

# 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)

The screenshot shows the top navigation bar with links: user lookup, merge users, new user, full registration. On the right, a dropdown menu shows 'branch: waupaca library'. Below this, there are two main search sections. The first section is labeled 'SCAN OR ENTER A USER ID' and contains a text input field with 'user id' and a red box around a button labeled 'advanced search'. The second section is labeled 'KEYWORD SEARCH' and contains a text input field with 'search terms' and a 'search' button. At the bottom left, there is a checkbox labeled 'No branch filtering applied'.

This screenshot shows the same interface as the previous one, but with the 'FILTER TYPE' dropdown menu open. The dropdown menu lists several options: keyword, name, phone, address (which is highlighted in blue), email address, date of birth, and my branch. To the right of the dropdown menu, there is a text input field labeled 'SEARCH TERMS' with 'search terms' inside. Below the input field, there is a red box around a button labeled 'add filter' with a plus sign icon, and a 'search' button.

- **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."