

PATRON REQUESTS – GENERATING PAPER NOTICES FOR BORROWERS WITHOUT EMAIL

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1. **Create the item record** according to our procedure for that category of material.
1. **In the Aleph Circulation module, go to the Loan tab and charge the item** to Materials Management's special pseudopatron: "In Transit to Circ for Patron"
 - The system will alert you that you are charging a Catalog Review item. Click OK.
2. Click to the **Items tab** in the Circulation module.
 - The item information from the Loan tab should be carried over into the Items tab, where you will see in the Items List the Loan that you just created.
3. Click the **Hold Request button** on the right side of the upper pane.
 - This will open the "Create Hold Request" form.
4. **Enter the patron's ID no.** into the Patron ID field, and **hit the [Enter] key** -- *Not the OK button!*
 - The patron's name should appear in the gray box to the right of the Patron ID field. Make sure it matches our requester's name.
 - If you do not have the patron ID no., check the Eudora Address book under the patron's last name. Look at the Notes tab to see if the ID no. is being kept on file.
5. **If the name is correct, click the OK button** to put a hold on the item for the patron.
 - You will now see that 1 Request is appearing in the Items List.
 - Make sure your Items List header is configured to display the following important fields:
 - Sub-Library
 - Description
 - Status
 - Due Date
 - Barcode
 - Call no.
 - Request
 - Loans
 - Last Return
 - Patron ID
 - Patron Name
6. **Put the patron's name (Last Name, First)** on the slip.
7. Covering the patron name, place the following [flag](#) in the book to alert Circulation staff:
"DISCHARGE BEFORE FILING UNDER PATRON NAME"
8. Check the box on the flag: "Mail Patron Notification"
9. **Place the item into the Priority crate** for delivery to Widener on the next business day.
 - Upon discharge in Aleph, the system will generate a paper Available Notice that will be mailed to the patron.