

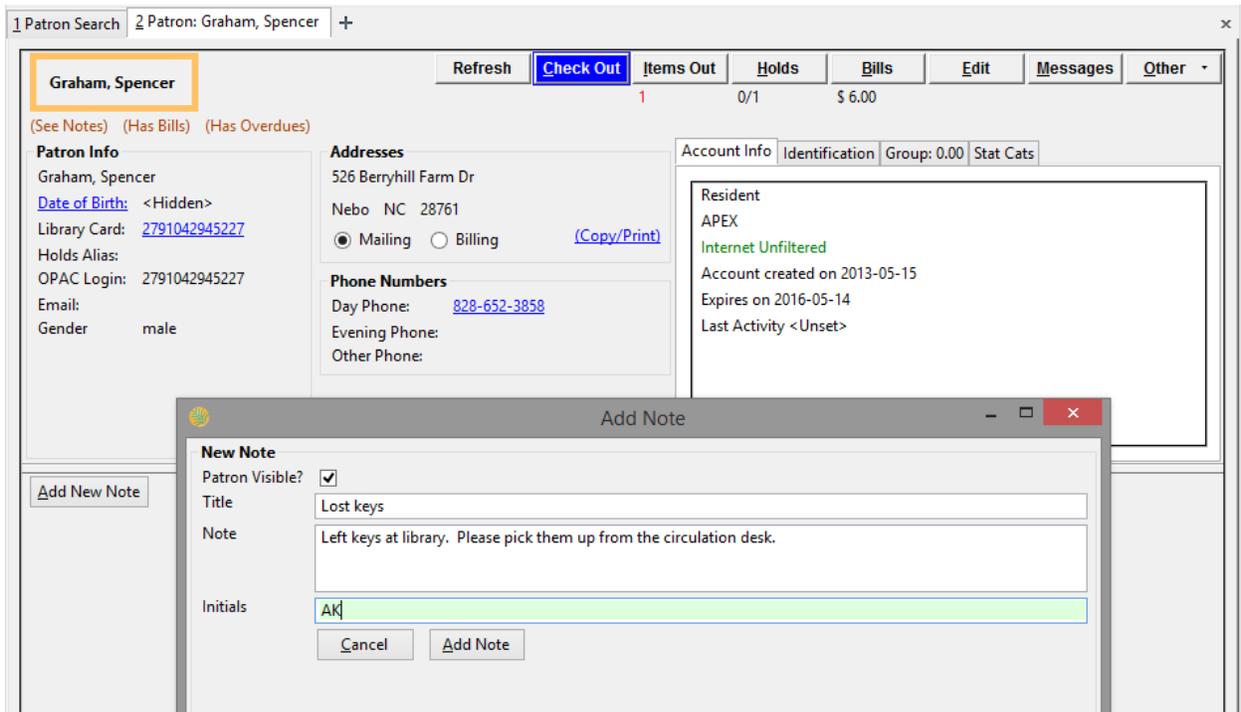
Patron Message Center

This feature is first available in Evergreen version 2.8

The Patron Message Center provides a way for libraries to communicate with patrons through messages that can be accessed through the patron's OPAC account. Library staff can create messages manually by adding an OPAC visible Patron Note to an account. Messages can also be automatically generated through an Action Trigger event. Patrons can access and manage messages within their OPAC account.

Creating a Patron Message in the Patron Account

1. Retrieve a patron account in the staff client
2. Within the account, go to **Other > Notes**.
3. In the Notes interface, click on **Add New Note**. A new window will pop up that allows you to create a note on the patron account.



The screenshot shows the staff client interface for a patron named Graham, Spencer. The 'Check Out' button is highlighted in blue. An 'Add Note' dialog box is open, displaying the following information:

- Patron Visible?**
- Title:** Lost keys
- Note:** Left keys at library. Please pick them up from the circulation desk.
- Initials:** AK

Buttons for 'Cancel' and 'Add Note' are located at the bottom of the dialog box.

4. Check the box next to **Patron Visible?** This will make the message appear in the patron's OPAC account.
5. Enter a subject for the message in the **Title** field.
6. Enter the body of the message in the **Note** field.
7. Enter **Initials** if staff are required to add initials to notes.
8. Click, **Add Note**. The note will now appear as a Patron Visible note in the staff client and as a Message in the patron's OPAC Account.

Graham, Spencer

Refresh
Check Out
Items Out
Holds
Bills
Edit
Messages
Other ▾

1
0/1
\$ 6.00

(See Notes)
(Has Bills)
(Has Overdues)

Patron Info

Graham, Spencer

[Date of Birth](#): <Hidden>

Library Card: [2791042945227](#)

Holds Alias:

OPAC Login: 2791042945227

Email:

Gender: male

Addresses

526 Berryhill Farm Dr

Nebo NC 28761

Mailing Billing [\(Copy/Print\)](#)

Phone Numbers

Day Phone: [828-652-3858](#)

Evening Phone:

Other Phone:

Account Info | Identification | Group: 0.00 | Stat Cats

Resident

APEX

Internet Unfiltered

Account created on 2013-05-15

Expires on 2016-05-14

Last Activity <Unset>

[Add New Note](#)

Lost keys 2015-04-23 4:32 PM Patron Visible

Left keys at library. Please pick them up from the circulation desk. [AK 2015-04-23 @ APEX]

Delete This Note
Print

Lost backpack? 2015-04-23 4:37 PM Patron Visible

A backpack was left at the library. Please call the library at 555-555-5555 to confirm that it is your or please stop by. [EJ 2015-04-23 @ APEX]

Delete This Note
Print

9. The patron visible note will also create a message in the patron account in the staff client in **Other > Message Center**. See **Managing Patron Messages in the Staff Client** below.

Creating a Patron Message using Action Triggers

Messages can be automatically added to a patron's OPAC account by an Action Trigger event. For example, when a hold is cancelled by a library staff member, a message can be added to the patron's OPAC account to inform them of the cancellation.

Action Trigger Messages are set up in **Admin > Local Administration > Notifications/Action Triggers**. There are several new fields in the Trigger Event Definition that allow the configuration of Patron Messages:

- Message Library Path: identifies the sending library for the message. This is the patron's home library (usr.home_ou) in the stock Hold Cancellation message.
- Message Template: contains the content of the message.
- Message Title: appears as the subject line in the OPAC message
- Message User Path: determines how to identify the user the message is sent to.

Note: If you want to send patrons a notification email and an OPAC message when their hold is cancelled, use two separate Action Triggers: one for the email notification and one for the message.

Managing Patron Messages in the Staff Client

Patron messages can be viewed and managed in the staff client within the patron account.

1. Retrieve a patron account in the staff client.
2. Within the account, go to **Other > Message Center**.
3. Double click on a message to view the full title and content 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?) and can manually delete a message by marking it as Deleted.

Note: When a message is marked deleted, the message will remain in Other > Message Center as a record that the patron received it.

Notes: Deleting a patron visible note in Other > Notes will not delete the patron message from the Other > Message Center.

Graham, Spencer

Refresh
Check Out
Items Out
Holds
Bills
Edit
Messages
Other ▾

1
0/1
\$ 6.00

(See Notes) (Has Bills) (Has Overdues)

Patron Info

Graham, Spencer

[Date of Birth:](#) <Hidden>

Library Card: [2791042945227](#)

Hold Alias:

OPAC Login: 2791042945227

Email:

Gender: male

Addresses

526 Berryhill Farm Dr

Nebo NC 28761

Mailing Billing [\(Copy/Print\)](#)

Phone Numbers

Day Phone: [828-652-3858](#)

Evening Phone:

Other Phone:

Account Info | Identification | Group: 0.00 | Stat Cats

Resident

APEX

Internet Unfiltered

Account created on 2013-05-15

Expires on 2016-05-14

Last Activity 2015-05-08

Reload Debug

Patron Messages Delete Selected

Context Org Unit APEX

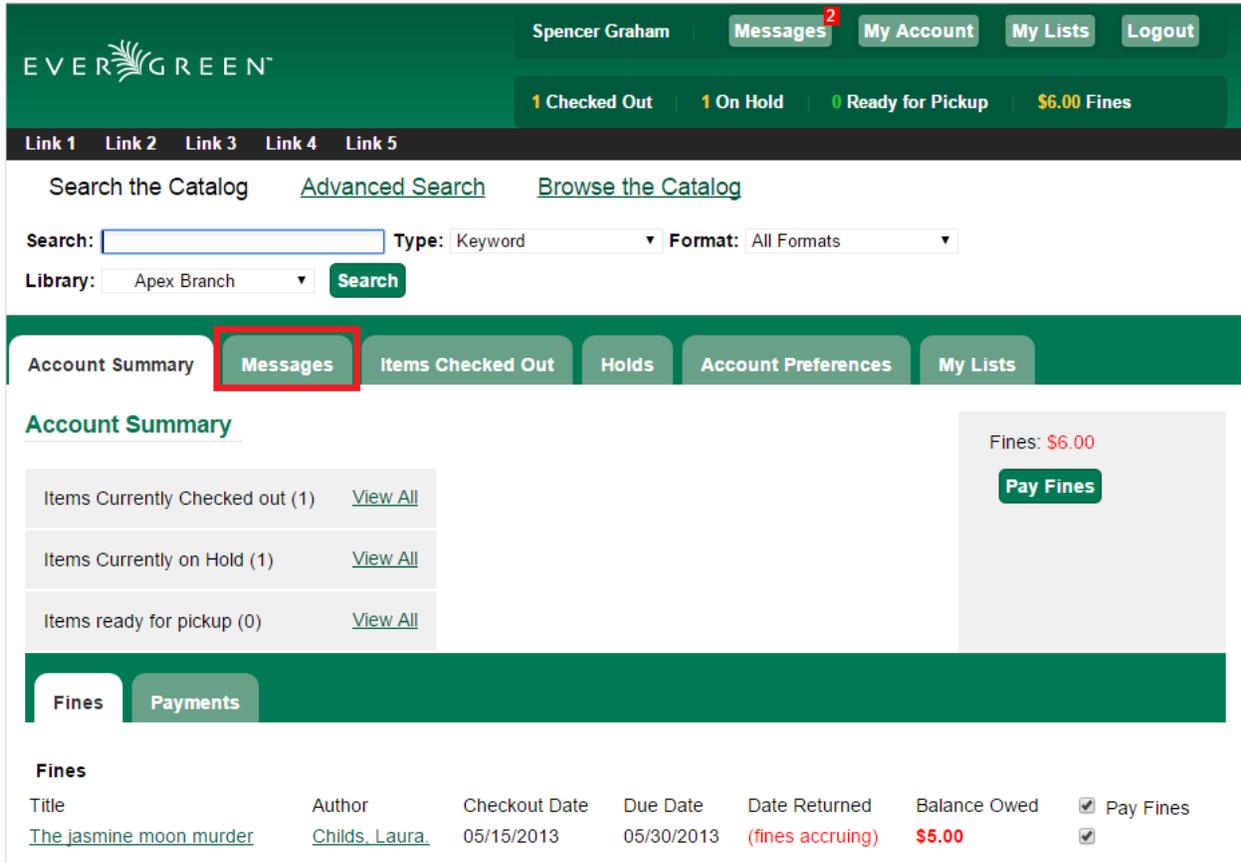
[Back](#) [Next](#) [Filter](#)

✓	#	Creation Date/Time	Title	Creating Library	Read Date/Time	Deleted?
<input type="checkbox"/>	1	4/23/15 4:32 PM	Lost keys	APEX	4/23/15 4:44 PM	True
<input type="checkbox"/>	2	4/23/15 4:37 PM	Lost backpack?	APEX	4/23/15 4:46 PM	False

Creation Date/Time	4/23/15 4:32 PM
Title	Lost keys
Creating Library	5
Read Date/Time	4/23/15 4:44 PM
Deleted?	<input checked="" type="checkbox"/>
Message	Left keys at library. Please pick them up from the circulation desk. [AK 2015-04-23 @ APEX]
<input type="button" value="Cancel"/> <input type="button" value="Save"/>	

Viewing Patron 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.



The screenshot shows the Evergreen OPAC interface. At the top, the user is logged in as Spencer Graham. The navigation bar includes links for Messages (with a red notification badge '2'), My Account, My Lists, and Logout. Below this, a summary bar shows: 1 Checked Out, 1 On Hold, 0 Ready for Pickup, and \$6.00 Fines. A search bar is present with options for Advanced Search and Browse the Catalog. The account summary section has tabs for Account Summary, Messages (highlighted with a red box), Items Checked Out, Holds, Account Preferences, and My Lists. The Messages tab is active, displaying an Account Summary with links to View All for items checked out, on hold, and ready for pickup. A 'Pay Fines' button is visible next to the \$6.00 total. Below this, a 'Fines' section shows a table of fines.

Title	Author	Checkout Date	Due Date	Date Returned	Balance Owed	Pay Fines
The jasmine moon murder	Childs, Laura	05/15/2013	05/30/2013	(fines accruing)	\$5.00	<input checked="" type="checkbox"/>

Patrons will see a list of the messages from the library by clicking on the **Messages** tab.

EVERGREEN

Spencer Graham **Messages**² My Account My Lists Logout

1 Checked Out 1 On Hold 0 Ready for Pickup \$6.00 Fines

Link 1 Link 2 Link 3 Link 4 Link 5

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

Search: Type: Keyword Format: All Formats Library: Apex Branch

Search

Account Summary **Messages** Items Checked Out Holds Account Preferences My Lists

Messages

Marked 1 message(s) as unread.

-- Actions for selected messages -- **Go** ?

<input type="checkbox"/>	Date	Library	Subject
<input type="checkbox"/>	05/11/2015	Apex Branch	Lost keys
<input type="checkbox"/>	04/23/2015	Apex Branch	Lost backpack?

Patrons can click on a message **Subject** to view the message. After viewing the message, it will automatically be marked as read. Patrons have the options to mark the message as unread and to delete the message.

EVERGREEN

Spencer Graham **Messages**¹ My Account My Lists Logout

1 Checked Out 1 On Hold 0 Ready for Pickup \$6.00 Fines

Link 1 Link 2 Link 3 Link 4 Link 5

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

Search: Type: Keyword Format: All Formats Library: Apex Branch

Search

Account Summary **Messages** Items Checked Out Holds Account Preferences My Lists

Message

Return to Message List **Delete** **Mark Unread**

Date 04/23/2015
Library Apex Branch
Subject Lost backpack?
Message A backpack was left at the library. Please call the library at 555-555-5555 to confirm that it is your or please stop by. [EJ 2015-04-23 @ APEX]

Note: Patron deleted messages will still appear in the patron's account in the staff client under Other > Message Center.