

BLUEcloud Circulation Trainer Guide

3 Contact Hours



Optional Training Activities

- Optional training activities are estimated to add 45 minutes to the original training time and include the minutes indicated for the original activity.

Learning Objectives

After completing the BLUEcloud Circulation Pathway, staff will know how to:

- Successfully log into BLUEcloud Central.
- Set into the correct institution (school building).
- Create a new patron record.
- Search for an existing patron.
- Checkout an item to a patron.
- Check an item in.
- Renew an item.
- View an existing bill.
- Make a partial and full payment on an existing bill.
- Place a hold on an item for a patron.
- View an existing hold.

In this course, participants will work through several lessons to learn how to access, use, and integrate BLUEcloud Circulation into your library. Below is a description of each lesson and the amount of time it should take for participants to complete each one.

Getting Started

Pre-test

- **Lesson Content**

Take a quiz to find out what you know or need to know about BLUEcloud Circulation. (5 minutes)

Your Assignment

- **Lesson Content**

Review the course objectives and the course overview. (10 minutes)

Optional Training Activities

- With the group, review the Workflows and BLUEcloud partnership. Work with a partner to discuss how BLUEcloud interacts with Workflows?
- Distribute the guided notes to each participant. Explain that they will use this throughout the course and complete the guided notes for this lesson.

How to Navigate BLUEcloud

- **Lesson Content**

Learn how to access and navigate BLUEcloud. (15 minutes)

Optional Training Activities

- Watch the video and then discuss with Library Staff what other links they would like to see added to Connections.
- Once you have a list created, discuss who will submit the list to your INFOhio
- Complete the guided notes for this lesson.

Patrons

Patron Search

- **Lesson Content**

Learn how to locate a patron record. (15 minutes)

Optional Training Activities

- In small groups, assign group members a different method of searching for a patron. Discuss the method you tried and list the pros and cons of each of that method. Share with the larger group.
- Complete the guided notes for this lesson.

Patron Registration

- **Lesson Content**

Learn how to add a new patron to BLUEcloud. (10 minutes)

Optional Training Activity

- Complete the guided notes for this lesson.

Applying What You Have Learned: Patron Management

- **Lesson Content**

Complete the lesson exercises to practice creating and maintaining a patron record. (10 minutes)

Optional Training Activity

- Have library staff discuss if they need to add patrons manually or if their school uses software that allows patrons to be loaded automatically into their database.

Basic Circulation

Check-in an Item

- **Lesson Content**

Learn how to check in materials with BLUEcloud Circulation. (10 minutes)

Optional Training Activities

- In small groups, start at the home screen and discuss the different ways to quickly access check-in. Share your findings with the larger group.
- Complete the guided notes for this lesson.

Checkout an Item

- **Lesson Content**

Learn how to check out and circulate materials from a patron record. (10 minutes)

Optional Training Activity

- Complete the guided notes for this lesson.

Renew an Item

- **Lesson Content**

Learn how to renew items that a patron has checked out. (10 minutes)

Optional Training Activity

- Complete the guides notes for this lesson.

Applying What You Have Learned: Basic Circulation

- **Lesson Content**

Complete the lesson exercises to practice checking items out and back in.
(10 minutes)

Optional Training Activities

- In a small group, discuss different ways you might take advantage of the user friendliness of BLUEcloud Circulation in your library. Perhaps you have student helpers or substitutes that can more easily help, allowing you to spend more time with students and teachers.
- Complete the guided notes for this lesson.

What Have You Learned So Far? Mid-Class Quiz

- **Lesson Content**

Take the mid-class quiz and test your knowledge of what you have learned so far in this course. (5 minutes)

Bills

Viewing and Paying Bills

- **Lesson Content**

Using the available Bills panel, learn how to view and pay for unpaid bills.
(10 minutes)

Optional Training Activity

- Complete the guides notes for this lesson.

Applying What You Have Learned: Bills

- **Lesson Content**

Complete the lesson exercises on viewing and paying bills. (5 minutes)

Hold

Viewing Holds

- **Lesson Content**

Learn how to view holds. (10 minutes)

Placing Holds and Searching the Catalog

- **Lesson Content**

Learn how to place and manage holds. Place a hold for the test patron you created earlier. (15 minutes)

Optional Training Activity

- Complete the guides notes for this lesson.

Applying What You Have Learned: Holds

- **Lesson Content**

Complete the lesson exercises to practice placing and viewing holds. (10 minutes)

Checking Your Learning

Self-Assessment

- **Lesson Content**

Answer questions to reflect on what you learned. (10 minutes)

Optional Training Activity

- Discuss any unanswered questions users may have or if completing this individually, direct any unanswered questions to your INFOhio Provider via email.

Contact Hour Quiz and Certificate

- **Lesson Content**

Take a quiz to earn a certificate for 3 contact hours. (10 minutes)