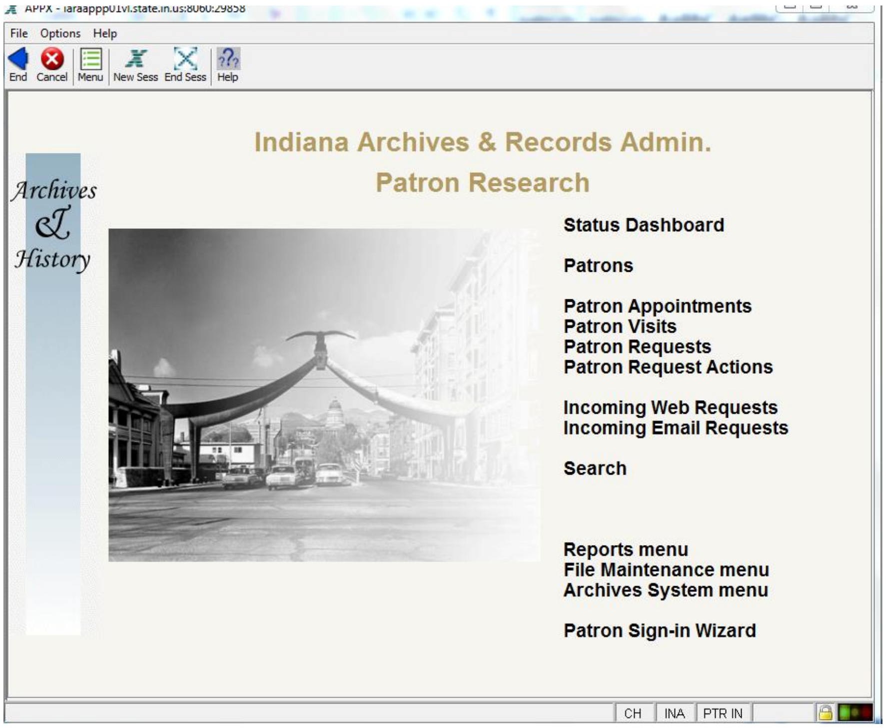
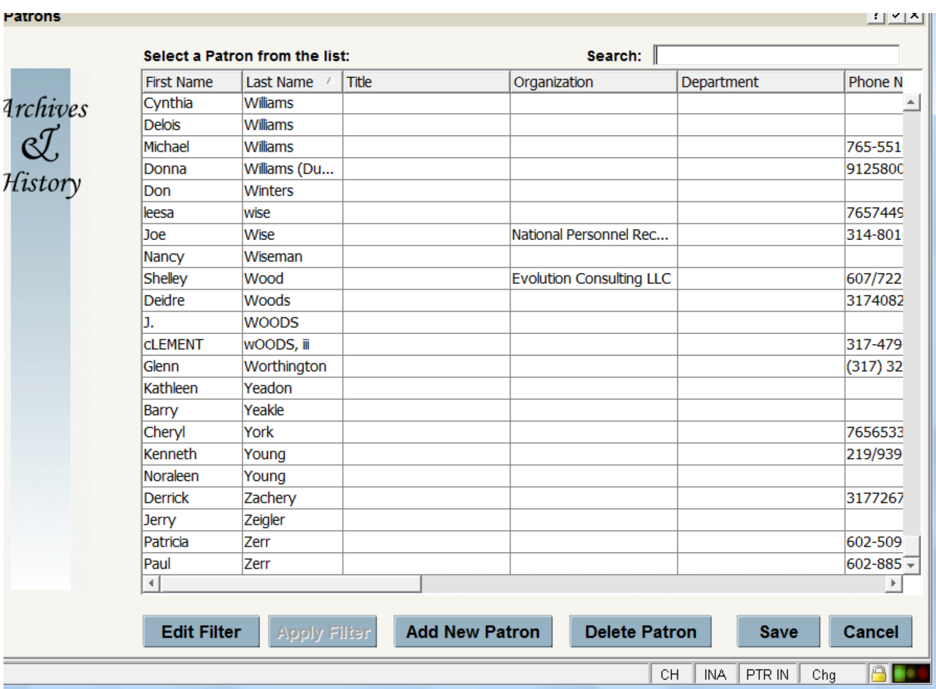
ADDING PATRONS AND REQUESTS



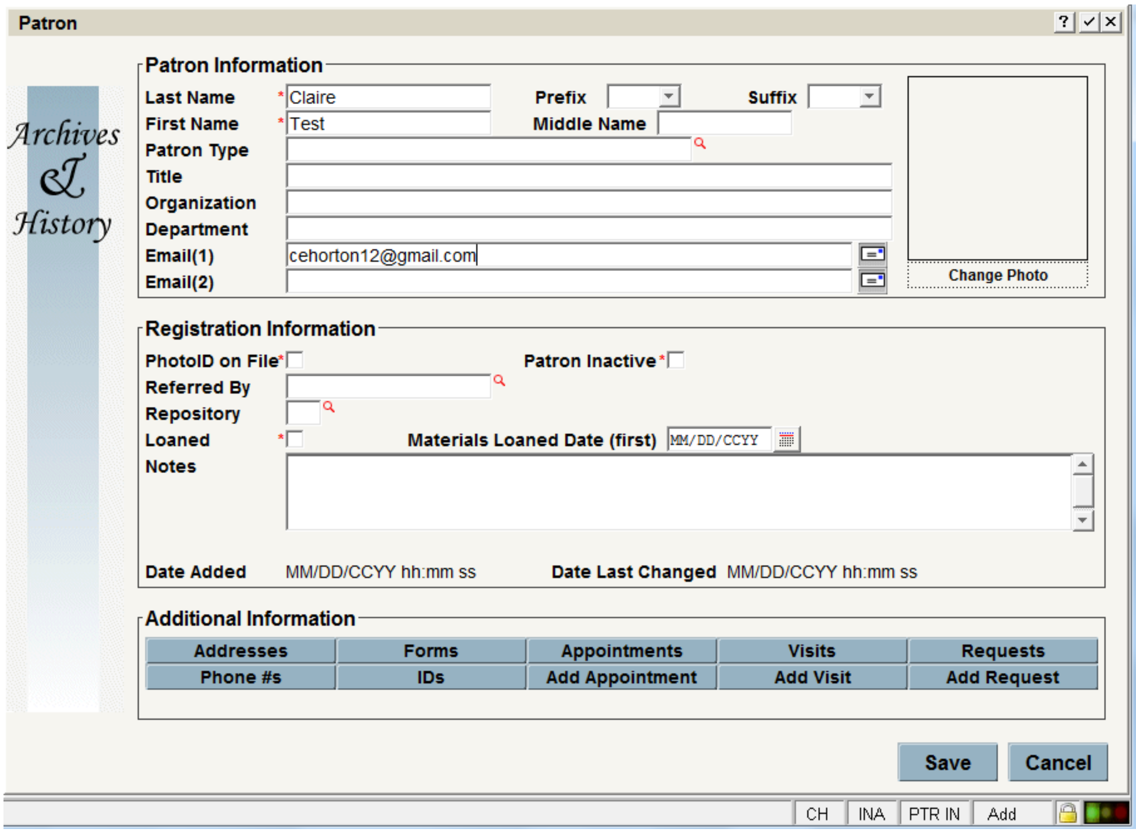
1. Click on “Patrons” to add a new patron. Look through the names to make sure the patron you are adding has not already been entered. If the patron is not on the list, select Add New Patron.



First Name	Last Name	Title	Organization	Department	Phone N
Cynthia	Williams				
Delois	Williams				
Michael	Williams				765-551
Donna	Williams (Du...				9125800
Don	Winters				
leesa	wise				7657449
Joe	Wise		National Personnel Rec...		314-801
Nancy	Wiseman				
Shelley	Wood		Evolution Consulting LLC		607/722
Deidre	Woods				3174082
J.	WOODS				
cLEMENT	wOODS, ii				317-479
Glenn	Worthington				(317) 32
Kathleen	Yeadon				
Barry	Yeakle				
Cheryl	York				7656533
Kenneth	Young				219/939
Noraleen	Young				
Derrick	Zachery				3177267
Jerry	Zeigler				
Patricia	Zerr				602-509
Paul	Zerr				602-885

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 then 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.



3. Click on the tab Add Request.

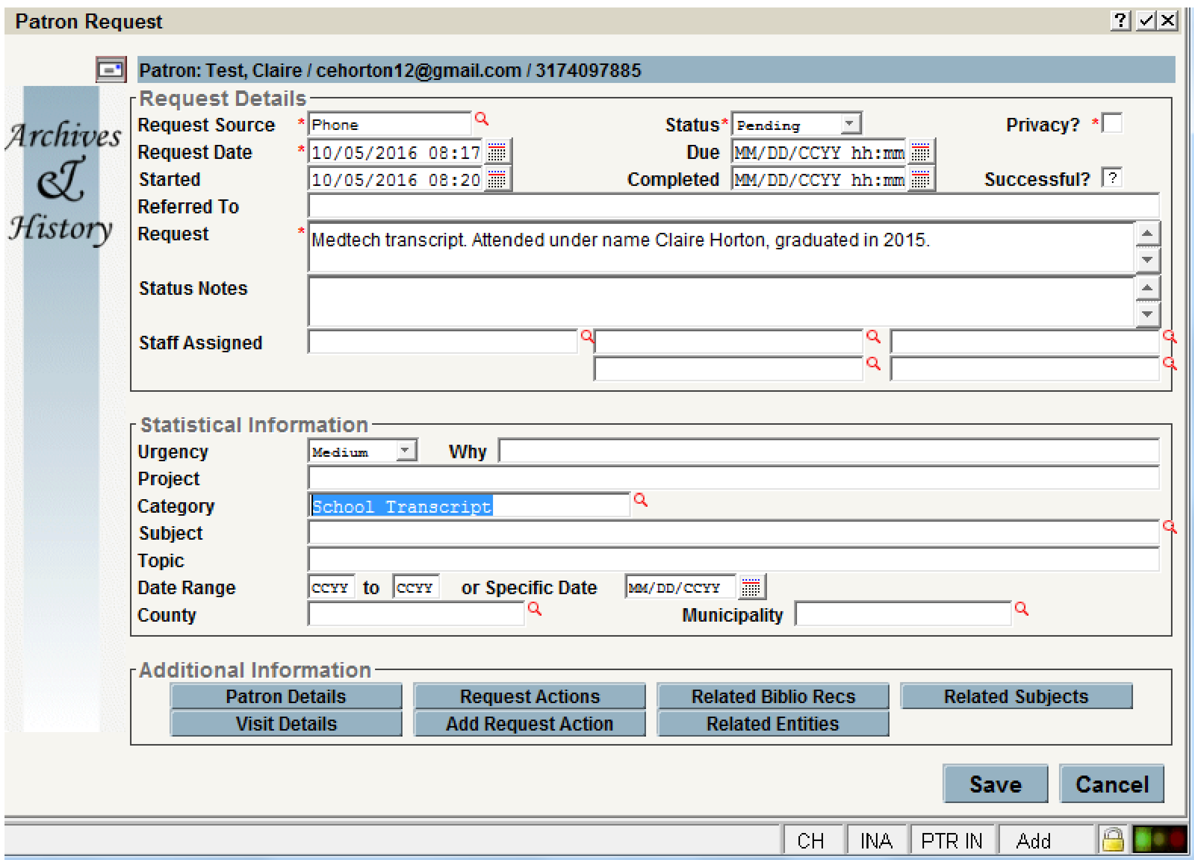
*Add the Request Source: Phone, Email, Fax, Letter, Website

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

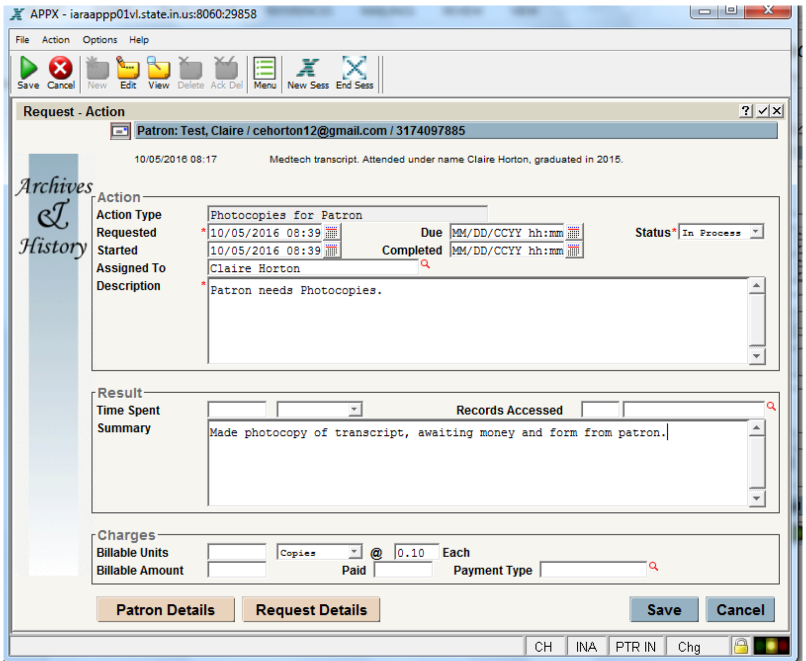
*Click on the Calendar Icon next to the Started Time, and then Click OK. This will fill in today's date and time.

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

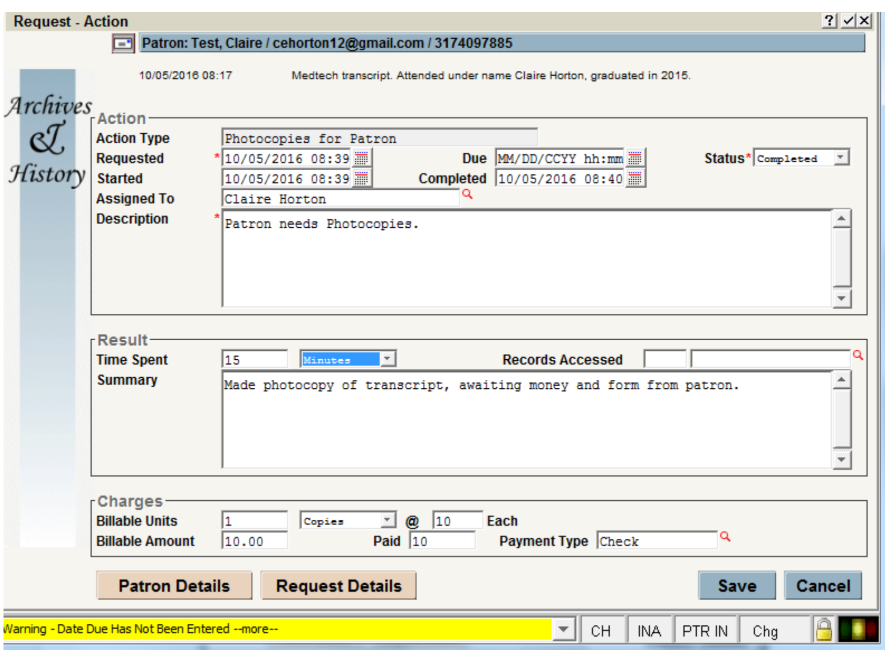
*Under Statistical Information, choose the category the request falls under.



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.



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.

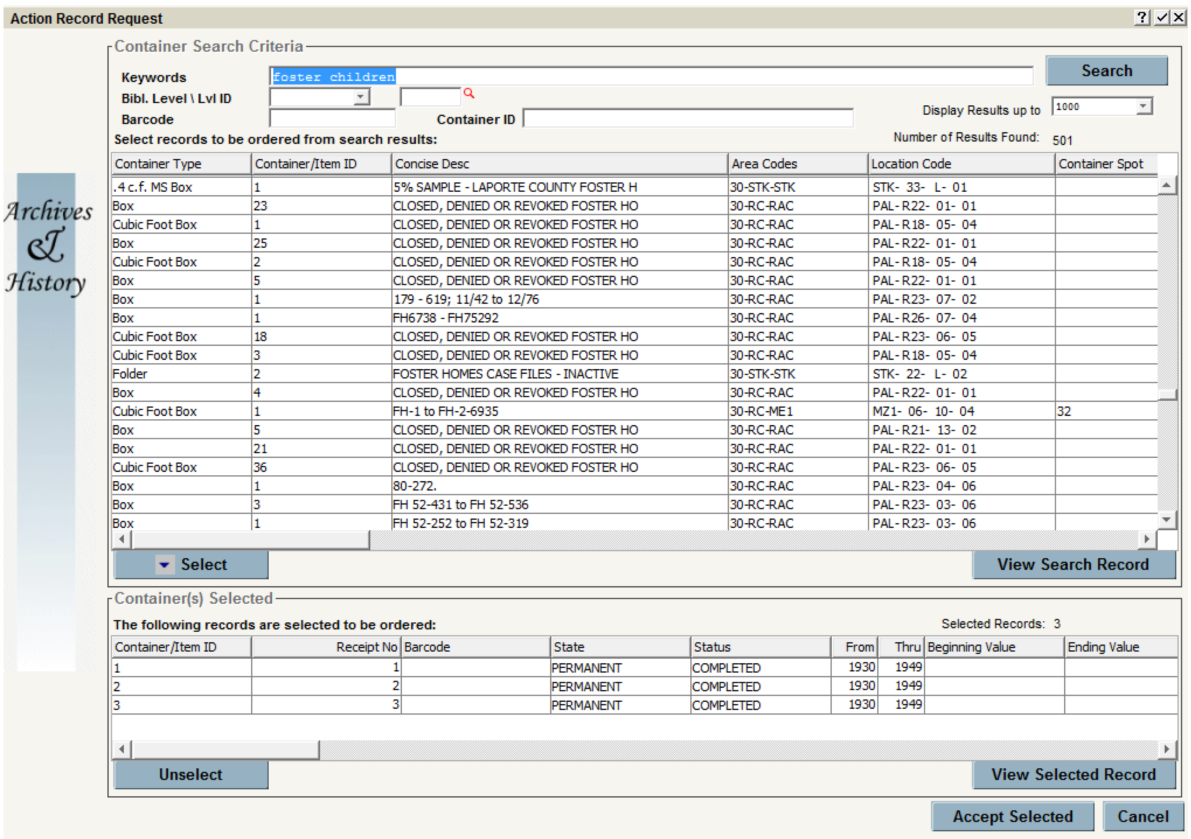


Ordering Records

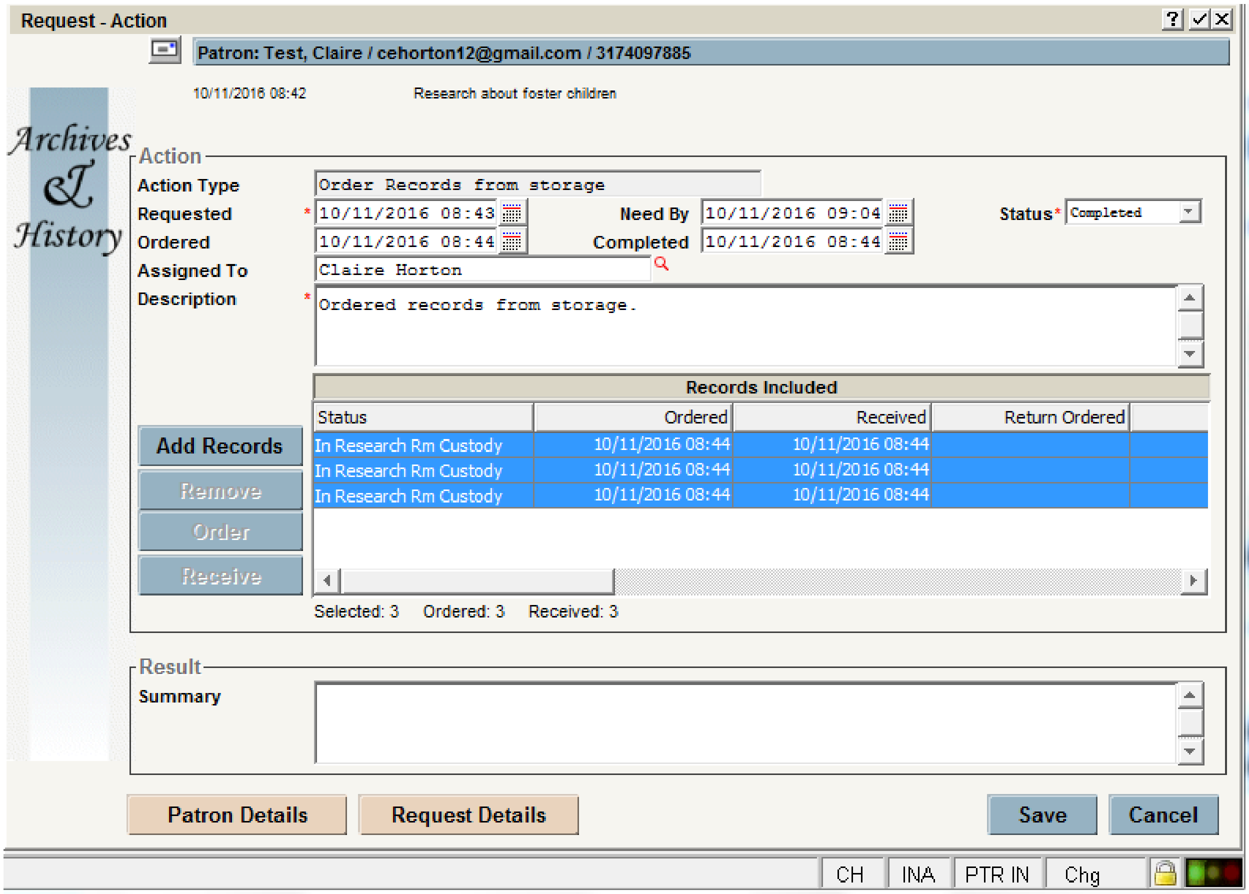
One of the Actions allows you to order records to be used in the reading room.

Choose the Action Order Records from Storage. This Action has a table that allows you to search for records by keyworrd, 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.



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



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.