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Welcome Back!

The entire staff at SRL hopes that you’re feeling welcomed and supported! We want to ensure that you have everything you need to be successful. To that end, Evergreen II will continue your training on using SRL’s ILS.

Patron Registration

In order to obtain a library card, a patron must be 16 years of age or have a parent / guardian sign for him. When a patron requests a library card, follow the steps below to issue one.

1. Perform the “Patron Search” steps to ensure he does not already have a library card.
2. Retrieve an unassigned library card.
3. Ask the patron for a photo identification and proof of current address.
4. Click “Circulation” and then “Register Patron.”

5. Complete the yellow fields and the fields SRL requires in all caps.
6. Click “Save.”
Patron Registration, continued

For an explanation of all of the fields on the Patron Registration page, please see your Patron Registration Handout.

Here are some additional notes that may assist you with unique registration situations.

- Some patrons will be residents of counties served by our reciprocal libraries (listed below). If that is the case, select “Reciprocal Borrower” in the Patron Type drop down menu. There is no charge for them to get a library card with us.
- Sometimes patrons outside of our three counties will want a library card with us. We charge $50.00 per year for this service. If this occurs during your shift, ask an experienced staff member to help you with the registration.
- If a patron uses a PO Box to receive mail, uncheck the “Physical” box and enter the PO box address as the “Mailing” address. Click “New Address,” check “Physical,” enter “Physical” in the Type field, and then enter the patron’s physical address.

Here are the definitions of the other patron types if you are just curious.

- **Bookmobile patron** – The bookmobile manager registers these patrons.
- **Homebound** – This is for patrons who receive Books-By-Mail. They are registered by the adult outreach coordinator.
- **Institution** – This is for day care centers, nursing homes, and any other business that does not receive bookmobile serve and wants to check out materials for its clients.
- **Non-resident** – These patrons live outside of our service area and must pay a non-resident fee.
- **Non-resident taxpayer** – These residents live outside of our service area but own property inside our service area. They must provide proof of ownership when registering and each year when their accounts are updated. Proof of ownership may be a property deed or a property tax receipt.
- **Reciprocal borrower** – We have reciprocal agreements with Washington Public Library, East Central College (all campuses, students and staff), Ozark Regional Library, Jefferson County Library, Washington County Library, Missouri River Regional Library, Heartland Regional Library, and St. Charles City-County Library. We issue free cards to patrons living in these library districts.
- **School registration** – Use this stat cat when registering a child from information provided by the school.
- **Staff** – This is anyone who receives pay for working at Scenic Regional Library.
- **Temporary resident** – This is anyone who will be living in our service area for a limited amount of time OR a teacher who lives outside of our district but teaches at a school inside our district. The expiration date for these patrons must be manually set to coincide with the date their residence in our area will end OR, for teachers, the end of the school year. These patrons may not have anything to prove where they are living temporarily in our district. If they request an extension of their temporary status after its expiration, some type of proof of address should be provided.
Checking Out Unprocessed Items (UPIs)

Back issues of magazines and many paperback books are Unprocessed Items, or UPIs. This means that they are not cataloged in the system. You will be able to tell if an item is a UPI because the label will not have a barcode on it. If a patron is checking out any UPIs, follow the steps below.

1. Click on “Circulation” and then “Check Out.”

2. Scan the barcode on the patron’s library card.

3. Click “Barcode” and select the correct material type from the drop down menu.
4. Click “Submit.”
Checking Out Unprocessed Items (UPIs), continued

5. Enter the number of that type of item when prompted.
6. Click “OK.”

7. Click “Done.”
Renewing Items

Patrons can renew items according to the chart below.

<table>
<thead>
<tr>
<th>Item Type</th>
<th>Number of Renewals Allowed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Books</td>
<td>2</td>
</tr>
<tr>
<td>Adult DVDs</td>
<td>1</td>
</tr>
<tr>
<td>Juvenile DVDs</td>
<td>1</td>
</tr>
<tr>
<td>Adult Audiobooks</td>
<td>2</td>
</tr>
<tr>
<td>Juvenile Audiobooks</td>
<td>2</td>
</tr>
<tr>
<td>Music CDs</td>
<td>2</td>
</tr>
</tbody>
</table>

Follow the steps below to renew an item for a patron who brings the item to the desk.

1. Click “Circulation” and then “Renew Items.”

2. Scan the item.
Renewing Items, continued

Follow the steps below to renew an item for a patron who does not have the item with him.

1. Click “Circulation” and then “Check Out.”

2. Scan the patron’s library card.

3. Click “Items Out.”
4. Click the box in front of the item to be renewed.
Renewing Items, continued

5. Click “Actions.”
6. Click “Renew.”

7. Click “OK/Continue.”

Notes

- If a patron calls on the phone to renew an item, do a patron search to open his account and ask him two questions to verify his identity such as “What is your birthdate?” and “What is your address?”

- If the item has reached its renewal limit, the system will ask you if you want to force the action. Scenic Regional Library does not allow patrons to exceed the renewal limits, so you will need to click “No” and inform the patron that the item cannot be renewed.

- If there is a hold on the item for another patron, do not force the action. SRL does not renew items with active holds.
Renewing an Expired Account

Every year on the anniversary of a patron’s account creation, the account expires. A patron cannot use the computers, reserve, renew, or check out items with an expired account. The expired account will be revealed when the patron’s library card is scanned. Follow the steps below to renew a patron’s account.

1. Click on “Edit.”
2. Ask the patron to verify his phone number and address and if they are incorrect, change them.
3. Scroll down until you find the Privilege Expiration Date Field.
4. Click “Update Expire Date” and the date will automatically be extended for one year.
5. Click “Save.”

Note

If a patron is renewing a non-resident account, he will need to pay $50.00 for the next year of service. He can also provide a tax bill to prove he owns property in one of the counties we serve to have the non-resident fee waived.
Searching the Catalog and Placing a Hold

A patron often calls the library or visits the circulation desk to inquire if a certain item is available. If this request is made, you will need to search the catalog and place a hold on the item for the patron.

Follow the steps below to search the catalog and place a hold for a patron.

1. Click “Circulation” and then “Check Out.”

2. Scan the patron’s library card.

3. Click on “Holds.”
4. Click on “Place Hold.”
Searching the Catalog and Placing a Hold, continued

5. Enter the patron provided information into the appropriate search fields. You can also choose additional features from the Search Filter selections.
6. Click “Search.”

7. If a copy is available at your branch, retrieve it for the patron. If not, click “Place Hold.”
8. Click “Submit.”

**Notes**

- When searching the catalog by keyword, it is very similar to a Google search. Enter in as specific of words as you can to help get the patron exactly what he needs. You can even enter things like one word of the title and the author’s last name if that is all the patron knows.

- When searching the catalog by author, keep in mind that some authors publish their titles with slight variations of their names. For example, one title might have the author’s middle initial, while another might not. You may need to do an internet search to determine if there are any variations on that author’s name.
Managing Holds

As seen in the last section, many patrons place holds on items that the library must fill. For Library Assistants, managing holds primarily involves the following duties.

- Pulling the hold request list
- Browsing the holds shelf

Library Assistants pull the hold request list to retrieve a report of the items that need to be pulled off of their branch’s shelves in order to fill hold requests. Some of the hold requests will be filled at their branch and some will be sent to other Scenic Regional Libraries, Evergreen partners, or to fill an Inter-Library Loan.

In order to pull the hold request list, follow the steps below.

1. Click “Circulation” and then “Pull List for Hold Requests.”

2. Click the column picker button.
3. Click “Print Full Grid.”

Once you have printed the list, you can physically retrieve the items from the shelves. Then use the “Checking In” and staging process to get the items to where they need to go.
Managing Holds, continued

Library Assistants also browse the holds shelf in order to clear it. Scenic Regional Library holds items for ten days and if the items are not picked up by then, they are returned to circulation.

In order to browse the holds shelf with the intention of clearing it, follow the steps below.

1. Click “Circulation” and then “Holds Shelf.”

2. Click “Show Clearable Holds.”
Managing Holds, continued

3. Click “Print Full List.”

4. Use the list to physically pull the expired items off of the holds shelf.
5. Cancel the hold for each item pulled by following the bullets listed below.
   - Click the box in front of the item for which you want to cancel the hold.
   - Click “Actions.”
   - Click “Cancel Hold.”

6. Check the item in to see where it goes next.

Note

If you pull all the items on the list, you can cancel all the holds at once by clicking the box in the title row of the chart, clicking “Actions,” and clicking “Cancel Hold.”
Billing

There are two types of bills in Evergreen.

- **Circulation Bills** – automatically added to a patron’s account by the system because of items being overdue, lost, or damaged.
- **Grocery Bills** – amounts added to a patron’s account manually by staff members.

When you access a patron’s record, if he has bills, an alert message will be displayed. Please note that if the bill is for a lost item, inform the patron that he can try to look for it and if he finds it and returns it to the library. SRL does not refund payment for lost items if the items are found later. We also do not accept replacement copies of lost items.

To assist a patron in paying a bill, follow the steps below.

1. Click “Circulation” and then “Check Out.”

2. Scan the patron’s library card.

3. Click on “Bills” to see the details of the charges.
Billing, continued

4. Use the drop down menu to select the payment type. **We only accept cash and checks.**

5. Manually enter the payment amount in the “Payment Received” field.
6. Check “Annotate.”
7. Click “Apply Payment.”

8. Enter the details of the payment and your initials into the annotation box.
9. Click “OK / Continue.”
Billing, continued

Notes

- If you need to see more details about a bill, you can click the box in front of the bill. Then, click “Actions” and then “Full Details.”

- If you are accepting payment for a lost item, please tell the patron that his money will not be refunded if the item is found.

To add a grocery bill to a patron’s account, follow the steps below.

1. Click “Search” and then “Search for Patrons.”

2. Enter the patron’s last and first names and then click “Search.”

3. Click the box in front of the patron’s name.
Billing, continued

4. Click on “Bills.”
5. Click on “Bill Patron.”

6. Use the drop down menu to select the reason for the bill in the “Billing Type” field. Note that some choices will automatically populate the amount field.
Billing, continued

7. Manually enter the amount of the bill if the field is not already populated.
8. Enter an explanation for the bill and your initials in the “Note” field.
9. Click “Submit Bill.”

Note: There are some billing functions that you may be required to fulfill that are a bit more complicated than what is covered here. As these situations arise, your branch manager will assist you in fulfilling them. Therefore, if you are faced with a situation that you are not sure how to handle, please ask your branch manager or a more experienced colleague for assistance.
**Entering and Paying Bills for Copies and Faxes**

Although we have already covered how to enter and pay bills in Evergreen, there is one process that needs specific coverage as it differs slightly from the standard process. Patrons often ask us to make copies and fax documents for them, and we charge $.15 per page for copies and $1.00 per page for faxes. When we copy or fax something for them, we need to enter and pay a bill for the transaction in Evergreen.

Follow these steps to enter and pay a bill in Evergreen for copies or faxes.

Please note that a tab for your branch’s Walkin account may already be open in Evergreen. If a tab is already open in Evergreen, please click on it, click “Refresh” and skip to step 5. If a tab is not currently open, begin with step 1.

1. Click “Search” and then “Search for Patrons.”

2. Enter “Walkin” in the Last Name field and your full branch location in the First Name field and click “Search.” The chart below includes the information for these accounts for your reference.

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Library Barcode Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>WALKIN</td>
<td>BOOKMOBILE</td>
<td>9301287773</td>
</tr>
<tr>
<td>WALKIN</td>
<td>HERMANN</td>
<td>930127020+</td>
</tr>
<tr>
<td>WALKIN</td>
<td>NEW HAVEN</td>
<td>9301270196</td>
</tr>
<tr>
<td>WALKIN</td>
<td>OWENSVILLE</td>
<td>9301270218</td>
</tr>
<tr>
<td>WALKIN</td>
<td>PACIFIC</td>
<td>930127017+</td>
</tr>
<tr>
<td>WALKIN</td>
<td>SAINT CLAIR</td>
<td>9301270188</td>
</tr>
<tr>
<td>WALKIN</td>
<td>SULLIVAN</td>
<td>9301270242</td>
</tr>
<tr>
<td>WALKIN</td>
<td>UNION</td>
<td>9301270250</td>
</tr>
<tr>
<td>WALKIN</td>
<td>WARRENTON</td>
<td>9301270226</td>
</tr>
<tr>
<td>WALKIN</td>
<td>WRIGHT CITY</td>
<td>930147249+</td>
</tr>
</tbody>
</table>
Entering and Paying Bills for Copies and Faxes, continued

3. Click on the box in front of your branch’s Walkin account.

4. Click on “Bills.”
5. Click on “Bill Patron.”

6. Click on the “Billing Type” field to reveal a drop down menu.
7. Click on the appropriate billing type, i.e. fax, copies, etc.
Entering and Paying Bills for Copies and Faxes, continued

8. Enter the amount in the “Amount” field.
9. Enter your initials in the “Note” field.
10. Click “Submit Bill.”

After creating the bill and accepting the patron’s payment, follow these steps to pay the bill in the Walkin account.

1. Click on the “Payment Type” field to reveal a drop down menu.
2. Click on “Cash” or “Check.”
Entering and Paying Bills for Copies and Faxes, continued

3. Enter the amount in the “Payment Received” field.
4. Check the “Annotate” box.
5. Click “Apply Payment.”

6. Enter your initials into the annotation box that pops up and click “OK / Continue.”

Notes

- As a best practice, leave a tab open for the Walkin account at all times.
- Sometimes a patron will owe money for copies or faxes and will pay you more than he owes and tell you to keep the change. For example, he owes $.45 for copies and gives you $.50 and tells you to keep the change. If this happens, enter the bill into the system for the amount he gives you, not the amount he owes. So in the example above, you would enter the entire $.50 as a bill for copies.
- This process is also used for other things such as printouts from the public computers, mug purchases, and book bag purchases. If you are unsure as to whether to charge the “Walkin” account for a purchase, please ask your Branch Manager.
Offline Circulation

Occasionally, your branch may lose internet access and when that happens, Evergreen will not function properly. However, you can use Offline Circulation to check out items until your branch is back online. Please note that this system is only used to check out books and nothing else.

In order to access and use Offline Circulation, follow the steps below.

1. Click “Circulation” and then “Offline Circulation.”

2. Click “Check Out.”

![Offline Circulation Steps]

![Checkout Steps]
Offline Circulation, continued

3. Click “Proceed.”

4. Choose a due date from the calendar of two weeks from today.
5. Scan the patron’s library card.
6. Scan the patron’s items.
7. Click “Checkout.”

Notes

- When the library is back online, the information captured in Offline Circulation will be uploaded into Evergreen.

- Ensure that the “Strict Barcode” box is unchecked.
Using the Online Public Access Catalog (OPAC)

As stated in the Missouri Evergreen I class, Evergreen has two main interfaces. We have spent most of our time learning the Staff Client Interface, but we must not forget the patron interface, the OPAC. Patrons often ask the Library Assistants for assistance while using an OPAC terminal in the library. Therefore, a Library Assistant must know how to navigate this system as well. Typically speaking, patrons ask for assistance in searching the catalog or accessing their library account. In order to access their account, they must have their library barcode number and their account password, which is typically their birthdate, unless they went into the system to change it.

When patrons search the catalog, they typically use the basic search functionality you see below.

![Example of an OPAC search interface]

Patrons usually ask for help once they get to the search results screen because often times, they are confused by what they are seeing.
Using the Online Public Access Catalog (OPAC), continued

There are many functions a patron can perform if they are logged into their account through the OPAC. A title, description, and screen shot for each is included on subsequent pages of this manual.

Account Summary Tab

The Account Summary tab lists information about the patron’s account in a summary form that can then be expanded if the patron would like additional information. From this page, a patron can see the following information.

- Account expiration date
- Items he currently has checked out
- Items he currently has on hold
- Items that are ready for pick up at his library
- Charges on his account
- Payments history

The screen print below shows you what the account summary page looks like when accessed.
Using the Online Public Access Catalog (OPAC), continued

Messages Tab

The Messages tab allows patrons to view any messages that the system adds to their account. For example, a courtesy notice will be posted here three days prior to an item being due. When patrons have a message, they can mark it as read, mark it as unread, or delete it.

The screen print below shows you what the messages page looks like when accessed.
Using the Online Public Access Catalog (OPAC), continued

Items Checked Out Tab

The Items Checked Out tab provides the patron with additional information concerning the items he currently has checked out, both physical items and electronic items. One of the most helpful features of this page is that it lists how many renewals are remaining for each item as well as the due date for each. If a patron so desires, he can renew an item on this page, assuming that he has renewals remaining and that the item is not on hold for another patron.

Within this tab, there is also a “Check Out History” section, which allows patrons to view all of the items they have checked out in the past. This can be helpful for patrons who claim they can never remember what they have read and what they haven’t, especially when reading multiple books by one author. In order for patrons to use this feature, they must set up their account preferences to record their check out history.

The screen print below shows you what the Items Checked Out tab looks like when accessed.
Using the Online Public Access Catalog (OPAC), continued

Holds Tab

The Holds tab allows patrons to see what items they have on hold. It provides them with the titles, which serves as a reminder since the hold may have been put in place some time ago, but it also provides them with additional status information about the item. The “Status” column shows them how many copies of the item are available system wide as well how many holds are on that item. This will help to give them an idea how long they may be waiting for their item. Also, this page allows patrons to cancel a hold they have placed as well as edit their pick up library.

The screen shot below shows you what the Holds tab looks like when accessed.
Using the Online Public Access Catalog (OPAC), continued

Account Preferences Tab

The Account Preferences tab allows patron to edit various characteristics about their accounts and how they can use their accounts.

On the Personal Information tab, a patron can modify his account user name, password and email address. If he needs to change his name, address or phone number, he must visit the library to make those changes.

On the Notification Preferences tab, a patron can edit how he will be notified when a hold is ready for pick up.

On the Search and History Preferences tab, a patron can alter how many results per page will appear when a search is completed, which library or libraries will be searched, where the patron would like to pick up his holds, and also whether or not the patron would like the system to keep a history of items checked out and put on hold.

Finally, on the My Lists Preferences tab, a patron can specify how many lists he wants visible per page and how many items in each list he wants visible per page. Once this is specified, he can set up and view his lists in the My Lists tab.

The screen shot below shows you what the Account Preferences tab generally looks like when accessed.
Using the Online Public Access Catalog (OPAC), continued

My Lists Tab

The My Lists tab is a wonderful feature that allows a patron to keep a list of, well, basically anything they want. From this tab, a patron can create a list as well as modify an existing list.
Using the Online Public Access Catalog (OPAC), continued

Menu Bar

The Menu bar provides access to other information that may be helpful to patrons.

The Menu bar is a simple way for patrons to navigate through the OPAC to find specific information. The list below contains the headings of the Menu bar and for what patrons can use them.

- **Home** – takes patrons to the SRL website home screen.
- **New Titles** – lists titles that were recently added to the catalog in specific categories.
- **Adopt-a-Book** – takes patrons to this section of the SRL website where they can get more information about this program.
- **eBooks** – takes patrons to the eBook section of the SRL website.
- **Request Materials** – takes patrons to this section of the SRL website where they can request materials that SRL does not have in its collection.
- **Find a Library** – takes patrons to the locations and hours section of the SRL website.
- **Request Scenic Library Card** – takes patrons to a page where they can request an electronic materials only library card.
- **Contact Us** – provides patrons with various ways to contact SRL.
- **Help** – takes patrons to the My Account section of the Resources section on the SRL website.

If you have not done so already, it is highly recommended that you set up and access your account as a library patron and play with this system to see what it can do. The more you have done for yourself, the more you will be able to help patrons with their accounts.