**Back Office Training Checklist**

**Hour Three –Fines/Holds/Study Rooms**

1. Fines
   * Explain how Fines accumulate
     + $0.25/day, but don’t show on account until fines reach $2.00 (Grace period)
   * Show where to locate a patron’s fines
     + Patron Tab
       - Loans Node – fines for individual items (accruing; item still on loan)
       - Cash Node – Active Tab (finalized fines; item returned)
         * Review other Cash tabs
     + Note to check both places when assessing what a patron owes.
2. Fine Payment (should we be including Fine Payment at this time?)
   * Assessing what a patron owes to SMU and Novanet
     + ‘By Sublibrary’ button
   * Filling out the Fine Payment form
3. Holds
   * Explain the difference between Novanet Express and a regular Hold
     + Explain that SMU patrons cannot request SMU items.
   * Using the OPAC Test
     + Demonstrate how to create a Novanet Express request (Item ‘In Library’)
     + Demonstrate how to create a Hold by requesting the same item for a second time (Item currently on ‘Loan’/’Requested’)
   * Using Aleph
     + Item Tab
       - Demonstrate how to create a Novanet Express request through Aleph
       - Create a second request for the same item (creating a Hold)
       - Point out the differences
         * Owning Library/Pickup Library
         * Request Date/ End Date
         * Status (In Processing/Waiting In Queue(after refreshed)/On Hold)
     + Patron Tab
       - Call up the Patron account you used for the previous NE and Hold requests
       - Review the Hold node
         * How to tell if a request is a NE or a Hold request
         * In Processing vs. Waiting in Queue vs. On Hold
4. Study Rooms
   * Using the OPAC
     + From the Library home page, demonstrate how a patron would book a Study Room, by using the Student Assistant’s newly made account
     + View the booking in the ‘My Account’ tab
   * Using Aleph
     + Patron Tab
       - Demonstrate Claiming a Study Room,
         * Enter the Student Assistant’s barcode/A# to call up the Study Room booking you just created in the OPAC

* In the Booking List node, review the Study Room booking
  + Point out Study Room Number, Patron Name, Booking Start Date, Booking Start/End Hour
  + Point out the Booking Note 1 field (where to place the Study Partner’s A#)
  + Note the possibility of multiple Bookings (max of 2), all for the same patron
* Point out the Print button, for issuing the Claim Slip
  + - Admin Tab
      * Review the information found in the Booking node
      * Demonstrate ‘grabbing’ (copy) a SMU Study Room barcode
    - Item Tab
      * Paste the Study Room barcode in the Item Field of the Item Tab
        + In the Booking node, review the Study Room Booking

Point out Study Room number, Patron Name, Booking Start Date and Booking Start/End Hour

Note multiple bookings for the same room, but the possibility of different patrons

* + - Demonstrate how you would delete a Booking and rebook for another time slot
      * Patron Tab: Delete the booking from the Patron’s record
      * Item Tab: create a new Study Room Booking, using the Booking Req button