**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