

View Patron Information

How to look up a patron's pickup library for conversion from article to loan

From the General Update Form:

Choose SHOW from the top menu and select User Info

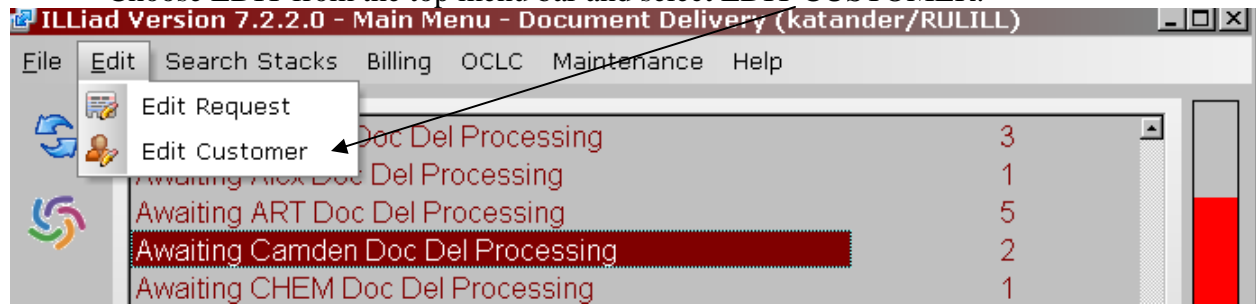
The screenshot shows the 'General Update Form' interface. At the top, there is a menu bar with 'Show', 'Email', and 'Browse'. A dropdown menu is open under 'Show', listing various options: Tracking, History, EMail, User Info (highlighted), Lender Info, Downloaded Request, Billing, ISO ILL Tracking, OCLC Policies Directory, OCLC Request, OCLC Search, OPAC Search (Alt+Z), and Copyright Gateway Search. The main form area is divided into sections: 'General Request Information' with fields for Transaction Number (10774), Username/Name (walkup, james walkup), Transaction Status (Awaiting Camden Doc Del Processing), Transaction Date (10/3/2007 10:10:10 AM), and Service Level/Shipping. Below this is 'Bibliographic Information' with tabs for Article, Loan, Citation, and Additional, and fields for Journal Title (Sociological Inquiry), Volume/Issue (50), and Month/Year/Pages (1980, 104-152). To the right, there are sections for 'Item Information' and 'System Information'.

The User Information Screen appears. The pickup library is listed under location.

The screenshot shows the 'User Information' screen. At the top, it says 'Customer Information - Last Modified 9/9/2007 2:04:17 PM'. The form is divided into several sections: 'Customer Information' with fields for Username (walkup), Last Name (walkup), First Name (james), Status (Rutgers Faculty), Organization, E-Mail (walkup@rci.rutgers.edu, jaywalks), and checkboxes for Blocked and ILLiad Authentication. 'Local/Mailing Address' and 'Other/Notification Address' sections have fields for Address, City, State/Zip, and Country. On the right, there are fields for Authorized Users, Phone, Fax, Department (Social Sciences / Psychology), Notification Method (E-Mail), Delivery Method (Mail to Address), Loan Del. Method (Hold for Pickup), Electronic Delivery (Yes), Location (ART), Request Limit, Expire Date, and Site. At the bottom, there is a 'Notes' section with a table header (Username, NoteDate, Note, AddedBy) and a message '<No data to display>'. Below the notes are buttons for 'Add User Note', 'Delete User Note', and 'Edit User Information'.

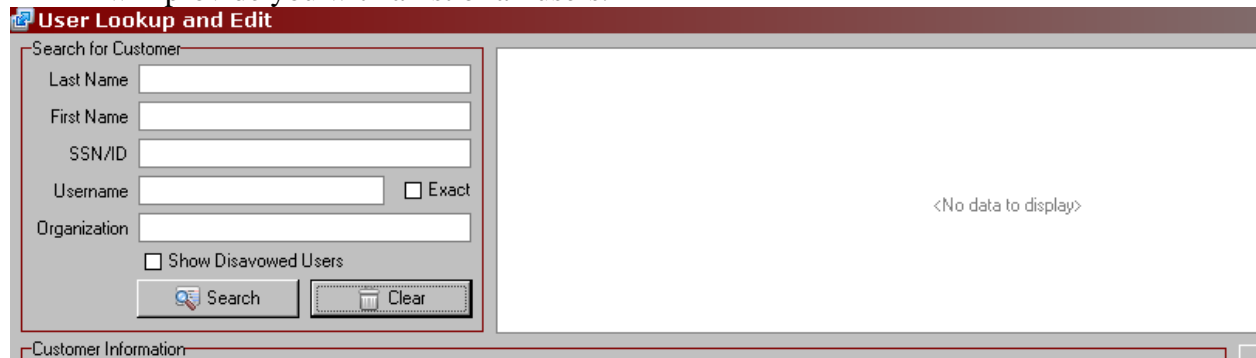
From the Main Menu:

Choose EDIT from the top menu bar and select EDIT CUSTOMER:

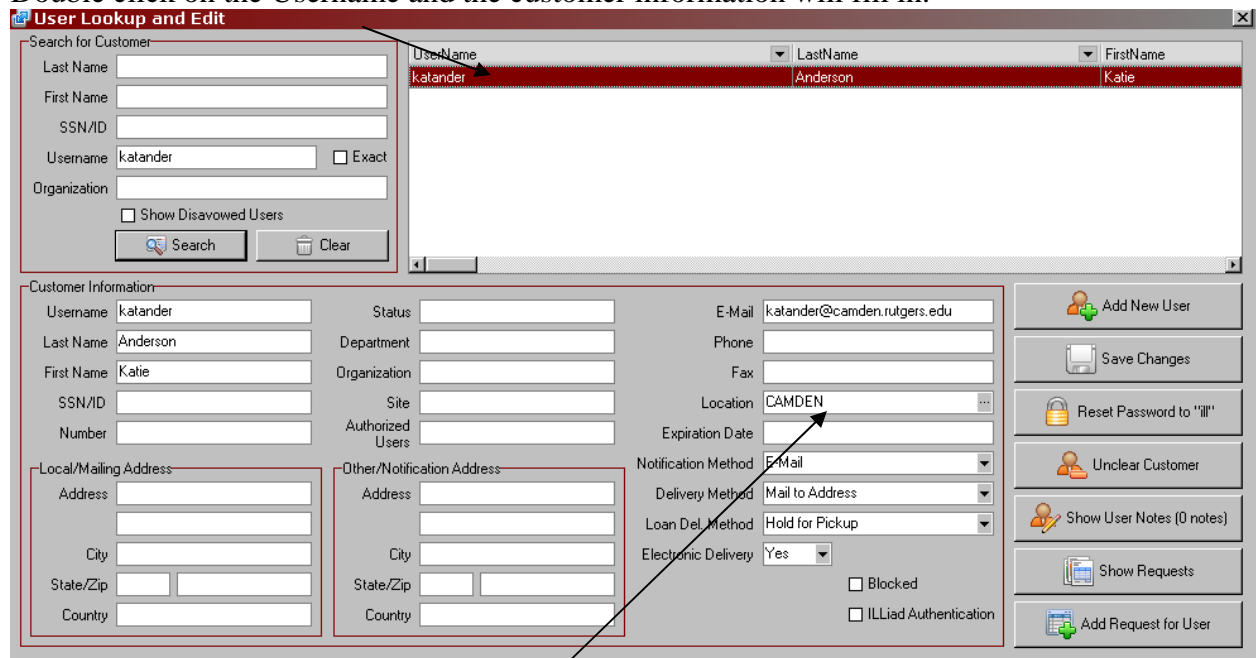


The User Lookup and Edit screen appears.

Enter the username and click search or leaving everything blank and clicking on search will provide you with a list of all users.



Double click on the Username and the customer information will fill in.



Pick-up Library is listed as LOCATION