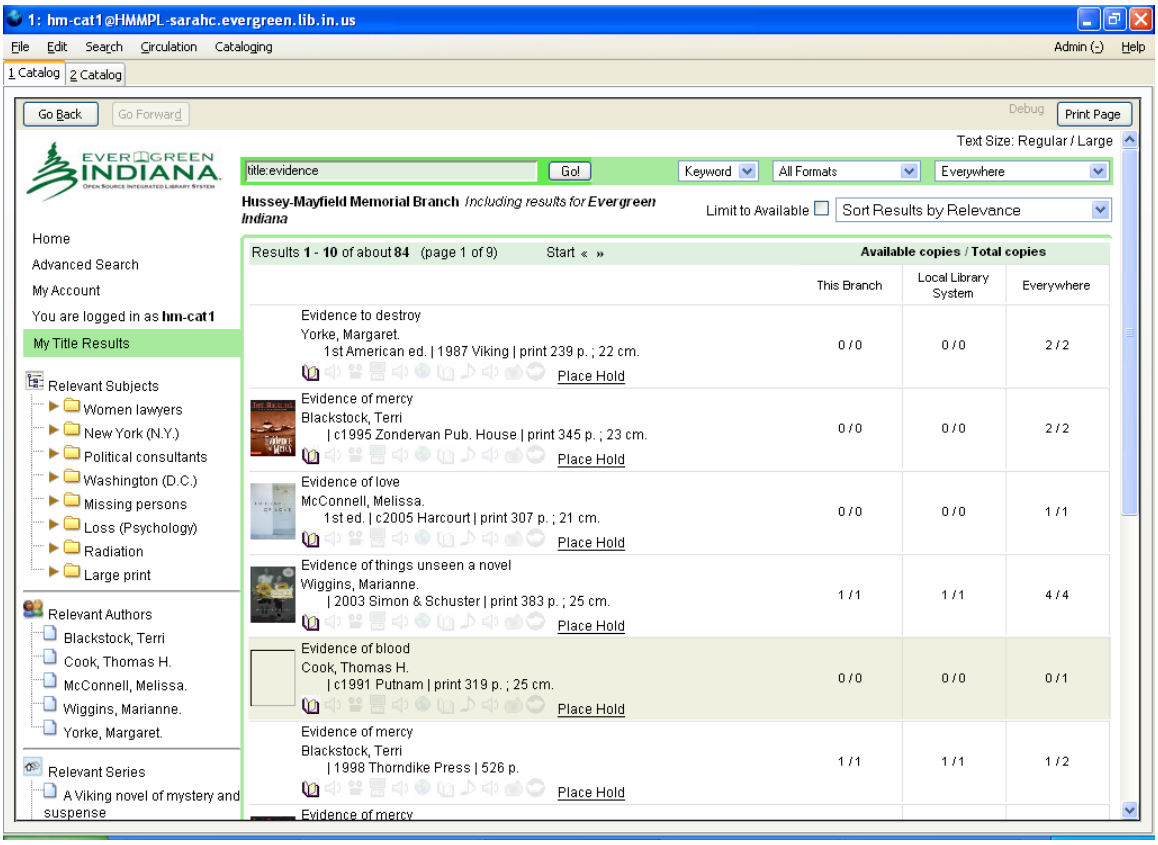
Unselect Microfilm to do a title search using the word "evidence". You should now be limiting for Books that are in English and Fiction. Note that when limiting by LiteraryForm, it is unnecessary to limit for Books, because the Literary Form fixed field is found only in records for books. You will get no results if you limit by Fiction and Audiobooks or Video Recordings.

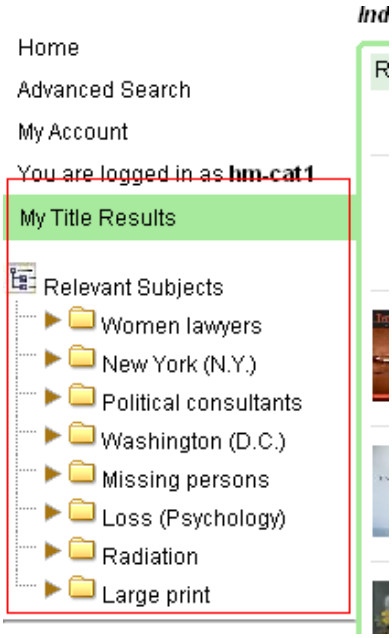


Item Type, LiteraryForm and Audience also have advanced options for search filters. These also depend on the coding of the MARC fixed fields, and results with Advanced options will be even less precise since for instance, juvenile items that could be coded for a specific age group may simply have a j. To see the advanced options, click on **Advanced** next to the field where you wish to expand your options.

Understanding Search Results

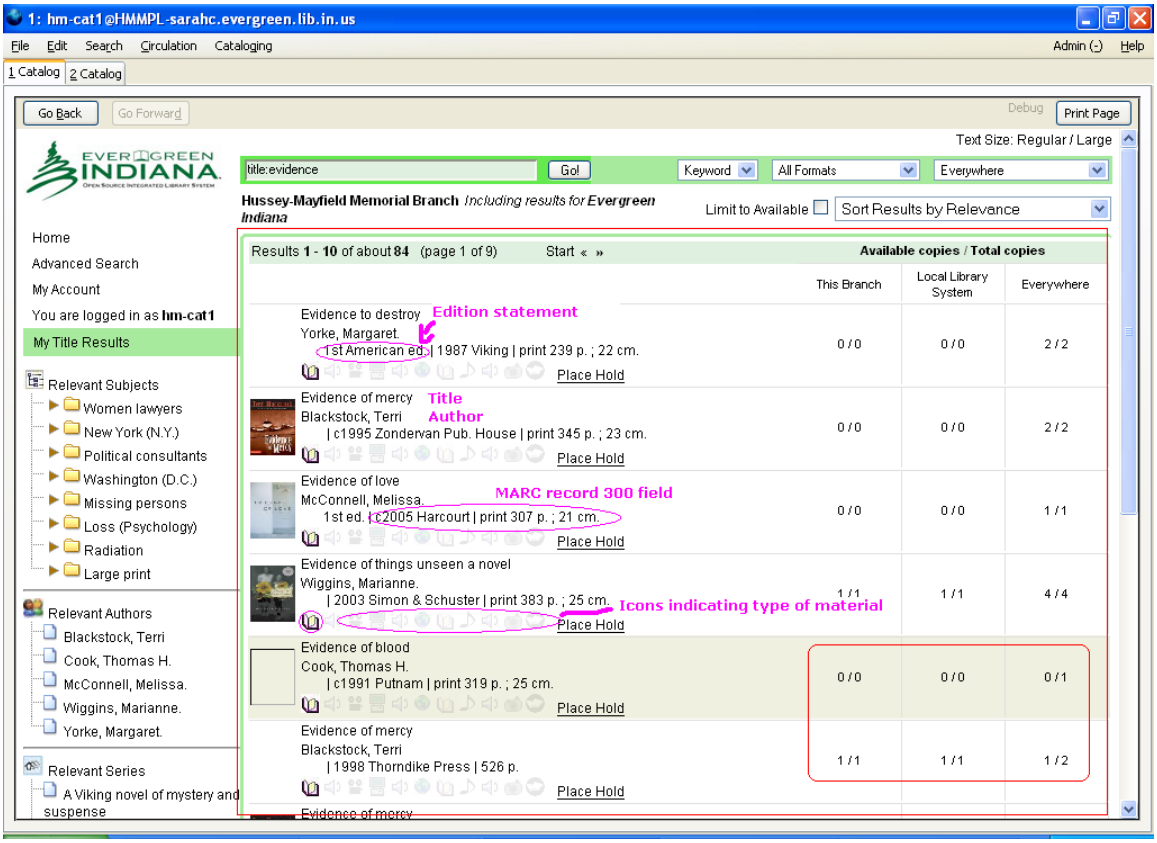
When you've performed a search in Evergreen Indiana, your search results page will look similar to the one below:





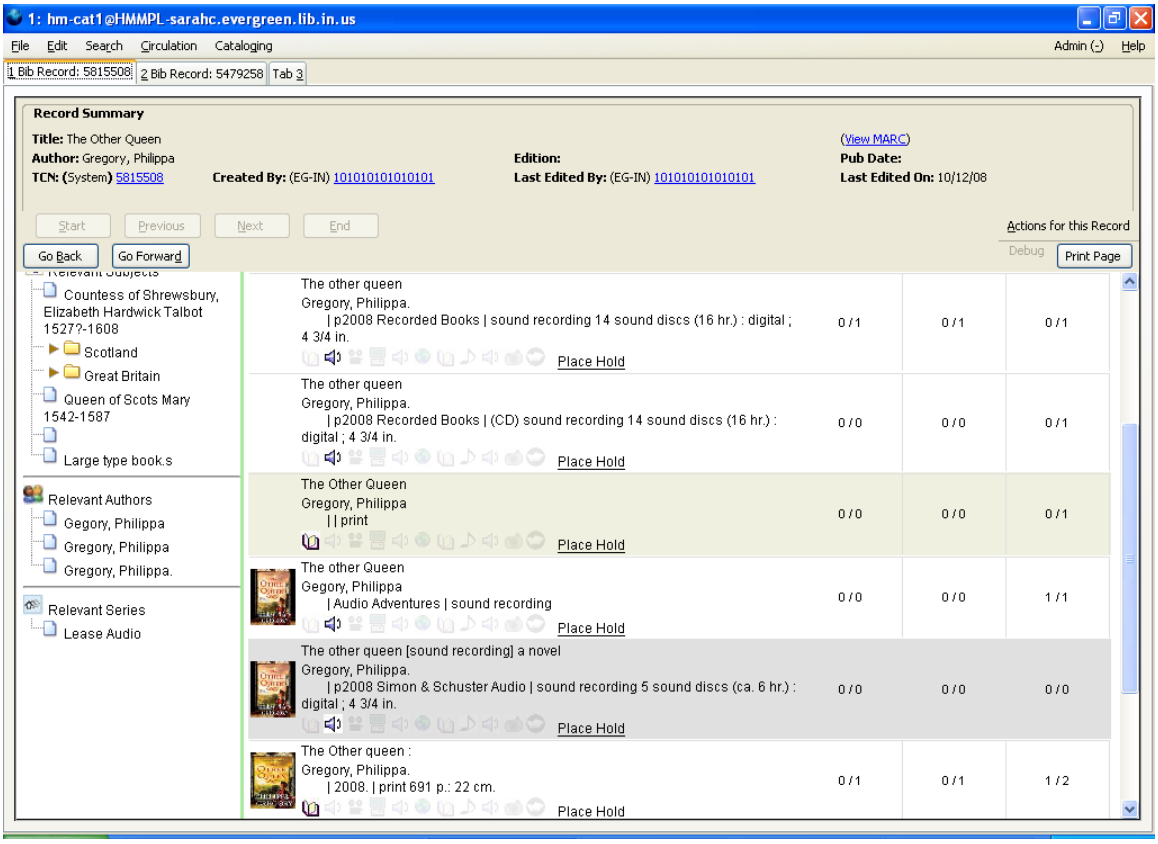
On the left side of the screen, under the green bar reading "My Title Results," you will see a list of relevant subjects, authors and series. This list displays the most common entries on the MARC records from the first page of your search results. You can click on these to link to other items with the same entries, however the subject entries link to all records with the same subfield a, so clicking on these links will give you results with fiction, non-fiction, juvenile and adult titles.

In the Results box, under a light green bar with information about how many search results you have, you will see title information relating to your search results. This information includes the title and the author. Author information will be pulled from the first added entry if there is no 100 field. Edition statements and information from the 300 field are also displayed. Note the row of small icons underneath the physical description. These icons indicate the type of material, and this information comes from the fixed fields, so it is important for those to be entered correctly. Many of the titles will also have covers displayed next to the title.



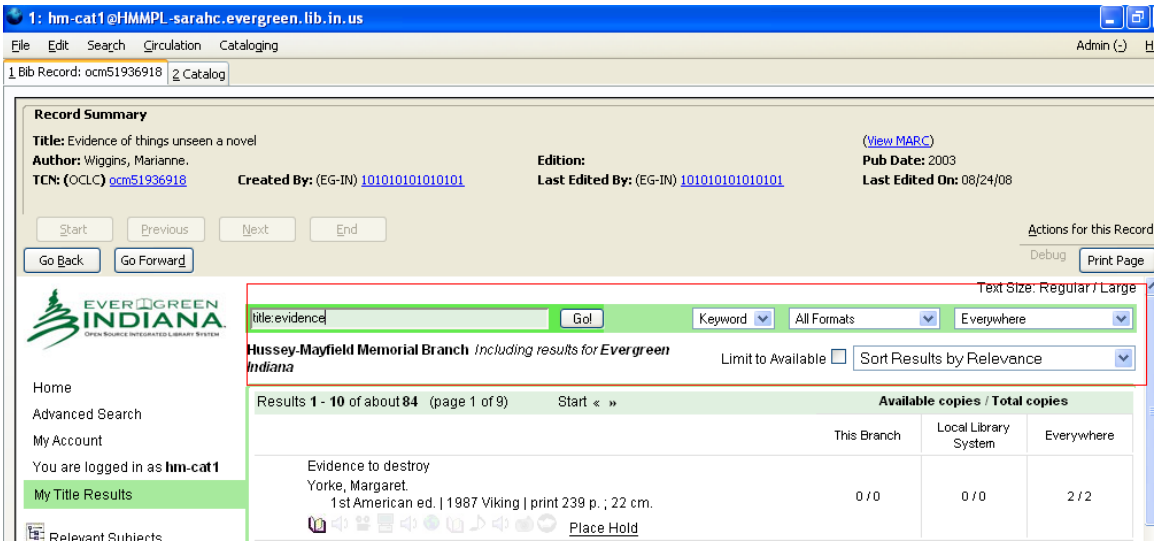
Note on the right the **Available copies / Total copies** columns. These tell you how many copies are held in your library branch, your local system, and in all of Evergreen Indiana. If an item shows 0/0 in your branch, your branch does not own the item. If it shows 0/1, in EI, there is one copy in EI, but it is not available. If it shows 1/1 copy, in your branch, your branch owns a copy and it is available. 1/2 in EI indicates there are two total copies, but only one is available. If your local library has no branches, the columns for This Branch and Local Library System will be the same.

Additionally, note that some lines are gray or tan. Depending on your computer and monitor, these may be harder to distinguish than shown below, but both colors indicate that the records will not display up in the OPAC with a title, author, or keyword search. If a patron uses the Quick Search section of Advanced search, for instance an ISBN search, barcode or call number search, the record will display but it will indicate no holdings.



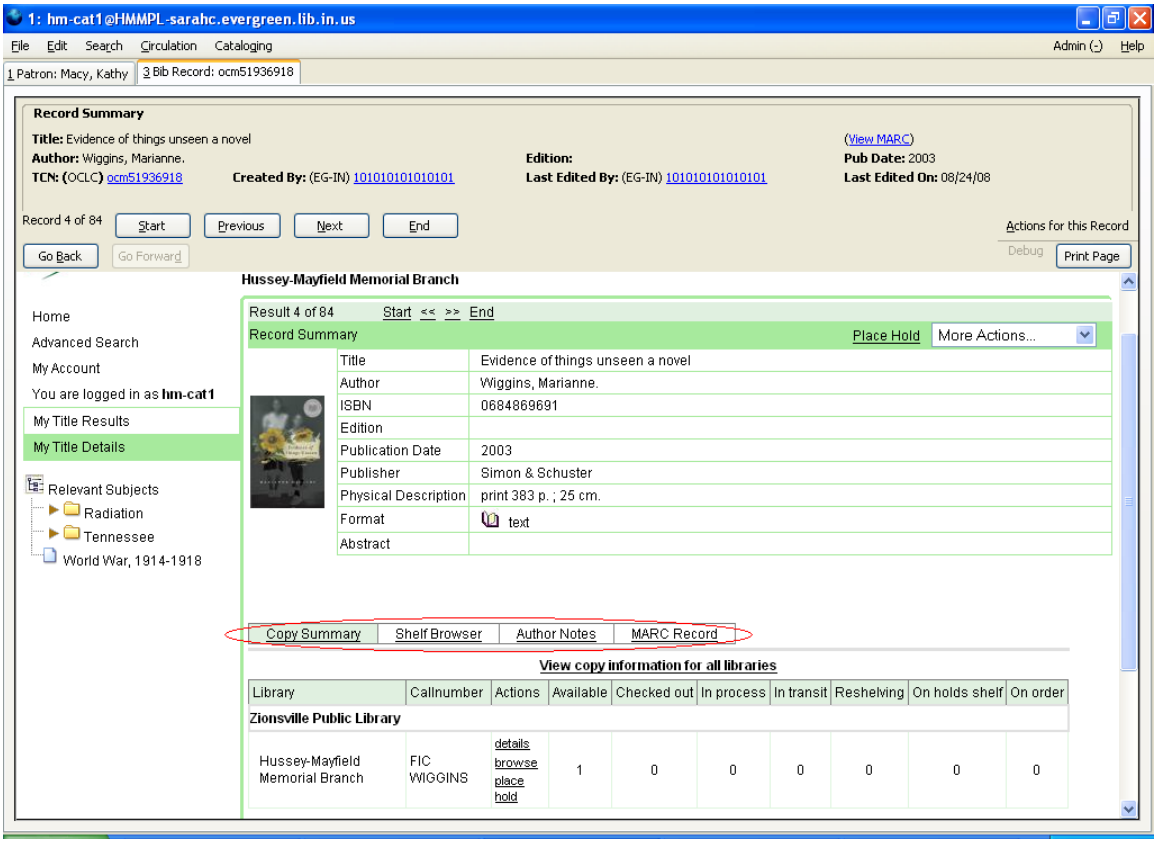
The gray line shows no holdings in the Evergreen Indiana system. It is possible to add records to the system without adding holdings. These records will appear as shown above. You may find records such as this due to a migration in progress, or because someone has imported a record and not yet added holdings. Records may also show up like this immediately after a record has been merged, later these records will no longer display.

The tan record shows one holding in Evergreen, but no available holdings. Tan lines indicate a status that does not display in the OPAC, such as lost or missing, or in some cases a library has had a group of records shadowed for some reason. Note that when you click on the record the OPAC view will show no holdings for gray or tan records, but holdings will be visible for the tan records from Holdings Maintenance.



At the top of the Search results screen is a search box. You can perform new searches directly from this screen. Note that it allows you to limit to available items and to change the order of your search results. When you use these options, you are performing a new search, so if you used any Search Filters in your search, they will no longer be applied, since they are not available in the abbreviated search from this screen. If you wish to use Search Filters and limit your results to available items, or change the way your results are sorted, you must use the Sort Criteria box on the Advanced Search screen. ***See Advanced Search: Sort Criteria*** on page 2.14.

When you click on a title to display the record, you must click on the title line or the book cover. If you click on the author it will take you to a list of works by that author. Clicking on the title line will take you to the bibliographic record in the current default screen view. If you have not changed the screen view, the OPAC view, as seen below, is the default view.



Note at the bottom of the screen there are links to will display various pieces of information. The Copy Summary with information on copies that are owned by your library is displayed by default, as seen above. The Copy Summary display gives the call number and current status of copies at your library.

Copy Summary | Shelf Browser | Author Notes | MARC Record

View copy information for all libraries

Library	Callnumber	Actions	Available	Checked out	In process	In transit	Reshelving	On holds shelf	On order
Zionsville Public Library									
Hussey-Mayfield Memorial Branch	FIC WIGGINS	details browse place hold	1	0	0	0	0	0	0

print these details

Barcode	Status	Location	Age Hold Protection	Create Date	Holdable	Due Date
33946001463426 more info. place hold	Available	Fiction . 2nd Floor	6month	2003-06-17	Yes	

Here you can click **browse** to access the Shelf Browser, place a hold, or click on **details**, seen in red above, to display further copy information below, including the item location. From there you can click also click on **more info**, circled above, to see public statistical categories, and public copy notes, if any.

Copy Summary | Shelf Browser | Author Notes | MARC Record

View copy information for all libraries

Library	Callnumber	Actions	Available	Checked out	In process	In transit	Reshelving	On holds shelf	On order
Zionsville Public Library									
Hussey-Mayfield Memorial Branch	FIC WIGGINS	details browse place hold	1	0	0	0	0	0	0

print these details

Barcode	Status	Location	Age Hold Protection	Create Date	Holdable	Due Date
33946001463426 less info. place hold	Available	Fiction . 2nd Floor	6month	2003-06-17	Yes	

Copy Category	Legacy Item Cat1 : FIC
Copy Category	Legacy Item Cat2 : ADULT
Copy Category	Legacy Item Type : B
Copy Category	Legacy Home Location : AFB

You can also click on **place hold** to place a copy level hold.

To view copy summaries for all libraries with holdings, click **View Copy Information** for all libraries, seen in red below:

Copy Summary | Shelf Browser | Author Notes | MARC Record

View copy information for all libraries

Library	Callnumber	Actions	Available	Checked out	In process	In transit	Reshelving	On holds shelf	On order	Reference
Zionsville Public Library										
Hussey-Mayfield Memorial Branch	FIC WIGGINS	details browse place hold	1	0	0	0	0	0	0	0

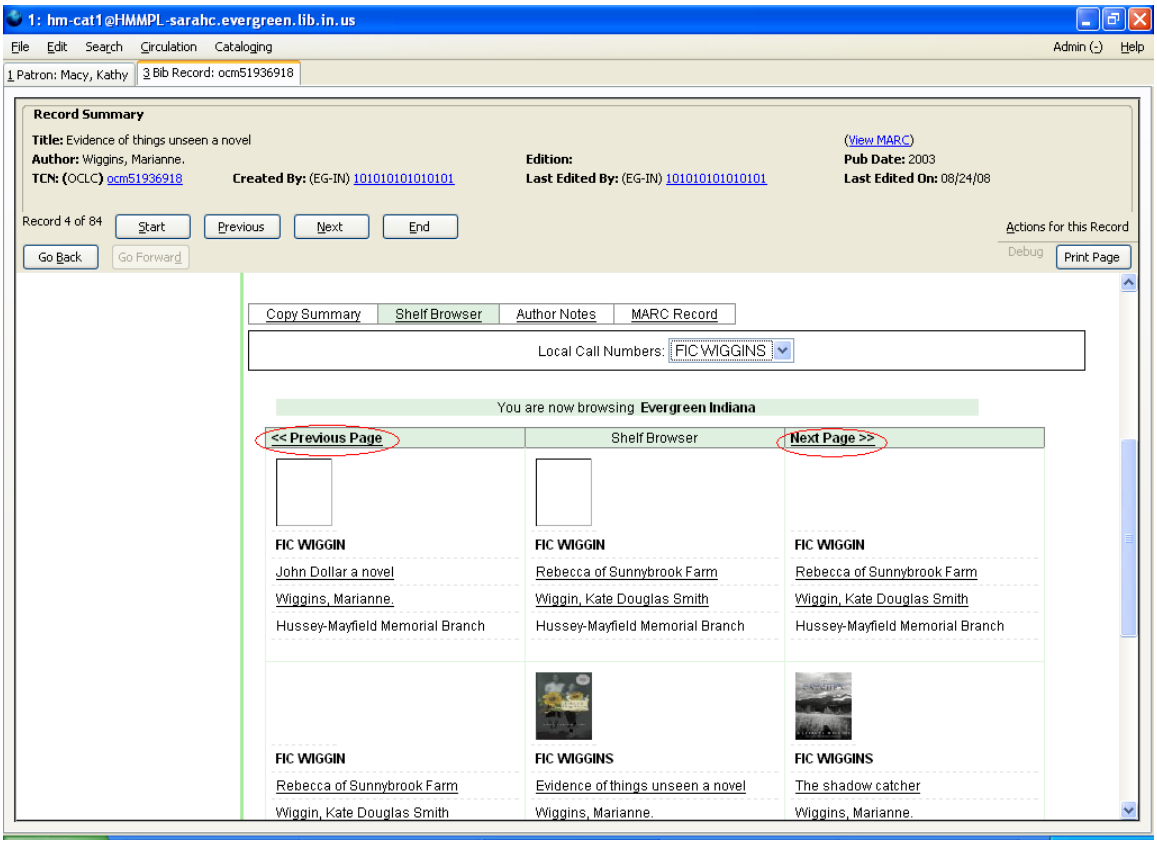
The other copy summaries will appear. You can click **View Copy Information for this location only** to switch back to just your library.

Copy Summary | Shelf Browser | Author Notes | MARC Record

View Copy Information for this location only

Library	Callnumber	Actions	Available	Checked out	In process	In transit	Reshelving	On holds shelf	On order	Reference
Jackson County Public Library										
Seymour Main Library	FIC WIG	details browse place hold	1	0	0	0	0	0	0	0
Lebanon Public Library										
Lebanon Public Library	F WIG	details browse place hold	1	0	0	0	0	0	0	0
Plainfield Public Library										
Plainfield-Guilford Township Public Library	FIC Wig	details browse place hold	1	0	0	0	0	0	0	0
Zionsville Public Library										
Hussey-Mayfield Memorial Branch	FIC WIGGINS	details browse place hold	1	0	0	0	0	0	0	0

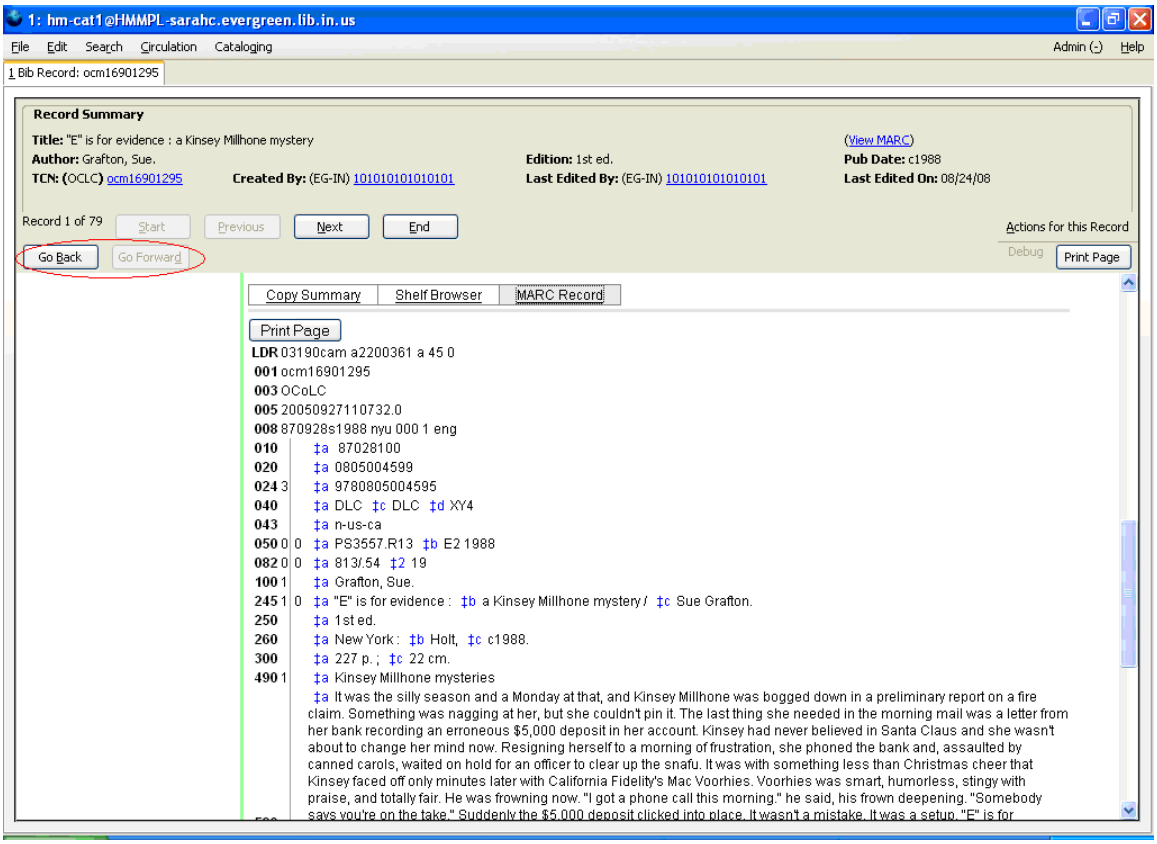
You can click on **Shelf Browser** to display items in the Evergreen Indiana catalog by call number. You can see what would be shelved to either side of a particular title if you thought of EI as one big physical library.



Note that you can click on **Previous Page** and **Next Page** to see browse further back and forth. This is the same display you will get if you do a call number Quick Search.

Other links may display here as well, when available, such as **Author Notes**, seen above.

Click on the **MARC Record** link and scroll down to see the MARC record displayed below the OPAC record summary:



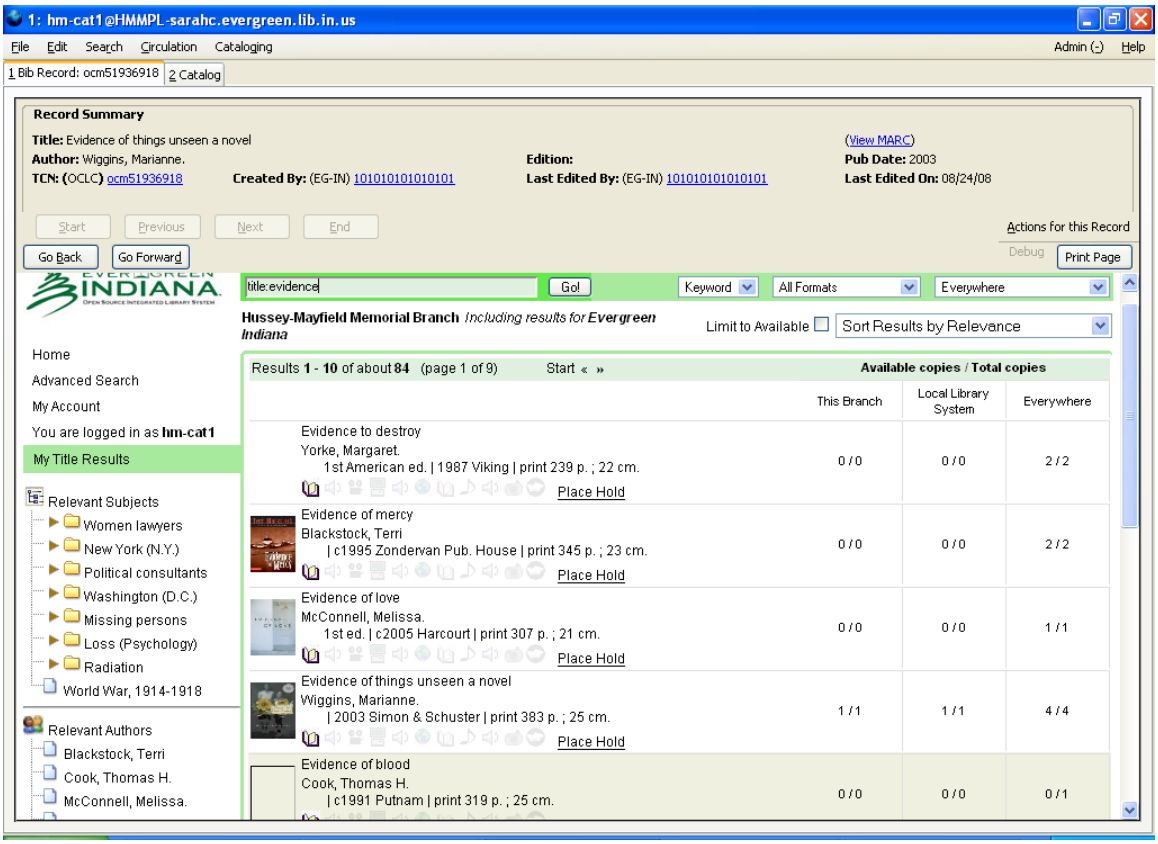
In the staff client there are navigation buttons near the top left of the screen –

Go Back and **Go Forward**. These work much like the back and forward arrow commands in a web browser, but they do not appear in all screens.

Note the **Go Back** Button to the Left

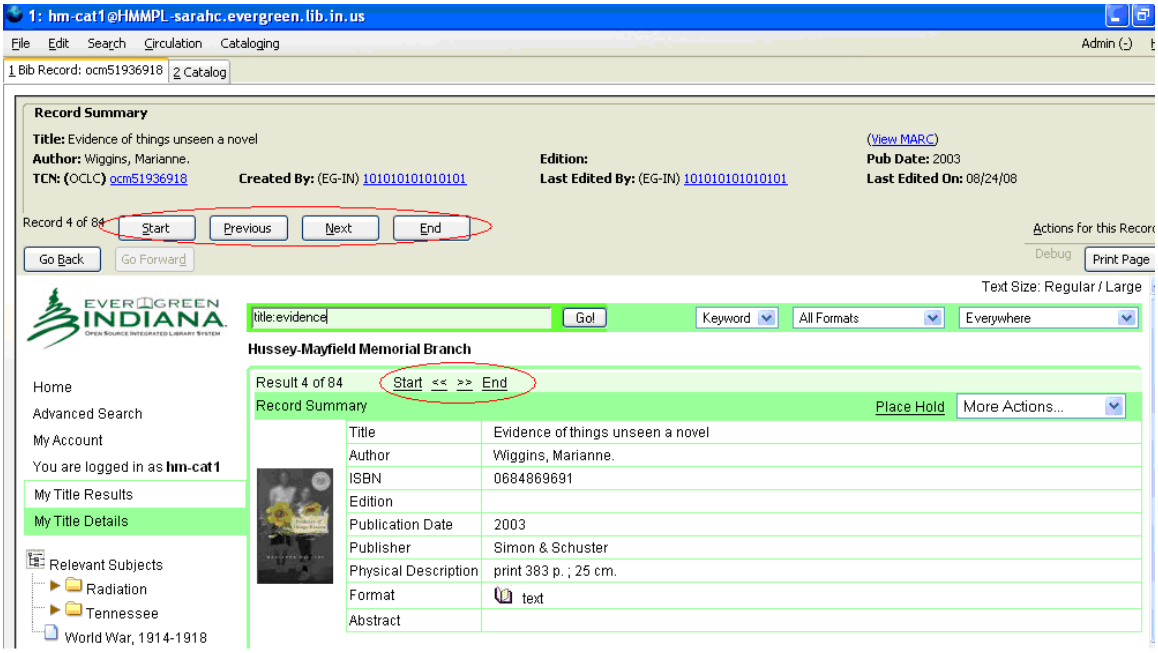
Click on the **Go Back** Button.

It will take you back to the list of titles:



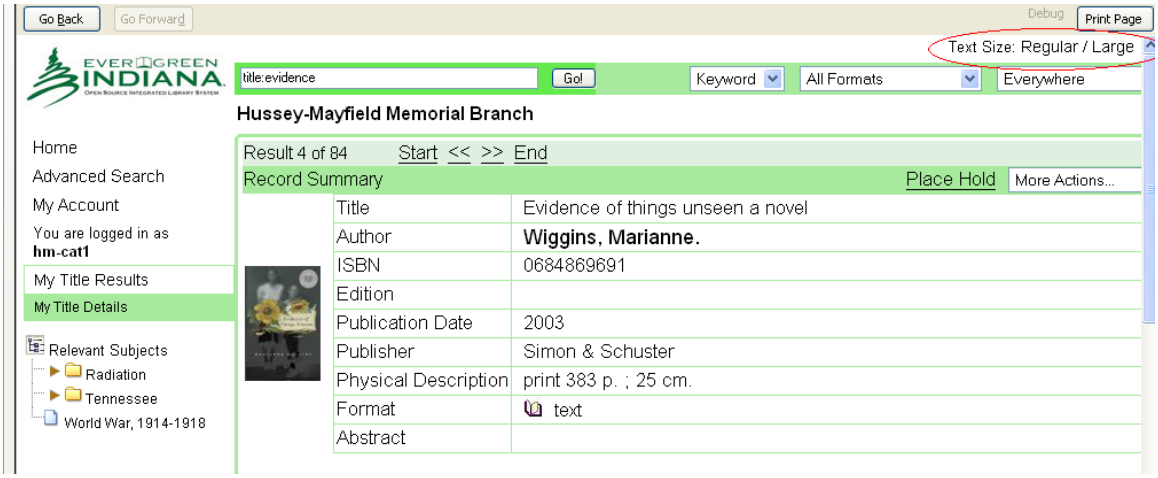
Click on the **Go Forward** button.

The bibliographic record reappears:



From here you can also navigate from record to record in your search results by clicking the left and right arrows to go to the next record or previous record. You can also click Start or End to go the first or last record in the list. These work just like the buttons in the Record Summary.

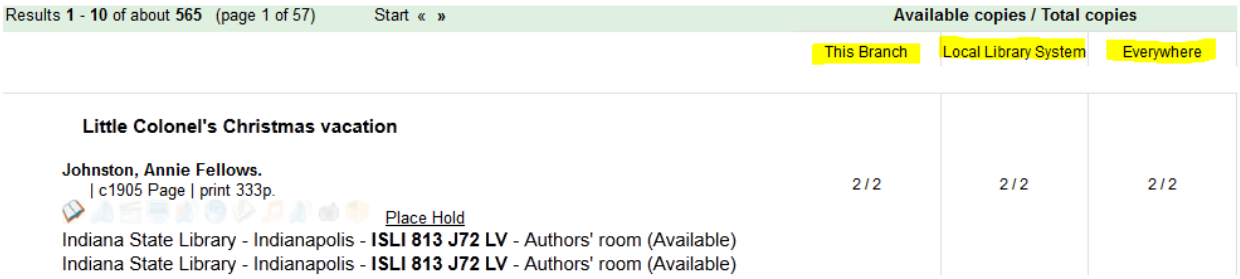
You can change the text size for the OPAC display by clicking **Large** in the upper right. Note the large text below:



To start a new search you can hit the **F3** key, click on **Advanced Search**, or use the brief search form on this page.

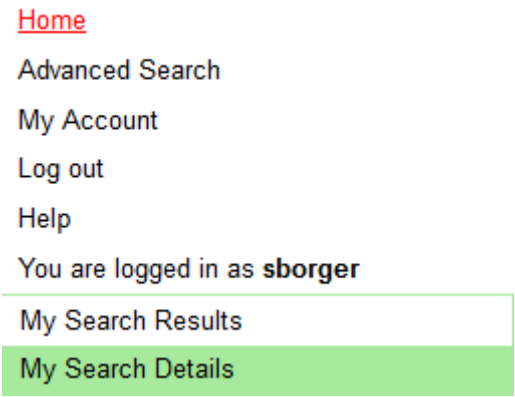
Availability

The number of available copies and total copies is displayed in the right-hand column. Depending on whether you've selected a particular library, you may see the results for the branch, the consortium (all your libraries), and any intermediate groupings of your libraries.



Going back

When you're viewing a specific record, you can always go back to a higher level to view all editions and formats, or back to the original search results. At the left of the page, you'll see links to the title groups and search results like these:



You can select the link to **My Search Results** to go back to your original search results.

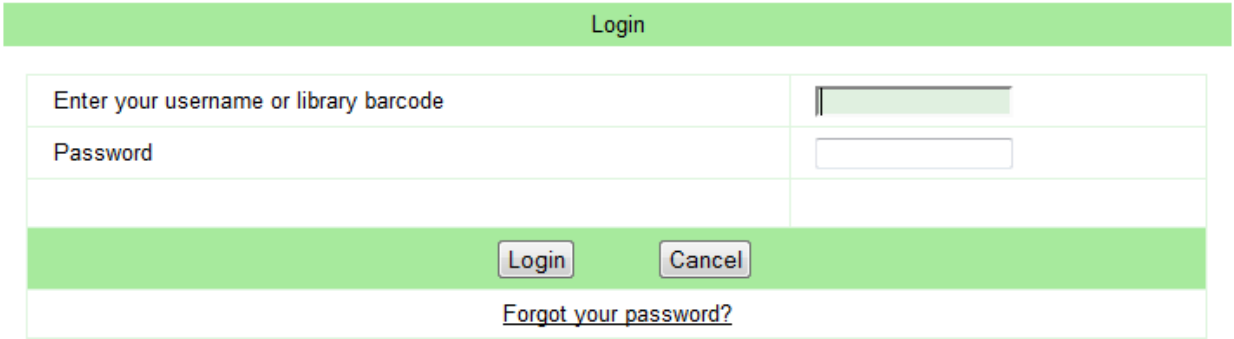
You can start a new search at any time by entering new search terms in the search box at the top of the page, or by selecting the **Home** or **Advanced Search** links in the left-hand sidebar.

My Account

You can access information about your account from any page in Evergreen by selecting the **My Account** link in the left-hand sidebar (or on the bottom of the home page). Your account information includes contact information, items you have checked out or on hold, your fines, preferences for Evergreen, and *bookbags*, a place for you to keep reading lists or other lists of items. Each of the sections in the My Account area is described below.

Logging Into Your Account

Click on the **My Account** link



Enter Your Username

* If this is your first time logging in, your username will be your library card number. You have the option to change your username on the **Account Summary** screen.

Enter Your Password

* You should have been given a password when you received your library card.

* If you do not have or cannot recall your password please contact your local library to have the password reset.

* If this is your first time logging into your account, you will be asked to reset your password. This is a security measure the system puts in place to protect your account and information.

Click on the **Login** button.

Problems Accessing My Account

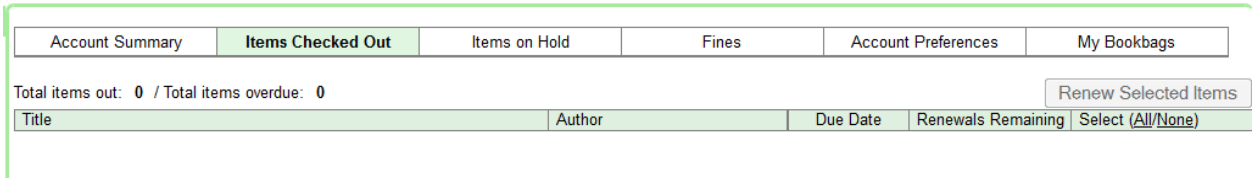
If the My Account screen is not responding to your login attempts or is displaying any other quirks, try clearing your browser's cache. Click here for instructions for clearing the cache of web browsers, by type. Please click on the link for the web browser you are using. In most cases, you can discover the version of your browser by going to Help > About [your browser's name] from the menu bar.

Account Summary

If you select the **Account Summary** link at the top of the My Account area, you see your contact and other account information. You can change the username and password that you use to log in to Evergreen as well as the email address the library uses to contact you by clicking the **Change** link next to the item.

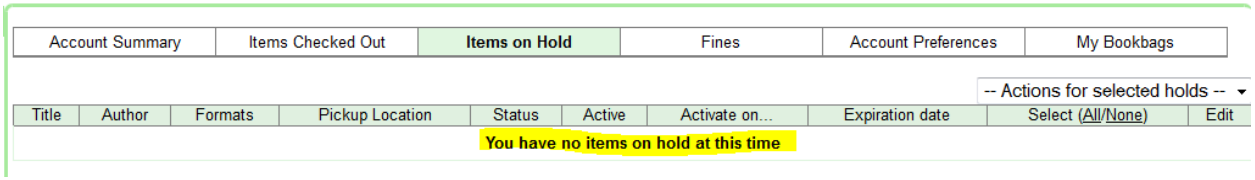
If you need to make a change to other information, such as your address, please see the library staff.

Items Checked Out



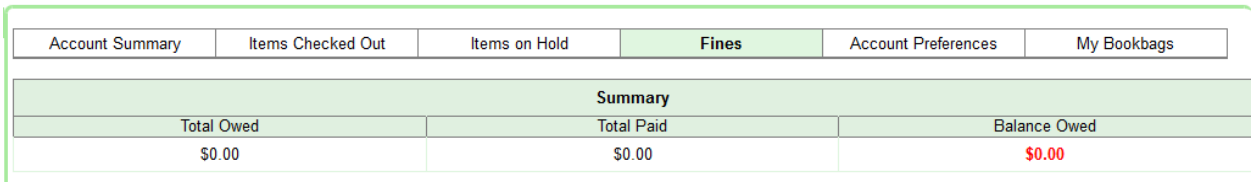
Select the **Items Checked Out** link at the top of the My Account area to display all of the items you currently have checked out, their due dates, and the number of times you can renew them. You can simply select the **renew** link to renew the materials and extend the due date.

Items on Hold



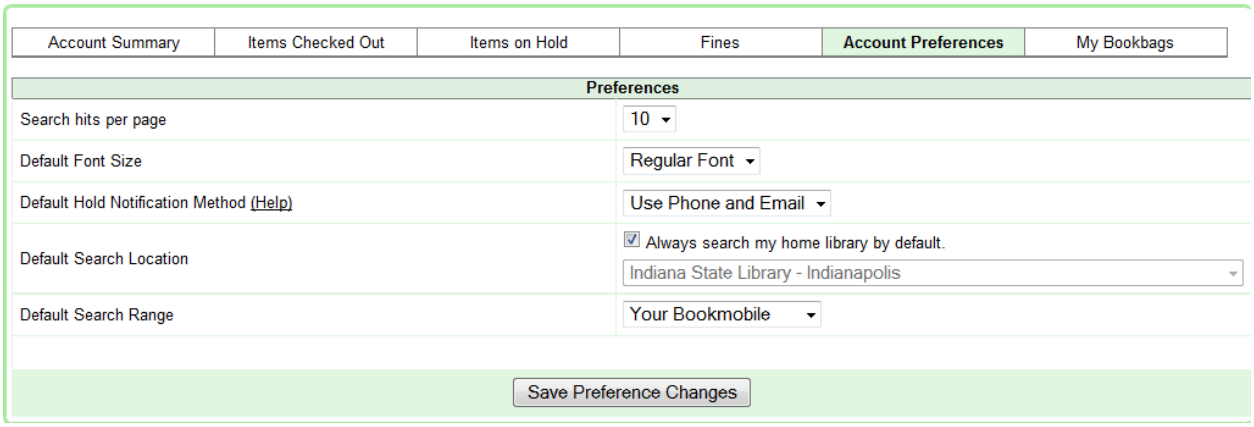
Items on Hold shows the materials you currently have on hold (reserve). The title, author, format, pickup location, and status are displayed. You may **cancel** a hold or **edit** how you'd like to be contacted when the item is ready or where you'd like to pick it up.

Fines



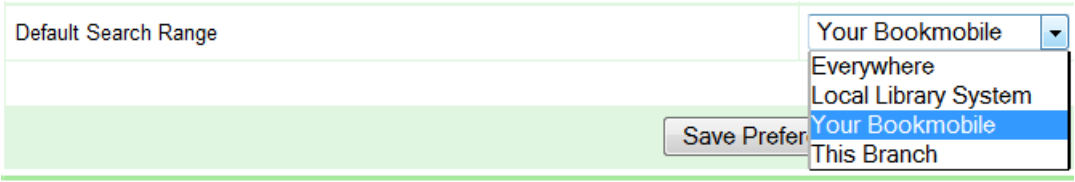
The **Fines** area displays any fines or fees the you have accrued. You can pay your fines at the library.

Account Preferences



In the **Account Preferences** area, you can set several options for using the catalog:

- **Search Hits Per Page:** You can increase or decrease the number of results that appear by default when searching the library catalog.
- **Default Font Size:** The catalog offers a *large font* and *regular font* for display.
- **Default Hold Notification Method:** You may elect to be notified of available holds by email, phone, or both.
- **Default Search Location:** You may choose to always search your home library first by default.
- **Default Search Range:** You may choose a default search range of your library branch, your local library system, or everywhere in the consortium.



My Bookbags

The **My Bookbags** section allows you to create, edit, share, and remove bookbags.

Bookbags are lists of items that can be used for any number of purposes. For example, to keep track of what books you have read, books you would like to read, to maintain a class reading list, to maintain a reading list for a book club, to keep a list of books you would like for your birthday. There are an unlimited number of uses.

You can see the bookbags you've created in the My Bookbags section of the My Account area.

How do I create a bookbag?

There are two ways to create a bookbag.

- First, in the **My Account** area, click on **My Bookbags**. In the **Create a new Bookbag** section, enter a name for your bookbag into the text box. Decide if you would like to share the contents of the bookbag with other users, and click the **Submit** button.
- If you are already logged in, on any item detail page, select the drop-down menu labeled **More Actions** in the upper-left. The last option in the drop-down is **Create a new bookbag**. Clicking it will prompt for a bookbag name and create a new bookbag.

What does "Share this bookbag" mean?

Bookbags can either be *private*, and only viewable by you; or *public*, and viewable by anyone who knows where the bookbag resides. By default, all bookbags are private, and you must explicitly instruct the system to allow others to view the contents of a bookbag. You can elect to share a bookbag from the **My Account** area, **My Bookbags** section.

You can give the address of your bookbag to anyone you want to share it with. In the My Bookbags section, in the list of your bookbags, there is a **View** link for every shared bookbag. Bookmark this link in your browser or copy and paste the address to share your bookbag.

Name	# Items	Shared	Share / Hide	Delete this bookbag?
new copies	5 Items	Yes (View)	Hide	Delete

How do I add items to a bookbag?

First, you need to be logged in to the online catalog by clicking the **My Account** link. Search the catalog normally for the item you would like to add to your bookbag. In the item record detail you'll see a drop-down menu in the upper right labeled **More Actions**. From that dropdown, select the bookbag you would like to place this title in. Alternatively, you can create a new bookbag from this dropdown.

How do I remove items from a bookbag?

In the My Account area, select the **My Bookbags** tab. Click on the name of the bookbag you would like to remove the item from. The items in the bookbag will appear at the bottom of the screen. Click the **remove** link next to the item you would like to remove from the bookbag. You'll be prompted to confirm the removal.