Training Checklist

Student name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date/Initial when trained on topic

1. **General Student Assistant Employee Info**

\_\_\_ Work Authorization Form to Payroll

\_\_\_ I-9 to Payroll

\_\_\_ Paper Time Card Routine

\_\_\_ E-Time Cards (NazNet)

\_\_\_ Policy Sheet

\_\_\_ ILLiad Username/Password

1. **General Office/Department Responsibilities**

\_\_\_ Department tour and what we are responsible for:

\_\_\_ Current Serials, Newspapers & Compact Shelves

\_\_\_ Microfilm/fiche Collection

\_\_\_ Interlibrary Loan

\_\_\_ How to answer phone

\_\_\_ How to Transfer a Call

\_\_\_ Basic customer service

\_\_\_ Patron questions

\_\_\_ Incident Report notebook

1. **SERIALS**
   1. **Location & Ordering (alpha/numeric):**

\_\_\_ regular stacks

\_\_\_ compact (and safe locking)

\_\_\_ most current issue

\_\_\_ newspapers

\_\_\_ microfilm

\_\_\_microfiche

\_\_\_ Missing Issues List

* 1. **Locating Holdings in:**

**\_\_\_** Ebsco A-Z

**\_\_\_** WebPac

* 1. **Mail Processing**

\_\_\_ Rotation from current to regular

\_\_\_ Discards routine

* 1. **Shelf-reading**

\_\_\_ Shelf-reading book/responsibilities

\_\_\_ Ordering of volumes/issues

\_\_\_ proper shelf straightening

\_\_\_ boxing/bookending

1. **INTERLIBRARY LOAN**

**ILL LENDING**

**LOANS**

* 1. **Sorting loan requests** (books, CDs, other, Media)
  2. **Locations**

\_\_\_ Books/Main

\_\_\_CDs

\_\_\_VHS/DVDs

\_\_\_Kid’s lit/

\_\_\_YA/

\_\_\_Merton/

\_\_\_Chesterton/

\_\_\_McNaughton/

\_\_\_Oversize/

\_\_\_Rare/

\_\_\_Reserves/

\_\_\_Reference

\_\_\_Browsing Lounge

* 1. **Updating to:**

\_\_\_ Checked out in Millennium

\_\_\_ Shipped in ILLiad

* 1. \_\_\_Shipping Shelves designation
  2. \_\_\_Troubleshooting – searching the catalog

**LOAN RETURNS**

1. \_\_\_ Lending Returns on ILLiad
2. \_\_\_ Check In on Millennium
3. \_\_\_ Take upstairs

**ARTICLES**

1. **Sorting article requests** (Format: *Print vs. Electronic* & Delivery: *Odyssey, Article Exchange, Snail Mail*)
2. **Locations**

\_\_\_ E- Journals

\_\_\_ Print Journals

\_\_\_ Microfilm/fiche

1. **Odyssey (TN #s)**

\_\_\_ Copier scanning (PDF) w/ TN#

\_\_\_ Adding coversheet

\_\_\_ Odyssey Helper

\_\_\_ Charging

\_\_\_ Deleting Images from Scan Docs & Images

1. **Article Exchange (ILL#s)**

\_\_\_ Copier Scanning (PDF) w/TN#

\_\_\_ Adding Coversheet

\_\_\_ ILLiad updating – Mark Found Scan Now

\_\_\_ Charging

\_\_\_ Deleting images from Scan Docs & Images

1. **Snail Mail**

\_\_\_ Copier Scanning (Double sided)

\_\_\_ Copier Printing (Double sided)

\_\_\_ ILLiad updating

\_\_\_ Charging

\_\_\_ Enveloping

1. **Microfilm machine**

\_\_\_ Operation

\_\_\_ Scanning to .TIFF to flash drive

\_\_\_ TIFF conversion to PDF

1. **Color Copying**

\_\_\_Copier Settings

**TROUBLESHOOTING**

\_\_\_ Searching websites

\_\_\_ google

1. **ILL BORROWING**

**Checking New BOOKS/MEDIA in**

\_\_\_ Unpacking ELD/RRLC/UPS/USPS

\_\_\_ Receive items from lending library

\_\_\_ Updating ILLiad

\_\_\_ In-Library Use Books

\_\_\_ No Renewal Books

\_\_\_ CD Cases

\_\_\_ Print book bands

\_\_\_ Wrap and attach book bands

\_\_\_ Contact Customers

**Returning BOOKS/MEDIA**

\_\_\_ Location Upstairs

\_\_\_ Finding TN number or ILL number if slip is gone

\_\_\_Updating in ILLiad

\_\_\_ Print Slips/matching

\_\_\_ Shipping shelves

**ARTICLES**

**Mail Arrivals**

\_\_\_ Scanning article to Naz & delivering thru ILLiad

1. **ILL DOCUMENT DELIVERY for Naz Customers**

**BOOKS**

\_\_\_ Collecting Naz books & taking to Main Circ Desk

\_\_\_ Updating the slips in ILLiad

\_\_\_ Contacting Customers

**ARTICLES**

\_\_\_ Copier scanning (PDF) w/ TN#

\_\_\_ Adding coversheet

\_\_\_ Odyssey Helper

\_\_\_ Deleting Images from Scan Docs

\_\_\_ Tightly bound issues – what to do

1. **ILL DOCUMENT DELIVERY for Course Reserve**

**BOOKS**

\_\_\_ Collecting Naz books & taking to Main Circ Desk for Course Reserve Shelf hold

\_\_\_ Routing books to On Course Reserve Processing Shelf in ILLiad

**ARTICLES**

\_\_\_ Copier scanning (PDF) w/TN# scan to jrygiel

\_\_\_ Routing articles to On Course Reserve Processing

Shelf in ILLiad

1. **ILL SHIPPING**

\_\_\_ Proper packing methods/materials

\_\_\_ Media packaging (Incoming and outgoing)

\_\_\_ EMPIRE (ELD)

\_\_\_ RRLC

\_\_\_ UPS website and printer

\_\_\_ Where NOT to send items UPS

\_\_\_ USPS/Snail Mail

\_\_\_ International

1. **HELPING PATRONS WITH ILL**

\_\_\_ Setting up an ILLiad account

\_\_\_ Resetting password

\_\_\_ Renewing an ILL

\_\_\_ How to use ILLiad in Worldcat or in a journal

database