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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.

- **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, schools, and assisted living centers whose staff wants to check out materials for their students / 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), Crawford County Library, Ozark Regional Library, Washington County Library, Missouri River Regional Library, Heartland Regional Library, St. Louis County Library, Municipal Library Consortium, 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.
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 it 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>
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<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. Place the item(s) to be renewed on the RFID pad. Watch the screen to make sure all of the items are captured and that the renewal is performed.
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, 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.”

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.”

![Image 1](image1.png)

2. Scan the patron’s library card.

![Image 2](image2.png)

3. Click on “Holds.”
4. Click on “Place Hold.”

![Image 3](image3.png)
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.”

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

Notes

- 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.”

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.”
Managing Holds, continued

3. Click “Print Full List.”

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.”

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

Note

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.”

![Circulation and Check Out](image)

2. Scan the patron’s library card.

![Scan Patron Barcode](image)

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

![Bills Details](image)
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.
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.”
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. 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.

![Search Results](image)

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

![Search Results](image)
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.

The screenshot below depicts the first screen a patron will see after logging into his account. In most cases, the patron will was to click on “My Account” in the upper right to access the Account Summary page, which provides a menu to access every page in his account.

Account Summary

The Account Summary page lists general information about the patron’s account. Additionally, it contains a menu to access other account pages. At a glance, the patron can see the following on this page.

- Charges on his account
- Number of account messages
- Number of items he has checked out
- Number of holds placed and ready for pickup
- Account expiration date
- Payments history

The screenshot below contains an example of an Account Summary page.
Using the Online Public Access Catalog (OPAC), continued

Home

Clicking here returns the patron the Account Summary page.

Charges

Clicking here displays a second menu. The patron can click on “Current Charges” to see a page listing any bills on his account. He can also click on “Payment History” to see any bills he has paid in the past.
Using the Online Public Access Catalog (OPAC), continued

Messages

Clicking here 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. They can also click “Read” to see the entire message.

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

Items Checked Out

Clicking here displays a second menu. A patron can click on “Current Items Checked Out” which will take him to a page that provides information about the items he currently has checked out. 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.

A patron can also click on “Check Out History” which allows him to view all of the items he has 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 screenshot below shows you what the Current Items Checked Out page looks like when accessed.
Using the Online Public Access Catalog (OPAC), continued

Holds

Clicking here displays a second menu. The patron can click on “Items on Hold” which takes him to a page that lists the items he has 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 screenshot below shows you what the Items on Hold page looks like when accessed.
Using the Online Public Access Catalog (OPAC), continued

Preferences

Clicking here displays a second menu.

On the Personal Information page, 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 Notifications page, a patron can edit how he will be notified when a hold is ready for pick up.

On the Search and History page, 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 Lists page, 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 on the My Lists page.
Using the Online Public Access Catalog (OPAC), continued

My Lists

Clicking here takes a patron to a page that allows him to create lists of materials as well as modify existing lists.

My Existing Basket and Lists
Using the Online Public Access Catalog (OPAC), continued

Menu Bar

The Menu bar provides access to other helpful information.

The Menu bar is a simple way for patrons to navigate through the OPAC to find specific information. Menu bar headings and their 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.