**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.