



Traverse des Sioux Library System

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Staff System Training Checklist

Below is a list of essential system skills for circ desk staff. Please feel free to add to this list as appropriate for your library.

✓	Task
	Staff know how to login using the Circ user ID and Password.
	Appropriate staff know the override password.
	Desk staff know how to charge and discharge materials.
	Desk staff know how to modify a due date.
	Desk staff know how to place and remove holds
	Desk staff know how to search for a user.
	Desk staff know how to accept payment for bills/fines or to forgive a fine.
	Desk staff know which User Profile to select when registering new users.
	Desk staff know the formula for the alt ID field.
	Desk staff know that temporary cards for participating TdS members should be given the user profile of TDSTEMP3.
	Desk staff know that they need to fill in User Cat 1 and User Cat 2 when registering new users.
	Desk staff know that they should never change the field names on the address tab.
	Desk staff know that they should enter dashes for phone numbers rather than a slash.
	Desk staff who are assigned the task of filling HOLDS, know the procedures for trapping holds and for marking items missing.
	Desk staff who are assigned the task of receiving in-transit items, know the procedures.
	Staff know how to search for an item by ISBN, author, title, subject, keyword in both iBistro and in WorkFlows.
	Staff know how to limit a search for an item by item type, date, language.
	Tech staff who add item records to the database know how to match the item in hand with an item as described in the MARC record.
	Tech staff know how to select the right item type and item categories.
	Tech staff know how to formulate a call number according to the library's current practices.
	Tech staff know how to transfer an item from a brief bib (such as the old CTE records) to a full MARC record.
	Tech staff know that items that have been cataloged by TdS need to be barcoded and an item attached to the bib record within 30 days.
	All staff know the library procedures for reporting system problems.