

# Evergreen Training for College Boreal

**REVISION HISTORY**

NUMBER	DATE	DESCRIPTION	NAME

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## 1 Agenda

9h30 - 10h15	Introduction
10h15 - 11h15	Staff client
11h15 - 11h45	Catalogue
12h15 - 13h30	Cataloguing
13h30 - 15h00	Circulation
15h00 - 16h00	Administration / reporting

## 2 Introduction to Conifer

- Consortium of academic libraries that launched in May 2009 to run a shared library system on the software called Evergreen; major partners are:
  - Algoma University
  - Laurentian University
  - Northern Ontario School of Medicine
  - University of Windsor
- Other partners include Université de Hearst, Sudbury Regional Hospital, the Art Gallery of Sudbury

## 3 Conifer communication processes

- Evergreen General mailing list
- Conifer Discussion mailing list
- Conifer *ticket* system
- Reporting critical problems directly

## 4 Evergreen General mailing list

- Available from <http://evergreen-ils.org/listserv.php>
- Used by the entire Evergreen library system community
- Publicly visible discussions
- Suggested uses:
  - Finding out about problems other sites are having
  - Finding out about new features that are in the works
  - Figuring out best practices

## 5 Conifer Discussion mailing list

- Available at <http://groups.google.com/group/conifer-discuss> - web interface for the mailing list
- Publicly visible discussion - anyone can read without having to subscribe, so do not post private or confidential information
- Suggested uses:
  - Notification of system upgrades and any associated requirements (for example, the need to install a new staff client) or downtime
  - For questions about the library system specific to Conifer
  - For finding out if others are running into the same problems (slow response times, etc)
  - For discussing possible enhancements to the system in general

## 6 Conifer ticket system

- Available at <http://biblio.laurentian.ca/tickets/conifer> - wiki and tracking system
- Wiki is publicly visible information
- Content of tickets (problem report or feature request) are only visible to account holders
- Will ask Daniel LeDuc be the official contact point for filing tickets; so - start with Daniel!
- Suggested uses:
  - For filing official problem reports or feature requests

## 7 Reporting critical problems directly

- A critical problem is one that results in you not being able to use the system or one which generates incorrect results
- Start by ensuring that other systems are working - for example, if you can not connect to Conifer, can you use a Web browser to visit other sites on the Internet?
- Recommended escalation path:
  1. Check the Conifer Discussion list to see if anyone else has reported the problem; a fix may already be in the works
  2. Contact Daniel Leduc via email and phone
  3. If no response, contact Dan Scott via email and phone

## 8 Staff client

- The Evergreen *staff client* is a piece of software that must be installed on any workstation where you will do cataloguing, circulation, or administrative work with Conifer
  - The version of the staff client must match the version of the Evergreen system run by Conifer
    - From time to time, we will upgrade Evergreen and you will be required to upgrade your staff client
  - The first time you log into the staff client on a particular workstation, you must *register* the staff client for a particular library
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## 9 Staff client permissions

- Evergreen allows administrators to assign different sets of permissions to users. Conifer mostly uses:
  - **Super Cataloguer**
  - **Super Circulator**
  - **Local Administrator**
  - Other permissions for less powerful users (for example, a student covering the circulation desk).
- Actions are associated with the user performing them, so you want to ensure that your user account is not associated with the wrong actions.
- Each account must also be associated with each library where that account has privileges - so a Laurentian cataloguer does not have access to modify College Boreal holdings.

## 10 Staff client exercise 1: choosing language

The staff client remembers your preferred language from the last time you logged on. The default language is "English".

1. Start the staff client by clicking on the Evergreen icon
2. Change to your preferred language:
  - a. From the **Localisation** drop-down, select your preferred language
  - b. Click **Appliquer localisation**. The interface should change to your preferred language.

Note that there are sections of the staff client that have not yet been translated. The translations are performed on a volunteer basis at <http://translations.launchpad.net/evergreen> if you want to contribute; most of the Canadian French translation was contributed by Natural Resources Canada.

## 11 Staff client library locations

Each Collège Boréal library has a *short name* and a *full name*. You will see the *short name* used throughout the staff client. The mapping for Collège Boréal is as follows:

Short name	Full name
BOREALSYS	Collège Boréal
HEBOREAL	Collège Boréal - Hearst
KABOREAL	Collège Boréal - Kapuskasing
NLBOREAL	Collège Boréal - New Liskeard
NPBOREAL	Collège Boréal - Nipissing
OSBO	Collège Boréal - Sudbury
TIBOREAL	Collège Boréal - Timmins
TO22COLBOREAL	Collège Boréal - Toronto (22 College)
TOCARBOREAL	Collège Boréal - Toronto (Carlaw)

## 12 Staff client exercise 2: registration

1. Enter the hostname for your Conifer server in the **Nom d'hôte** box:

- Test and training server: *boreal-test.concat.ca*
  - Production server: *boreal.concat.ca*
2. (Test server only): You will be warned that the client certificate has expired.
    - a. Close the warning window.
    - b. Click the **Ajouter une exception SSL** button. The **Add Security Exception** window opens.
    - c. Click the **Confirm Security Exception** button. The **Add Security Exception** window closes and you can proceed with logging in.
  3. Enter your username and password:
    - **Nom d'utilisateur:**
    - **Mot de passe:**
  4. You will be prompted to enter a workstation name. Enter something unique, such as your username and a digit, and click **Inscrire**.
  5. If you have successfully registered your workstation, you will be prompted to enter your username and password one more time.

### 13 Staff client exercise 3: tabs and windows

You can open multiple windows simultaneously.

You can have multiple tabs open in each window.

1. Open a new window. After logging in, click **File** → **New window** or click **CTRL-n**
2. Change your current tab to the **Search for Patrons** interface:
  - a. Click **Search** → **Recherche des clients** or press **F4**
3. To keep your patron search running while you search for a book for a different patron, open a new tab in the window.
  - a. Click **File** → **New tab** or press **CTRL-t**
  - b. Click **Search** → **Rechercher dans le catalogue** or press **F3**
4. To switch to a different tab, click on it, or press the **ALT-#** hotkey
5. To close the tab that you currently have open, click the red **X** on the right-hand side of the window.

### 14 Staff client exercise 4: Changing the operator

- Changing the operator enables another user to temporarily use the staff client without logging out of the staff client entirely
- The temporary user:
  - Will have their own permissions (so they can forgive a fine, which a student might not have the permission to do)
  - Will have their account associated with the action
    1. Click **Administration** → **Changement d'opérateur: Nouveau** on the top right-hand side of the screen. The **Autorisation** window opens.
    2. In the **Autorisation** window, enter the username and password of the temporary operator. If you have entered the correct credentials:
      - \* the **Autorisation** window closes
      - \* the background of the staff client turns red
      - \* the title bar displays the name of the temporary operator
    3. After you have completed your temporary session, click **Administration** → **Changement d'opérateur** again to return control to the original user.



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## 15 The catalogue

- The catalogue is our patrons' primary interface to their borrowing activity:
  - Searching (finding an item)
  - Retrieving (locating an item)
  - Requesting (placing holds)
  - Making lists (manipulating bookbags)
  - Managing their account (renewing items, status of holds, resetting password)

## 16 Searching the catalogue

- Search interfaces range from the basic, single-box home page, to the many-box advanced search page
- For best / fastest results, use two terms in your search phrase
  - Keyword searching on the test server is quite slow
- Default search index is **keyword** - every word of interest in the record that describes the object. Other indexes include:
  - Title
  - Author
  - Subject
- Sub-indexes for each of these primary indexes can be accessed from the search results page
- You can change *search scope* to narrow down to a single library or search across all libraries in Conifer - the default scope for boreal.concat.ca is currently all Collège Boréal libraries
- You can bookmark and share any URL - helpful for responding to questions via instant message or email
- **NOTE** Search scope inside the staff client includes all libraries by default and includes records without visible copies!

## 17 Retrieving an item

- The search results page lists the library, call number, shelving location, and copy status for up to four copies per record, scoped to the current library scope:

Collège Boréal - Sudbury - LB1140.2 .R7 1995 - collection générale (Disponible)

- Clicking through to the record details (by clicking the title of the record) displays all of the copies attached to that record
  - The record details page can optionally display the due date for a copy if it is currently checked out
  - Subjects in the record details page launch brand new searches
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## 18 Requesting an item

- Patrons may place a hold on an item to put themselves in line to get an item
- Hold policies differ from library to library:
  - Libraries can disable holds for items that are currently available
  - Libraries can disable holds for items that in particular copy locations (such as a reference shelf)
  - Libraries can disable holds on particular items
  - Libraries can decide whether they will allow their copies to fulfill hold requests at other libraries
- When an item that is on hold returns to a library, it will show up in a pull list for hold requests that circulation staff must manually check; or it may be captured when it is checked in
- Notification that a hold is available can be sent via email if the patron has an email account and requests email notification, or via phone

## 19 Making lists (manipulating bookbags)

- When a patron is logged into their account, they have the ability to add records to bookbags from the record details page
- They can create a new bookbag on the fly using the **D'autres actions...** button by selecting **Créer un nouveau sac de livres**

## 20 Managing your account

- To log in to an account from the catalogue, click **Mon compte** or **Ouverture de session** from the left-hand column and enter your username or barcode, then the password for your account
- **Sommaire du compte** - gives patrons the ability to check their contact information and change their user name, email address, and password
- **Éléments empruntés** - lists the items the patron has currently borrowed
- **Éléments en réserve** - lists the items on which the patron has placed a hold
- **Amendes** - lists the fines that the patron owes to the libraries in the system
- **Préférences du compte** - some settings for patron notification preferences, font size, default search library
- **Mes sacs de livres** - enables patrons to adjust the visibility of their bookbags so that they can be shared with other users or deleted entirely

## 21 Cataloguing

- Basic rule: we share and reuse records in the system when possible
    - This is easy, as the default search scope in the catalogue includes all records for all libraries, whether they have copies in visible locations or not
    - Addendum: we add information to records; we do not remove information
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## 22 Cataloguing concepts

- There are 3 main levels of cataloguing objects in the system:
  1. Records: contain the metadata in MARC21 format that describes the object
  2. Call numbers / Volumes: attach a *record* to a particular library in the system with a given label
  3. Barcodes / Copies / Items: attach a *barcode* owned by a particular library to a particular call number
- In addition, copy locations, copy attributes, and the 856 field can affect whether a given record and its copies are visible or not.

## 23 Exercise 1: Add a call number and copy to an existing record

1. In the staff client, search the catalogue and find a candidate record that you might add holdings to for Collège Boréal (suggestion: search for `education curriculum` in `Sujet`). Records for which your library has no holdings display with a grey background.
2. To display the details of a record, click on its title in the search results. The **Compte du bibliotheque** window displays.
3. To add a copy to the record, click **Actions pour cet enregistrement** → **Ajouter des volumes**. The **Add Volume/Item** window displays.
  - a. Enter the number of volumes (*call numbers*) to add in the **Nombre de volumes** box.
  - b. For each volume, enter the call number in the **Cote** box. (For records that have an appropriate call number defined in the record, you can click the **Appliquer** button).
  - c. Enter the number of copies to add in the **Nombre d'exemplaires** box.
  - d. For each copy, enter the barcode. Write down the barcode - we will use it in subsequent exercises.
4. When you have entered all barcodes for all copies, you can click the **Create with defaults** button to immediately create the copies with the default status (*En traitement*), shelving location, circulation modifier, price, and the like. Most sites click **Edit then create** to adjust the shelving location and circulation modifier.
5. If you chose **Edit then create**, then you must click **Modify/create copies** to create the copies, or your copies will not be created.
6. Click **Reload** in the **Compte du bibliotheque** window to show the copies that you just added.

## 24 Exercise 2: Making a copy visible in the system

Now that you have added the copy to the record, search for the record again in the catalogue in a browser. You might notice that the copy is not visible in the regular catalogue; this is because, by default, the copy is set to the status *En traitement* which is not a visible status.

Once cataloguing finishes their work with the copy, it is normally checked in at the circulation desk. Checking in the copy sets the status of the copy to *Remise des documents sur les rayons* - a status which makes the copy visible in the catalogue. This status automatically changes to *Disponible* after a configurable interval. The default interval is 4 hours.

1. Open a new tab in the staff client. From the main menu, select **Circulation** → **Check in items**. The tab changes to the **Entrée des articles** window.
2. Type in the barcode for one of the copies you just added. A summary of the copy should be displayed in the table.
3. Display the status of the item by changing the attributes that are displayed in the table.
  - a. Click the column picker (small square) in the top right corner of the copy table. A list of copy attributes displays.

- b. Select the **Statut** entry from the list of copy attributes. The **Statut** column is added to the table, showing the status of the copy that you checked in.
  - c. Change the width of the columns by dragging the bars on the headers of the table left and right. Remove the **Bill #** column by using the column picker.
4. If you like the new configuration of the table, click **Actions relatives à la liste** → **Enregistrer la configuration de la liste** on the bottom left corner of the window to save the configuration.
5. Refresh the catalogue to ensure the copy is now visible.

## 25 Exercise 3: Modifying existing holdings for your library

Copies and call numbers together are often referred to as *holdings*. Evergreen includes an interface for modifying existing holdings on a given record, including adding, editing, and deleting copies and call numbers.

1. In the staff client, search the catalogue and find a record for which Collège Boréal already has holdings (suggestion: search for `education sante`).
2. Display the record details by clicking on the record title.
3. Enter the holdings maintenance interface by clicking **Actions pour cet enregistrement** → **Tenue à jour des articles mis en réserve**. The **Tenue à jour du fonds documentaire** panel displays.
4. The default display shows the list of parent libraries down to the library your workstation is registered with, along with the number of volumes and the number of copies held at each library.
  - To display the volumes by default, click **Afficher les volumes**
  - To display the copies by default, click **Afficher les exemplaires**
  - To display all copies for all libraries in the Collège Boréal system, change **OSBO** to **BOREALSYS**.
  - **NOTE:** These changes do not take effect until the next record you display
5. To edit a call number label, click a volume to select it, then right-click on the volume or click **Actions pour les rangées** and select **Modifier les volumes** to edit the call number label.
6. To print a spine label, click on a copy to select it, then right-click on the copy or click **Actions pour les rangées** and select **Imprimer l'étiquette au dos de reliure des articles**. The **Étiquette au dos de la reliure** window opens. **NOTE:** You must set up your spine label printer as the default printer on the workstation and adjust the printer settings for the spine label.

This screen offers many other actions, such as transferring copies to a different call number, deleting copies and volumes, and marking copies as lost or damaged.

## 26 Exercise 4: Adding a new record by Z39.50 import

If you can not find an existing record in Conifer for one of your items, you can try *copy cataloguing* - using the Z39.50 service to search for a matching record at other libraries across the world.

1. Open a new tab in the staff client. From the main menu, select **Catalogage** → **Importer le compte de Z39.50**
2. In the **Service et justificatifs d'identité** panel, select **McGill University**.
  - Some services have options for user names and passwords: in some cases, authentication is required to get any results; in others, such as AMICUS, an authenticated user gets results with full records.
  - You can search multiple services at once, but searching takes longer and you will see fewer results per service.

3. In the **Titre** box, enter `education sante` and press <Enter> to submit the search.
4. Highlight one of the results from the **Résultats** box.
  - a. Click **Affichage MARC** to view the MARC record and decide if you want to import it
  - b. Click **Éditeur du MARC pour l'Importation** to open the MARC record in a MARC editor. The **MARC Editor** window opens.
5. Click **Import Record** to import the record into Conifer. The **Comptes de bibliothèque** window opens; from here you can add volumes and copies as normal.

## 27 Exercise 5: Replacing a barcode

Occasionally a barcode becomes damaged or falls off and needs to be replaced. In addition to the Holdings Maintenance screen, Evergreen offers a quick way of replacing an existing barcode for an item.

1. From the main menu, select **Catalogage** → **Remplacer le code à barres**. The barcode replacement dialogue opens.
2. Enter the old barcode in the dialogue.
3. Enter the new barcode in the dialogue. Write down the new barcode - we will use it in subsequent exercises.
4. Verify that the barcode has been changed. Retrieve the item using the **Afficher l'article** window, either by selecting **Catalogage** → **Afficher l'article** or pressing **F5**, then entering the barcode.

**NOTE:** You can use either the keyboard or a barcode scanner to enter barcodes anywhere in the staff client.

## 28 Circulation overview

- Circulation deals with people and items and the relationship between them
  - Creating and maintaining patron accounts
  - Loaning items to patrons
  - Returning items to the library
  - Handling fines for overdue, lost, or damaged materials
  - Placing and managing holds

## 29 Exercise 1: Creating a patron account

1. From the main menu, select **Circulation** → **Register patron**. The **Inscrire le client** window opens.
2. Enter the required information. If you leave the password at the default 4-digit value, the patron will be forced to change their password to something more secure the first time they log into their account.
  - This is on purpose; we hand the patron their new card, tell them their 4-digit password, and ask them to immediately log onto a public terminal and change their password to something containing at least 1 digit, 1 letter, and at least 7 characters long.
  - You can click the **Show only required fields** link to hide the optional values.
  - An address is not mandatory; you can click the **X** to delete the address fields from the registration form
  - The **Home Library** field defaults to the library with which you registered your staff client workstation.
3. Click the **Save** button when you have completed entering the data for the new patron. The form resets, ready to register another patron.

## 30 Exercise 2: Searching for a patron

Objective: Explore the ways you can search for and retrieve a patron record.

1. From the main menu, select **Search** → **Rechercher des client**. The **Recherche de client** window opens.
2. Enter one or more search terms. For example, in the **Nom de famille** field, enter `boreal`. Notice that the patron search fields are insensitive to case, as the family name being displayed is `Boreal`.
  - a. Clear the search fields.
  - b. In the **Prénom** field, enter `test`. Notice that 3 records are now retrieved, one with a family name of `Boréal`. The patron search does distinguish between letters with and without accents.
  - c. Clear the search fields again.
  - d. In the **Nom de famille** field, enter `bor`. Notice that 3 records are retrieved. The patron search matches anything starting from the left-hand side.
3. Select the patron record you want to retrieve. A summary of the patron information displays on the left-hand pane as you highlight each patron.
4. To retrieve the full patron record, click **Récupérer un client**. The **Client** window opens.

## 31 Searching for patrons from other campuses

- To protect patron privacy in Conifer, staff at libraries are not allowed to retrieve records for patrons registered at a different library until that patron *opts in* to sharing their personal information with another library.
- This applies not only between Laurentian and Boréal, but also between the branches within Boréal. Staff at the New Liskeard campus will not know that a patron registered at the Kapuskasing campus exists until:
  1. The patron walks into the New Liskeard library
  2. The patron presents their library card to the staff member
  3. The staff member searches for the patron by barcode using the special **Search** → **Rechercher des clients par code à barres** screen
  4. The staff member asks the patron if they want to share their account information with this branch, and the patron agrees.
- Once a patron has opted to share their account information with another branch, they never have to repeat the process for that particular branch.

## 32 Exercise 2: Opt a patron into your library

Objective: Confirm that patron opt-in works

1. Search for a patron in the normal patron search interface using the user name (in the **OPAC Login** field) `boreal`. You should see the 3 staff training accounts.
2. Use the opt-in process to pretend that a patron from a different Collège Boréal library has walked into your library and is interested in borrowing a book.
3. From the main menu, search for the patron by barcode by selecting **Search** → **Rechercher des clients par code à barres** or press **F1**.
4. Enter the barcode that your instructor gives you. The **Confirmation de l'acceptation du client ou de la bibliothèque** dialogue opens.
5. Click **Acceptation** to confirm that the client wishes to opt-in to sharing their account information at this library.
6. Confirm that the patron can now be found via the normal patron search interface.

### 33 Exercise 3: Checking out an item to a patron

When you loan an item to a patron, the checkout interface is within their patron record.

1. Retrieve the record for the patron that you just opted into your library in the last exercise. Use any patron search method you like to display the patron record.
2. Unless an alert message has been added to the patron record, the display defaults to the **Sortie** tab of the patron record, with the focus automatically in the **Code a barres** field.
3. Scan the item barcode or enter it by hand. Use the barcode that you created during the cataloguing exercises.
  - **NOTE:** There is currently a bug that a dialogue will open stating that the name of the status could not be retrieved. You can click **Oui** to override the warning.
4. The item due date and title are displayed in the **Sortie** table. The due date is automatically calculated based on the rules for your library for the combination of patron type (student or staff), circulation modifier on the copy attributes, and many other factors.
5. Once you check out all of the items to the patron, you have the option of printing a receipt for them by clicking the **Imprimer le reçu** button.

### 34 Exercise 4: Setting a specific due date

To override the due date that will be set by the circulation rules for your library, you can set a specific due date as follows:

1. As in the last exercise, retrieve the patron record.
2. Check the **Specific due date** box on the top right corner of the **Sortie** panel.
3. Select the specific date and time that the item will be due.
  - **TIP:** You can invoke a calendar widget to set the date by clicking the down-arrow to the right of the date field.
4. Check out an item and confirm that the due date is what you set.

**NOTE** Once you have finished overriding the due date, do not forget to clear the **Specific due date** box or subsequent check outs will set the same due date.

### 35 Exercise 5: Checking in items

To check in items, perform the following steps:

1. From the main menu, select **Circulation** → **Check in items** or press **F2**. The **Entrer ou traiter un article** window opens with focus automatically set to the **Entrer le code à barres** field.
2. Scan the barcode of the returned item. Information about the last transaction for the item displays in the **Entrée** table.

You can set a number of options that affect the check-in operation:

- To check in items that were dropped off while the library was closed, you can change the **Effective Date** field on the top right corner of the panel to check the item in for a previous date.
  - To offer amnesty to patrons (automatic forgiveness of all fines on overdue items), select **Checkin modifiers** → **Amnesty mode / Forgive fines** in the bottom right corner of the panel.
  - You can mark an item as damaged by clicking the item, then selecting **Actions pour les articles sélectionnées** → **Marquer l'article comme « endommagé »**. This may cause fines to be applied to the patrons account.
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## 36 Exercise 7: Creating a bill for a patron

Most bills in Evergreen are generated automatically by overdues, or as a result of an item being marked damaged or lost. However, it is possible to manually create a bill for a given patron.

1. Retrieve a patron, as in previous exercises.
2. Click the **Factures** tab of the patron record. The **Factures** panel displays.
3. Create a bill by clicking the **Facturer le client** button on the left-hand side of the panel. The **Assistant de la facturation du client** window displays.
4. Select the type of transaction from the **Type de transaction** list. The only option is *Épicerie*.
5. Select the type of bill from the **Type de facturation** list. The list of options reflects Conifer's history and needs to be rationalized.
6. Enter the amount of the bill in the **Montant** field.
7. Enter details about the bill in the **Note** field.
8. To save the bill, click the **Transmettre cette facture** button. The **Assistant de la facturation du client** window closes and the **Factures** panel shows the updated total bills owed by the patron.

## 37 Exercise 8: Recording a payment for a bill from a patron

1. Retrieve the patron, as in previous exercises.
2. Click the **Factures** tab of the patron record. The **Factures** panel displays.
3. Select the bill to which you want to apply a payment.
4. Select the type of payment from the **Type de paiement** list.
  - Note that *Pardonner* is one of the options. We have found the *Forgive* payment is a better way of clearing fines that we want to go away than voiding fines entirely.
5. Enter the amount of the payment in the **Payment received** field.
6. Click **Appliquer le paiement!**

Note that a bug on the test server means that the result of the payment is not visible on the patron record until you completely reload the patron record. Not even the **Actualiser** button works.

Bill payments can get very complex and very difficult to untangle problems, so while there are options like automatically splitting a payment over multiple bills, I recommend keeping things as simple as possible and paying only a single bill at a time, or paying the complete set of bills at once. Partial payments can get very complex.