Missouri Evergreen II

April 2021



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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."

ŵ	Search -	Circulation -		Acquisitions -	Booking	 Administration -
		 ▲ Check Out ▲ Check In ★ Capture Ho ➡ Pull List for ♥ Renew Iter ▲ Register Page 	olds r Hold Requests ms atron		E '	∨ e r≱
		A Retrieve La	ast Patron atrons ets	5		Item Search a

- 5. Complete the yellow fields and the fields SRL requires in all caps.
- 6. Click "Save."

A Search	Acquisitions - Booking -	Administration -	admindata @ SRL-UN-HQ1L 🛛 🧮
		Register Patron	
Show: Required Fields Suggested Fields All Fields			Print Save & Clone
Barcode			
OPAC/Staff Client User Name			
Password	3827	Generate Password	
Primary Name Preferred Name			
Prefix/Title			
First Name			
Middle Name			
Last Name			

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 Scenic Regional Library no longer has a bookmobile.
- *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 and assisted living centers whose staff wants to check out materials for their 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, 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 fishing rods 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."

A	Search -	Circulation -	Cataloging -	Acquisitions -	Booking -	Administration -
		Check Out Check III Capture Ho Pull List for Renew Iter Register Pa	olds • Hold Requests ns atron		ΕV	
		A Retrieve La	ast Patron atrons	S		Item Search and
		🔳 User Bucke	ets		Se	arch catalog for

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

A	Search -	Circulation -	Cataloging -	Acquisitions -	Booking -	Administrat	tion -			
				Check Out	Items Out	Holds	Bills	Messages	Edit	Other -
				Patron Barco	de Patron I	Barcode		74		

- 3. Click "Barcode" and select the correct material type from the drop down menu.
- 4. Click "Submit."

Search -	Circulation -	Cataloging -	Acquisitions -	Booking -	Administra	ition -							adr	nindata @) SRL-UN-H	ג1L
PATRON, JE	NNIFER	1	Check Out	Items Out	(0) Hold	s (0 / 0)	Bills (\$0.00)	Messages	E	dit	Other •	•			Patro	n Sea
Profile	Patrons					_										
Home Library	SRL-UN		Barcode -				Submit			Date	Options	10/23/2				
Net Access	Unfiltered		Barcode									~	~			
Date of Birth	12/01/1978			_								09	44	AM		
Parent/Guardiar	n		Adult Magaz	zines												
Last Activity	10/11/2019		Fishing Rod	is								~	~			
Last Updated	08/29/2019		Juvenile Ma	agazines												
Create Date	04/21/2015		Paperback I	Book												
Expire Date	04/03/2020								Las I	44	hh	Actions	- Do	we 25 -	Page 1 -	
Fines Owed	\$0.00								Idd		79	ACIOIIS	RU	ws 20 ¥	raye I ♥	•
Items Out	0		# 🗏 Balai	nce C Barcode	Circ ID	Call Num	tDue Date Fa	mily Na Locatio	n Ren	nainin	Title	Circula	atio Circ	ulatioO	wning Li Ale	erts
Overdue	0															

Checking Out Unprocessed Items (UPIs), continued

- 5. Enter the number of that type of item when prompted.
- 6. Click "OK."



7. Click "Done."

Search - Cir	rculation - Cataloging	Acquisitions - Booking - Administration -	admindata @ SRL-UN-HQ1L
PATRON, JEN	NIFER	Check Out Items Out (0) Holds (0 / 0) Bills (\$0.00) Messages Edit Other -	Patron Sear
Profile	Patrons		
Home Library	SRL-UN	Barcode Submit Date Options 10/2	23/2 📖
Net Access	Unfiltered	٨	^
Date of Birth	12/01/1978	09	44 AM
Parent/Guardian			
Last Activity	10/11/2019	· · · · · · · · · · · · · · · · · · ·	·
Last Updated	08/29/2019		
Create Date	04/21/2015		
Expire Date	04/03/2020	Idd dd bb Actio	Pos - Rows 25 - Rage
Fines Owed	\$0.00		non rono zo nag
Items Out	0	# 🗏 Balance C Barcode Circ ID Call NumtDue Date Family Na Location Remainint Title Circ	culatio Circulatio Owning L
Overdue	0	No Items To Display	
Long Overdue	0	to tono to biopidy	
Claimed Returned	0		
Lost	0	Strict Barcode	😫 Quick Receipt 👻 Done 👻
Non-Cataloged	0		· · · · · · · · · · · · · · · · · · ·

Renewing Items

Patrons can renew items according to the chart below.

Item Type	Number of Renewals Allowed
Books	2
Adult DVDs	1
Juvenile DVDs	1
Adult Audiobooks	2
Juvenile Audiobooks	2
Music CDs	2

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."

A	Search -	Circulation -	uisitions -	Booking -	Administration -
		 Check Out Check In Capture Holds Pull List for Hold Requests Renew Items Register Patron 		ΕV	ER
		 Retrieve Last Patron Pending Patrons 	S		Item Search and

2. Scan the item.

f	Search -	Circulation	- Catalog	jing	ons - Book	king - Adm	inistration -							admindata @) SRL-UN-H	Q-1L	
F					-		Renew	Items									
	Barcode	I		Submit				Specific Due Date	2017-11-21							1	
	#	Alert Msg	Location	Balance Owed	CN Suffix	Title	Bill #	Family Name	Due Date	K	H arcode		Actions - CN Prefix	Rows 25 -	Page 1 - Ren Call Nu	• mber	
	No Item:	s To Display									Print R	eceip	: 🔲 Trim L	.ist (20 Rows)	Strict E	arcod	le

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.

f	Search -	Circulation -	Cataloging -	Acquisitions -	Booking -	Administra	tion -			
				Check Out	Items Out	Holds	Bills	Messages	Edit	Othe
				Patron Barco	ode Patron	Barcode				

- 3. Click "Items Out."
- 4. Click the box in front of the item to be renewed.

Search - Circulation - Cataloging - Acquisitions - Booking - Administration - PATRON, JENNIFER Profile Resident Home Library SRL-UN Net Access Unfiltered Date of Birth 12/1/1978 Acquisitions - Booking - Administration - Messages Edit Other - Messages Edit Other - Messages Edit Other - Messages Edit Other - Messages Edit Other - Messages Edit Other - Messages Edit Other - Messages Edit Other - Messages Edit Other - Messages Edit Other - Messages Edit Other - Messages Edit Other - Messages Items Checked Out (3) Other/Special Circulations (0) Non-Cataloged Circulations (1)			admindata @ :	SRL-UN-HG	2-1L												
PATR	ON, JI	ENNIFER	1	Check	Out	Out (3)			Messages	Ed	lit	Other	•		Patro	on Search	h
Profile		Resident		Items C	Checked Out (3)	Other/Sp	ecial Circulation	s (0) Non-(Cataloged C	irculati	ons (1))					
Home	Library	SRL-UN															
Net Ac	cess	Unfiltered								144	44	Þ	Actions -	Rows 25 -	Page 1 -	-	
Date of	of Birth	12/1/1978													. age .		
Last A	ctivity	8		#	Circ ID	Due Date	Checkout / Re	Title	Renewals	Rem	Barco	ode	Fines Stoppe	d Workstation	n Checkin	Work	
Last U	pdated	6			9592929	12/1/2017	SRL-UN	sakinas rest	. 2	3	002198	5987		SRL-UN-H			
Create	Date	4/21/2015		2	9592930	12/1/2017	SRL-UN	a man of no	. 2	3	002976	627+		SRL-UN-H			
Expire	Date	5/24/2018		3	9592931	12/1/2017	SRL-UN	neil simons	. 2	3	002958	5981		SRL-UN-H			
Fines (Owed	\$0.00															

Renewing Items, continued

- 5. Click "Actions."
- 6. Click "Renew."

cquis	ition	s∓ Booking	 Adminis 	tration -				admindata @ SRL-UN-HQ-1L 🛛 🧮
CI	neck	Out Items	Out (3) Ho	olds (0 / 0) B	ills (\$0.00)	Mes	sages Edit Other -	Patron Search
Ite	ms C	Checked Out (3)	Other/Sp	ecial Circulations	s (0) Non-C	Catal	Deged Circulations (1)	
#		Circ ID	Due Date	Checkout / Re	Title	Re	Print Item Receipt	ed Works tion Checkin Works
1		9592929	12/1/2017	SRL-UN	sakinas rest	2	Edit Due Date	SRL-UN-H
2		9592930	12/1/2017	SRL-UN	a man of no	2	Mark Lost (By Patron)	SRL-UN-H
3		9592931	12/1/2017	SRL-UN	neil simons	2	Mark Claims Returned Mark Claims New Booked Out Renew	SRL-UN-H

7. Click "OK/Continue."

Acqu	uisitions -	Booking -	Administration -					
	Rene	w Items?					×	ther -
	3002 1 959	87						
					O	<td>Cancel</td> <td>*</td>	Cancel	*
#		Circ ID	Due Date Check	cout / Re	Title	Renewals Rem	Barcod	e F

Notes

- If a patron calls on the phone to renew an item, perform 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 a computer, place a hold, or 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 the information in his account (phone number, address, email address, method of hold notification). Make changes on his record if necessary.
- 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."

Search - Circulation - Cataloging -	Acquisitions - Booking - Admir	nistration -		admindata @ SRL-UN-HQ-1L 🗮 🛑
	Check Out Items Out (3)	Holds (0 / 0)	Edit Other -	Patre Search
PATRON, JENNIFER 🗾	Show: Required Fields Suggest	ted Fields All Fields		Save
Email	Daytime Phone	636-636-6364	Invalidate	
MAILING (print)	Evening Phone			
44444 BURNING BUSH BLVD	Other Phone			
UNION, MO 63084	Home Library	SRL-UN -		
	Main (Profile) Permission Group	Resident -	Secondary Groups	
	Privilege Expiration Date	2018-05-24	Update Expire Date	
	Internet Access Level	Unfiltered •		
	Active			

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. You will need to search the catalog to find the item. If it is not available at your branch, 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.

A	Search -	Circulation -	Cataloging -	Acquisitions -	Booking -	Administra	tion -			
				Check Out	Items Out	Holds	Bills	Messages	Edit	Other -
					_			74		
				Patron Barco	de Patron	Barcode				

- 3. Click on "Holds."
- 4. Click on "Place Hold."

A	Search +	Circulation -	Cataloging -	Acquisitions - Booking - Administration -	
	PATRON, J	ENNIFER	1	Check Out Items Out (3) Holds (0 / 0) B	t
	Profile	Resident		Open Hold Requests Recently Canceled Holds	
	Home Library	SRL-UN			
	Net Access	Unfiltered			
	Date of Birth	12/1/1978		Place Hold	
	Last Activity	8/23/2017		# Hold ID Pickup Libr Available D, Hold Type Status Current CorReg	uest
	Last Updated	5/24/2017			
	Create Date	4/21/2015		No Items To Display	
	Expire Date	5/24/2019			

Searching the Catalog and Placing a Hold, continued

- 5. Enter the patron provided information into the appropriate search fields. You can search by title, author, keyword, subject, or series. You can choose to search for a specific format. You can choose to search the entire Missouri Evergreen catalog (recommended) or only one library or branch.
- 6. Click "Search."

	Staff Catalog	
	Placing hold for patron PATRON, JENNIFER .	Clear
Keyword Search Numeric Search MARC Search Browse Shelf Browse		ME Search Reset
All Formats Keyword Contains Query Query	⊕ ⊖ :	₹emplates ▼
Sort by Relevance		(0) Basket Actions → Preferences

7. From the results page, you can select a record on which to place a hold.

					Staff Catalog					
				Placing H	old for patron PATRON, JENN	FER.				Clear
Keyword Search Numeric Se	earch MARC	Search Browse Shelf	Browse			0 • •			ME	Search Reset
All Books 🗸	Title	✓ Contains	*	red velvet cupcake murder		⊕⊖:				Search Templates 💌
Sort by Relevance	Y 🗆 Limit t	to Available 🗌 Group Formats	s/Editions 🗌 Results 1	from All Libraries					(0)	Basket Actions * Catalog Preferences
Search Results (3)		🗆 Select 1 - 3								« 1 »
Personal Author			Red velvet cupcake r	murder			3 / 3 items	@ ME	TCN: 1312520 Holds: 0	Created 7/15/14 by sceniccatmaster Edited 7/15/14 by admin
Fluke, Joanne 1943-	3	FLUKE,	🎾 Book							✓ Place Hold
Topic Subject		RED VELVET CUPCAKE	Phys. Desc.: viii, 359 pa Edition: First Kensingto	ges ; 18 cm., print in mass market edition.						
Bakers	3	MURDER	Pub Date: 2014	075000050						
Women detectives	3		ISBN: 0758280351, 978	0/58280350						
Investigation	1	2. D JOANNE	Red Velvet Cupcake	Murder.			56 / 64 items	@ ME	TCN: 631515 Holds: 1	Created 6/22/13 by admin Edited 8/26/20 by icitech2
Kriminalroman	1	FLUKE,	Huke, Joanne 1943-							✓ Place Hold
Large type books	1	RED VELVET	Phys. Desc.: print, viii, 3	323 pages ; 22 cm.						
Genre		MURDER	Pub Date: 2013 ISBN: 9780758280343,	0758280343						4
Detective and mystery fiction.	2	3. D	Red velvet cupcake r	murder			14 / 14 items	@ ME	TCN: 1893562	Created 6/1
Detective and mystery stories, American.	1	FLUKE	Fluke, Joanne 1943- 📯 Large Print Book						Holds: 0	Edited 8/26
Series Title		RED VELVET	Phys. Desc.: 475 pages	(large print) ; 23 cm. tion						
Hannah Swensen mystery	2	MURDER	Pub Date: 2013	uon.						
Hannah Swensen mystery ; 17	1		ISBN: 9781410456045,	1410456048						

Searching the Catalog and Placing a Hold, continued

8. Check all of the information on this page (patron's name, notification type, pick up location, and title of the item). Click "Place Holds."

			Staff Ca	atalog				
		Placi	ng hold for patron	PATRON, JENNIFER .				Clear
								Show Search Form 🗘
←Return Place Hold (PATRON, JENNIFER)				Q, Search for Patron				
Place hold for patron by barcode:	9301230216		Submit	Notifications				
O Place hold for this staff account:	circco			Notify by Email		Email Address	jennyabc123@hotmail.com	
Pickup Location:	SRL-UN			Notify by Phone		Phone Number	626-626-5555	
Suspend Hold	yyyy-mm-di 🖾						656 656 5555	
Number of copies:	1		~	Notify by SMS		SMS Number		
				SMS Carrier		SMS Carriers		÷
				Place Hold(s) Reset				
Placing TITLE hold on record(s)								
Format Title	Author	Part	-	Call N	Barcode	Holds Status		Override
Red Velvet Cupcake Murder.	Fluke, Joanne 1943-	N/A		ANY	ANY	Hold Pending		

<u>Notes</u>

- When searching the catalog by keyword, it is very similar to a Google search. Be as specific 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 items on the hold request list
- Removing expired and canceled holds from the hold shelf

Library Assistants retrieve a report of the items that need to be pulled from their branch's shelves in order to fill hold requests. Some of the holds will be filled for patrons at your branch and some will be sent to other Scenic Regional branches, to Evergreen partners, or to fill an Inter-Library Loan.

In order to retrieve the report of items that need to be pulled, 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."

Pic	kup	Library SF	RL-HQ ▼													
	De	etail View	Show Clearable	Holds Clear	r These Holds	Print Full List				M	*	₩	Actions 🕶	Rows 25 -	Page 1	•
#		Hold ID	Hold Type	Title	Capture Date	Request Date	Potential Copi	Status	Author	Po	st-Cle	ar	🗡 Configur	e Columns		
1		975650	т	Secrets of th	11/29/2017	11/28/2017	2	Ready for Pi					🛱 Save Co	lumns		
2		978408	т	The shadow	11/30/2017	11/30/2017	4	Ready for Pi	L'Amour, Lo		•		C Reset Co	olumns		
3		986403	М	The cradle	12/9/2017 3:	12/8/2017 2:	22	Ready for Pi	Clark Many					CSV		
4		975748	т	In harm's wa	11/29/2017 1	11/28/2017	1	Ready for P					🚔 Print Full	Grid		
5		971374	Μ	Keepsake cr	11/27/2017	11/22/2017	1	Ready for P								
0		005600	т	The Shack	10/10/2017	10/10/2017	6	Doody for Di	Young Willi				-			

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 clear the hold shelf of expired and canceled holds. 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 find items that need to be cleared from the hold shelf, follow the steps below.

1. Click "Circulation" and then "Holds Shelf."



2. Click "Show Clearable Holds."

A	Sea	arch -	- Circu	ation -	Cataloging	l≁ Acquisi	tions ▼ Bo	oking -	Admini	stration -	
	_										
										Holds She	elf
	Pic	kup L	ibrary S	RL-UN ▼ Show C	learable Ho	olds		Print F	ull List		
	#		Hold ID	Hol	d Type	Title	Capture Dat	e Request	Date I	Potential Copie	Statu
	1		882575	Т	١	What's wron	9/28/2017 1:	9/6/2017	11:	0	Canceleo
	2		906759	Т	١	Magic tree h	9/26/2017 1.	. 9/25/201	7 9:	0	Canceleo
	3		895656	Т	١	Ay rotten re	9/19/2017 9:	9/16/201	7 3:	0	Canceleo
	4		879114	Т	٦	Fen days in	9/25/2017 2:	9/2/2017	12:	0	Canceleo
		_	000005	т		atea du ain a	0/40/0047.0	0/40/004	7 7.	0	Opposite

Managing Holds, continued

3. Click "Print Full List."

A	Sea	arch	- Circula	ation – (Catalogin	g - Acquisit	tions -	Book	ing - ,	Adminis	stration -			
											Holds She	lf		
	Pic	kup l	Library Sf	RL-UN ▼ Show All	Holds	Clear These	Holds	Print	t Full List	K				×
	#		Hold ID	Hold	Туре	Title	Capture	Date	Request	Date F	Potential Copie	Status	Author	
	1		882575	Т		What's wron	9/28/201	7 1:	9/6/2017	11:	0	Canceled	Kitamura, S	
	2		906759	Т		Magic tree h	9/26/201	7 1	9/25/201	7 9:	0	Canceled	Osborne, M	
	3		895656	Т		My rotten re	9/19/201	7 9:	9/16/201	7 3:	0	Canceled	Polacco, Pat	
	4		879114	т		Ten days in	9/25/201	7 2.	9/2/2017	12:	0	Canceled	Bly Nellie	

- 4. Use the list to physically pull the expired and canceled items off of the hold 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."

							Holds She	elf								
P		orary SF	RL-UN -	Clear These	Holds Prin	t Full List				K4	*	Actions	7	Rows 25 -	Page 1 -	•
#	Y	Hold ID	Hold Type	Title	Capture Date	Request Date	Potential Conic	Status	Autho	Un-Set	Top of	Queue	^	Current Conv	Bickup Lil	brand
1		882575	Т	What's wron	9/28/2017 1:	9/6/2017 11:	0	Canceled	Kitamura	Transfer	r To Ma	arked Title	ĺ	3802947746	SRL-UN	brury
2		906759	т	Magic tree h	9/26/2017 1	9/25/2017 9:	0	Canceled	Osborne	Mark Ite	em Dan	naged		380302160+	SRL-UN	
3		895656	Т	My rotten re	9/19/2017 9:	9/16/2017 3:	0	Canceled	Polacco,	Mark Ite	em Mise	sing		3990262457	SRL-UN	
4		879114	Т	Ten days in	9/25/2017 2:	9/2/2017 12:	0	Canceled	Bly, Nelli	First A.				3842110043	SRL-UN	
5		898005	Т	Introducing	9/19/2017 8:	9/18/2017 7:	0	Canceled	Beaton,	FINA AN	oller	arge		1500004.	. SRL-UN	
6		873765	Т	Autumn story	9/27/2017 1	8/29/2017 2:	0	Canceled	Barklem,	Cancel	Hold			5800000.	. SRL-UN	
7		899363	Т	Turtle's race	9/19/2017 4:	9/19/2017 4:	0	Canceled	Bruchac,	Uncance	ei Hold		-	3465800002	. SRL-UN	

6. Check in the items to see where they go next.

<u>Note</u>

If you remove all the items on the list from the hold shelf, you can cancel all the holds at once by clicking "Clear These Holds."

Billing

There are two types of bills in Evergreen.

- Circulation Bills automatically added to a patron's account by the ILS when items are lost or damaged.
- Grocery Bills bills 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 if he returns it to the library, the bill will be voided. SRL does not refund payment for lost items if the items are found later. We also do not accept replacement copies for 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.

A	Search -	Circulation -	Cataloging -	Acc	quisitions -	Boo	king -	Administra	tion -			
					Check Out	It	ems Out	Holds	Bills	Messages	Edit	Other -
										-		
					Patron Barco	ode	Patron E	Barcode				

3. Click on "Bills" to see the details of the charges.

Search - Ci	rculation - Cataloging		ooking - Adminis	tration -			admindata @ SRL-UN-HQ-1L
PATRON, JEN	INIFER	Check Out	Items Out (3) Ho	olds (0 / 0) Bills (<mark>\$6.00</mark>)			Patron Search
Profile	Resident	Total Owed:	\$6.00	Refunds Available:	\$0.00	Pay Bill	
Home Library	SRL-UN	Total Paid:	\$0.00	Session Voided:	\$0.00		
Net Access	Unfiltered					Payment Type	Cash •
Date of Birth	12/1/1978	Owned fee Delegated		Deading Deverants			
Last Activity	8/23/2017	Billed for Selected	. \$6.00	Pending Payment. Pending Change:	\$0.00	Check Number	
Last Updated	5/24/2017	Paid for Selected:	\$0.00			Payment Received	\$
Create Date	4/21/2015					-	
Expire Date	5/24/2018					Annotate	Apply Payment
Fines Owed	\$6.00						
Items Out	3						
Overdue	0	Bill Patron	History Che	ck All Refunds		🚧 🗰 🍽 Actions -	Rows 25 - Page 1
Long Overdue	0						
Claimed Returned	0	# ■ Balance 1	OwPayment Pe Ba \$0.00	rcode Start Last Bill 11/21/20 08-Parti	ing Total Paid a \$0.00	Type Total Billed Bil \$6.00 9592	II # Title Location 938 SRL-UN

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

dmindata @ : I-HQ-1L 🚦	adm		ration -	Booking - Adm	Cquisitions -
Patron Search	Other 🗸	Messages	lds (0 / 0) Bills (\$6.00)	Items Out (3)	Check Out
	ay Bill	\$0.00	Refunds Available:	\$6.00	Total Owed:
	•	\$0.00	Credit Available:	\$6.00	Total Billed:
Cash	Payment Type	\$0.00	Session Voided:	\$0.00	Total Paid:
Cash	r dyment Type				
Check	Chook Number	\$0.00	Pending Payment:	d: \$6.00	Owed for Selecte
Credit Card	Check Number	\$0.00	Pending Change:	t: \$6.00	Billed for Selecte
Patron Credit	Payment Received			\$0.00	Paid for Selected
Work					
Goods	Annotate				

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

			adm	indata @ SRL-UN	-HQ-1L	≣
Messages	Edit (Other 👻		Ρ	atron Sea	rch
\$0.00 \$0.00	Pay	Bill				
\$0.00		Payment Ty	/pe	Cash	v	- 1
\$0.00 \$0.00		Check Num Payment Receiv	ber /ed		¢	
		Annotate		Apply Payment		

- 8. Enter the details of the payment and your initials into the annotation box.
- 9. Click "OK / Continue."

Acqu	uisitions -	Booking -	Administration -			
	Pleas	e annotate	this payment		×	ther 🗸
То						sill
То				OK/Continue	Cancel	Pa
-			A0.00 D	 A.A. A.A.		<u> </u>

<u>Notes</u>

- 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."

quisitions -	Booking -	Administrati	on v				 	 	admindata @	SRL-UN-HO	2-1L
Check Out	Items Out	Holds	Bills	Messages	Edit	Other -				Patro	on Sear
Last Name	First	Name	Mide	dle Name		Search					
		. Hudinio	IVIICA	are marrie		ocarch					
Patron Sear	rch Results	Add To	Bucket	Merge P	Patrons	ocarci		 ₽	Rows 25 -	Page 1 -	•

3. Click the box in front of the patron's name.

cquisitions -	Booking -	Administra	tion -							admindata @	SRL-UN-HG	1L
Check Out	Items Out	Holds	Bills	Messages	Edit	Other 👻					Patro	on Sea
P	jen	nifer	М	iddle Name		Search	Clear	Forn	n	0		
Pat ear	rch Results	Add 1	To Bucket	• Merge F	Patrons		••		₩	Rows 25 -	Page 1 -	•
#	ID Crea	ted On Ma	iling:Stre	eHome Librar) Profile	DoB	Middle Nar	ne F	irst Na	me Last Na	me Car	d
1 248	030 4/21	/2015 44	444 BU	SDL LIN	Decident	12/1/1078					030123	02

- 4. Click on "Bills."
- 5. Click on "Bill Patron."

Search - Ci	rculation - Cataloging -	Acquisitions - Booking	- Administrati	ion -			а	dmindata @ SR	L-UN-HQ-1L
PATRON, JEN	INIFER	Check Out Items	Out (3) Holds	(0 / 0) Bills (\$0.00)					Patron Searc
Profile	Resident	Total Owed:	\$0.00	Refunds Available:	\$0.00	Pay Bill			
Home Library	SRL-UN	Total Paid:	\$0.00	Session Voided:	\$0.00				
Net Access	Unfiltered						Payment Type	Cash	*
Date of Birth	12/1/1978	Owed fee Celested	\$0.00	Dending Developt	*• • • •				
Last Activity	8/23/2017	Billed for Selected:	\$0.00	Pending Payment. Pending Change:	\$0.00	c	Check Number		
Last Updated	11/21/2017	Paid for Selected:	\$0.00			Payn	nent Received		\$
Create Date	4/21/2015								
Expire Date	5/24/2018					,	Annotate 📃	Apply Pay	ment
Fines Owed	\$0.00								
Items Out	3								
Overdue	0	Bill Patron				₩ ₩ ₩	Actions -	Rows 25 - P	age 1 🗸 👻
Long Overdue	0								
Claimed Returned	0	# Balance OwPa	ayment Pe Barco	de Start Last Bill	ing Total Paid	Type Tota	al Billed Bill	# Title	Location
Lost	0	No nems to Display							

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.

мсци	Bill Patron: PATRON, JE	ENNIFER : 9301230216	×
Te	Location:	SRL-UN	
To To	Billing Type:		▼ 3111
0	Amount:	01-Copies 02-Fax 03 Book Sale	
Bil Pa	Note:	04-Donation 05-Inter-Library Loan Fee 06-Friends Merchandise 07-Non-Resident Fee 08-Partial Damages	
	Bill Patron History	10-Book Bag 11-Flash Drive 12-Missing Pieces 13-Passport Fees	*

- 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."

ca	uisitions - Booking - Adi	ministration -			
	Bill Patron: PATRON, J	ENNIFER : 93012302	16	×	th
-	Location:	SRL-UN			
ΓΟ ΓΟ ΓΟ	Billing Type:			•	i
	Amount:				
DN Bil Pa	Note:	Note		,	a
	Bill Patron History	Check All Retunds			

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.

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. 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.

Acquisitions -	Booking -	Administrat	ion -						а	dmindata @	SRL-UN-HO	ג-1L
Check Out	Items Out	Holds	Bills Mes	sages Ed	iit Other	Ŧ					Patro	on Se
Last Name	Firs	t Name	Middle N	ame	Search	1						
Patron Sear	ch Results	Add T	o Bucket+	verge Patrons	5		141		₩	Rows 25 🕶	Page 1 🔻	•
#	ID Crea	ted On Mai	ling:StreeHome	Library Pr	ofile	DoB Mid	dle Na	me Fi	rst Nam	e Last Na	me Car	d

Entering and Paying Bills for Copies and Faxes, continued

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

Acquisitions -	Booking -	Administration	-					admindata @	SRL-UN-HQ-1	IL 🧾
Check Out	Items Out	Holds E	Bills Messages	Edit	Other 👻				Patron	Search
Walkin	Unio	n	Middle Name		Search	Clear	Form	0		
Patron Sea	rch Results	Add To B	ucket- Merge P	atrons		M	₩ ₩	Rows 25 🗸	Page 1 -	•
# 29	IF Creat	t <mark>ed On M</mark> ailing 08 H/	g:StreeHome Library AWT SRL-UN	Profile Patrons	DoB 1/1/1991	Middle Na	me First Na UNION	wALKIN	me Card 93012702	2

- 4. Click on "Bills."
- 5. Click on "Bill Patron."

Search - Ci	rculation - Cataloging	l▼ Acquisitions▼ Book	ing - Administration	▼			admindat	a @ SRL-UN-HQ	-1L
WALKIN, UNI	ON	Check Out Iter	ns Out (0) Holds (0	/ 0] Bills (\$0.00)				Patro	n Searc
Profile	Patrons	Total Owed:	\$0.00 F	Refunds Available:	\$0.00	Pay Bill			
Home Library	SRL-UN	Total Paid:	\$10.80	Session Voided:	\$0.00				
Net Access	Filtered					Paymer	t Type C	ash	*
Date of Birth	1/1/1991	Over 1 for Only starts	¢0.00	Deadler Deveration	AA AA				
Last Activity	11/25/2015	Billed for Selected:	\$0.00 F	Pending Payment: Pending Change:	\$0.00	Check N	umber		
Last Updated	10/4/2017	Paid for Selected:	\$0.00			Payment Re	ceived		\$
Create Date	9/22/2015								
Expire Date	9/25/2018					Annotat	e Ap	oply Payment	
Fines Owed	\$0.00		•						
Items Out	0								
Overdue	0	Bill Patron	His		H	🙀 📢 🍽 Actio	ns - Rows 25	5 • Page 1 •	-
Long Overdue	0								
Claimed Returned	0	# Balance Ov	Payment Barcode	Start Last Billing	Total Paid	Type Total Billed	Bill #	Title Locat	tion
Lost	0	No nems to Display							

- 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.

Acqu	iisitions - Booking - Ad	Iministration -	
	Bill Patron: WALKIN, U	INION : 9301270250 ×	the
To	Location:	SRL-UN	
To	Billing Type:	· · · · · · · · · · · · · · · · · · ·	
0)	Amount:	01-Copies 02-Fax 03-Book Sale	
Bil Pa	Note:	04-Donation 05-Inter-Library Loan Fee 06-Friends Merchandise 07-Non-Resident Fee 08-Partial Damages 09-SRL Replacement Library Card 10-Book Bag 11-Flash Drive	layı
	Bill Patron History	12-Missing Pieces 13-Passport Fees	(b+

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."

Acq	lisitions	ministration - NION : 9301270250		×	
	Location:	SRL-UN			
TO TO	Billing Type:			• Sill	
	Amount:				F
O\ Bil Pa	Note:	Note		ayr	
	Bill Patron History	Check All Refunds	Submit Bill	ancel	

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."

Acquisitions - Book	king - Adminis	stration -					admi	indata @ SRL-UN-HQ-	-1L 🔳	
Check Out Ite	ms Out (0) H	olds (0 / 0)	ills (<mark>\$0.30</mark>)	Messages	Edit	Other 🗸		Patror	n Search	-
Total Owed:	\$0.30	Refunds Av	ailable:	\$0.00	Pa	y Bill	_			
Total Paid:	\$10.80	Session Vo	ided:	\$0.00		Payment	туре	Cash	•	
Owed for Selected: Billed for Selected:	\$0.00 \$0.00	Pending Pa	ayment:	\$0.00 \$0.00		Check Nu	umber	Cash Check Credit Card		
Paid for Selected:	\$0.00	r chung or	ange.	00.00		Payment Rec	eived	Patron Credit Work		
						Annotate		Goods		

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."

Acquisitions - Bool	king - Administra	ation -			adı	mindata @ SRL-UN-HC	⊱1L 🧮
Check Out Ite	ems Out (0) Hold	ls (0 / 0) Bills (<mark>\$0.30</mark>)	Messages	Edit Of	ther 🗸	Patro	on Search
Total Owed: Total Billed: Total Paid:	\$0.30 \$11.10 \$10.80	Refunds Available: Credit Available: Session Voided:	\$0.00 \$0.00 \$0.00	Pay E	Bill Payment Type	Cash	T
Owed for Selected: Billed for Selected: Paid for Selected:	\$0.00 \$0.00 \$0.00	Pending Payment: Pending Change:	\$0.00 \$0.00		Check Number Payment Received		\$
				ÞL	Annotate	Apply Payment	

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

Acqui	sitions - Booking - Administration -	
	Please annotate this payment ther	
То		
То	OK/Continue Canc.	
0.00	d for Calastadi 60.00 Danding Daumanti 60.00	

<u>Notes</u>

- 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. 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. Look for the Offline Circulation icon on the computer desktop and click on it.



2. Click "Check Out."

ñ	Search +	Circulation -	Cataloging -	Acquisitions -	Booking -	Administration -	
	Wo	orkstation	SRL-UN-F	Work	king location		•
	Session N	Management	Checkout		e Checl	kin Register Pa	atron
	Pendin	g Transactions	Offline Sessions				
	Export	Transactions	Import Transactions				
	Туре	Timestamp	Patron Barcode	Item Barcoo	le Non-ca	ataloged Type	Checkout D

Offline Circulation, continued

3. Click "Proceed."

iging -	Acquisitions -	Booking -	Administration -		
UN-ł ▼	Work	ing location	•	Save Transactions	Reprint Last Rece
	Warnir You are about Proceed	1g to enter offline	e mode. If you proceed, you w	ill be logged out.	

- 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."

	Searc	:h •	Circulation -	Catalogin	g - Ao	quisitions -	Boo	king -	Adm	inistratio	on -	
		Worl	kstation	SRL-H	Q-⊦ ▼	v	/orking l	ocation				•
	Chee	ckout	Renew	In-house Us	e Che	eckin F	Register F	patron				
		Due I	Date:					N	o Offse	t v	•	Pa
		Patro	n barcode:								ר	
(Item	Barcode:									
(D	Non-	cataloged Type:		Select	Non-catalo	ged Type	٣				
	Clea		Strict Bar	code		Print rece	eipt		Ct	neckout		

<u>Notes</u>

- 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. 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.

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

Sceníc Regional & Washington Public Library										
Home New Titles Adopt-a-E	ook eBooks Request Ma	terials Find a Library Request S	cenic Library Card	Contact Us	Help					
Search the Catalog	Advanced Search	Browse the Catalog			Basket Actions	T Go				
Search:	Type: Title	Format: All Formats	 Library: 	Scenic Regional	• Search	All Libraries				
	Need help searching th	e catalog? Click here to view a sho	rt instructional vic	leo.						
New Adult Fiction Titles										
			der Jessica Beck DARK DRIZZLES	Jessica Beck COUNTERFEIT CONFECTIONS						

Staff may be called on to explain the information on the search results page.

2. JAMIE CARIE	Snow angel / by Jan	nie Carie.			Place Hold
	Carie, Jamie, Carge Print Book Call number:		LP F Carie		Add to my list
	Library	Shelving location	Call number	Status	
SNOW ANGEL	Livingston County Library	Adult Large Print	LP F Carie	Available	
	<u>Pulaski County</u> Library- Richland	Large Print Fiction	F Car	Available	
	<u>Scenic</u> Regional- Hermann	Large Print Fiction	LP FIC	Available	
	Sikeston Public Library	Large Print Fiction	LPF C19	Available	
	<u>Ste. Genevieve</u> County Library	Adult Fiction	LP F CAR	Available	
	Summary				
	A half-frozen to c Elizabeth shows remote Alaskan I	leath, beautifu up on the doo	Il young wom orstep of Noal	an named Wesley's inShow	

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.

Search:	Type: Title	Format: All Formats	Library:	Scenic Regional	 Search 	All Libraries	A
Account Sur	nmary Messages Items Checked O	ut Holds Account Preferences My	/ Lists				
	Account Summary						
	Account Expiration Date	04/03/2020					
	Items Currently Checked out (0)	Items Currently Checked out (0)					
	Items Currently on Hold (0)	Items Currently on Hold (0)					
	Items ready for pickup (0)	<u>Items ready for pickup (0)</u>					
	Charges Payments						
	You have no current fines.						
Museu	TE of ImandLibrary SERVICES						

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.

Home New T	itles Adopt-a-Book	eBooks Reques	t Materials Find a Library	Request Scenic Library Card	Contact Us	Help	\$0.00 Charges
Search th	e Catalog A	dvanced Searc	h Browse the Cat	alog		- Basket Actions	5 🔻 G0
Search:		Type: Title	Format: All For	mats • Library:	Scenic Regiona	• Search	All Libraries
Account Sum	mary <mark>Messages</mark> Ite	ems Checked Out	Holds Account Preference	es My Lists			
	Messages						
[Actions for selected mess	sages 🔻 😡 🙆					
	Date Libra	ary	Subject				
	10/22/2019 Sc	enic Regional-Union	Hold Ready for Pickup SMS I	Notification			
Museu	nand Library SERVICES						

Items Checked Out Tab

The Items Checked Out tab provides the patron with information about 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 can't 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.

Home New T	tles Adopt-a-Boo	ok eBooks	Request Mate	rials Find a	Library R	equest Scenic	Library Card	Contact Us	Help	0 Ready for Pickup
Search th	e Catalog	Advance	d Search	Browse th	ne Catalo	g			Basket Action	S T Go
Search:		Type: Tit	tle	▼ Format	t: All Format	ts •	Library:	Scenic Regiona	▼ Search	All Libraries
Account Sum	mary Messages	Items Chec	ked Out Holds	Account Pre	eferences	My Lists				
	Current Item	s Checke	ed Out Check	COUT Histo	огу					
	Current Items (Checked (Out							
[Renew Selected Titles	Go 📀								
	Title		Author	Renewals Left	tDue Date	Barcode	Call number			
	The use of far	me : a novel	<u>Nixon, Cornelia,</u>	2	11/06/2019	3005948846	FIC NIX			
	SERVICES									

Holds Tab

The Holds tab allows patrons to view the items they have on hold. The Status of a hold will be waiting for copy, waiting for capture, in transit, or suspended. This page allows patrons to cancel a hold as well as edit their pickup library.

The screen shot below shows you what the Holds tab looks like when accessed.

Home New	Inties Адорт-а-воок е	BOOKS Request Materi	ais fir	ia a Library Request S	cenic Library Caro	Contact US	нер		\$0.00 Charges	
Search t	he Catalog Adv	anced Search	Brows	e the Catalog			Baske	t Actions	▼ Go	
Search:	Ту	pe: Keyword	▼ For	mat: All Formats	Library:	Scenic Regional	•	Search	\II Libraries	
Account Sur	nmary Messages Items	s Checked Out <mark>Holds</mark> .	Accoun	t Preferences My Lists						
	Itoms on Hold H	olde History								
	items on hold h	olus history								
	Current Items on H	old								
	Actions for selected holds	Go @ Show all ho	ds Sho	w only available holds						
	Title	Author	Format	Pickup Location	Cancel if not filled b	y Status	Notes	5	_	
	The 19th Christmas	Patterson, James, 1947-		Scenic Regional-Union		Waiting for co	ру	<u>Edit</u>		

Account Preferences Tab

The Account Preferences tab allows patrons to edit various characteristics of their account and how they can use their account.

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 contact 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 by default, 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 placed 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.

Search the Catalog Advance	ced Search Browse the C	atalog		-
Search: Snow Angels Type:	Title • Format: All I	Formats • Library:	Missouri Evergreen • Search	All Libraries
Account Summary Messages	Items Checked Out Holds	Account Preferences	My Lists	
Personal Information	Notification Preferences	s Search and History	Preferences	A
My Lists Preference	22			•
Account Information a	nd Preferences			
NAME	JENNIFER PATRON			
DAY PHONE	636-636-6364			
EVENING PHONE				
OTHER PHONE				
USERNAME	9301230216	Change		
PASSWORD	(not shown)	Change		
EMAIL ADDRESS		Change		
ACTIVE BARCODE	9301230216			

My Lists Tab

My Lists allows a patron to create lists of materials as well as modify existing lists.

Home New Titles Ado	opt-a-Book eBooks Request	Materials Find a Librar	y Contact Us Help		
Search the Catalo	og <u>Advanced Search</u>	Browse the C	atalog		
Search:	Type: Title	• Format: All	Formats • Librar	y: Scenic Regional-Uni Show fewer locations	All Libraries
Account Summary	Messages Items Cheo	cked Out Holds	Account Preferences	My Lists	
Create	ə New List				
Enter the List desc	ame of the new list:				
Share thi	is list?	No V 🕜 Cancel Submit			
My Ex Saved L	isting Lists				
Books I	Want to Read	Share	Delete List Download CSV M	ake Default List	
	ry s				

Menu Bar

The Menu bar provides access to other helpful information.

Sceníc Regional Líbrary										
Home New Titles	Adopt-a-Book	eBooks	Request Materials	Find a Library	Request Scenic	Library Card	Contact Us	Help	Get Mobi	ile App
Search the (Catalog A	dvanced	Search B	rowse the Cata	alog					
Search:		Type: Title		- Format: All Fo	rmats ~	Library:	Scenic Regional	- -	Search	All Libraries

The Menu bar is a simple way for patrons to navigate through the OPAC to find specific information. Menu bar headings and there uses are listed below.

- 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 the 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 the section of the SRL website where they can request materials that Missouri Evergreen 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 Internet Only library card.
- Contact Us provides patrons with various ways to contact SRL.
- Help takes patrons to the page that explains how to use their online account.
- Get Mobile App takes patrons to instructions for downloading the Missouri Evergreen mobile
 app

If you have not done so already, 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.