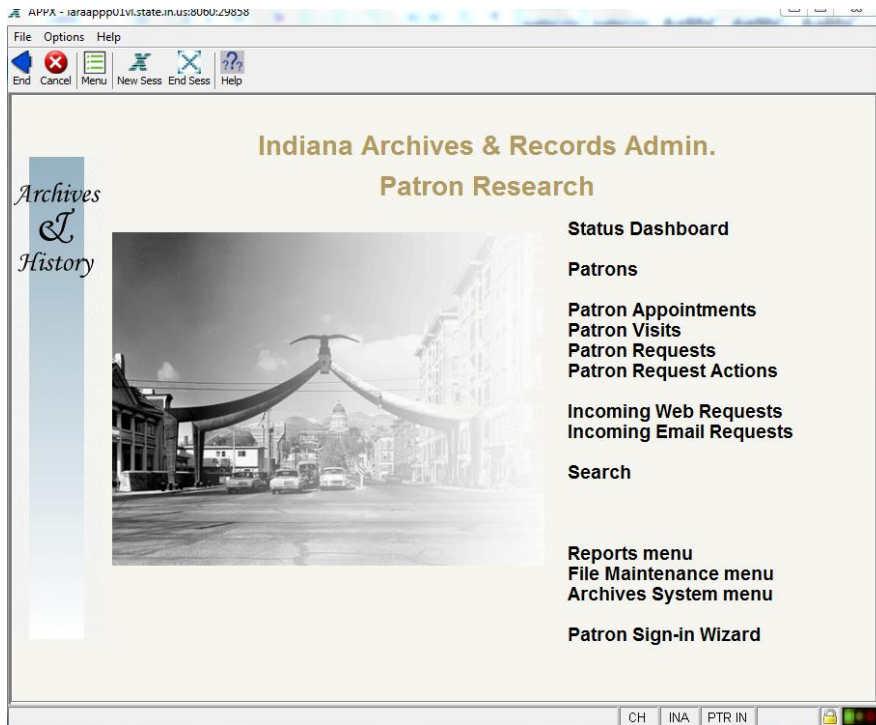
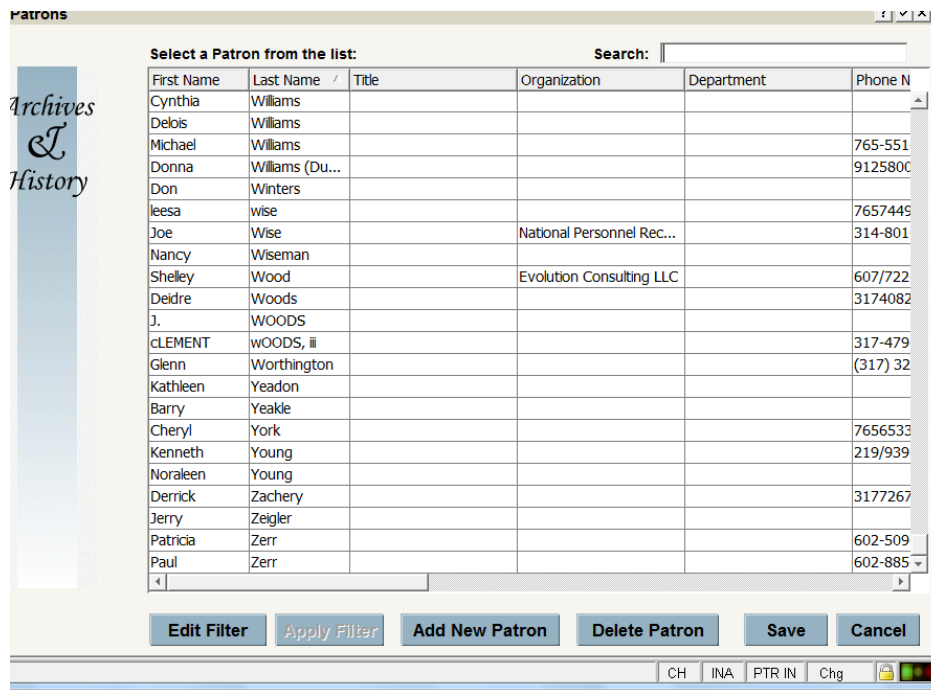


ADDING PATRONS AND REQUESTS



1. Click on "Patrons" to add a new patron. Look through the names to make sure the patron you are adding has not already been entered. If the patron is not on the list, select Add New Patron.



2. Add as much information as possible. You must add their name, and you should also add as much contact information as you have. The tabs on the bottom of the page allow you to add addresses and phone numbers. If the patron has requested a transcript be sent to a different address than their own, you can add several addresses.

If the patron sends in a form for release of records, you can scan it and add it to the Forms tab.

Patron

Archives & History

Patron Information

Last Name * Claire Prefix Middle Name Suffix
First Name * Test
Patron Type
Title
Organization
Department
Email(1) cehorton12@gmail.com
Email(2)
Change Photo

Registration Information

PhotoID on File * Patron Inactive *
Referred By
Repository
Loaned * Materials Loaned Date (first) MM/DD/CCYY
Notes
Date Added MM/DD/CCYY hh:mm ss Date Last Changed MM/DD/CCYY hh:mm ss

Additional Information

Addresses	Forms	Appointments	Visits	Requests
Phone #s	IDs	Add Appointment	Add Visit	Add Request

Save Cancel

CH INA PTR IN Add

3. Click on the tab Add Request.

*Add the Request Source: Phone, Email, Fax, Letter, Website

*Add information about what the patron needs. This could be a research topic, or information that you will need to find the correct transcript.

*Click on the Calendar Icon next to the Started Time, and then Click OK. This will fill in today's date and time.

*If this request has been assigned to a Staff Member, choose their name (or your name) from the magnifying glass.

*Under Statistical Information, choose the category the request falls under.

Patron Request

Patron: Test, Claire / cehorton12@gmail.com / 3174097885

Request Details

Request Source * Phone

Status * Pending

Privacy? * ☐

Request Date * 10/05/2016 08:17

Due MM/DD/CCYY hh:mm

Started 10/05/2016 08:20

Completed MM/DD/CCYY hh:mm

Successful? ☐

Referred To

Request * Medtech transcript. Attended under name Claire Horton, graduated in 2015.

Status Notes

Staff Assigned

Statistical Information

Urgency Medium Why

Project

Category School Transcript

Subject

Topic

Date Range CCYY to CCYY or Specific Date MM/DD/CCYY

County

Municipality

Additional Information

Patron Details Request Actions Related Biblio Recs Related Subjects

Visit Details Add Request Action Related Entities

Save Cancel

CH INA PTR IN Add

4. You can add Actions to show how much of the request has been completed. To add an action after you filled out the Initial Request, choose the Patron and then click on Requests (it should be red). Click View, and then Add Request Action. This is helpful to keep track of what you have done for each request, and what still needs to be done.

APPX - iaraapp01vl.state.in.us:8060:29858

File Action Options Help

Save Cancel New Edit View Delete Add Del Menu New Sess End Sess

Request - Action

Patron: Test, Claire / cehorton12@gmail.com / 3174097885

10/05/2016 08:17 Medtech transcript. Attended under name Claire Horton, graduated in 2015.

Archives & History

Action

Action Type Photocopies for Patron

Requested 10/05/2016 08:39 Due MM/DD/CCYY hh:mm Status In Process

Started 10/05/2016 08:39 Completed MM/DD/CCYY hh:mm

Assigned To Claire Horton

Description Patron needs Photocopies.

Result

Time Spent

Records Accessed

Summary Made photocopy of transcript, awaiting money and form from patron.

Charges

Billable Units 1 Copies @ 0.10 Each

Billable Amount Paid Payment Type

Patron Details Request Details Save Cancel

CH INA PTR IN Chg

When you complete the action, update the Status to Completed, and fill in any additional information. You should also update the Status of the Request to be Completed.

Request - Action

Patron: Test, Claire / cehorton12@gmail.com / 3174097885

10/05/2016 08:17 Medtech transcript. Attended under name Claire Horton, graduated in 2015.

Archives & History

Action

Action Type Photocopies for Patron

Requested 10/05/2016 08:39 Due MM/DD/CCYY hh:mm Status Completed

Started 10/05/2016 08:39 Completed 10/05/2016 08:40

Assigned To Claire Horton

Description Patron needs Photocopies.

Result

Time Spent 15 Minutes

Records Accessed

Summary Made photocopy of transcript, awaiting money and form from patron.

Charges

Billable Units 1 Copies @ 10 Each

Billable Amount 10.00 Paid 10 Payment Type Check

Patron Details Request Details Save Cancel

Warning - Date Due Has Not Been Entered --more--

CH INA PTR IN Chg

Ordering Records

One of the Actions allows you to order records to be used in the reading room.

Choose the Action Order Records from Storage. This Action has a table that allows you to search for records by keyword, series number, barcode, or container ID. You can look at the full container entry for any record by clicking View Search Record.

Select the boxes you would like to order.

Action Record Request

Container Search Criteria

Keywords:

Bibl. Level \ Lvl ID:

Barcode: Container ID:

Display Results up to:

Number of Results Found: 501

Select records to be ordered from search results:

Container Type	Container/Item ID	Concise Desc	Area Codes	Location Code	Container Spot
.4 c.f. MS Box	1	5% SAMPLE - LAPORTE COUNTY FOSTER H	30-STK-STK	STK- 33- L- 01	
Box	23	CLOSED, DENIED OR REVOKED FOSTER HO	30-RC-RAC	PAL- R22- 01- 01	
Cubic Foot Box	1	CLOSED, DENIED OR REVOKED FOSTER HO	30-RC-RAC	PAL- R18- 05- 04	
Box	25	CLOSED, DENIED OR REVOKED FOSTER HO	30-RC-RAC	PAL- R22- 01- 01	
Cubic Foot Box	2	CLOSED, DENIED OR REVOKED FOSTER HO	30-RC-RAC	PAL- R18- 05- 04	
Box	5	CLOSED, DENIED OR REVOKED FOSTER HO	30-RC-RAC	PAL- R22- 01- 01	
Box	1	179 - 619; 11/42 to 12/76	30-RC-RAC	PAL- R23- 07- 02	
Box	1	FH6738 - FH75292	30-RC-RAC	PAL- R26- 07- 04	
Cubic Foot Box	18	CLOSED, DENIED OR REVOKED FOSTER HO	30-RC-RAC	PAL- R23- 06- 05	
Cubic Foot Box	3	CLOSED, DENIED OR REVOKED FOSTER HO	30-RC-RAC	PAL- R18- 05- 04	
Folder	2	FOSTER HOMES CASE FILES - INACTIVE	30-STK-STK	STK- 22- L- 02	
Box	4	CLOSED, DENIED OR REVOKED FOSTER HO	30-RC-RAC	PAL- R22- 01- 01	
Cubic Foot Box	1	FH-1 to FH-2-6935	30-RC-ME1	MZ1- 06- 10- 04	32
Box	5	CLOSED, DENIED OR REVOKED FOSTER HO	30-RC-RAC	PAL- R21- 13- 02	
Box	21	CLOSED, DENIED OR REVOKED FOSTER HO	30-RC-RAC	PAL- R22- 01- 01	
Cubic Foot Box	36	CLOSED, DENIED OR REVOKED FOSTER HO	30-RC-RAC	PAL- R23- 06- 05	
Box	1	80-272.	30-RC-RAC	PAL- R23- 04- 06	
Box	3	FH 52-431 to FH 52-536	30-RC-RAC	PAL- R23- 03- 06	
Box	1	FH 52-252 to FH 52-319	30-RC-RAC	PAL- R23- 03- 06	

Container(s) Selected

The following records are selected to be ordered:

Container/Item ID	Receipt No	Barcode	State	Status	From	Thru	Beginning Value	Ending Value
1	1		PERMANENT	COMPLETED	1930	1949		
2	2		PERMANENT	COMPLETED	1930	1949		
3	3		PERMANENT	COMPLETED	1930	1949		

Click Order to request the records, and Receive once you have them.

Request - Action

Patron: Test, Claire / cehorton12@gmail.com / 3174097885

10/11/2016 08:42
Research about foster children

Archives & History

Action

Action Type

Order Records from storage

Requested

* 10/11/2016 08:43

Need By

10/11/2016 09:04

Status*

Completed

Ordered

10/11/2016 08:44

Completed

10/11/2016 08:44

Assigned To

Claire Horton

Description

* Ordered records from storage.

Add Records

Remove

Order

Receive

Records Included

Status	Ordered	Received	Return Ordered
In Research Rm Custody	10/11/2016 08:44	10/11/2016 08:44	
In Research Rm Custody	10/11/2016 08:44	10/11/2016 08:44	
In Research Rm Custody	10/11/2016 08:44	10/11/2016 08:44	

Selected: 3
Ordered: 3
Received: 3

Result

Summary

Patron Details

Request Details

Save

Cancel

CH
INA
PTR IN
Chg

To Return the records, you must use a new action. APPX is currently working on adding Return to the initial action in order to streamline the process.

Checking out an item allows us to keep track of where the item is and indicates which records are being used often.