

Searching for Patron Accounts

The patron search function can be accessed by the staff client home page (Search For Patron) or from the top menu (Search > Search for Patrons). If you only see a few name search fields when you go to the page, click the down arrow to the right of the search button to expand the section to see all available search fields. This option is “sticky,” meaning that it will save your preference on your workstation.

Most of the search fields are left-anchored. What this means for searching is that you can type in the first letters of a name and the search will retrieve name variants starting with those fields. For example, typing “kat” in the first name field will retrieve patrons with first names of Kat, Katherine, Kate, Katie, Katelyn, etc.

Name Keyword Searching

The Name Keywords search field is new as of 2019.01. This field may be used to search across First Name, Last Name, Middle Name, Preferred Name, and Name Keyword fields. For example, using the name keyword field to search for 'Carol James' should retrieve anyone named Carol James, Caroline James-Smith, James Carrollton, etc.

Filtering by Permission Group and Location

In most situations, such as searching to see if a new patron already has a library card or not, you will want to search across all of PINES and all Profile Groups (aka, permission groups), and have the Include Inactive? box checked. However, you can see subsets - for example, to easily retrieve a list of all staff members registered in your library system), change Profile Group to “Staff” and change PINES to your system.

Searching by Date of Birth

If searching for a common name, it may be useful to filter your search results by birth date. If you know the exact birth date, you may enter it in the DOB Year, DOB Month (enter numerically, eg 9 for September), and DOB Day fields. If you know the year but not the month or day, just enter the year. If you are not sure of the year but think it is in a particular decade, you could enter 197 to filter to patrons born between 1970-1979.

Searching by Identification

All Georgia driver's licenses should be entered in the format GA-123456789. Because of this, when searching by ID, type in your search in the same format. (Searching GA 123456789 will not retrieve GA-123456789 and vice versa.)

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