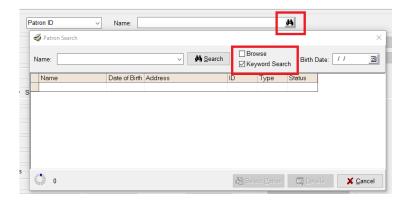
Patron Search Cheat Sheet



When searching for a patron account staff may need to use other means in locating the patron. Staff may only have a piece of the patron account such as a street name. Here are some search options staff can use within CARL-X and Connect.

CARL-X (client)



Browse:

- Alphabetically searches by last name, but will display names beyond the spelling (e.g., Greenburg, Gregory, Grenz, etc.)
- No set number of results.
- Navigate using next and previous buttons.

Unchecking Browse:

- Initiates a 'Begins With'
- Example:
 - Search for, Green, will return accounts in which the Name field begins with 'Green'.

Keyword Search:

- All fields in patron records are indexed for keyword searching.
- Examples:
 - Search by name.
 - Search by birthdate.
 - Search by name and birthdate.
 - Search street name (e.g., Green Drive) for results where 'Green' and 'Drive' are anywhere in the account.

Keyword Search—Phrase:

- Use quotes for exact phrases (e.g., "Green Drive").
- Displays results where 'green' and 'drive' appear together in the account.

Keyword Search—Phrase plus additional search term:

- Example: "Green Drive" meghan
- Keyword and Wild Card Search:
 - Example: "Green Drive" O* (utilizes wildcard 'O*' will search ANY field that begins with 'O').

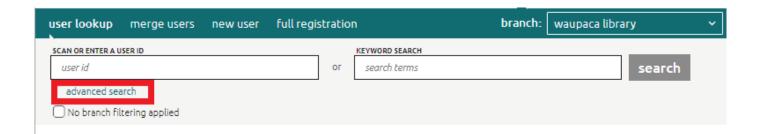
Keyword Search on Specific Fields:

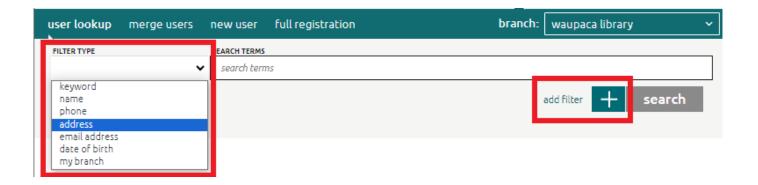
- Search on email address (e.g., mkomp@owlsweb.org).
- Search on city (e.g., Manawa).

Patron Search Cheat Sheet



Connect Staff (web)





Keyword Search:

- Search all indexed fields in a patron record.
- Check a filter box for targeted results by registration branch.
- Options include name, email, address, etc.

Advanced Search:

- Utilize up to 10 filters for a detailed search.
- Combine multiple fields for refined results.

• Phrase Search:

Enclose phrases in quotation marks for exact matches in the account.

Wildcard Search:

- Use asterisk (*) to broaden search criteria.
- Example: Typing "715*" in the Phone field fetches accounts with phone numbers starting with "715."