

Patron Interface

Evergreen 3.0 Web Client

Searching for patrons (basic vs. advanced)

1. “Search” drop-down box in top menu
 - a. “Search for Patrons”
2. Home screen, “Search For Patron By Name” under “Circulation and Patrons”

Basic Search: Type in last name/first name/middle initial (or combination of any), press enter or click on “Search” button.

Advanced Search: Click on the arrow button to the right of the “Clear Form” button. This will open the advanced search options. This button is “sticky,” which means once you open the advanced menu, it should be open for every patron search (even if you leave the screen and go back).

****You can now search for patrons by birthday—dates must be in number format.**

****Search can be scoped by BCLS or individual libraries through the drop-down box in the advanced search options.**

****Clicking on patron’s name once (as opposed to double-clicking) will give you all patron options (check-out, edit, etc). Double-clicking on patron will get rid of search screen to show patron account screen.**

Patron screen layout

1. Patron summary information is now down the left-hand side of the screen (instead of over the top).
2. Check-out, Items out, etc. are listed across the top of the screen.
3. “Other” drop-down menu shows less used options.

Register Patron screen

1. SPARK Home screen, “Circulation” drop-down menu at top of screen, “Register Patron”
 - a. Required/Suggested Fields
 - b. “Email checkout receipts by default?” check box under “Email Address” field.

Retrieve Recent Patrons

1. SPARK Home screen, “Circulation” drop-down menu at top of screen, “Retrieve Recent Patrons” and you will see the last 5 patrons whose records were opened on that workstation

Add a Patron to a Group

1. Search-Search for Patron OR Circulation-Checkout- Enter Barcode
2. In the Other tab, choose Group Member Details.
3. Click on the Patron Account you want to clone. Select Register a New Group Member by Cloning Selected Patrons **OR** go to Actions-Register a New Group Member by Cloning Selected Patrons



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Replace a Library Card

1. In the patron account, click on the edit tab. Click Replace Barcode.
2. Enter new barcode, and click "Save".
3. Click on See All to see All Barcodes associated with the patron.

Add a Note to a Patron's Account

1. In the Patron's account, Click on the Tab labeled Other.
2. Click on Notes, then Add New Note.
3. To make it visible to the patron check the box.

Add an Alert to a Patron's Account

1. In the Patron's account, Click on the tab labeled Messages.
2. Under Staff-Generated Penalties/Messages click Apply Standing Penalty/Messages.
3. In the popup box select Alert. Enter initials and click OK.