

MobileStaff Trainer Guide

3 Contact Hours



Optional Training Activities

- Optional training activities are estimated to add 35 minutes to the original training time and include the minutes indicated for the original activity.

Learning Objectives

Participants in the MobileStaff class will achieve the following objectives:

- Understand your Setup options.
- Successfully search for users and items using MobileStaff.
- Check items in and out.
- Renew items.
- Add and modify user records.
- Manage holds and generate a “holds pull list.”
- Inventory an item.
- Generate a list of items to be weeded with Deselect.
- Use MobileStaff in Offline mode.
- Use MobileStaff Kiosk as a self-checkout station.
- Use MobileStaff to track event attendance.
- Reflect on learning by sharing information with others.

In this course, participants will work through several lessons to learn more about MobileStaff. Upon successful completion of this class, participants will earn a certificate for three contact hours. 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 MobileStaff.
(5 minutes)

Welcome to the MobileStaff Class

- **Lesson Content**

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

Optional Training Activity

- Create a "Parking Lot" for questions that arise throughout the training, either with chart paper or in a shared digital document like Google Docs. (5 minutes)

Using Open Space Groups

- **Lesson Content**

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

Getting Started with MobileStaff

- **Lesson Content**

Learn how to access and set your defaults before you use MobileStaff.
(10 minutes)

Optional Training Activities

- Have participants sign into MobileStaff on a computer or device to ensure they can access the software successfully. (5 minutes)
- Demonstrate adding default settings and discuss with the group the pros and cons of using each one. (5 minutes)

MobileStaff Search

Searching with MobileStaff

- **Lesson Content**

Learn how to use MobileStaff to search for both users and items. (15 minutes)

Optional Training Activities

- Demonstrate searching in MobileStaff for both users and items. Encourage participants to try a few different searches themselves. Discuss any questions or difficulties that arise. (10 minutes)
- Use the MobileStaff Guided Notes throughout this training to help participants engage in learning. (time include in lesson)

Circulation

Check In

- **Lesson Content**

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

Optional Training Activity

- Demonstrate checking in items. Participants can follow along on a device or in a browser window. (10 minutes)

Check Out

- **Lesson Content**

Learn how to check out materials to students and staff with MobileStaff.
(10 minutes)

Optional Training Activity

- Demonstrate checking items out to users. Participants can follow along on a device or in a browser window. (10 minutes)

Renewing Items

- **Lesson Content**

Learn how to renew materials by item and user. (10 minutes)

Optional Training Activities

- Demonstrate renewing items by user and by item. Participants can follow along on a device or in a browser window. (10 minutes)

Item Maintenance

Hold

- **Lesson Content**

Learn how to manage holds and generate a "holds pull list." (20 minutes)

Optional Training Activities

- Discuss Holds setup in Workflows and why this must be in place before using Holds within MobileStaff. (10 minutes)
- Demonstrate creating an On-Shelf Holds Pull List as well as the various other Holds features. (10 minutes)
- As a group, discuss the pros and cons of allowing holds. (10 minutes)

Inventory

- **Lesson Content**

In combination with Workflows, learn how to inventory your collection with MobileStaff. (20 minutes)

Optional Training Activity

- Demonstrate how to use MobileStaff to inventory items. Include a quick summary of the whole inventory process and how MobileStaff fits into inventory planning. (15 minutes)

Deselect

• Lesson Content

Learn how to generate a list of items to be weeded and/or discarded. (15 minutes)

Optional Training Activity

- Demonstrate using deselect to mark items missing and discarded. (10 minutes)

User Management

Adding and Modifying Users

• Lesson Content

Learn how to add users and modify user information. (10 minutes)

Special Functions

Kiosk

• Lesson Content

With MobileStaff Kiosk, learn how to create a self-checkout/check in station. (10 minutes)

Optional Training Activity

- Demonstrate using Kiosk mode and brainstorm ways library staff could set up their own Kiosk station. (15 minutes)

Offline

• Lesson Content

Learn how to use offline mode in case of an internet outage. (10 minutes)

Optional Training Activities

- Demonstrate going offline on a device projected to a large screen. (15 minutes)
- Have participants print and/or save a file of barcodes in preparation for offline mode access. (10 minutes)

Events

- **Lesson Content**

Learn how to track event attendance with MobileStaff Events. (10 minutes)

Optional Training Activities

- Do a live presentation on setting up an Event. Demonstrate checking in at a previously created Event. (10 minutes)
- Brainstorm ways Events could be used in the library and school. Share with the group. (5 minutes)

Checking Your Learning

Self-Assessment

- **Lesson Content**

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

Optional Training Activity

- Take a few minutes to review any "Parking Lot" questions. (5 minutes)
- Answer the discussion questions from the lesson in the [BLUEcloud Library Services](#) Open Space group. Find the *Your Reflections on MobileStaff* post in the Discussions tab. (5 minutes)

Contact Hours Quiz and Certificate

- **Lesson Content**

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