**MobileStaff Checklist and Guided Notes**

**Use this Guide for the following lessons in the MobileStaff Training Class:**

* Searching with MobileStaff
* Check In
* Check Out
* Renewing Items
* Holds
* Inventory
* Deselect
* Adding and Modifying Users
* Kiosk
* Offline
* Events

**Fill in the blanks in the text below using words from the training site.**

**Searching with MobileStaff**

List three ways you can search for a user:

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ tool allows you to search for an item if you do not have the barcode handy.

With \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ you can check an item’s status by scanning the item barcode or search for the item using Item Search.

**Check In**

Scan or type an item’s \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ in the Check In screen to easily check in items.

With \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ you can mark an item as used in the library by scanning the item’s \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

**Check Out**

To check out an item to a user, first locate the user’s \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. Then scan or enter the item \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. Once an item is checked out, the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, title, and \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ are shown.

When using the Modify Due Date icon, library staff can choose from these options when assigning a specific date:

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 4. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

5. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 6. Cancel

**Renewing Items**

When renewing an item, choose from Renew by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ or Renew by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ means the item was brought to you and you saw it before it was renewed.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ would mean the item was not brought back and therefore was unseen.

**Holds**

You may \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, modify, and \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ holds associated with a user with Holds by User.

The \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ option is used to view and process holds currently on the hold shelf. You can modify available holds and determine what actions need to take place, such as marking an item \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ or removing a \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

The \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ provides a list of on-shelf items that need to be pulled to fulfill holds. Holds and the ability to place them on checked out and/or available items must be \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ in your Library Holds policy in \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

**Inventory**

The MobileStaff Inventory method takes the place of Step \_\_\_\_\_ and Step \_\_\_\_\_ in the Inventory Process.

In Setup, allowing Audio Alerts will include a sound when which three things happen:

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

To ensure items are correctly shelved, turn on \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

**Deselect**

Another word for weeding is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

When selecting the \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ date, MobileStaff looks for items with a date created, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, or charged earlier than the date selected.

Click the trash can icon to mark an item as \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. Click the question mark (?) icon to mark an item \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

**Adding and Modifying Users**

A helpful way to ensure duplicate accounts are not being created unnecessarily is to check for duplicate users by selecting user information fields in \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

Any changes made to a user record will \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ stay if your library is using the Patron Update Process from the district's student information system.

**Kiosk**

Kiosk mode is your solution for a \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ station.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ by name is not available in Kiosk.

**Offline**

List the tasks available in MobileStaff when using Offline mode:

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 4. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

5. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Offline mode is only available for use in the MobileStaff \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ on a mobile device.

The data used by MobileStaff Offline is automatically \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ when the device used next connects to the server.

After working offline, contact your \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and let them know you were using Offline mode.

To upload offline transactions in MobileStaff:

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Events**

The Events feature in MobileStaff allows librarians and other staff to take and track \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ for events.

Before using Events, a new \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ group of Event and a \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ user account must be created.

If \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ is turned on in Workflows, library staff will be able to access attendee information through Item Search/Display, found in the Common Tasks wizard group.