

# Consolidated Patron Notes, Alerts, Blocks, and Messages

Evergreen provides a variety of options for adding notifications to patron accounts. Notes, Alerts, Blocks, and Messages can all be applied to a patron account and managed in the Notes tab that is present in every account. It is also possible to add a custom Standing Penalty to a patrons account in the Notes tab.

The visibility and functionality of each option varies and can depend on the configuration of the Standing Penalty type.

## Managing Notes, Alerts, and Blocks

As with other patron functions, Notes, Alerts, and Blocks are controlled by the existing UPDATE\_USER and VIEW\_USER permissions. A staff member who has permissions to view or edit a user will be able to view and edit notes for that user.

In the Notes tab of a patron account, the top portion of the screen displays active notes, alerts, and blocks while the bottom portion of the screen will display those that have been archived. The archived notes, alerts, and blocks from the last year display by default. The calendar pickers can be used to view older archived notes, alerts, or blocks.

Check Out

Items Out (6)

Holds (0 / 3)

Bills (\$0.00)

Notes (1)

Edit

Other ▾

Patron Search

Ramos, Annette Angela II

Alert Note Title

3/17/2020

Notes

Create Note

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⏵

Actions ▾

Rows 25 ▾

Page 1 ▾

#	Penalty Name	Patron Visible?	Title	Note Text	Read Date/Time	Location	Creation Date/Ti
1	ALERT_NOTE	No	Alert Note Title	This is an alert		BR1	3/17/2020 5:0...

Archived Notes

Set Date Start:

2019-03-17

Set Date End:

2020-03-17

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⏩

⏴

⏵

Rows 25 ▾

Page 1 ▾

#	Penalty Name	Patron Visible?	Title	Note Text	Read Date/Time	Location	Creation Date/Ti
1	SILENT_NOTE	No	Note Title	This is a note		BR1	3/17/2020 4:59...

New notes, alerts, and blocks can be added by clicking the Create Note button. This process and the functionality of each type of notification are further detailed in this documentation. Library staff can Edit, Remove, and Archive notes, alerts, and blocks by selecting them from the

1

list and then going to the Actions menu (you can also right-click on a selection to view the Actions menu).

- **Edit Note** - allows staff to modify the original note, alert, or block
  - Patron visible notes, alerts, and blocks that have been read by the patron cannot be edited by staff.
  - When a note, alert, or block is edited, the note will retain the original context org unit instead of the current workstation library.
- **Remove Note** - will permanently delete the note, alert, or block. There will not be a record of it on the patron account once it has been removed.
  - Patron visible notes, alerts, and blocks that have been read by the patron cannot be deleted by staff.
- **Archive Note** - will move the note, alert, or block to the Archived Notes section of the screen.
  - Archiving a block will remove the block from the patron account.
  - Once archived, notes, alerts, and blocks cannot be deleted from the Notes tab. Archived patron visible notes will continue to display in the patron's OPAC account unless they are deleted from the Other>Message Center interface.

[Check Out](#)
[Items Out \(6\)](#)
[Holds \(0 / 3\)](#)
[Bills \(\\$0.00\)](#)
[Notes \(1\)](#)
[Edit](#)
[Other ▾](#)
[Patron Search](#)

### Notes

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Actions ▾

Remove Note

Edit Note

Archive Note

Rows 25 ▾

Page 1 ▾

▾

#	<input type="checkbox"/>	Penalty Name	Patron Visible?	Title	Note Text	Location	Creation Date/Time
1	<input checked="" type="checkbox"/>	ALERT_NOTE	No	Alert Note Title	This is an al	1	3/17/2020 5:0...

### Archived Notes

Set Date Start:

2019-03-17

Set Date End:

2020-03-17

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⏭

Rows 25 ▾

Page 1 ▾

▾

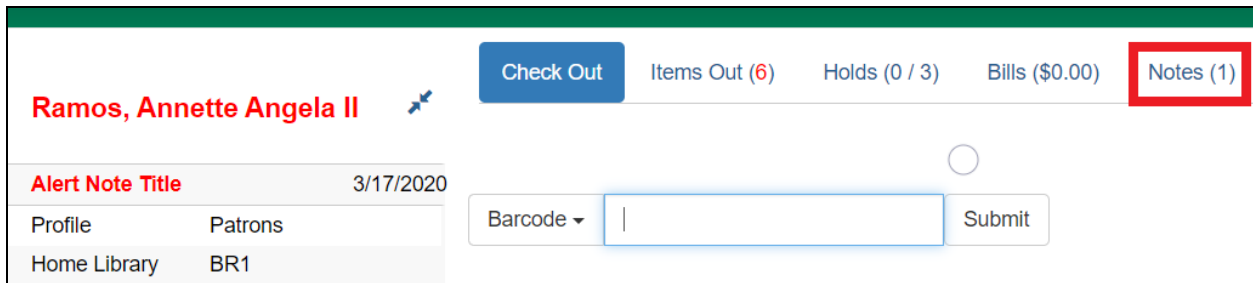
#	Penalty Name	Patron Visible?	Title	Note Text	Read Date/Time	Location	Creation Date/Time
1	SILENT_NOTE	No	Note Title	This is a note		BR1	3/17/2020 4:59...

## Notes

Notes can be added to patron accounts. Notes can be visible in the patron OPAC account or they can be visible only to library staff.

### Note Display

When a note is present on a patron account, staff will see a counter on the tab ribbon that indicates how many un-archived notes, alerts, and blocks are on the account that are visible at the workstation at which the staff member is logged in. To view the note, click on the Notes tab.



The screenshot shows the Equinox patron account interface for **Ramos, Annette Angela II**. The top navigation bar includes a **Check Out** button and counters for **Items Out (6)**, **Holds (0 / 3)**, **Bills (\$0.00)**, and **Notes (1)**. The **Notes (1)** tab is highlighted with a red box. Below the navigation bar, there is a section for **Alert Note Title** with a date of **3/17/2020**. To the right of this section is a circular icon. Below the alert section, there is a **Barcode** dropdown menu, a text input field, and a **Submit** button. On the left side, there is a table with the following information:

<b>Alert Note Title</b>	3/17/2020
Profile	Patrons
Home Library	BR1

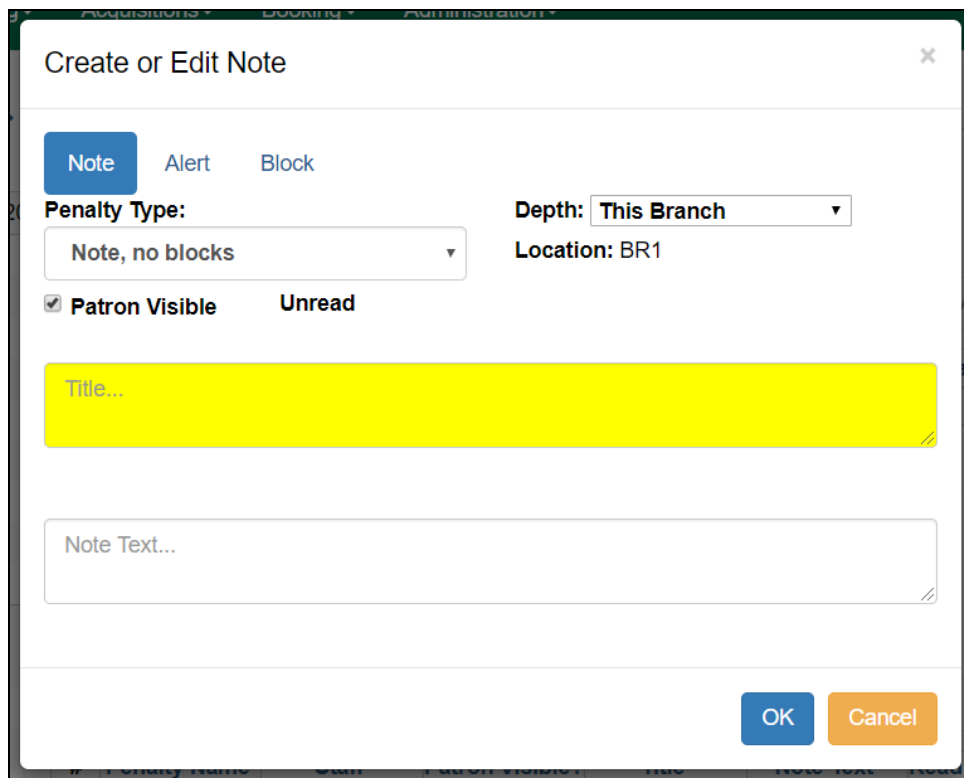
The Notes tab contains a list of all of the notes, alerts, and blocks present on a patron's account. The top portion of the screen displays active notes, alerts, and blocks, while the bottom portion of the screen will display those that have been archived within the past year (by default). Notes only appear in the Notes tab.

### Create a Note

To create a new Note:

1. Go to the *Notes* tab in the patron account and click **Create Note**.
2. A modal will appear where you can create a new Note. Required fields are highlighted in yellow.
3. Select "*Note*" at the top of the screen.
4. Check the box next to *Patron Visible* for a note that will display in the patron's OPAC account. Leave it unchecked to create a note that is staff visible only.
5. The Depth drop down menu controls the visibility of the note. Values correspond to OPAC labels, and by default they are This Branch, Local Library System, and Everywhere.
  - a. By default, the Location will be set to the library the staff member's workstation is registered to. The note will be visible to the workstation library, as well as all Org Units that are ancestors and descendants in the Org Unit hierarchy.
6. Enter a title or subject for the note in the *Title...* field. The title field is required.
7. Enter the main content of the note in the *Note Text...* field.

8. Enter your initials if your library requires initials when creating notes on patron accounts.
9. Click **OK** to create the note.



## Messages and Message Center

When a patron visible Note is created on an account, Evergreen automatically creates a Message that then displays in the patron's OPAC account. The original Note can be viewed in the Notes tab. The Message can be viewed in the staff interface under Other>Message Center.

Check Out	Items Out (0)	Holds (0 / 0)	Bills (\$0.00)	Notes	Edit	Other ▾	Patrc
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Patron Messages										Delete Selected
Context Org Unit BR1 ▾										
Back Next Filter										
✓	#	Creation Date/Time	Title	Creating Library	Read Date/Time	Deleted?	Edit Date/Time	Editor	Patron Visible?	Stop Date/Time
<input type="checkbox"/>	1	10/23/19 10:03 AM	Lost sunglasses	BR1		False			True	

The Message Center provides an interface for staff to view all patron visible notes that have been added to a patron account. Staff can double click on a message to view the full title and

content of the message, as well as the date and time the message was created and the date and time that the message was read. Staff can also see if a patron has deleted the message from their OPAC account (Deleted?).

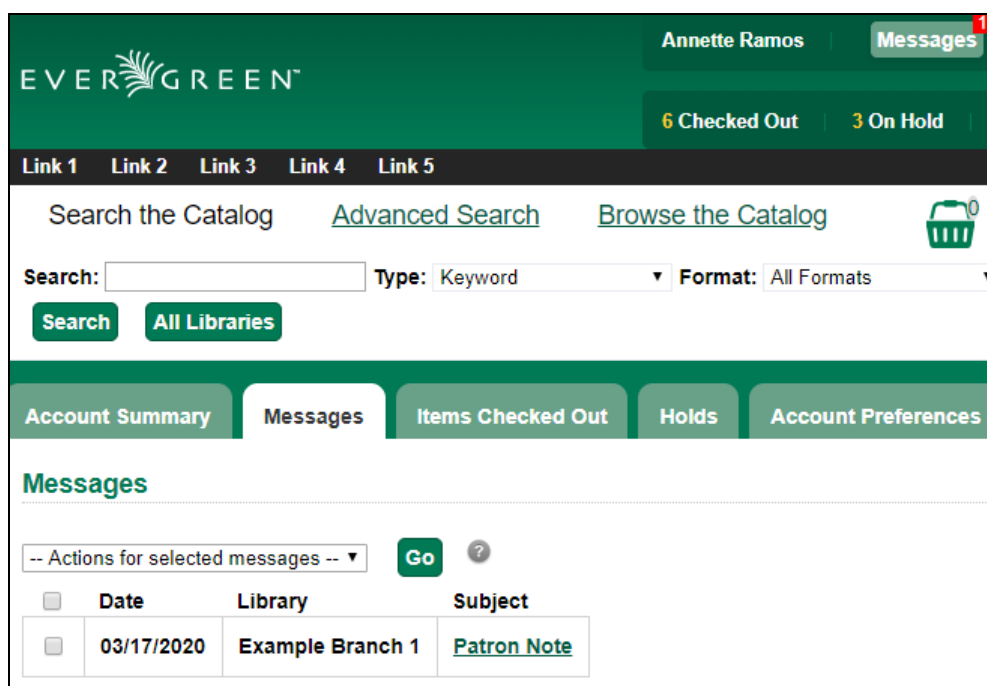
**Note:** Deleting a message from this interface will remove it from the patron's view. If the message is linked to a note in the Notes tab, the note will continue to appear in the Notes tab.

**Note:** Deleting a patron visible note from the Notes tab will also remove the message from the patron's OPAC account. If the message is linked to a note in the Notes tab, the note will continue to appear in the Notes tab.

## Viewing Messages in the OPAC

Patrons will see a new tab for Messages in their OPAC account, as well as a notification of Unread Messages in the account summary.

Unread messages display in bold font. Click on the subject of the message to view the full message.




EVERGREEN

Annette Ramos Messages <sup>1</sup>

6 Checked Out 3 On Hold

Link 1 Link 2 Link 3 Link 4 Link 5

Search the Catalog [Advanced Search](#) [Browse the Catalog](#) 

Search:  Type: Keyword Format: All Formats

Search All Libraries

Account Summary Messages Items Checked Out Holds Account Preferences

Messages

-- Actions for selected messages -- Go ?

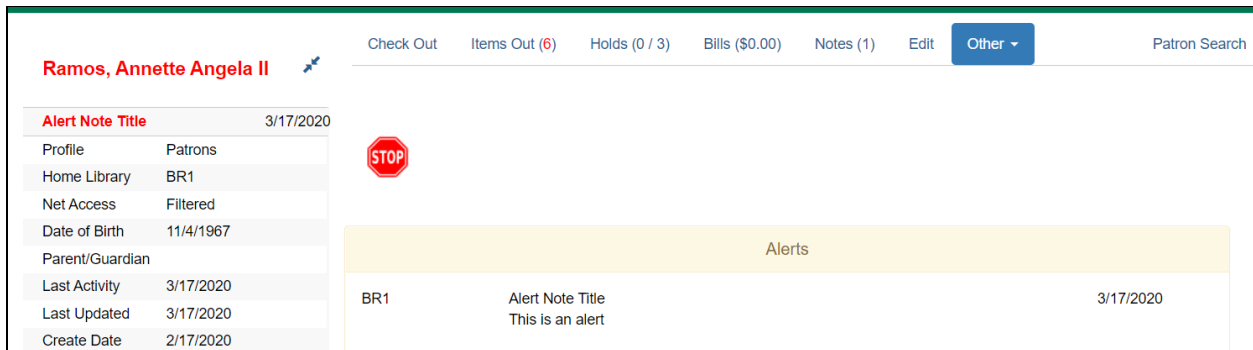
<input type="checkbox"/>	Date	Library	Subject
<input type="checkbox"/>	03/17/2020	Example Branch 1	<a href="#">Patron Note</a>


## Alerts

Alerts can be applied to patron accounts to notify library staff when the patron account is retrieved. Alerts can be visible in the patron OPAC account or they can be visible only to library staff.

## Alerts Display

When an alert is present on a patron account, a Stop sign and the alert text is displayed when the patron account is viewed. The alert title also displays in the patron account summary on the left hand side of the screen and there is an indicator in the patron summary that indicates how many un-archived notes, alerts, and blocks are on the account that are visible at the workstation at which the staff member is logged in. Alerts can also be displayed by going to Other>Display Alerts.



**Ramos, Annette Angela II** 

Check Out   Items Out (6)   Holds (0 / 3)   Bills (\$0.00)   Notes (1)   Edit   Other ▾   Patron Search

Alert Note Title	3/17/2020
Profile	Patrons
Home Library	BR1
Net Access	Filtered
Date of Birth	11/4/1967
Parent/Guardian	
Last Activity	3/17/2020
Last Updated	3/17/2020
Create Date	2/17/2020

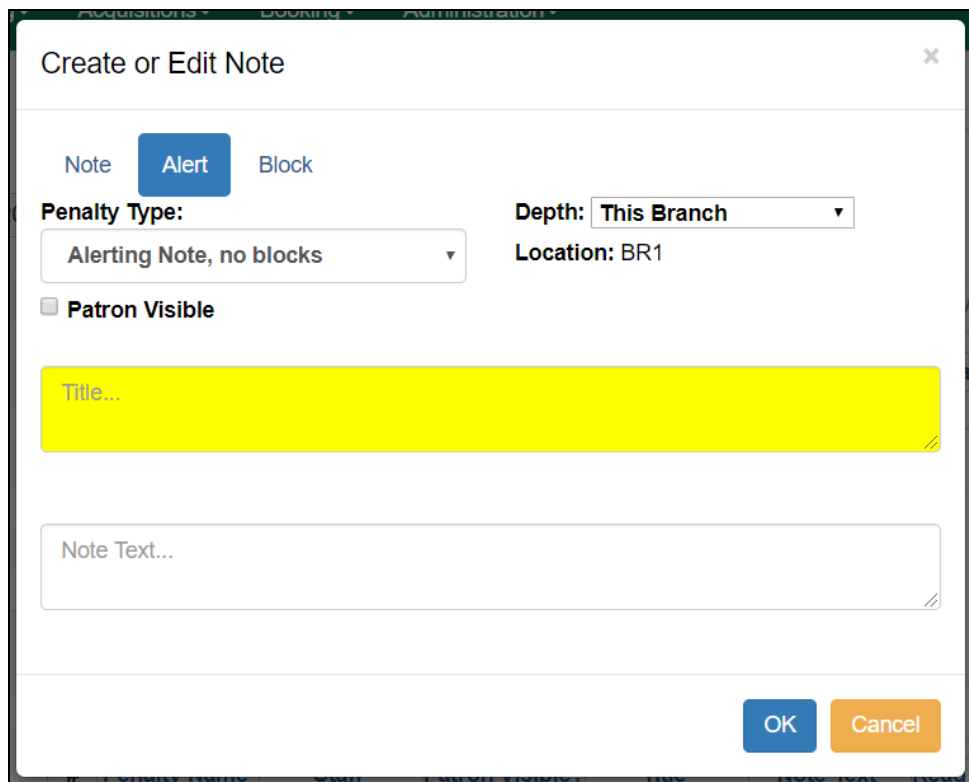
Alerts		
BR1	Alert Note Title This is an alert	3/17/2020

## Create an Alert

To create a new Alert:

1. Go to the **Notes** tab in the patron account and click **Create Note**.
2. A modal will appear where you can create a new Alert. Required fields are highlighted in yellow.
3. Select "**Alert**" at the top of the screen.
4. The Depth drop down menu controls the visibility of the note. Values correspond to OPAC labels, and by default they are This Branch, Local Library System, and Everywhere.
  - a. By default, the Location will be set to the library the staff member's workstation is registered to. The note will be visible to the workstation library, as well as all Org Units that are ancestors and descendants in the Org Unit hierarchy.
5. Enter a title or subject for the alert in the *Title...* field. The Title field is required.
6. Enter the main content of the alert te in the *Note Text...* field.

7. Enter your initials if your library requires initials when creating alerts on patron accounts.
8. Click **OK** to create the alert.



## Blocks

Blocks can be manually added to a patron account to take away certain library privileges from the patron for as long as the block remains on the account. The following privileges can be blocked on patron accounts as determined by configuration in the Standing Penalties interface in the Local Administration menu.

- CIRC - Users cannot check out items
- HOLD - Users cannot place holds on items
- RENEW - Users cannot renew items
- CAPTURE - This penalty prevents a user's holds from being captured. If the HOLD penalty has not been applied to a user's account, then the patron can place a hold, but the targeted item will not appear on a pull list and will not be captured for a hold if it is checked in.
- FULFILL - This penalty prevents a user from checking out an item that is on hold. If the HOLD and CAPTURE penalties have not been applied to a user's account, then the user can place a hold on an item, and the item can be captured for a hold. However, when he tries to check out the item, the circulator will see a pop up box with the name of the

penalty type, FULFILL. The circulator must correct the problem with the account or must override the penalty to check out the item.

## Block Display

When a block is present on a patron account, a Stop sign and the block text is displayed when the patron account is viewed. The block title also displays in the patron account summary on the left hand side of the screen and there is an indicator in the patron summary that indicates how many un-archived notes, alerts, and blocks are on the account that are visible at the workstation at which the staff member is logged in. Blocks can also be displayed by going to Other>Display Alerts.



**Ramos, Annette Angela II**

Check Out   Items Out (6)   Holds (0 / 3)   Bills (\$0.00)   Notes (1)   Edit   Other ▾   Patron Search

<b>Block</b>	3/17/2020
Profile	Patrons
Home Library	BR1
Net Access	Filtered
Date of Birth	11/4/1967
Parent/Guardian	
Last Activity	3/17/2020
Last Updated	3/17/2020
Create Date	2/17/2020

**Alerts**

BR1	Block This is a block!	3/17/2020
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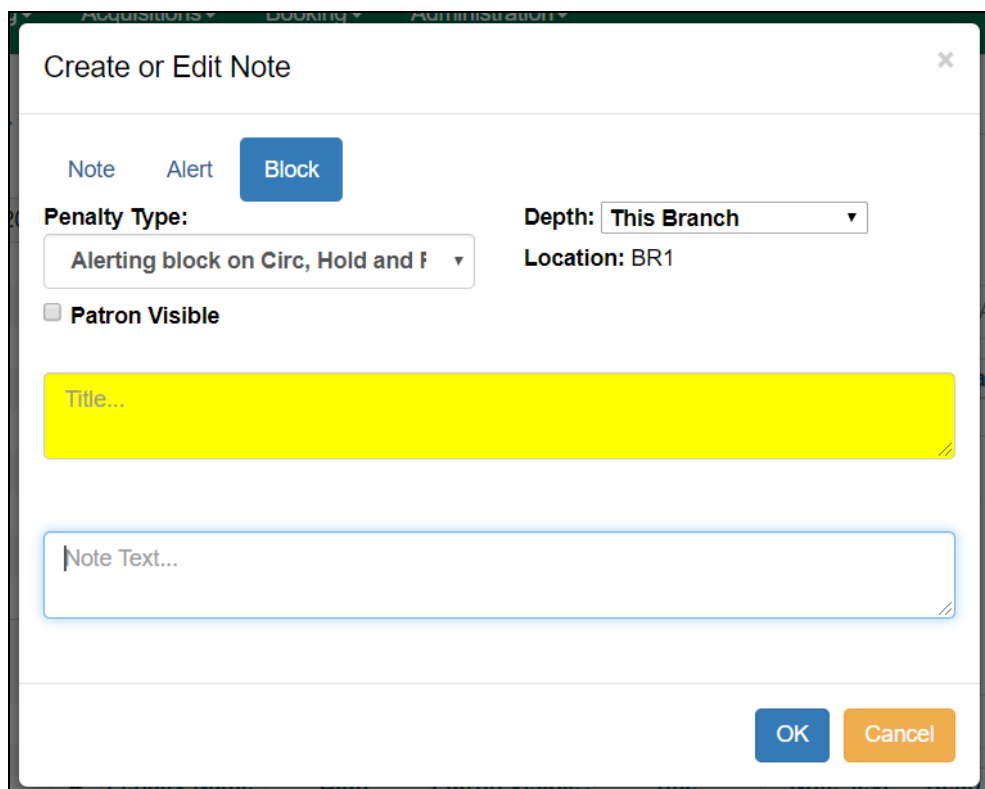
## Create a Block

To create a new Block:

1. Go to the *Notes* tab in the patron account and click **Create Note**.
2. A modal will appear where you can create a new Block. Required fields are highlighted in yellow.
3. Select "*Block*" at the top of the screen.
  - a. The default Block is a block on CIRC, HOLD, RENEW
  - b. Other Penalty Types can be selected from the drop down menu. These Penalty Types are configured in Local Administration > Standing Penalties.
4. The Depth drop down menu controls the visibility of the note. Values correspond to OPAC labels, and by default they are This Branch, Local Library System, and Everywhere.
  - a. By default, the Location will be set to the library the staff member's workstation is registered to. The note will be visible to the workstation library, as well as all Org Units that are ancestors and descendants in the Org Unit hierarchy.
5. Enter a title or subject for the alert in the *Title...* field. The Title field is required.
6. Enter the main content of the block in the *Note...* field.



7. Enter your initials if your library requires initials when creating blocks on patron accounts.
8. Click **OK** to create the block.



Create or Edit Note

Note Alert **Block**

Penalty Type: Alerting block on Circ, Hold and f

Depth: This Branch

Location: BR1

☐ Patron Visible

Title...

Note Text...

OK Cancel

## Administration for Patron Notes, Alerts, Blocks, and Messages

### Library Settings

Library Settings are found under Administration>Local Administration>Library Settings Editor. There is one new Library Setting related to patron notes in Evergreen:

- GUI: Require staff initials for entry/edit of patron standing penalties and notes

**Note:** this Library Setting replaces two previous settings:

- Require staff initials for entry/edit of standing penalties and messages

- Require staff initials for entry/edit of patron notes

Values from these deprecated settings will be migrated to the new setting via the upgrade script.

If a value was set for “Require staff initials for entry/edit of standing penalties and messages”, that value will be the new value for the new Library Setting.

If there was no value set for “Require staff initials for entry/edit of standing penalties and messages”, but there was a value for “Require staff initials for entry/edit of patron notes”, then the value from the legacy “patron notes” setting will be the value for the new Library Setting.

If two different values are set for the legacy settings, the value from the legacy “standing penalties and messages” setting will become the value for the new Library Setting and the “patron notes” value will be recorded in a text file as part of the upgrade script.