

# 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 in to BLUEcloud Central.
- Set into the correct institution (school building).
- Create a new patron record.
- Search for an existing patron.
- Check out an item to a patron.
- Check an item in.
- Renew an item.
- Explore special circulation features such as check item status and mark items used.
- 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.
- Reflect on learning by sharing information with others.

**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

### Pretest

- **Lesson Content**

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

### Welcome to the BLUEcloud Circulation Class

- **Lesson Content**

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

#### Optional Training Activity

- 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.

### Using Open Space Groups

- **Lesson Content**

Join the BLUEcloud Library Services group in Open Space. (5 minutes)

### How to Navigate BLUEcloud

- **Lesson Content**

Learn how to access and navigate BLUEcloud. (10 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 ITC's Library Support Staff.
- Complete the guided notes for this lesson.

## Patron Management

---

### 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 for each 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. (15 minutes)

#### Optional Training Activities

- Complete the guided notes for this lesson.
- 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 Out an Item

- **Lesson Content**

Learn how to check out and circulate materials from a patron record. (15 minutes)

#### Optional Training Activities

- Complete the guided notes for this lesson.

#### Check In an Item

- **Lesson Content**

Learn how to check in materials with BLUEcloud Circulation. (15 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.

### Renew an Item

- **Lesson Content**

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

#### Optional Training Activities

- Complete the guided notes for this lesson.

### Special Circulation Functions

- **Lesson Content**

Learn how to check an item's status, mark items used, and receive transits. (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. (20 minutes)

#### Optional Training Activities

- Complete the guided notes for this lesson.

## Holds

---

### Viewing Holds

- **Lesson Content**

Learn how to view holds. (15 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. (20 minutes)

#### Optional Training Activities

- Complete the guided notes for this lesson.

### 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 and/or answer the discussion questions from the lesson in the [BLUEcloud Library Services](#) Open Space group. Find the *Your Reflections on BLUEcloud Circulation* post in the Discussions tab. (5 minutes)

### Contact Hour Quiz and Certificate

- **Lesson Content**

Take a quiz to earn a certificate for 3 contact hours. (5 minutes)