Search for patrons

Learn how to search for patrons in Tipasa and find information about the patron search results screen. Search for patrons in the system.

To search for a patron:

1. On the left navigation, click Find Patrons.
2. From the Limit search to list, select an index.
   - Name, ID, Email: Search terms entered for this index returns results based on the following:
     - Name: Last name, First name, Middle name, or preferred name
     - ID: Barcode, User ID at Source, ILL Identifier, PPID
     - Email Address: Email address located in the Library Record area of the Basic User Data accordion for the user
       Note: Values searched upon for the name and email address in the Name, ID, Email index may generate slightly different results than the individual Name and Email index.
       - The Name, ID, Email index takes a single token from the user input and compares with a left-handed match of a searchable value. Example: "smith"
       - The individual Name and Email index searches allow multiple tokens to be passed, separated by spaces. Example: "smith* john**"
   - Identifier: Searches the circulation barcode, ILL identifier, User ID at Source, and PPID.
   - Name: Name of the patron.
   - Barcode: Barcode (ID number) of the patron.
   - Street Address: Address of the patron (e.g., house number, street name).
   - State/Province: State or Province of the patron.
   - Postal Code: Postal code (e.g., zip code) of the patron's address.
   - Email Address: Email address of the patron.
3. In the search box, enter your search terms.
   - To search with a truncation operator, use an asterisk (*). For example, connect* retrieves connect, connection, connectivity, etc.
4. Click Search or press <Enter>.

Patron Search Results

The image below is an example of the patron search results screen. After you search for a patron under Find Patrons, any search results matching the terms you entered will display. From the patron search results screen, you can perform different actions using the sections described below.
1. Search tabs

The tabs on the side of the screen show any searches you have performed.

- Click on a search to return to it.
- To remove a search, click the X (×) next to the search. All searches are saved until you remove them or sign out of WorldShare.
- Click Close All Tabs to remove all searches.

2. Results

The number of results you receive and your place in the results list appears at the top and bottom of the results list.

- To refresh the results list, click the Refresh icon (↻).

3. Name

The name of the patron.

- Click the patron’s Name to view or edit their account.

4. ILL Identifier

The interlibrary loan identifier of the patron. If you use WorldShare Circulation, you do not need to use ILL Identifiers for your patrons.

5. Barcode

The Circulation barcode of the patron. This field only applies to libraries using WorldShare Circulation.

6. Email

The email of the patron used for interlibrary loan notifications.

7. Phone

The phone number of the patron used for interlibrary loan notifications via SMS.

8. Address

The home address of the patron.

9. Rows

The number of rows per page and page navigation buttons appear at the top and bottom of the results list.
• Select a **number** from the Rows list to change the number of rows you see per page.
• If there is more than one page of results, use the navigation buttons to move between pages.