**Back Office Training Checklist**

**Hour Two – Patron Input**

1. Create a New Patron Record Overview
	* Have the Student Assistant you are training fill out a Student ID form.
	* Using that form, create a New Patron Record for that Student Assistant (Refer to #2).
		+ Have the Student Assistant do the data entry, while you give instruction.
	* Visit the Student Assistant’s newly created account in the OPAC ‘My Account’ tab.
2. Patron Input (New Student)
	* Do a name search, to verify there are no other SMU accounts in Aleph for this patron.
		+ Never overwrite another institutions account
		+ Update an existing SMU account for returning SMU Student, Faculty or Staff only (more on this later)
		+ Community borrowers require an OCB/BARA account (different form; more on this later)
		+ SMU Alumni require a new OCB/BARA account (retain expired student account)
	* Do an ‘A’ number search, to verify there are no other SMU accounts for this patron.
		+ Aleph will not duplicate a barcode or ‘A’ number
	* Review the ‘New Patron’ button and ‘Patron Registration Form’ fields:
		+ Barcode - found on Student ID
		+ Barcode Verification - last 4 digits of phone number or ‘0000’ if unavailable
		+ Name - Last name first; first name last
		+ Address - start with Permanent address
		+ Email – can be whatever email patron uses most; only one
		+ Postal Code – can also be ZIP code, etc.
		+ Telephone 1 and 2 – home/cell phone/work
		+ Patron Sublibrary – should always be SMU for our students or any patrons we create
		+ Patron Status – Undergrad, Novanet Grad, OCB, Staff, Faculty, etc.
			- Explain difference between SMU Faculty and Faculty other
		+ Patron Type – only used for OCB/BARA patrons (more on this later)
		+ Home Library – should always be SMU for our students or any patrons we create
		+ Update button
	* Patron Tab in Aleph – Patron Registration node:
		+ Global Patron Information node
			- ‘Global Patron Details’ tab – verify info
			- ‘Global Blocks and Notes’ tab – all of Novanet is notified upon Checkout
				* Global Block 1:

(10)Administrative Block (loaning privileges revoked) vs. (20) Mail Returned (loaning privileges intact)

Reasons to use each

* + - * + Global Note 1- Novanet not notified upon Checkout

Example – NSDL for OCB

* + - Local Patron Information node:
			* Explain the concept of each library having its own set of borrowing privileges
				+ If a patron is valid at one Novanet library, they are valid for all Novanet libraries
			* Nov 50 – Expiration Date should be July 30, 2024; verify Patron Status
			* SMU Saint Mary’s University line - verify privileges reflect correct Patron Status and Expiration Date of September 30, 20??
			* ALEPH General Patron line – Patron Status and Expiration Date should match that of the SMU Saint Mary’s University line (Sept. 30, 20??)
			* Briefly review the following tabs:
				+ Local Patron Details
				+ Local Blocks and Notes
				+ Local Privileges
		- Address Information node:
			* Review the information in the (01)Permanent Address
				+ Ensure the ‘Valid to’ date is September 30, 20??
				+ Explain the difference between the

(01) Permanent Address (parent’s/home address) vs.

(02) Local Address (current local residence)

Aleph uses (02) address for notifications

Can be the same address for both

* + - * Create the (02) address (New button)
				+ Show how to duplicate, if using the same address for both
				+ Changing the Address Type to (02)
				+ Verify ‘Valid to’ date
				+ Update to save changes/additions
		- Additional IDs node:
			* Never alter the System Number information
			* Verify Barcode Number and explain what is used for the Verification number
				+ last four digits of phone number provided or
				+ ‘0000’ and a (20) Mail Returned Block
			* Use ‘Add ID’ button to create Student ID (A#) information
		- Return to ‘Global Blocks and Notes’, if any additional information/clarification is required.
1. Patron Input (Returning Student)
	* Briefly, go over the concept of a returning student and how you would go about visiting all the nodes to update the patron’s information in an existing account.
		+ Search for the returning student by ‘A’ number and name, to ensure there are no other SMU student accounts for this patron.
			- Explain that students may have other accounts for other institutions, but only one student account for SMU.