Evergreen Training Outline

Circulation

A. Working with Tabs
B. Patron registration
   a. Required fields
   b. Explanation of user name
   c. Explanation of primary ID
   d. Birth date
   e. Mailing address, physical address, valid, city limits
   f. Profile
   g. Explanation of family group (do we use?)
C. Searching for a Patron
   a. Choice of fields to search
   b. Choose fields to display (column picker)
   c. Retrieve patron
   d. Alert message (check here to confirm)
D. Edit Patron Record
   a. Replace patron card number
E. Check out
   a. Choose fields to display
   b. Receipts
   c. Due date
F. Check out of pre-cataloged items
G. Check out of non-cataloged items
H. Tabs from Check Out
   i. Items out
      1. Actions for selected item
   ii. Holds
      1. Actions for selected hold
   iii. Bills
      1. Creating a bill
         a. Item still Checked Out
         b. Items already Checked In
      2. History
      3. Apply payment
      4. Payment types
      5. Full details
         a. Void billing
   iv. Edit
   v. Info
      1. Notes
2. Stat Cats
3. Surveys (not used currently)
4. Group

I. Renewing Items
J. Check in
   a. Choose fields to display
   b. Effective date
   c. Actions for selected items
K. Use of in-house items
L. Holds
   a. Placing holds
   b. Capturing holds
   c. Pull list for holds requests
   d. Browse holds shelf
M. Item maintenance
   a. Show copy status by barcode
   b. Replace barcode (if doing any Cataloging)
   c. Owning lib vs. Circ lib.
   d. Buckets
N. Offline Interface
   a. What to do when Evergreen is down and you need to circulate?