



Campbell County Public Library

1000 Highland Avenue
Fort Thomas, Kentucky

You Should Know This By Now: Getting Your Staff Tech Skills on the Same Page

- Slide 1: Introduction
 - Serve a county population of 90,000
 - Staff of 85 people; 4 branches, 1 of which I manage
- Slide 2: Roadmap for this session
 - Why we created a competency program
 - Organization
 - Planning
 - Answering all of the questions
 - Involving the staff
 - How it turned out
 - How we maintain the program
- Slide 3: First Attempt
 - In 2008 (before I was on staff), the library created an online help desk for staff to submit computer help tickets.
 - This sounded like a great idea but ended up being too many questions
 - For one (1) IT person
 - And that led to a discussion of what staff should know how to do versus what should be reported to IT
 - In 2010 a committee was created to make competency lists for reference and circulation staff
 - A committee members went over the lists with staff members.
 - They felt like it was a checklist of too many things. Staff reacted negatively to the process.

- Turned out to be a one-time thing which was not repeated.
 - There was no follow-up or enforcement for those who didn't retain the training.
 - Then the person who started the competency program left the library and no more work was done on it.
- Fast forward to 2014 - PLA
 - My director attended a presentation at the Public Library Association conference on staff tech competencies and decided we needed to try it again.
 - The project was assigned to the newest manager (me) who had no history with the previous, failed attempt at a competencies program.
 - I was assigned a committee and told to get started.
- Slide 4: A good old-fashioned literature review
 - I was a bit overwhelmed with the task so what do good librarians do when they need information?
 - I scoured EBSCO databases, library websites, and the web in general to find help in getting started.
 - The best resource I found was Sarah Houghton-Jan's *Library Technology Report: Technology Competencies and Training for Libraries*.
 - Although it was published in 2007, I still think it's relevant and useful for anyone wanting to start a competencies program.
 - At over 60 pages it's not a short read, but it was invaluable to us. I assigned it to my committee members and we would read and discuss a couple of chapters at each of our meetings.
 - I have included a list of other good sources to check out in the presentation documents.
- Slide 5: Why do we want tech competencies?
 - Get staff tech skills on the same page – make sure that people in the same position (such as circ clerk) are equally competent
 - Communicate management expectations to the staff – employees need to know what is expected of them
 - Create a culture of learning – tech is changing and employees have to keep up with the changes in order to be successful
 - Relieve the tech Pack Mules – (and you may be one!) those people who get tapped to fix a tech problem, answer a patron's tech question, or explain (once

again) to a staff member how to do a common tech task (that they should know how to do). The Pack Mules get tired, possibly angry, possibly resentful, of having to carry the load of co-workers who have the exact same job.

- Improve customer service – if the Pack Mule is not working, what happens when a patron asks for help with something that the person on the desk can't handle?
- New hire training - An unintended side effect of this process was creating a training tool for new hires. Use the tech competency lists in initial training for new employees.
- Slide 6: Our definition of competency
 - We needed to define for the committee and the staff what competence meant for our organization.
 - This definition can apply to all sorts of competencies.
 - Some libraries have implemented customer service competencies.
- Slide 7: Why aren't we competent?
 - Shared responsibility/failure
 - For us ... no formal training program for new employees ... but we're working on that
 - We have people who are not committed to learning what they need to know to do their jobs well
- Slide 8: Initial thoughts and goals
 - Involve the entire staff
 - We wanted the process to be transparent and to involve all 85+ people
 - Stressed to them that the competencies would be
 - obtainable
 - reasonable
 - within their reach
 - Take our time

9 months from the first committee meeting to the first round of assessments
Don't rush the process!
 - Add teeth
 - Wanted to build in consequences so the process would be taken seriously
AND
 - Motivate staff to get the training they need to meet the competencies
 - Staff training
 - Would be a by-product

- Would need resources and time to provide training
 - Wanted positive attitudes among committee members
The committee members responsible for
 - fostering and maintaining a positive attitude,
 - encouraging open feedback, and
 - reining in discussions that get off point or become too negative.
- Slide 9: First steps
 - Develop a purpose statement
 - Distributed to all staff members.
 - Outlined
 - the purpose of the competency program
 - goals of the program
 - intended benefits for the staff and library
 - Develop a step-by-step plan.
 - Include supervisors in determining what the competencies should be.
- Slide 10: The Plan – Year One
 - Develop competencies for all positions
 - Complete pre-assessment for all employees
 - First pre-assessment served as baseline
 - Informed committee of training needs
 - Train where necessary
 - Post-test employees who failed the pre-assessment
 - Going forward we would include competency requirements in job descriptions and evaluations
- Slide 11: What constitutes tech?
 - We defined tech very broadly to include any kind of electronics, hardware, or software.
 - We even included a laminator!
- Slide 12: How specific should the competencies be?
 - Very!
 - Must be measurable and unambiguous
 - Do they know it or not?
 - Most of our competencies start with CAN (do something) or KNOWS (something)
 - For a knowledge-based competency you would ask the employee to describe or explain the competency to you.

- Slide 13: What is “core”?
 - Our program is called CORE Technology Competencies
 - There can be A LOT of discussion over what is core. Different people have different ideas.
 - Start with the job description.
 - What are the minimum skills required for the job?
 - What about those rare events?

Some tasks are not done very often so some committee members thought they should not be core. We threw out the idea that the frequency of a task should be the deciding factor.

 - For Example: We don’t process many credit card refunds but the staff should still be able to handle them when they come up.
 - What about different practices among branches?
 - Azuradisc example:
 - Disc resurfacing machine for discs that are scratched, skip, won’t play, etc.
 - Fort Thomas branch – all circ staff were required to know how to use it
 - Newport branch – only 1 person was allowed to touch the machine (and I think that was because somebody broke the first machine they had)
 - Cold Spring branch – was somewhere in between
 - Ultimately, (after some haggling) this was added as core for all circ staff
 - Pages example:
 - The pages at the Newport branch help with basic circulation functions so staff at the Newport branch wanted those on the pages’ competency lists.
 - However, the other branches do not use Pages at the circ desk and did not want those circulation functions as core.
 - Because circ functions weren’t part of their job description, they were not included.
- Slide 14: What documentation do we already have?
 - Start with existing documentation to compile the lists

- Slide 15: Involving the entire staff
 - They (should) know their jobs best
 - Give them a sense of having a “say” in the process
 - Hoping that would create buy-in and ownership
 - We used the Padlet app at a staff-wide tech training.
 - Employees used tablets to give their ideas on what the competencies should be for each department.
 - The results were projected on a screen in real time so that everyone could see and interact with the ideas.
 - The app provided anonymity so that staff felt that they could be honest.
 - The results were easily compiled and reviewed by the committee.
- Slide 16: Finalizing the competencies
 - Ready to create a master list for all positions
 - Had polled the supervisors
 - Had polled the staff
 - Had combed through documentation
 - Created forms for each position
 - Supervisors gave final review
- Slide 17: Preparing for the pre-assessment
 - Released forms to entire staff 2 months prior to the beginning of the assessment period.
 - They were to review and get training for what they were unsure of.
 - Continually stressed to the staff that their score on the pre-assessment would not count against them.
 - It was simply going to be used as a baseline
 - And to let the committee know where we needed to focus training efforts.
 - Post-assessment would carry some penalties
 - At my branch, I noticed a lot of team-building as the staff members helped each other work through their lists.
 - Some people learned things they didn’t know before
 - Some people learned easier ways of doing tasks.
 - 3 people at my branch learned how to set their voicemail greeting as a result of the competencies.
- Slide 18: Prepping the supervisors

- While the staff was prepping for the assessments, the committee prepped the supervisors.
- The supervisors would be required to perform the assessments, not the committee members (like 2010).
- For this to work, the supervisors had to be willing to put in the time to do the competencies correctly.
- Ask the employee to perform or discuss each competency. Does the supervisor have to see the employee complete each task on the list?
 - Yes! This was part of the problem in the first attempt in 2010 – some employees were allowed to assess themselves.
 - You may have supervisors who want to do it this way.
 - We had a supervisor close to retirement who gave the competency forms to her employees and told them to let her know what they couldn't do. That's not acceptable.
 - Doing it this way takes time – my first list for my position was 16 pages long and took 3 hours to complete. A 30 minute assessment is not being done correctly.
 - There will be some obvious exceptions
 - Your employee routinely sends you emails
 - Your employee has sent you attachments
 - Your employee has submitted time off requests through the online timekeeping system
 - You know your employee can do these things so no need to ask them to demonstrate it
- Do not prompt or help the employee
 - I had a supervisor who was a bit of a mother hen with her employees. I had to really stress to her not to do this as it was her natural tendency. We stressed to the supervisors that they are not with their employees every second of the work day – they can't be. So employees must be able to do these tasks on their own. It's the whole point of the program.
- Allow the employee a reasonable amount of time to complete the competency.
 - What's reasonable? The amount of time an average patron will wait for an employee to figure out how to help them.
 - We allow employees to use manuals, instructions, etc. to complete a competency but still must be done in a reasonable amount of time.

- Slide 19: Best practices
 - Go through your own competency review before you do it with your employees.
 - You will have a better appreciation for the process.
 - You may learn some things that you need to know before testing someone else.
 - Provide a quiet space away from the rest of the staff for you and the employee to meet.
 - You want to remove as many stressors as possible.
 - We use laptops in the branch's study room
 - Sometimes we use the employee's office computer.
 - Consider using a computer/browser that does not have everything made into a shortcut or bookmark. Challenge the employee to find sites/programs independently.
 - Not everyone does this and they joke that I'm being too tough to require this of my employees but I think it's important. What if they lost all of their shortcuts one day and had to start over?
 - Use your ILS's training server for the ILS competencies
 - We use Polaris and no one at my library knew we had a training server until we started doing competency reviews. Now the circ supervisors use it all the time.
 - You can add charges, take payments, place holds, add fake patrons, delete patrons, etc. without affecting the production server. The only thing we can't do is take credit card payments.
 - Consider breaking up the competency review into two or more days.
 - Depends on the length of the competency lists.
 - Some of ours were very long.
 - A fatigued employee can make mistakes.
 - You'll want a break as well.
- Slide 20: Example of our competency form (also included in presentation docs)
- Slide 21: Incentives and Scoring
 - We set a 3-month window during which all competencies had to be completed.
 - To encourage everyone to make the deadline we made it competitive.
 - Each branch that had 100% completion (not 100% passing) received a food party. (everyone completed and we continue to use this incentive)

- A score of 95% was required to pass. There was no consequence for not passing other than they would have some training and then be assessed again (where there WOULD be consequences for not passing).
- We didn't formally decide what the penalty would be for not passing until AFTER the pre-assessments were completed.
- I would recommend that you work this out BEFORE you even start doing assessments on people so they will know what to expect.
- Out of 75 employees, 5 did not pass. They were re-assessed 6 months later and passed.
 - Some had test anxiety.
 - Some didn't take it seriously.
 - One person scored a 70%. The competency program really highlighted how far behind everyone else she was. Her supervisor worked hard to help her pass the post-assessment and then she (the employee) retired.
- Slide 22: Some common trouble spots
- Slide 23: Follow-up training
 - Created training videos for staff
 - One-on-one, supervisor/employee training
 - We now use the Litmos online learning management system for training and have been very happy with it.
 - We roll out new hire training this way as well as new training for all employees.
 - Willing to talk to anyone after the presentation about it. Can show you our Litmos site.
- Slide 24: Penalties : The Serious Stuff
 - Committee was split on the seriousness of staff not passing
 - We knew this had to have teeth to work. Our 2010 experiment proved that.
 - Some thought that termination should be a penalty, others didn't want to go that far.
 - Our HR Manager says that librarians are too nice.
 - Ultimately, the director, HR manager, and I decided that termination was the only option.
 - And it has not happened yet.
- Slide 25: The Road to Termination
 - Fail the pre-assessment

- Issued a formal notice that says they failed the pre-assessment and must complete a post-assessment. Outlines all of the steps ...
 - Have 4 months to train and prepare for the post-assessment
 - Fail post-assessment then put into Performance Improvement Plan
 - Have 2 weeks to pass the post-assessment
 - Can the post-assessment as many times as they want
 - Only retest on the competencies they failed the first time, not the entire list
 - Fail 2nd post-assessment – immediate termination
 - This has scared some people who failed the pre-assessment so it works.
- Slide 26: Things We Learned
 - Repeat the process every 2 years
 - Initially we thought we would do this every year but we realized that was too much for everyone.
 - Plus, we needed to allow enough time to pass that the competencies would change some between assessments.
 - Maintenance means removing competencies related to outdated equipment, software, processes
 - Add new
 - Create new lists when new positions are added
- Slide 27: Ideas for the future
 - Automate
 - Move the process online (using paper forms now)
 - Easier management
 - Results easily tabulated
 - Not sure how to go about doing this
 - Incentivize
 - Create a second, optional tier of competencies for employees to shoot for
 - Would encourage the staff to achieve more
 - Reward success
 - Pay raise?
 - Gift?
 - Public recognition?
- Slide 28: Summary
 - Create a purpose statement
 - Allow entire staff to participate in identifying the core competencies of their jobs

- Develop a system to assess staff members
- Decided to use a pass/fail system
- Provided training
- Develop a schedule for maintenance and future assessments



Campbell County Public Library

1000 Highland Avenue
Fort Thomas, Kentucky

Core Technology Competencies Purpose Statement

It is the goal of the library to identify the essential technological skills and knowledge required for each job position and to ensure that all employees meet or exceed these requirements through evaluation and training. Each employee will be given the opportunity to strengthen existing technological skills and learn new ones. The library desires that all employees feel confident in performing their job duties. When employees successfully carry out their responsibilities patrons have a positive and productive library experience and a greater appreciation of the knowledge and skill required to work at the public library. The library believes that a core technology competencies program will equip the entire staff with the appropriate levels of expertise and the ability to assist the public more effectively.

Helpful resources

- Sarah Houghton-Jan (Librarian in Black)
 - April 2007–*Library Technology Report: Technology Competencies and Training for Libraries* (free PDFs available through archive section of ALA TechSource - <https://journals.ala.org/index.php/ltr/issue/view/209>)
 - *Technology Competencies: a path to training* (slideshow at <http://slideplayer.com/slide/1471717>)
- Library Staff Competency Collections, compiled by WebJunction
https://www.webjunction.org/documents/webjunction/Library_Staff_Competency_Collections.html
- Ohio Public Library Core Competencies
<http://olc.org/resources/education/core-competencies>
- Ephrata Public Library (PA) Staff Competencies
<http://ephratapubliclibrary.libguides.com/competencies>
- Southern Ontario Library Service
<http://www.sols.org/index.php/develop-your-library-staff/competencies2/competencies-index>

Patron Services Assistant Core Technology Competencies Checklist	Employee Name: _____	Date started: _____	Select assessment period _____ Pre _____ Post
	Supervisor Name: _____	Date completed: _____	

<p>Scoring:</p> <p>A. Number of items for which the employee needs further training: _____</p> <p>B. Number of pages in this checklist: _____</p> <p>Pass: The number on line A is less than or equal to the number on line B. Fail: The number on line A is greater than the number on line B.</p> <p>This employee has (check one): PASSED _____ FAILED _____</p>	<p>Please sign when checklist is completed:</p> <p>Employee _____</p> <p>Supervisor _____</p> <p>Manager _____</p>
--	---

Place in a checkmark in each box when completed			Comments
✓	1.	Timesheet Software	
	a.	Can reset forgotten password for timesheet	
	b.	Can enter regular hours and holiday hours	
	c.	Can locate accumulated vacation, sick leave, or PTO	
	d.	Can locate pending and approved time off requests	
	e.	Can submit time off requests	
	f.	Can approve individual timesheet	
	g.	Can reset forgotten password for pay stubs	
	h.	Can retrieve electronic pay stubs and W2s	
✓	2.	Email	
	a.	Can open, create, reply, forward, send, delete email	
	b.	Can open other folders (e.g. sent, deleted)	
	c.	Can attach a file to a message	
	d.	Can change password	
	e.	Can set up automatic out-of-office reply	
	f.	Can change email signature	
✓	3.	Wiki	
	a.	Can reset forgotten password	
	b.	Can locate work schedules	
	c.	Can locate job description	
	d.	Can locate performance review forms	
	e.	Can locate Personnel Policies	

Place in a checkmark in each box when completed		Comments
	f. Can locate branch staff list	
	g. Can locate emergency contact form	
	h. Can locate core competency checklist	
	i. Can locate applicable training manuals and guidelines	
	j. Can change password	
	k. Can open documents (e.g. performance review forms)	
✓	4. Litmos	
	a. Can reset forgotten username/password	
	b. Can find and take courses from the Course Library	
	c. Can view completed courses	
	d. Can view/download achievement certificates	
	e. Can view courses that are in progress, overdue, or not started	
✓	5. Basic computer use	
	a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)	
	b. Can reboot computer	
	c. Can exit slideshow and restart public relations device at Patron Services desk	
✓	6. Polaris – Basics	
	a. Can start, logon, logoff, and exit Polaris client	
	b. Can load entire search list when Polaris loads only partial results	
✓	7. Polaris – Searching	
	a. Can search bibliographic records	
	b. Can search item records	
	c. Knows the difference between bibliographic and item records	
	d. Can search for items by common fields: title, author, keyword, series, barcode	

Place a checkmark in each box when completed		Comments
	e. Can find a patron registration by using patron name or barcode	
	f. Can sort search results by author, date and format	
✓	7. Polaris – Record sets	
	a. Can create an item record set	
	b. Can add item records to a record set	
	c. Can find and access a record set	
	d. Can remove items from a record set	
	e. Can delete a record set	
	f. Can bulk change item record sets	
	g. Can properly bulk change weeding item record sets	
	h. Knows how to assign the correct ownership level to record sets	
✓	9. Polaris – Patron registration	
	a. Can create a new patron registration	
	b. Knows how to determine correct statistical class	
	c. Can delete a patron registration	
	d. Can update a patron registration	
	e. Can reset PIN	
	f. Can add patron photo	
	g. Can turn on a patron's reading history – knows how long the reading history is kept, how many items can be in the list, and what happens when reading history is turned off	
	h. Can enable eReceipts	
✓	10. Polaris – Patron notes and blocks	
	a. Can add a library-assigned or free text patron block	
	b. Can delete a patron block	

Place in a checkmark in each box when completed		Comments
	c. Can add a blocking or non-blocking note	
	d. Can delete a blocking or non-blocking note	
	e. Knows what to enter in a patron note field after submitting an item request on behalf of patron	
✓	11. Polaris – Reports	
	a. Can run and print the Request Manager report (pick list)	
	b. Can run and print financial report for balancing cash drawer	
	c. Can run, post, and print fines Z-fold mailer	
	d. Can run, post, and print holds Z-fold mailer	
	e. Can run, post, and print billing Z-fold mailer	
	f. Can run, post, and print overdue Z-fold mailer	
	g. Knows how to re-print daily notices (e.g. in the event of printer error)	
✓	12. Polaris – Check out/renewal	
	a. Can open check out screen	
	b. Can process check out blocks and messages	
	c. Can check out items to a patron	
	d. Can print check out receipt	
	e. Can view items checked out to a patron	
	f. Knows how to assign a special loan period and under what conditions	
	g. Can renew all items on a patron account	
	h. Can renew partial list of items on a patron account	
	i. Can determine how many times an item has been renewed	
	j. Can identify how many renewals are remaining	

Place in a checkmark in each box when completed		Comments
	k. Knows when auto-renewal takes place and the reasons (3) why the renewal may be denied	
	l. Can print a list of all items out	
	m. Can reset due date	
✓	13. Polaris – Check in	
	a. Can check in on normal mode	
	b. Can check in on bulk mode	
	c. Can check in on in-house mode	
	d. Can set free days on check in	
	e. Knows difference between grace period and free days	
	f. Can process check in messages and blocks	
	g. Can print check in receipt	
✓	14. Polaris – Patron accounting	
	a. Can view a patron's charges	
	b. Can process cash or check payment in full	
	c. Can process cash or check partial payment	
	d. Can waive all charges	
	e. Can waive partial charges	
	f. Can process credit card payment in full	
	g. Can process credit card partial payment	
	h. Can process payment from credit	
	i. Can view a patron's notice history	
	j. Can create a charge on a patron's account	

Place in a checkmark in each box when completed		Comments
	k. Can manually create a credit on a patron's account	
	l. Can view a patron's financial transaction history	
	m. Can determine what form of payment a patron used to pay a charge (e.g. cash, credit card, etc.)	
	n. Knows the procedure for refunding a credit when the original charge was paid by cash/check	
	o. Knows the procedure for refunding a credit when the original charge was paid by credit card	
✓	15. Polaris – Claims and lost items	
	a. Can set an item to Claim Returned	
	b. Can set an item to Claim Never Had	
	c. Can estimate fines for a patron on overdue items that have not been returned	
	d. Can declare an item lost	
	e. Can find the price of a lost item for a patron	
	f. Can resolve a lost and un-paid item	
	g. Can resolve a lost and paid item	
	h. Can resolve a withdrawn item that has been returned	
	i. Can resolve a deleted item that has been returned	
✓	16. Polaris – Holds	
	a. Can place a bibliographic-level hold on an item	
	b. Can place an item-level hold on an item (and knows when it is appropriate to do so)	
	c. Can view a patron's hold list	
	d. Can cancel a hold	
	e. Can delete a hold	
	f. Knows what the following holds terms mean: active, cancelled, held, inactive, pending, not-supplied	

Place in a checkmark in each box when completed		Comments
	g. Can view holds queue	
	h. Can inactivate a hold request	
	i. Can reactivate a hold request	
	j. Can group and ungroup holds	
	k. Can change pickup location on a hold with a status of Active, Inactive, Pending, or Held	
✓	17. Polaris – Item records	
	a. Can change an item circulation status to in-repair, missing, or withdrawn	
	b. Know when to check/uncheck boxes in item records (non-circulating, display in PAC, loanable outside system, holdable)	
	c. Can determine item availability	
	d. Can find item due date	
	e. Can find last check in date	
	f. Can find item check out date	
	g. Can view and interpret an item's circulation history	
	h. Can change the barcode number of an item	
	i. Can find the current borrower information on a checked out item	
	j. Can find last borrower information on an item	
	k. Can add a library assigned or free text block to an item	
	l. Can change loan periods (e.g. 3 days to 7 days for DVDs)	
✓	18. Polaris – Serials	
	a. Can check in newspapers and magazines	
	b. Can uncheck in newspapers and magazines	
	c. Can combine magazine issues	

Place in a checkmark in each box when completed		Comments
	d. Can add/predict more magazine issues	
✓	19. Polaris – Off-line	
	a. Can log into Polaris off-line	
	b. Can log off Polaris off-line	
✓	20. Public Access Catalog	
	a. Can search for items	
	b. Can search for items for Accelerated Reader or Lexile information (e.g. Lexile score, AR interest level, book level, or point level)	
	c. Can narrow search by type of material and branch	
	d. Can help a patron log in to account	
	e. Can help a patron place a hold	
	f. Can help a patron make a payment	
✓	21. Library website	
	a. Can register a patron for a program	
	b. Can submit request for one-on-one technology training for patron	
	c. Can sign up a patron for the library newsletter	
	d. Knows where to direct a patron to sign up for a digital only library card	
	e. Knows where to direct a patron to apply to use a meeting/study room	
	f. Knows where to direct a patron to apply for a job or volunteer position	
	g. Knows where to direct a patron to sign up for book recommendations by email	
✓	22. Library telephone system	
	a. Can answer incoming calls	
	b. Can transfer calls	
	c. Can place call on hold	

Place in a checkmark in each box when completed		Comments
	d. Can make outside calls	
	e. Can make in-house calls	
	f. Can check voicemail	
	g. Can delete voicemail	
	h. Can change personal voicemail greeting	
✓	22. Miscellaneous web sites	
	a. Can submit a trouble ticket (for technology help)	
	b. Can submit an item request (for purchase)	
	c. Can create/edit reservations for meetings using online calendars	
✓	24. Printing – basics	
	a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs	
	b. Can use print preview (when available)	
	c. Can choose between printers	
✓	25. Printing – receipt printers	
	a. Can turn on/off	
	b. Can change paper	
✓	26. Printing – Dymo label printer	
	a. Can change paper	
	b. Can print spine label	
✓	27. Printing – copier/printer/scanner/fax	
	a. Knows where main power switch is located	
	b. Can load paper	
	c. Can clear paper jams (knows all the places to look for paper jams)	
	d. Can change toner	
	e. Can copy in black/white or color	
	f. Can enlarge and reduce	

Place in a checkmark in each box when completed		Comments
	g. Can use Preview feature	
	h. Can make single-sided or double-sided copies	
	i. Able to use any tray for copying and copy to all paper sizes	
	j. Can scan and email documents in black/white or color	
	k. Can make an image lighter or darker	
	l. Knows procedure for calling Millennium for service	
✓	28. Equipment - Televisions	
	a. Can turn on/off	
	b. Can select various inputs (HDMI, AV, etc.)	
	c. Can display live programming on TVs with antenna (e.g. weather)	
	d. Can change channel	
	e. Can adjust volume	
✓	29. Equipment - Azuradisc	
	a. Can resurface discs	
	b. Can clean machine	
✓	30. Equipment – Security camera hardware/software	
	a. Can launch security camera software	
	b. Can view live feeds on all cameras at home branch	
✓	31. Equipment – Miscellaneous	
	a. Can operate shredder	
	b. Can take photos with digital camera or cell phone	
	c. Can operate ZappBug Oven	
	d. Can arm and disarm emergency door alarms	
	e. Can arm and disarm AED door alarm	

Place in a checkmark in each box when completed		Comments
<input type="checkbox"/>	f. Can operate AED	



Core Technology Competencies for Personnel

"Connecting you to big ideas wherever you are!"

Introduction.....	3
Competency Review Schedule.....	4
Pre-assessment Evaluation Process	9
Post-assessment Evaluation Process	11
Performance Improvement Plan Process	13
Training.....	15
Adult Outreach Services Librarian.....	16
Adult Programming Coordinator	22
Adult/Teen Services Librarian	28
Adult/Teen Services Programmer	41
Assistant Library Director.....	53
Branch Manager.....	59
Branch Services Assistant.....	75
Branch Supervisor	87
Children’s Programmer.....	100
Children’s Services Librarian	109
Collection Services Assistant.....	118
Collection Services Coordinator	121
Collection Services Librarian	127
Custodian	133
Digital Marketing Coordinator.....	134
Early Literacy Outreach Librarian.....	140
Early Literacy Outreach Programmer	147
Facilities Specialist	154
Human Resources Manager.....	157
Information Services Assistant	161
Information Services Librarian.....	172
Information Technology Coordinator.....	183
Interlibrary Loan Specialist	189
Library Accountant	193
Library Director.....	199
Library Page.....	205
Page Supervisor	207
Patron Services Assistant	214
Patron Services Supervisor.....	221
Processing Assistant.....	229
Public Relations Manager	232
Public Relations Specialist.....	238
Technical Services Assistant.....	243
Technical Services Manager	245
Technical Services Specialist.....	250
Weekend Courier	253
Master List	255

Introduction

Created 15 April 2015
Revised 11 Nov 2015
Reviewed 3 Dec 2018

It is the goal of the Library to identify the essential technological skills and knowledge required for each job position and to ensure that all employees meet or exceed these requirements through evaluation and training.

Each employee will be given the opportunity to strengthen existing technological skills and learn new ones. The Library desires that all employees feel confident in performing their job duties. When employees successfully carry out their responsibilities patrons have a positive and productive library experience and a greater appreciation of the knowledge and skill required to work at the public library. The Library believes that a core technology competencies program will equip the entire staff with the appropriate levels of expertise and the ability to assist the public more effectively.

Competency Review Schedule

Created 11 Nov 2015
Revised 3 Dec 2018
Reviewed 3 Dec 2018

All employees will be assessed on their core technology competencies on a schedule determined by the Competencies Committee and library administration.

The initial competencies calendar is as follows:

Time period	Activity
Nov 2014 – Mar 2015	Competency Committee members and supervisors create the competency lists for each job position.
Apr 2015	All competency lists are posted on the wiki and staff members are encouraged to review them and prepare for their pre-assessments.
May – Jul 2015	Supervisors complete one-on-one pre-assessments with each employee using the competency checklists posted on the wiki. The completed pre-assessments are sent to the Human Resources Manager.
Aug 2015 – Jan 2016	The Competency Committee reviews the pre-assessments and develops training tools based on the needs identified in the pre-assessments. Using the training tools, supervisors and employees work together to master the failed competencies from the pre-assessment.
Feb – Mar 2016	Post-assessment period (for those employees who do not pass the pre-assessment)

2017 – 2018 Competencies Calendar

Time period	Activity
Jan – May 2017	Competency Committee members and supervisors update/create the competency lists for each job position.
Jun – Jul 2017	All competency lists are posted on the wiki and staff members are encouraged to review them and prepare for their pre-assessments.
Aug – Oct 2017	Supervisors complete one-on-one pre-assessments with each employee using the competency checklists posted on the wiki. The completed pre-assessments are sent to the Human Resources Manager.
Nov 2017 – Jan 2018	The Competency Committee reviews the pre-assessments and develops training tools based on the needs identified in the pre-assessments. Supervisors and employees work together to master the failed competencies from the pre-assessment.
Feb 2018	Post-assessment period (for those employees who do not pass the pre-assessment)

2019 – 2020 Competencies Calendar

Time period	Activity
Jan – May 2019	Competency Committee members and supervisors update/create the competency lists for each job position.
Jun – Jul 2019	All competency lists are posted on the wiki and staff members are encouraged to review them and prepare for their pre-assessments.
Aug – Oct 2019	Supervisors complete one-on-one pre-assessments with each employee using the competency checklists posted on the wiki. The completed pre-assessments are sent to the Human Resources Manager.
Nov 2019 – Jan 2020	The Competency Committee reviews the pre-assessments and develops training tools based on the needs identified in the pre-assessments. Supervisors and employees work together to master the failed competencies from the pre-assessment.
Feb 2020	Post-assessment period (for those employees who do not pass the pre-assessment)

2021 – 2022 Competencies Calendar

Time period	Activity
Jan – May 2021	Competency Committee members and supervisors update/create the competency lists for each job position.
Jun – Jul 2021	All competency lists are posted on the wiki and staff members are encouraged to review them and prepare for their pre-assessments.
Aug – Oct 2021	Supervisors complete one-on-one pre-assessments with each employee using the competency checklists posted on the wiki. The completed pre-assessments are sent to the Human Resources Manager.
Nov 2021 – Jan 2022	The Competency Committee reviews the pre-assessments and develops training tools based on the needs identified in the pre-assessments. Supervisors and employees work together to master the failed competencies from the pre-assessment.
Feb 2022	Post-assessment period (for those employees who do not pass the pre-assessment)

Competencies Calendar for New Hires

First 12 months of employment	Activity
Months 1-4	Introductory period
Month 5	4 month evaluation
Month 6	Core Technology Competencies pre-assessment
<p>Exception: If the employee's 6 month anniversary date falls between Jan 1 and Oct 31 of odd years, the employee's competency assessment will be conducted during the all-staff assessment period of Aug-Oct of odd years. For example, an employee hired August 1, 2018, has a 6 month anniversary date of February 1. This employee's competency assessment will be delayed until the all-staff assessment period of Aug-Oct 2019.</p>	
Months 7-9	Training period
Month 10	Post-assessment period (for those employees who do not pass the pre-assessment)
Month 13	Annual evaluation

Pre-assessment Evaluation Process

Created 11 Nov 2015
Revised 23 Mar 2017
Reviewed 3 Dec 2018

Pre-assessments

During the assigned pre-assessment period, supervisors will print the appropriate competency worksheet from the wiki and ask the employee to demonstrate his/her knowledge of each individual competency for his/her job position. The competency review may take place in one day or over a number of days but must be completed by the assigned deadline.

A competency is considered to be mastered if the employee can perform it within a reasonable amount of time and without prompting from his/her supervisor. If an employee cannot demonstrate that he/she has mastered a competency, that competency should be marked as "needs training."

Scoring

Once the pre-assessment has been completed, the supervisor counts the number of competencies that are marked "needs training" and enters it in the scoring box on the worksheet. If the number is less than or equal to the number of pages in the entire competency checklist, the employee has passed the pre-assessment and a post-assessment is not necessary. This is roughly a 95% pass rate. The method for this calculation is as follows:

- There are 20 or less competencies on each page of the checklists
- Since each page has no more than 20 competencies, a 95% passing rate means that each employee must get 19 correct per page.
- This means that an employee may fail 1 competency per page and still pass the pre-assessment.

* Note: The "failed" competencies will be counted cumulatively so that an employee could miss 3 competencies on one page as long as the total competencies failed does not exceed the number of pages in the checklist.

Example: The competency checklist for the Patron Services Assistant position is 9 pages long. Patron Services Assistants who "need training" on 9 or less competencies have passed the pre-assessment. Conversely, a Patron Services Assistant who "needs training" on 10 or more competencies did not pass the pre-assessment and must complete a post-assessment.

Pass vs. Fail

1. An employee who passes the pre-assessment has successfully completed the core technology competency evaluation cycle.
2. An employee who fails the pre-assessment must complete a post-assessment.

Employee Performance Reviews

When completing annual employee performance reviews, supervisors should include any competencies for which the employee “needs training” and list those as goals for the upcoming year even if the employee passed the pre-assessment.

Post-assessment Evaluation Process

Created 11 Nov 2015
Revised 11 Nov 2015
Reviewed 3 Dec 2018

Failure to pass the pre-assessment is considered a serious deficiency in an employee's overall performance. It is the library's intention that each employee be given the opportunity to train, learn, and improve his/her skills in a reasonable amount of time before the post-assessment is given.

Post-assessments

1. An employee who has failed the pre-assessment will be asked to sign a form by the Human Resources Manager acknowledging that failure to pass the post-assessment will result in the issuance of a Performance Improvement Notice to the employee.
2. During the assigned post-assessment period, supervisors will print the appropriate competency worksheet from the wiki and ask the employee to demonstrate his/her knowledge of only those competencies from the pre-assessment which were marked as "needs training." The post-assessment may take place in one day or over a number of days but must be completed by the assigned deadline.
3. A competency is considered to be mastered if the employee can perform it within a reasonable amount of time and without prompting from his/her supervisor. If an employee cannot demonstrate that he/she has mastered a competency, that competency should be marked as "failed."

Scoring

Scoring of the post-assessment follows the same rules as the pre-assessment. Once the post-assessment has been completed, the supervisor counts the number of competencies that are marked "failed" and enters it in the scoring box on the worksheet. If the number is less than or equal to the number of pages in the entire competency checklist, the employee has successfully completed the core technology competency evaluation cycle.

Pass vs. Fail

1. An employee who passes the post-assessment has successfully completed the core technology competency evaluation cycle.
2. An employee who fails the post-assessment must complete a Performance Improvement Plan.

Performance Improvement Plan Process

Created 11 Nov 2015
Revised 23 Mar 2017
Reviewed 3 Dec 2018

Performance Improvement Notice

1. The Performance Improvement Notice will be issued to the employee by his/her supervisor and the Human Resources Manager within one week of the date of the failed post-assessment.
2. Within 2 weeks of the issuance of the Performance Improvement Notice, the employee will be required to demonstrate knowledge of the competencies he/she failed during the post-assessment in the presence of his/her supervisor and the Human Resources Manager.
3. The employee may make multiple attempts during the 2-week period to pass the failed competencies.
4. If the employee does not successfully demonstrate knowledge of the minimum number of competencies by the end of the 2-week period, the employee will be immediately terminated.

Scoring

Scoring follows the same rules as the post-assessment. Once the assessment has been completed, the supervisor counts the number of competencies that are marked "failed" and enters it in the scoring box on the worksheet. If the number is less than or equal to the number of pages in the entire competency checklist, the employee has successfully completed the core technology competency evaluation cycle.

Example of this process

1. A Patron Services Assistant may miss 9 competencies on the pre-assessment and still pass.
2. In our example, a Patron Services Assistant misses 12 competencies during the pre-assessment.
3. The Patron Services Assistant must complete a post-assessment with his/her supervisor.
4. During the post-assessment, the Patron Services Assistant must demonstrate knowledge of **all 12** competencies that he/she failed in the pre-assessment.

5. If the employee successfully demonstrates knowledge of at least 3 of the 12 competencies, he/she has passed the post-assessment and has successfully completed the core technology competency evaluation cycle.
6. If the employee fails to demonstrate knowledge of at least 3 of the 12 competencies during the post-assessment he/she is issued a Performance Improvement Notice within a week.
7. During the next 2 weeks, the employee must demonstrate knowledge of **all 12** competencies that were failed during the post-assessment.
8. Results (pass or fail):
 - a. PASS: The employee successfully demonstrates knowledge of at least 3 of the failed competencies and has successfully completed the core technology competency evaluation cycle.
 - b. FAIL: The employee fails to demonstrate knowledge of at least 3 of the competencies that were failed during the post-assessment and is immediately terminated.

Training

Created 11 Nov 2015
Revised 3 Dec 2018
Reviewed 3 Dec 2018

Training

The Competencies Committee will develop training tools for employees and supervisors as needed to use in conjunction with mastering the core competencies. Training should be led by the supervisor and may take the following forms:

- One-on-one training between the supervisor and the employee
- Group training at branch/department meetings
- Annual In-House Computer Training
- Instructional videos uploaded to a training page on the wiki
- Step-by-step instructions for specific competencies uploaded to a training page on the wiki
- Litmos courses

Adult Outreach Services Librarian

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change password
 - e. Can set up automatic out-of-office reply
 - f. Can change email signature
 - g. Can manage email contacts
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms
 - d. Can locate Personnel Policies
 - e. Can locate branch staff list
 - f. Can locate emergency contact form
 - g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines
 - i. Can change password
 - j. Can add and edit content
 - k. Can open documents (e.g. performance review forms)
4. Litmos
 - a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates

Adult Outreach Services Librarian

- e. Can view courses that are in progress, overdue, or not started
- 5. Basic computer use
 - a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can minimize, maximize or resize a window
- 6. Polaris – Basics
 - a. Can start, logon, logoff, and exit Polaris client
 - b. Can load entire search list when Polaris loads only partial results
- 7. Polaris – Searching
 - a. Can search bibliographic records
 - b. Can search item records
 - c. Knows the difference between bibliographic and item records
 - d. Can search for items by common fields: title, author, keyword, series, barcode
 - e. Can find a patron registration by using patron name or barcode
 - f. Can sort search results by author, date and format
- 8. Polaris – Record sets
 - a. Can create an item record set
 - b. Can add item records to a record set
 - c. Can find and access a record set
 - d. Can remove items from a record set
 - e. Can delete a record set
 - f. Can bulk change item record sets
- 9. Polaris – Patron registration
 - a. Can create a new patron registration
 - b. Can delete a patron registration
 - c. Can update a patron registration
 - d. Can reset PIN
 - e. Can add patron photo
 - f. Can turn on a patron's reading history – knows how long the reading history is kept, how many items can be in the list, and what happens when reading history is turned off
 - g. Can enable eReceipts
- 10. Polaris – Patron notes and blocks
 - a. Can add a library-assigned or free text patron block
 - b. Can delete a patron block
 - c. Can add a blocking or non-blocking note
 - d. Can delete a blocking or non-blocking note

Adult Outreach Services Librarian

- e. Knows what to enter in a patron note field after submitting an item request on behalf of patron
- 11. Polaris – Check out/renewal
 - a. Can open check out screen
 - b. Can process check out blocks and messages
 - c. Can check out items to a patron
 - d. Can print check out receipt
 - e. Can view items checked out to a patron
 - f. Knows how to assign a special loan period and under what conditions
 - g. Can renew all items on a patron account
 - h. Can renew partial list of items on a patron account
 - i. Can print a list of all items out
- 12. Polaris – Check in
 - a. Can check in on normal mode
 - b. Can check in on bulk mode
 - c. Can process check in messages and blocks
 - d. Can print check in receipt
- 13. Polaris – Patron accounting
 - a. Can view a patron's charges
 - b. Can process cash or check payment in full
 - c. Can process cash or check partial payment
 - d. Can waive charges
 - e. Can view a patron's notice history
 - f. Can view a patron's financial transaction history
 - g. Can create a charge on a patron's account
 - h. Can manually create a credit on a patron's account
 - i. Can refund a credit
 - j. Can process payment from credit
- 14. Polaris – Claims and lost items
 - a. Can set an item to Claim Returned
 - b. Can set an item to Claim Never Had
 - c. Can estimate fines for a patron on overdue items that have not been returned
 - d. Can declare an item lost
 - e. Can find the price of a lost item for a patron
 - f. Can resolve a lost and un-paid item
 - g. Can resolve a lost and paid item
 - h. Can resolve a withdrawn item that has been returned
 - i. Can resolve a deleted item that has been returned
- 15. Polaris – Holds

Adult Outreach Services Librarian

- a. Can place a bibliographic-level hold on an item
 - b. Can place an item-level hold on an item (and knows when it is appropriate to do so)
 - c. Can view a patron's hold list
 - d. Can cancel a hold
 - e. Can delete a hold
 - f. Knows what the following holds terms mean: active, cancelled, held, inactive, pending, not-supplied
 - g. Can inactivate a hold request
 - h. Can reactivate a hold request
16. Polaris – Item records
- a. Can change an item circulation status to in-repair, missing, or withdrawn
 - b. Know when to check/uncheck boxes in item records (non-circulating, display in PAC, loanable outside system, holdable)
 - c. Can determine item availability
 - d. Can find item due date
 - e. Can find last check in date
 - f. Can view and interpret an item's circulation history
 - g. Can change the barcode number of an item
 - h. Can find the current borrower information on a checked out item
 - i. Can find last borrower information on an item
 - j. Can add a library assigned or free text block to an item
 - k. Can change loan periods (e.g. 3 days to 7 days for DVDs)
17. Public Access Catalog
- a. Can search for items
 - b. Can search for items by Accelerated Reader or Lexile information (e.g. Lexile score, AR interest level, book level, or point level)
 - c. Can help a patron log in to account
 - d. Can help a patron place a hold
 - e. Can help a patron make a payment
18. Library website
- a. Can register a patron for a program through library website
 - b. Can submit request for one-on-one technology training for patron
 - c. Can sign up a patron for the library newsletter
 - d. Knows where to direct a patron to sign up for a digital only library card
 - e. Knows where to direct a patron to apply to use a meeting/study room
 - f. Knows where to direct a patron to apply for a job or volunteer position
 - g. Knows where to direct a patron to sign up for book recommendations by email
19. Library telephone system

Adult Outreach Services Librarian

- a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail
 - h. Can change personal voicemail message
20. Miscellaneous web sites
- a. Can submit a trouble ticket (for technology help)
 - b. Can submit an item request (for purchase or ILL)
21. Microsoft Office Basics (Word, Excel, PowerPoint, or Publisher)
- a. Can create a new document
 - b. Can open and close a document
 - c. Can save files in different formats (.docx, .xlsx, .pdf, etc.)
 - d. Can print preview and print only selected pages of a document
 - e. Can copy/cut and paste
 - f. Can format fonts (color, font used, size, bold, italicize, underline)
 - g. Can format paragraphs (line spacing, indents)
 - h. Can format document (margins, orientation, columns)
 - i. Can spell check
 - j. Can use find and replace commands
 - k. Can use undo and redo
22. Microsoft Word
- a. Can create numbered and bulleted lists
 - b. Can insert an image or clip art
 - c. Can use Microsoft templates
23. Microsoft Excel
- a. Can format cells (number format, alignment, border, fill)
 - b. Can adjust row height
 - c. Can adjust column width
 - d. Can sort fields
24. Microsoft PowerPoint
- a. Can create, add, edit, copy, delete slides
 - b. Can view a slideshow in normal, slide sorter, reading, and slideshow view
25. Microsoft Publisher
- a. Can insert text boxes
 - b. Can insert an image or clip art
26. Internet browsers

Adult Outreach Services Librarian

- a. Can use forward and back buttons
 - b. Can refresh the page
 - c. Can complete a search
 - d. Can open/close multiple tabs
 - e. Can navigate between tabs
 - f. Can print using embedded icons (e.g. Adobe PDF)
 - g. Can upload a file (e.g. resume to a job application site)
 - h. Can save or copy an image
27. Printing – basics
- a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - b. Can use print preview (when available)
 - c. Can choose between printers
28. Printing – receipt printers
- a. Can turn on/off
 - b. Can change paper
29. Printing –copier/printer/scanner/fax
- a. Knows where main power switch is located
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can copy in black/white or color
 - f. Can enlarge and reduce
 - g. Can make single-sided or double-sided copies
 - h. Able to use any tray for copying and copy to all paper sizes
 - i. Can scan and email documents in black/white or color
 - j. Can make an image lighter or darker
 - k. Knows procedure for calling Millennium for service
30. Wifi
- a. Can connect devices to public wifi
 - b. Can connect devices to staff wifi
31. Equipment – Miscellaneous
- a. Can operate shredder
 - b. Can take photos with digital camera or cell phone
 - c. Can arm and disarm emergency door alarms
 - d. Can operate AED

Adult Programming Coordinator

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change password
 - e. Can set up automatic out-of-office reply
 - f. Can change email signature
 - g. Can manage email contacts
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms
 - d. Can locate Personnel Policies
 - e. Can locate branch staff list
 - f. Can locate emergency contact form
 - g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines
 - i. Can change password
 - j. Can add new pages
 - k. Can add and edit content
 - l. Can open documents (e.g. performance review forms)
 - m. Can upload and link to uploaded files or images
4. Litmos
 - a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library

Adult Programming Coordinator

- c. Can view completed courses
- d. Can view/download achievement certificates
- e. Can view courses that are in progress, overdue, or not started
- 5. Basic computer use
 - a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can minimize, maximize or resize a window
 - e. Can diagnose basic computer problems
 - f. Understands basic password security and password creation
 - g. Can move, rename, and delete files
 - h. Can create a folder
 - i. Can identify properties of a file including size, date created, and date last modified
- 6. Polaris – Basics
 - a. Can start, logon, logoff, and exit Polaris client
 - b. Can load entire search list when Polaris loads only partial results
- 7. Polaris – Searching
 - a. Can search bibliographic records
 - b. Can search item records
 - c. Knows the difference between bibliographic and item records
 - d. Can search for items by common fields: title, author, keyword, series, barcode
 - e. Can find a patron registration by using patron name or barcode
- 8. Public Access Catalog
 - a. Can search for items
 - b. Can search for items by Accelerated Reader or Lexile information (e.g. Lexile score, AR interest level, book level, or point level)
 - c. Can narrow search by type of material and branch
- 9. Cloud storage (e.g. Google Drive, Dropbox)
 - a. Understands cloud storage and can explain its use
 - b. Can create, access, edit and delete docs in cloud storage
- 10. Library website
 - a. Can register a patron for a program
 - b. Can submit request for one-on-one technology training for patron
 - c. Can sign up a patron for the library newsletter
 - d. Knows where to direct a patron to sign up for a digital only library card
 - e. Knows where to direct a patron to apply to use a meeting/study room
 - f. Knows where to direct a patron to apply for a job or volunteer position

Adult Programming Coordinator

- g. Knows where to direct a patron to sign up for book recommendations by email
- 11. Library telephone system
 - a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail
 - h. Can change personal voicemail message
 - i. Can access personal voicemail messages remotely
- 12. Event Calendar
 - a. Can log in and search for programs
 - b. Can view registrations/bookings for an event
 - c. Can create a new event
 - d. Can duplicate an event
 - e. Can insert an image
 - f. Can add a hyperlink
 - g. Can set event category, PR category, and reporting category
 - h. Can select appropriate booking and attendee form
 - i. Can publish event or save draft
 - j. Can edit events
 - k. Can delete an event
 - l. Can enter final attendance
 - m. Can preview an event on the website
 - n. Can enable registration for an event and set registration and wait list limits
 - o. Can set booking cut-off date
 - p. Can edit/delete bookings
 - q. Knows how to export bookings to generate participant list
 - r. Can choose columns to export in Export Bookings report
 - s. Can send an email to registrants
 - t. Can access statistical data on program attendance
- 13. Miscellaneous web sites
 - a. Can submit a trouble ticket (for technology help)
 - b. Can submit an item request (for purchase or ILL)
 - c. Can create/edit reservations for meetings using online calendars (Newport calendars only)
- 14. Microsoft Office Basics (Word, Excel, PowerPoint, or Publisher)
 - a. Can create a new document

Adult Programming Coordinator

- b. Can open and close a document
 - c. Can save files in different formats (.docx, .xlsx, .pdf, etc.)
 - d. Can print preview and print only selected pages or selected text of a document
 - e. Can copy/cut and paste
 - f. Can format fonts (color, font used, size, bold, italicize, underline)
 - g. Can format paragraphs (line spacing, indents)
 - h. Can format document (margins, orientation, columns)
 - i. Can use spell check
 - j. Can use find and replace commands
 - k. Can use undo and redo
 - l. Can use mail merge to create labels
15. Microsoft Word
- a. Can create numbered and bulleted lists
 - b. Can insert an image or clip art
 - c. Can use Microsoft templates
16. Microsoft Excel
- a. Can format cells (number format, alignment, border, fill)
 - b. Can adjust row height
 - c. Can adjust column width
 - d. Can sort fields
17. Microsoft PowerPoint
- a. Can create, add, edit, copy, delete slides
 - b. Can view a slideshow in normal, slide sorter, reading, and slideshow view
18. Microsoft Publisher
- a. Can insert text boxes
 - b. Can insert an image or clip art
19. Internet browsers
- a. Can use forward and back buttons
 - b. Can refresh the page
 - c. Can complete a search
 - d. Can open/close multiple tabs
 - e. Can navigate between tabs
 - f. Can print using embedded icons (e.g. Adobe PDF)
 - g. Can upload a file
 - h. Can save or copy an image
 - i. Can add a site to favorites and favorite bar
 - j. Can set the home page
 - k. Can play, pause, and change the volume of an embedded video
 - l. Can download a file and identify the download location

Adult Programming Coordinator

- m. Can disable pop-up blocker in web browsers
- 20. Printing – basics
 - a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - b. Can use print preview (when available)
 - c. Can choose between printers
- 21. Printing – copier/printer/scanner/fax
 - a. Knows where main power switch is located
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can copy in black/white or color
 - f. Can enlarge and reduce
 - g. Can use Preview feature
 - h. Can use Card Shot feature
 - i. Can make single-sided or double-sided copies
 - j. Able to use any tray for copying and copy to all paper sizes
 - k. Can send a fax
 - l. Can scan and email documents in black/white or color
 - m. Can make an image lighter or darker
 - n. Knows procedure for calling Millennium for service
- 22. Wifi
 - a. Can connect devices to public wifi
 - b. Can connect devices to staff wifi
- 23. Equipment – Projector
 - a. Can turn on/off
 - b. Can connect laptop to projector and mirror laptop screen
 - c. Can change size of the projected image
 - d. Can focus projected image (tabletop projectors only)
 - e. Can adjust height
- 24. Equipment – Televisions
 - a. Can turn on/off
 - b. Can connect DVD player and play DVD
 - c. Can connect laptop and mirror the screen
 - d. Can mirror a device such as a tablet or smartphone to Apple TV
 - e. Can select various inputs (HDMI, AV, etc.)
 - f. Can display live programming on TVs with antenna (e.g. weather)
 - g. Can change channel
 - h. Can adjust volume

Adult Programming Coordinator

25. Equipment – Miscellaneous

- a. Can operate shredder
- b. Can take photos with digital camera or cell phone
- c. Can arm and disarm emergency door alarms
- d. Can arm and disarm AED door alarm
- e. Can operate AED

Adult/Teen Services Librarian

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
 - i. Can approve or deny time off requests of employees
 - j. Can approve timesheets of employees
 - k. Can generate report of hours worked by part-time employees
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change password
 - e. Can set up automatic out-of-office reply
 - f. Can create and add to a mailing list
 - g. Can change email signature
 - h. Can manage email contacts
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms
 - d. Can locate Personnel Policies
 - e. Can locate branch staff list
 - f. Can locate emergency contact form
 - g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines
 - i. Can change password
 - j. Can add new pages
 - k. Can add and edit content
 - l. Can upload and link to uploaded files or images

Adult/Teen Services Librarian

- m. Can open documents (e.g. performance review forms)
- 4. Litmos
 - a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started
 - f. Can switch between Learner and Team Leader/Admin views
- 5. Basic computer use
 - a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can minimize, maximize or resize a window
 - e. Can diagnose basic computer problems
 - f. Understands basic password security and password creation
 - g. Can move, rename, and delete files
 - h. Can create a folder
 - i. Can identify properties of a file including size, date created, and date last modified
- 6. Polaris – Basics
 - a. Can start, logon, logoff, and exit Polaris client
 - b. Can load entire search list when Polaris loads only partial results
- 7. Polaris – Searching
 - a. Can search bibliographic records
 - b. Can search item records
 - c. Knows the difference between bibliographic and item records
 - d. Can search for items by common fields: title, author, keyword, series, barcode
 - e. Can find a patron registration by using patron name or barcode
 - f. Can sort search results by author, date and format
- 8. Polaris – Record sets
 - a. Can create an item record set
 - b. Can add item records to a record set
 - c. Can find and access a record set
 - d. Can remove items from a record set
 - e. Can delete a record set
 - f. Can bulk change item record sets
 - g. Can properly bulk change weeding item record sets
 - h. Knows how to assign the correct ownership level to record sets

Adult/Teen Services Librarian

9. Polaris – Patron registration
 - a. Can update a patron registration
 - b. Can reset PIN
 - c. Can turn on a patron’s reading history – knows how long the reading history is kept, how many items can be in the list, and what happens when reading history is turned off
10. Polaris – Patron notes and blocks
 - a. Can add a library-assigned or free text patron block
 - b. Can delete a patron block
 - c. Can add a blocking or non-blocking note
 - d. Can delete a blocking or non-blocking note
 - e. Knows what to enter in a patron note field after submitting an item request on behalf of patron
 - f. Knows what kind of patron note to enter and what text to enter after patron signs a laptop user agreement (Fort Thomas and Alexandria)
11. Polaris – Check out/renewal
 - a. Can open check out screen
 - b. Can check out items to a patron
 - c. Can view items checked out to a patron
 - d. Can renew all items on a patron account
 - e. Can renew partial list of items on a patron account
12. Polaris – Check in
 - a. Can check in on normal mode
 - b. Can check in on in-house mode
13. Polaris – Patron accounting
 - a. Can view a patron’s charges
 - b. Can process cash payment in full
 - c. Can process cash partial payment
 - d. Knows policy on allowing patrons to pay \$1 per computer use
14. Polaris – Holds
 - a. Can place a bibliographic-level hold on an item
 - b. Can place an item-level hold on an item (and knows when it is appropriate to do so)
 - c. Can view a patron’s hold list
 - d. Can cancel a hold
 - e. Can delete a hold
 - f. Knows what the following holds terms mean: active, cancelled, held, inactive, pending, not-supplied
 - g. Can view holds queue

Adult/Teen Services Librarian

- h. Can inactivate a hold request
 - i. Can reactivate a hold request
 - j. Can group and ungroup holds
 - k. Can change pickup location on a hold with a status of Active, Inactive, Pending, or Held
15. Polaris – Item records
- a. Can change an item circulation status to in-repair, missing, or withdrawn
 - b. Know when to check/uncheck boxes in item records (non-circulating, display in PAC, loanable outside system, holdable)
 - c. Can determine item availability
 - d. Can find item due date
 - e. Can find last check in date
 - f. Can find item check out date
 - g. Can view and interpret an item's circulation history
 - h. Can find the current borrower information on a checked out item
 - i. Can find last borrower information on an item
16. Public Access Catalog
- a. Can search for items
 - b. Can search for items by Accelerated Reader or Lexile information (e.g. Lexile score, AR interest level, book level, or point level)
 - c. Can narrow search by type of material and branch
 - d. Can help a patron log in to account
 - e. Can help a patron place a hold
 - f. Can help a patron make a payment
17. Cloud storage (e.g. Google Drive, Dropbox)
- a. Understands cloud storage and can explain its use
 - b. Can create, access, edit and delete docs in cloud storage
18. Library website
- a. Can register a patron for a program
 - b. Can submit request for one-on-one technology training for patron
 - c. Can sign up a patron for the library newsletter
 - d. Knows where to direct a patron to sign up for a digital only library card
 - e. Knows where to direct a patron to apply to use a meeting/study room
 - f. Knows where to direct a patron to apply for a job or volunteer position
 - g. Knows where to direct a patron to sign up for book recommendations by email
19. Library telephone system
- a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold

Adult/Teen Services Librarian

- d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail
 - h. Can change personal voicemail message
 - i. Can access personal voicemail messages remotely
20. PC Reservation (staff client on reference desk PCs)
- a. Can create a guest pass
 - b. Can view PC status
 - c. Can determine name of patron logged on each computer
 - d. Can extend a session by adding time
 - e. Can end a session
 - f. Can send a message
 - g. Can create a reservation
 - h. Can cancel a reservation
 - i. Can unlock a computer that has been locked by a patron
 - j. Can mark a computer out of service
21. PC Reservation Station
- a. Can assist patrons in making reservations
22. Event Calendar
- a. Can log in and search for programs
 - b. Can view registrations/bookings for an event
 - c. Can create a new event
 - d. Can duplicate an event
 - e. Can insert an image
 - f. Can add a hyperlink
 - g. Can set event category, PR category, and reporting category
 - h. Can select appropriate booking and attendee form
 - i. Can publish event or save draft
 - j. Can edit events
 - k. Can delete an event
 - l. Can enter final attendance
 - m. Can preview an event on the website
 - n. Can enable registration for an event and set registration and wait list limits
 - o. Can set booking cut-off date
 - p. Can edit/delete bookings
 - q. Knows how to export bookings to generate participant list
 - r. Can send an email to registrants
23. Kentucky Libraries Unbound (native interface)

Adult/Teen Services Librarian

- a. Can navigate to website
 - b. Can find help and troubleshooting pages
 - c. Can sign in
 - d. Can search for items
 - e. Can check out items
 - f. Can determine format of items (audio, ebook, Kindle, video) and understand the differences
 - g. Can determine number of copies and availability of an item
 - h. Can place a hold on an item
 - i. Can view items checked out
 - j. Can view holds
 - k. Knows about the Advantage collection and understands how it works in relation to the consortium collection
 - l. Can limit search results by format, maturity, and availability
 - m. Can change default lending periods
24. Kentucky Libraries Unbound (Public Access Catalog)
- a. Can search for items
 - b. Can check out items
 - c. Can determine format of items (audio, book, video)
 - d. Can place a hold on an item
25. Overdrive app
- a. Can download Overdrive app to compatible device
 - b. Can add KLU to "My Libraries"
 - c. Can sign in to KLU account
 - d. Can download items to device
 - e. Can return an item
 - f. Can download Kindle app to compatible device
 - g. Can add a KLU checkout to the Kindle app through Amazon
26. Libby app
- a. Can download Libby app to compatible device
 - b. Can add KLU to "Your Libraries"
 - c. Can add a card
 - d. Can link a second card
 - e. Can switch between two linked cards
 - f. Can search for and borrow an item
 - g. Can display book details (e.g. length of audiobook)
 - h. Can open and change reading settings of an ebook (font size, lighting, book design)
 - i. Can download items to Libby

Adult/Teen Services Librarian

- j. Can change the loan period of an item
 - k. Can limit search by format (ebook, eaudiobook, etc.)
 - l. Can limit search to available titles only
 - m. Can limit search to Kindle-compatible items only
 - n. Can send borrowed titles to Kindle app/device
 - o. Can place and suspend holds
 - p. Can adjust download settings
 - q. Can return a title
 - r. Can find list of loans and holds
 - s. Can view place in line for a hold
27. Miscellaneous web sites
- a. Can submit a trouble ticket (for technology help)
 - b. Can submit an item request (for purchase or ILL)
 - c. Can create/edit reservations for meetings using online calendars
 - d. Can log a study room use (Fort Thomas only)
 - e. Can locate materials at other libraries using WorldCat
28. Microsoft Office Basics (Word, Excel, PowerPoint, or Publisher)
- a. Can create a new document
 - b. Can open and close a document
 - c. Can save files in different formats (.docx, .xlsx, .pdf, etc.)
 - d. Can print preview and print only selected pages or selected text of a document
 - e. Can copy/cut and paste
 - f. Can format fonts (color, font used, size, bold, italicize, underline)
 - g. Can format paragraphs (line spacing, indents)
 - h. Can format document (margins, orientation, columns)
 - i. Can use spell check
 - j. Can use find and replace commands
 - k. Can use undo and redo
29. Microsoft Word
- a. Can create numbered and bulleted lists
 - b. Can insert an image or clip art
 - c. Can use Microsoft templates
30. Microsoft Excel
- a. Can format cells (number format, alignment, border, fill)
 - b. Can adjust row height
 - c. Can adjust column width
 - d. Can sort fields
31. Microsoft PowerPoint
- a. Can create, add, edit, copy, delete slides

Adult/Teen Services Librarian

- b. Can view a slideshow in normal, slide sorter, reading, and slideshow view
- 32. Microsoft Publisher
 - a. Can insert text boxes
 - b. Can insert an image or clip art
- 33. Internet browsers
 - a. Can use forward and back buttons
 - b. Can refresh the page
 - c. Can complete a search
 - d. Can open/close multiple tabs
 - e. Can navigate between tabs
 - f. Can print using embedded icons (e.g. Adobe PDF)
 - g. Can upload a file (e.g. resume to a job application site)
 - h. Can save or copy an image
 - i. Can add a site to favorites and favorite bar
 - j. Can set the home page
 - k. Can play, pause, and change the volume of an embedded
 - l. Can download a file and identify the download location
 - m. Can disable pop-up blocker in web browsers
- 34. Printing – basics
 - a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - b. Can use print preview (when available)
 - c. On a public Internet computer can send a black/white or color print job to the PC Reservation print release station
 - d. Can choose between printers
- 35. Printing –receipt printers
 - a. Can turn on/off
 - b. Can change paper
- 36. Printing –copier/printer/scanner/fax
 - a. Knows where main power switch is located
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can copy in black/white or color
 - f. Can enlarge and reduce
 - g. Can use Preview feature
 - h. Can use Card Shot feature
 - i. Can make single-sided or double-sided copies
 - j. Able to use any tray for copying and copy to all paper sizes

Adult/Teen Services Librarian

- k. Can send a fax
 - l. Can scan and email documents in black/white or color
 - m. Can make an image lighter or darker
 - n. Knows procedure for calling Millennium for service
 - o. Knows what bills/coins are accepted by the coin-op
 - p. Can use bypass key
37. Printing – public printer
- a. Can turn the printer on/off
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can clear error messages from printer screen
 - f. Knows procedure for calling Millennium for service
 - g. Knows what bills/coins are accepted by the coin-op
 - h. Can use bypass key
38. Public Laptops (Alexandria and Fort Thomas only)
- a. Can override filter
 - b. Can adjust volume
 - c. Can assist a patron with choosing black/white or color printer and submit print job
 - d. Knows the difference between closing client and logging in as super user and can do both
 - e. Can end session
 - f. Can lock a computer
 - g. Can check condition of laptop and peripheral equipment
 - h. Can connect laptop to charger
39. Printing – PC Reservation print release station
- a. Can view patron's print jobs via patron barcode
 - b. Can view entire print queue for all print jobs
 - c. Can preview a print job
 - d. Can release single or multiple print jobs
 - e. Can delete single or multiple print jobs
 - f. Can override payment with staff password
 - g. Can override payment with bypass key
 - h. Can close PC Reservation program in order to shut down computer
40. BookScan Station
- a. Can turn on/off scanner and computer
 - b. Can scan documents to the computer in color or black/white
 - c. Can rotate documents on-screen

Adult/Teen Services Librarian

- d. Can delete a scanned image
 - e. Can scan to fax, USB, printer, email, Google Drive, phone/tablet
 - f. Can send a fax in color
 - g. Can set up email or print confirmation
 - h. Can create a cover page
 - i. Knows procedure for calling Millennium for service
 - j. Knows what bills/coins are accepted by the coin-op
 - k. Knows when fax/email jobs should be split into multiple jobs due to number of pages, page content, etc.
 - l. Can use bypass key
41. Public Internet computers
- a. Can assist a patron with logging into the computer
 - b. Can override filter
 - c. Knows the difference between closing client and logging in as super user and can do both
 - d. Can end a session
 - e. Can lock a computer
 - f. Can adjust volume
 - g. Can assist a patron with choosing black/white or color printer and submit print job via Envisionware
 - h. Knows purpose of NTouch Videophone software and how to use it
42. AWE computers
- a. Can power on/shutdown AWE computers
43. Wifi
- a. Can connect devices to public wifi
 - b. Can connect devices to staff wifi
44. Equipment – Projector
- a. Can turn on/off
 - b. Can connect laptop to projector and mirror laptop screen
 - c. Can change size of the projected image
 - d. Can focus projected image (tabletop projectors only)
 - e. Can adjust height
45. Equipment – Televisions
- a. Can turn on/off
 - b. Can connect DVD player and play DVD
 - c. Can connect laptop and mirror the screen
 - d. Can wirelessly connect devices such as a tablet, laptop, or smartphone to smart TV (Fort Thomas only)
 - e. Can mirror a device such as a tablet or smartphone to Apple TV

Adult/Teen Services Librarian

- f. Can select various inputs (HDMI, AV, etc.)
 - g. Can display live programming on TVs with antenna (e.g. weather)
 - h. Can change channel
 - i. Can adjust volume
46. Equipment – Miscellaneous
- a. Can operate shredder
 - b. Can take photos with digital camera or cell phone
 - c. Can arm and disarm emergency door alarms
 - d. Can arm and disarm AED door alarm
 - e. Can operate AED
47. Mobile Hotspot
- a. Can turn on and off
 - b. Knows the signal name
 - c. Knows the password
 - d. Can connect to hotspot with a mobile device
48. RB Digital magazines
- a. Can locate on CCPL website
 - b. Can create a new account and sign in
 - c. Can install RB Digital app to compatible device
 - d. Can checkout, download, and view title in RB Digital app
49. EBSCO databases (any research database such as MasterFILE Premier)
- a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can search for a topic
 - d. Can tell the difference between full text entries and citations only
 - e. Can limit search results to full text
 - f. Can sort results by date
 - g. Can email an article/attachment
 - h. Can retrieve a list of all articles in a specific magazine/journal issue (e.g. Nov 2016 National Geographic)
 - i. Can find a full-text newspaper article that mentions a northern Kentucky city/town.
50. NoveList
- a. Can locate on the CCPL website
 - b. Can explain to patron how to access from home
 - c. Can identify read-a-likes based on a title or author
 - d. Can limit results based on age of audience
 - e. Can limit results based on grade level, lexile range, or accelerated reader book level number (e.g. 4.2)

Adult/Teen Services Librarian

- f. Can find book discussion guides
 - g. Can find books by Appeal and create your own Appeal Mix
 - h. Can sign up for NovelList newsletters
51. Mango Languages
- a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can create an account and log in
 - d. Can start a course
 - e. Can use the translate feature
 - f. Can track user activity
52. Consumer Reports
- a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can find product ratings
 - d. Can filter ratings by cost and score
 - e. Can sort results by price
 - f. Can compare three models of a product
 - g. Can find My Benefits and use the Car Recall Tracker
53. Gale Courses
- a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can explain service (as if to a patron)
 - d. Can identify the New, Popular, and Featured courses
 - e. Can find courses on basic computer skills
54. Learning Express Library
- a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can find the Citizenship practice test
 - d. Can find the Introduction to the GED test
 - e. Can find ACT practice tests
 - f. Can find the GRE practice tests
 - g. Can find Resume Builder
 - h. Can find career match quizzes
55. Miscellaneous tech
- a. Can install and configure library app on a mobile device
 - b. Knows the difference between streaming and downloading
 - c. Can turn a mobile device on/off
 - d. Can increase or decrease the volume or mute a mobile device
 - e. Can close all apps on a mobile device

Adult/Teen Services Librarian

f. Can use thermal laminator

Adult/Teen Services Programmer

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can reset forgotten password for pay stubs
 - g. Can approve individual timesheet
 - h. Can retrieve electronic pay stubs and W2s
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change password
 - e. Can set up automatic out-of-office reply
 - f. Can create and add to a mailing list
 - g. Can change email signature
 - h. Can manage email contacts
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms
 - d. Can locate Personnel Policies
 - e. Can locate branch staff list
 - f. Can locate emergency contact form
 - g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines
 - i. Can change password
 - j. Can add new pages
 - k. Can add and edit content
 - l. Can upload and link to uploaded files or images
 - m. Can open documents (e.g. performance review forms)
4. Litmos
 - a. Can reset forgotten username/password

Adult/Teen Services Programmer

- b. Can find and take courses from the Course Library
- c. Can view completed courses
- d. Can view/download achievement certificates
- e. Can view courses that are in progress, overdue, or not started
- 5. Basic computer use
 - a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can diagnose basic computer problems
 - e. Understands basic password security and password creation
 - f. Can minimize, maximize or resize a window
 - g. Can move, rename, and delete files
 - h. Can create a folder
 - i. Can identify properties of a file including size, date created, and date last modified
- 6. Polaris – Basics
 - a. Can start, logon, logoff, and exit Polaris client
 - b. Can load entire search list when Polaris loads only partial results
- 7. Polaris – Searching
 - a. Can search bibliographic records
 - b. Can search item records
 - c. Knows the difference between bibliographic and item records
 - d. Can search for items by common fields: title, author, keyword, series, barcode
 - e. Can find a patron registration by using patron name or barcode
 - f. Can sort search results by author, date and format
- 8. Polaris – Patron registration
 - a. Can update a patron registration
 - b. Can reset PIN
 - c. Can turn on a patron's reading history – knows how long the reading history is kept, how many items can be in the list, and what happens when reading history is turned off
- 9. Polaris – Patron notes and blocks
 - a. Can add a library-assigned or free text patron block
 - b. Can delete a patron block
 - c. Can add a blocking or non-blocking note
 - d. Can delete a blocking or non-blocking note
 - e. Knows what to enter in a patron note field after submitting an item request on behalf of patron

Adult/Teen Services Programmer

- f. Knows what kind of patron note to enter and what text to enter after patron signs a laptop user agreement (Fort Thomas and Alexandria)
- 10. Polaris – Check out/renewal
 - a. Can open check out screen
 - b. Can check out items to a patron
 - c. Can view items checked out to a patron
 - d. Can renew all items on a patron account
 - e. Can renew partial list of items on a patron account
- 11. Polaris – Check in
 - a. Can check in on normal mode
 - b. Can check in on in-house mode
- 12. Polaris – Patron accounting
 - a. Can view a patron's charges
 - b. Can process cash payment in full
 - c. Can process cash partial payment
 - d. Knows policy on allowing patrons to pay \$1 per computer use
- 13. Polaris – Holds
 - a. Can place a bibliographic-level hold on an item
 - b. Can place an item-level hold on an item (and knows when it is appropriate to do so)
 - c. Can view a patron's hold list
 - d. Can cancel a hold
 - e. Can delete a hold
 - f. Knows what the following holds terms mean: active, cancelled, held, inactive, pending, not-supplied
 - g. Can view holds queue
 - h. Can inactivate a hold request
 - i. Can reactivate a hold request
 - j. Can group and ungroup holds
 - k. Can change pickup location on a hold with a status of Active, Inactive, Pending, or Held
- 14. Polaris – Item records
 - a. Can change an item circulation status to in-repair, missing, or withdrawn
 - b. Know when to check/uncheck boxes in item records (non-circulating, display in PAC, loanable outside system, holdable)
 - c. Can determine item availability
 - d. Can find item due date
 - e. Can find last check in date
 - f. Can find item check out date

Adult/Teen Services Programmer

- g. Can view and interpret an item's circulation history
 - h. Can find the current borrower information on a checked out item
 - i. Can find last borrower information on an item
15. Public Access Catalog
- a. Can search for items
 - b. Can search for items by Accelerated Reader or Lexile information (e.g. Lexile score, AR interest level, book level, or point level)
 - c. Can narrow search by type of material and branch
 - d. Can help a patron log in to account
 - e. Can help a patron place a hold
 - f. Can help a patron make a payment
16. Cloud storage (e.g. Google Drive, Dropbox)
- a. Understands cloud storage and can explain its use
 - b. Can create, access, edit and delete docs in cloud storage
17. Library website
- a. Can register a patron for a program
 - b. Can submit request for one-on-one technology training for patron
 - c. Can sign up a patron for the library newsletter
 - d. Knows where to direct a patron to sign up for a digital only library card
 - e. Knows where to direct a patron to apply to use a meeting/study room
 - f. Knows where to direct a patron to apply for a job or volunteer position
 - g. Knows where to direct a patron to sign up for book recommendations by email
18. Library telephone system
- a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail
 - h. Can change personal voicemail message
19. PC Reservation (staff client on reference desk PCs)
- a. Can create a guest pass
 - b. Can view PC status
 - c. Can determine name of patron logged on each computer
 - d. Can extend a session by adding time
 - e. Can end a session
 - f. Can send a message
 - g. Can create a reservation

Adult/Teen Services Programmer

- h. Can cancel a reservation
 - i. Can unlock a computer that has been locked by a patron
 - j. Can mark a computer out of service
20. PC Reservation Station
- a. Can assist patrons in making reservations
21. Event Calendar
- a. Can log in and search for programs
 - b. Can view registrations/bookings for an event
 - c. Can create a new event
 - d. Can duplicate an event
 - e. Can insert an image
 - f. Can add a hyperlink
 - g. Can set event category, PR category, and reporting category
 - h. Can select appropriate booking and attendee form
 - i. Can publish event or save draft
 - j. Can edit events
 - k. Can delete an event
 - l. Can enter final attendance
 - m. Can preview an event on the website
 - n. Can enable registration for an event and set registration and wait list limits
 - o. Can set booking cut-off date
 - p. Can edit/delete bookings
 - q. Knows how to export bookings to generate participant list
 - r. Can send an email to registrants
22. Kentucky Libraries Unbound (native interface)
- a. Can navigate to website
 - b. Can find help and troubleshooting pages
 - c. Can sign in
 - d. Can search for items
 - e. Can check out items
 - f. Can determine format of items (audio, ebook, Kindle, video) and understand the differences
 - g. Can determine number of copies and availability of an item
 - h. Can place a hold on an item
 - i. Can view items checked out
 - j. Can view holds
 - k. Knows about the Advantage collection and understands how it works in relation to the consortium collection
 - l. Can limit search results by format, maturity, and availability

Adult/Teen Services Programmer

- m. Can change default lending periods
- 23. Kentucky Libraries Unbound (Public Access Catalog)
 - a. Can search for items
 - b. Can check out items
 - c. Can determine format of items (audio, book, video)
 - d. Can place a hold on an item
- 24. Overdrive app
 - a. Can download Overdrive app to compatible device
 - b. Can add KLU to "My Libraries"
 - c. Can sign in to KLU account
 - d. Can download items to device
 - e. Can return an item
 - f. Can download Kindle app to compatible device
 - g. Can add a KLU checkout to the Kindle app through Amazon
- 25. Libby app
 - a. Can download Libby app to compatible device
 - b. Can add KLU to "Your Libraries"
 - c. Can add a card
 - d. Can link a second card
 - e. Can switch between two linked cards
 - f. Can search for and borrow an item
 - g. Can display book details (e.g. length of audiobook)
 - h. Can open and change reading settings of an ebook (font size, lighting, book design)
 - i. Can download items to Libby
 - j. Can change the loan period of an item
 - k. Can limit search by format (ebook, eaudiobook, etc.)
 - l. Can limit search to available titles only
 - m. Can limit search to Kindle-compatible items only
 - n. Can send borrowed titles to Kindle app/device
 - o. Can place and suspend holds
 - p. Can adjust download behavior
 - q. Can return a title
 - r. Can find list of loans and holds
 - s. Can view place in line for a hold
- 26. Miscellaneous web sites
 - a. Can submit a trouble ticket (for technology help)
 - b. Can submit an item request (for purchase or ILL)
 - c. Can create/edit reservations for meetings using online calendars

Adult/Teen Services Programmer

- d. Can log a study room use (Fort Thomas only)
- e. Can locate materials at other libraries using WorldCat
- 27. Microsoft Office Basics (Word, Excel, PowerPoint, or Publisher)
 - a. Can create a new document
 - b. Can open and close a document
 - c. Can save files in different formats (.docx, .xlsx, .pdf, etc.)
 - d. Can print preview and print only selected pages or selected text of a document
 - e. Can copy/cut and paste
 - f. Can format fonts (color, font used, size, bold, italicize, underline)
 - g. Can format paragraphs (line spacing, indents)
 - h. Can format document (margins, orientation, columns)
 - i. Can use spell check
 - j. Can use find and replace commands
 - k. Can use undo and redo
- 28. Microsoft Word
 - a. Can create numbered and bulleted lists
 - b. Can insert an image or clip art
 - c. Can use Microsoft templates
- 29. Microsoft Excel
 - a. Can format cells (number format, alignment, border, fill)
 - b. Can adjust row height
 - c. Can adjust column width
 - d. Can sort fields
- 30. Microsoft PowerPoint
 - a. Can create, add, edit, copy, delete slides
 - b. Can view a slideshow in normal, slide sorter, reading, and slideshow view
- 31. Microsoft Publisher
 - a. Can insert text boxes
 - b. Can insert an image or clip art
- 32. Internet browsers
 - a. Can use forward and back buttons
 - b. Can refresh the page
 - c. Can complete a search
 - d. Can open/close multiple tabs
 - e. Can navigate between tabs
 - f. Can print using embedded icons (e.g. Adobe PDF)
 - g. Can upload a file (e.g. resume to a job application site)
 - h. Can save or copy an image
 - i. Can add a site to favorites and favorite bar

Adult/Teen Services Programmer

- j. Can set the home page
 - k. Can play, pause, and change the volume of an embedded video
 - l. Can download a file and identify the download location
 - m. Can disable pop-up blocker in web browsers
33. Printing – basics
- a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - b. Can use print preview (when available)
 - c. On a public Internet computer can send a black/white or color print job to the PC Reservation print release station
 - d. Can choose between printers
34. Printing –receipt printers
- a. Can turn on/off
 - b. Can change paper
35. Printing –copier/printer/scanner/fax
- a. Knows where main power switch is located
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can copy in black/white or color
 - f. Can enlarge and reduce
 - g. Can use Preview feature
 - h. Can use Card Shot feature
 - i. Can make single-sided or double-sided copies
 - j. Able to use any tray for copying and copy to all paper sizes
 - k. Can send a fax
 - l. Can scan and email documents in black/white or color
 - m. Can make an image lighter or darker
 - n. Knows procedure for calling Millennium for service
 - o. Knows what bills/coins are accepted by the coin-op
 - p. Can use bypass key
36. Printing – public printer
- a. Can turn the printer on/off
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can clear error messages from printer screen
 - f. Knows procedure for calling Millennium for service
 - g. Knows what bills/coins are accepted by the coin-op

Adult/Teen Services Programmer

- h. Can use bypass key
- 37. Public Laptops (Alexandria and Fort Thomas only)
 - a. Can override filter
 - b. Can adjust volume
 - c. Can assist a patron with choosing black/white or color printer and submit print job
 - d. Knows the difference between closing client and logging in as super user and can do both
 - e. Can end session
 - f. Can lock a computer
 - g. Can check condition of laptop and peripheral equipment
 - h. Can connect laptop to charger
- 38. Printing – PC Reservation print release station
 - a. Can view patron's print jobs via patron barcode
 - b. Can view entire print queue for all print jobs
 - c. Can preview a print job
 - d. Can release single or multiple print jobs
 - e. Can delete single or multiple print jobs
 - f. Can override payment with staff password
 - g. Can override payment with bypass key
 - h. Can close PC Reservation program in order to shut down computer
- 39. BookScan Station
 - a. Can turn on/off scanner and computer
 - b. Can scan documents to the computer in color or black/white
 - c. Can rotate documents on-screen
 - d. Can delete a scanned image
 - e. Can scan to fax, USB, printer, email, Google Drive, phone/tablet
 - f. Can send a fax in color
 - g. Can set up email or print confirmation
 - h. Can create a cover page
 - i. Knows procedure for calling Millennium for service
 - j. Knows what bills/coins are accepted by the coin-op
 - k. Knows when fax/email jobs should be split into multiple jobs due to number of pages, page content, etc.
 - l. Can use bypass key
- 40. Public Internet computers
 - a. Can assist a patron with logging into the computer
 - b. Can override filter

Adult/Teen Services Programmer

- c. Knows the difference between closing client and logging in as super user and can do both
 - d. Can end a session
 - e. Can lock a computer
 - f. Can adjust volume
 - g. Can assist a patron with choosing black/white or color printer and submit print job via Envisionware
 - h. Knows purpose of NTouch Videophone software and how to use
41. AWE computers
- a. Can power on/shutdown AWE computers
42. Wifi
- a. Can connect devices to public wifi
 - b. Can connect devices to staff wifi
43. Equipment – Projector
- a. Can turn on/off
 - b. Can connect laptop to projector and mirror laptop screen
 - c. Can change size of the projected image
 - d. Can focus projected image (tabletop projectors only)
 - e. Can adjust height
44. Equipment – Televisions
- a. Can turn on/off
 - b. Can connect DVD player and play DVD
 - c. Can connect laptop and mirror the screen
 - d. Can wirelessly connect devices such as a tablet, laptop, or smartphone to smart TV (Fort Thomas only)
 - e. Can mirror a device such as a tablet or smartphone to Apple TV
 - f. Can select various inputs (HDMI, AV, etc.)
 - g. Can display live programming on TVs with antenna (e.g. weather)
 - h. Can change channel
 - i. Can adjust volume
45. Equipment – Miscellaneous
- a. Can operate shredder
 - b. Can take photos with digital camera or cell phone
 - c. Can arm and disarm emergency door alarms
 - d. Can arm and disarm AED door alarm
 - e. Can operate AED
46. Mobile Hotspot
- a. Can turn on and off
 - b. Knows the signal name

Adult/Teen Services Programmer

- c. Knows the password
- d. Can connect to hotspot with a mobile device
- 47. RB Digital magazines
 - a. Can locate on CCPL website
 - b. Can create a new account and sign in
 - c. Can install RB Digital app to compatible device
 - d. Can checkout, download, and view title in RB Digital app
- 48. EBSCO databases (any research database such as MasterFILE Premier)
 - a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can search for a topic
 - d. Can tell the difference between full text entries and citations only
 - e. Can limit search results to full text
 - f. Can sort results by date
 - g. Can email an article/attachment
 - h. Can retrieve a list of all articles in a specific magazine/journal issue (e.g. Nov 2016 National Geographic)
 - i. Can find a full-text newspaper article that mentions a northern Kentucky city/town.
- 49. NovelList
 - a. Can locate on the CCPL website
 - b. Can explain to patron how to access from home
 - c. Can identify read-a-likes based on a title or author
 - d. Can limit results based on age of audience
 - e. Can limit results based on grade level, lexile range, or accelerated reader book level number (e.g. 4.2)
 - f. Can find book discussion guides
 - g. Can find books by Appeal and create your own Appeal Mix
 - h. Can sign up for NovelList newsletters
- 50. Mango Languages
 - a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can create an account and log in
 - d. Can start a course
 - e. Can use the translate feature
 - f. Can track user activity
- 51. Consumer Reports
 - a. Can locate on CCPL website
 - b. Can explain to patron how to access from home

Adult/Teen Services Programmer

- c. Can find product ratings
 - d. Can filter ratings by cost and score
 - e. Can sort results by price
 - f. Can compare three models of a product
 - g. Can find My Benefits and use the Car Recall Tracker
52. Gale Courses
- a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can explain service (as if to a patron)
 - d. Can identify the New, Popular, and Featured courses
 - e. Can find courses on basic computer skills
53. Learning Express Library
- a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can find the Citizenship practice test
 - d. Can find the Introduction to the GED test
 - e. Can find ACT practice tests
 - f. Can find the GRE practice tests
 - g. Can find Resume Builder
 - h. Can find career match quizzes
54. Miscellaneous tech
- a. Can install and configure library app on a mobile device
 - b. Knows the difference between streaming and downloading
 - c. Can turn a mobile device on/off
 - d. Can increase or decrease the volume or mute a mobile device
 - e. Can close all apps on a mobile device
 - f. Can use thermal laminator

Assistant Library Director

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
 - i. Can approve or deny time off requests of employees
 - j. Can approve timesheets of employees
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change password
 - e. Can set up automatic out-of-office reply
 - f. Create, edit and time events in staff and personal calendar
 - g. Can change email signature
 - h. Can manage email contacts
 - i. Can archive email documents as necessary
 - j. Can subscribe and unsubscribe to email listservs
 - k. Can create new accounts
 - l. Can delete accounts
 - m. Can disable accounts
 - n. Can log in to Barracuda website and manage quarantined messages (e.g. deliver, whitelist, block, delete, download, open)
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms
 - d. Can locate Personnel Policies
 - e. Can locate branch staff list
 - f. Can locate emergency contact form

Assistant Library Director

- g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines
 - i. Can change password
 - j. Can add new pages
 - k. Can add and edit content
 - l. Can upload and link to uploaded files or images
 - m. Can open documents (e.g. performance review forms)
 - n. Can add/block users
 - o. Can protect and place watch on specific pages
 - p. Can overwrite existing files
 - q. Can link to other pages and outside websites
 - r. Can create tables
 - s. Can search for particular documents
 - t. Can download a form, save it locally, and modify form as needed
4. Litmos
- a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started
 - f. Can switch between Learner and Team Leader/Admin views
 - g. Can create, edit, and delete courses/learning paths
 - h. Can create, edit, and delete quizzes
 - i. Can create and upload a certificate
 - j. Can assign courses/learning paths to individuals/teams
 - k. Can run reports
5. Basic computer use
- a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can locate files/folders
 - e. Can minimize, maximize or resize a window
 - f. Can save files using a standardized file format and using a logical filing system
 - g. Can diagnose basic computer problems
 - h. Can run and update software
 - i. Understands basic password security and password creation
 - j. Can restart public relations device at Patron Services desk
 - k. Can move, rename, and delete files

Assistant Library Director

- l. Can create a folder
- m. Can identify properties of a file including size, date created, and date last modified
- 6. Library website
 - a. Can upload files
 - b. Can link to uploaded files
 - c. Can perform basic navigation of administrative module
- 7. Internet browsers
 - a. Can use forward and back buttons
 - b. Can refresh the page
 - c. Can complete a search
 - d. Can open/close multiple tabs
 - e. Can navigate between tabs
 - f. Can print using embedded icons (e.g. Adobe PDF)
 - g. Can upload a file (e.g. resume to a job application site)
 - h. Can save or copy an image
 - i. Can add a site to favorites and favorite bar
 - j. Can set the home page
 - k. Can play, pause, and change the volume of an embedded video
 - l. Can download a file and identify the download location
 - m. Can disable pop-up blocker in web browsers
- 8. Social media
 - a. Has basic understanding of library's social media presence(s) insomuch that can post appropriate material if needed
- 9. KeePass
 - a. Can access list of current online accounts and passwords
- 10. Microsoft Office Basics (Word, Excel, PowerPoint, or Publisher)
 - a. Can create a new document
 - b. Can open and close a document
 - c. Can save files in different formats (.docx, .xlsx, .pdf, etc.)
 - d. Can print preview and print only selected pages or selected text of a document
 - e. Can copy/cut and paste
 - f. Can format fonts (color, font used, size, bold, italicize, underline)
 - g. Can format paragraphs (line spacing, indents)
 - h. Can format document (margins, orientation, columns)
 - i. Can use spell check
 - j. Can use find and replace commands
 - k. Can use undo and redo
- 11. Microsoft Word

Assistant Library Director

- a. Can create numbered and bulleted lists
 - b. Can insert an image or clip art
 - c. Can use Microsoft templates
 - d. Can create and maintain a table of contents
12. Microsoft Excel
- a. Can format cells (number format, alignment, border, fill)
 - b. Can adjust row height
 - c. Can adjust column width
 - d. Can sort fields
 - e. Can create multiple sheets in a workbook and toggle between them
 - f. Can edit information in a cell
13. Microsoft PowerPoint
- a. Can create, add, edit, copy, delete slides
 - b. Can view a slideshow in normal, slide sorter, reading, and slideshow view
14. Microsoft Publisher
- a. Can insert text boxes
 - b. Can insert an image or clip art
15. Printing – basics
- a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - b. Can use print preview (when available)
 - c. On a public Internet computer can send a black/white or color print job to the PC Reservation print release station
 - d. Can choose between printers
16. Printing – workroom copier/printer/scanner/fax
- a. Knows where main power switch is located
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can copy in black/white or color
 - f. Can enlarge and reduce
 - g. Can use Preview feature
 - h. Can use Card Shot feature
 - i. Can make single-sided or double-sided copies
 - j. Able to use any tray for copying and copy to all paper sizes
 - k. Can send a fax
 - l. Can scan and email documents in black/white or color
 - m. Can make an image lighter or darker
 - n. Knows procedure for calling Millennium for service

Assistant Library Director

17. Polaris
 - a. Can start, logon, logoff, and exit Polaris client
 - b. Can access patron file and navigate to specific information in the patron account
 - c. Can waive fines
 - d. Can access reports and statistical information
18. Smartphone
 - a. Make/receive calls
 - b. Make/receive text messages
 - c. Access voicemail
 - d. Check and respond to emails
 - e. Manage online calendar
19. Library telephone system
 - a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail
 - h. Can change personal voicemail message
 - i. Can access personal voicemail messages remotely
20. Equipment – Security camera hardware/software
 - a. Can launch security camera software
 - b. Can view live feeds on all cameras at all locations
 - c. Can search previously recorded footage
 - d. Can print images to file with incident reports
 - e. Can save video footage to a flash drive
21. Equipment – Miscellaneous
 - a. Can operate shredder
 - b. Can take photos with digital camera or cell phone
 - c. Can arm and disarm emergency door alarms
 - d. Can arm and disarm AED door alarm
 - e. Can operate AED
22. Wifi
 - a. Can connect devices to public wifi
 - b. Can connect devices to staff wifi
23. Event Calendar
 - a. Can log in and search for programs
 - b. Can view registrations/bookings for an event

Assistant Library Director

- c. Can create a new event
- d. Can duplicate an event
- e. Can insert an image
- f. Can add a hyperlink
- g. Can set event category, PR category, and reporting category
- h. Can select appropriate booking and attendee form
- i. Can publish event or save draft
- j. Can edit events
- k. Can delete an event
- l. Can enter final attendance
- m. Can preview an event on the website
- n. Can enable registration for an event and set registration and wait list limits
- o. Can set booking cut-off date
- p. Can edit/delete bookings
- q. Knows how to export bookings to generate participant list
- r. Can send an email to registrants
- s. Can access statistical data on program attendance

Branch Manager

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO (add for all staff)
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
 - i. Can approve or deny time off requests of employees
 - j. Can approve timesheets of employees
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can set up automatic out-of-office reply
 - e. Can change password
 - f. Can create and add to a mailing list
 - g. Can change email signature
 - h. Can manage email contacts
 - i. Can subscribe and unsubscribe to email listservs
 - j. Can log in to Barracuda website and manage quarantined messages (e.g. deliver, whitelist, block, delete, download, open)
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms
 - d. Can locate Personnel Policies
 - e. Can locate branch staff list
 - f. Can locate emergency contact form
 - g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines
 - i. Can change password
 - j. Can add new pages

Branch Manager

- k. Can add and edit content
- l. Can upload and link to uploaded files or images
- m. Can open documents (e.g. performance review forms)
- 4. Litmos
 - a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started
 - f. Can switch between Learner and Team Leader/Admin views
 - g. Can create, edit, and delete courses/learning paths
 - h. Can create, edit, and delete quizzes
 - i. Can create and upload a certificate
 - j. Can assign courses/learning paths to individuals/teams
 - k. Can run reports
- 5. Basic computer use
 - a. Can save files to network drive and removable storage (e.g. S: drive, flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can minimize, maximize or resize a window
 - e. Can diagnose basic computer problems
 - f. Understands basic password security and password creation
 - g. Can restart public relations device at Patron Services desk
 - h. Can move, rename, and delete files
 - i. Can create a folder
 - j. Can identify properties of a file including size, date created, and date last modified
- 6. Polaris – Basics
 - a. Can start, logon, logoff, and exit Polaris client
 - b. Can load entire search list when Polaris loads only partial results
- 7. Polaris – Searching
 - a. Can search bibliographic records
 - b. Can search item records
 - c. Knows the difference between bibliographic and item records
 - d. Can search for items by common fields: title, author, keyword, series, barcode
 - e. Can find a patron registration by using patron name or barcode
 - f. Can sort search results by author, date and format
- 8. Polaris – Record sets
 - a. Can create an item record set

Branch Manager

- b. Can add item records to a record set
 - c. Can find and access a record set
 - d. Can remove items from a record set
 - e. Can delete a record set
 - f. Can bulk change item record sets
 - g. Can properly bulk change weeding item record set
 - h. Knows how to assign the correct ownership level to record sets
9. Polaris – Patron registration
- a. Can create a new patron registration
 - b. Knows how to determine correct statistical class
 - c. Can delete a patron registration
 - d. Can update a patron registration
 - e. Can reset PIN
 - f. Can add patron photo
 - g. Can turn on a patron's reading history – knows how long the reading history is kept, how many items can be in the list, and what happens when reading history is turned off
 - h. Can enable eReceipts
10. Polaris – Patron notes and blocks
- a. Can add a library-assigned or free text patron block
 - b. Can delete a patron block
 - c. Can add a blocking or non-blocking note
 - d. Can delete a blocking or non-blocking note
 - e. Knows what to enter in a patron note field after submitting an item request on behalf of patron
 - f. Knows what kind of patron note to enter and what text to enter after patron signs a laptop user agreement (Fort Thomas and Alexandria)
11. Polaris – Reports
- a. Can run and print the Request Manager report (pick list)
 - b. Can run and print the financial report for balancing cash drawer
 - c. Can run, post, and print fines Z-fold mailer
 - d. Can run, post, and print holds Z-fold mailer
 - e. Can run, post, and print billing Z-fold mailer
 - f. Can run, post, and print overdue Z-fold mailer
 - g. Knows how to re-print daily notices (e.g. in the event of printer error)
 - h. Can find, open, and complete branch statistical report
 - i. Can run patron register report
 - j. Can run in-house report
12. Polaris – Check out/renewal

Branch Manager

- a. Can open check out screen
 - b. Can process check out blocks and messages
 - c. Can check out items to a patron
 - d. Can print check out receipt
 - e. Can view items checked out to a patron
 - f. Knows how to assign a special loan period and under what conditions
 - g. Can renew all items on a patron account
 - h. Can renew partial list of items on a patron account
 - i. Can determine how many times an item has been renewed
 - j. Can identify how many renewals are remaining
 - k. Knows when auto-renewal takes place and the reasons (3) why the renewal may be denied
 - l. Can print a list of all items out
 - m. Can reset due date
13. Polaris – Check in
- a. Can check in on normal mode
 - b. Can check in on bulk mode
 - c. Can check in on in-house mode
 - d. Can set free days on check in
 - e. Knows difference between grace period and free days
 - f. Can process check in messages and blocks
 - g. Can print check in receipt
14. Polaris – Patron accounting
- a. Can view a patron's charges
 - b. Can process cash or check payment in full
 - c. Can process cash or check partial payment
 - d. Can waive all charges
 - e. Can waive partial charges
 - f. Can process credit card payment in full
 - g. Can process credit card partial payment
 - h. Can process payment from credit
 - i. Can view a patron's notice history
 - j. Can create a charge on a patron's account
 - k. Can manually create a bill
 - l. Can manually create a credit on a patron's account
 - m. Can view a patron's financial transaction history
 - n. Can determine what form of payment a patron used to pay a charge (e.g. cash, credit card, etc.)

Branch Manager

- o. Knows the procedure for refunding a credit when the original charge was paid by cash/check
 - p. Knows the procedure for refunding a credit when the original charge was paid by credit card
 - q. Knows policy on allowing patrons to pay \$1 per computer use
15. Polaris – Claims and lost items
- a. Can set an item to Claim Returned
 - b. Can set an item to Claim Never Had
 - c. Knows procedure for processing a Claim Returned item that is not returned
 - d. Knows procedure for processing a Claim Never Had item that is not returned
 - e. Can estimate fines for a patron on overdue items that have not been returned
 - f. Can declare an item lost
 - g. Can find the price of a lost item for a patron
 - h. Can resolve a lost and un-paid item
 - i. Can resolve a lost and paid item
 - j. Can resolve a withdrawn item that has been returned
 - k. Can resolve a deleted item that has been returned
16. Polaris – Holds
- a. Can place a bibliographic-level hold on an item
 - b. Can place an item-level hold on an item (and knows when it is appropriate to do so)
 - c. Can view a patron's hold list
 - d. Can cancel a hold
 - e. Can delete a hold
 - f. Knows what the following holds terms mean: active, cancelled, held, inactive, pending, not-supplied
 - g. Can view holds queue
 - h. Can shuffle holds queue
 - i. Can inactivate a hold request
 - j. Can reactivate a hold request
 - k. Can group and ungroup holds
 - l. Can change pickup location on a hold with a status of Active, Inactive, Pending, or Held
17. Polaris – Item records
- a. Can change an item circulation status to in-repair, missing, or withdrawn
 - b. Know when to check/uncheck boxes in item records (non-circulating, display in PAC, loanable outside system, holdable)
 - c. Can determine item availability
 - d. Can find item due date

Branch Manager

- e. Can find last check in date
 - f. Can find item check out date
 - g. Can view and interpret an item's circulation history
 - h. Can change the barcode number of an item
 - i. Can find the current borrower information on a checked out item
 - j. Can find last borrower information on an item
 - k. Can add a library assigned or free text block to an item
 - l. Can change loan periods (e.g. 3 days to 7 days for DVDs)
18. Polaris – Serials
- a. Can check in newspapers and magazines
 - b. Can uncheck in newspapers and magazines
 - c. Can combine magazine issues
 - d. Can add/predict more magazine issues
19. Polaris – Off-line
- a. Can log into Polaris off-line
 - b. Can log off Polaris off-line
20. Public Access Catalog
- a. Can search for items
 - b. Can search for items by Accelerated Reader or Lexile information (e.g. Lexile score, AR interest level, book level, or point level)
 - c. Can narrow search by type of material and
 - d. Can help a patron log in to account
 - e. Can help a patron place a hold
 - f. Can help a patron make a payment
21. Unique Management System
- a. Can log in to Unique's website
 - b. Can search for and locate patron account
 - c. Can update patron information
 - d. Can view transaction history
 - e. Can determine status of an account
22. Cloud storage (e.g. Google Drive, Dropbox)
- a. Understands cloud storage and can explain its use
 - b. Can create, access, edit and delete docs in cloud storage
23. Library website
- a. Can register a patron for a program
 - b. Can submit request for one-on-one technology training for patron
 - c. Can sign up a patron for the library newsletter
 - d. Knows where to direct a patron to sign up for a digital only library card
 - e. Knows where to direct a patron to apply to use a meeting/study room

Branch Manager

- f. Knows where to direct a patron to apply for a job or volunteer position
- g. Knows where to direct a patron to sign up for book recommendations by email
- 24. Library telephone system
 - a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail
 - h. Can change personal voicemail message
 - i. Can access personal voicemail messages remotely
- 25. PC Reservation (staff client on Information Services desk PCs)
 - a. Can create a guest pass
 - b. Can view PC status
 - c. Can determine name of patron logged on each computer
 - d. Can extend a session by adding time
 - e. Can end a session
 - f. Can send a message
 - g. Can create a reservation
 - h. Can cancel a reservation
 - i. Can unlock a computer that has been locked by a patron
 - j. Can mark a computer out of service
- 26. PC Reservation Station
 - a. Can assist patrons in making reservations
- 27. Event Calendar
 - a. Can log in and search for programs
 - b. Can view registrations/bookings for an event
 - c. Can create a new event
 - d. Can duplicate an event
 - e. Can insert an image
 - f. Can add a hyperlink
 - g. Can set event category, PR category, and reporting category
 - h. Can select appropriate booking and attendee form
 - i. Can publish event or save draft
 - j. Can edit events
 - k. Can delete an event
 - l. Can enter final attendance
 - m. Can preview an event on the website

Branch Manager

- n. Can enable registration for an event and set registration and wait list limits
 - o. Can set booking cut-off date
 - p. Can edit/delete bookings
 - q. Knows how to export bookings to generate participant list
 - r. Can send an email to registrants
28. Kentucky Libraries Unbound (native interface)
- a. Can navigate to website
 - b. Can find help and troubleshooting pages
 - c. Can sign in
 - d. Can search for items
 - e. Can check out items
 - f. Can determine format of items (audio, ebook, Kindle, video) and understand the differences
 - g. Can determine number of copies and availability of an item
 - h. Can place a hold on an item
 - i. Can view items checked out
 - j. Can view holds
 - k. Knows about the Advantage collection and understands how it works in relation to the consortium collection
 - l. Can limit search results by format, maturity, and availability
 - m. Can change default lending periods
29. Kentucky Libraries Unbound (Public Access Catalog)
- a. Can search for items
 - b. Can check out items
 - c. Can determine format of items (audio, book, video)
 - d. Can place a hold on an item
30. Overdrive app
- a. Can download Overdrive app to compatible device
 - b. Can add KLU to "My Libraries"
 - c. Can sign in to KLU account
 - d. Can download items to device
 - e. Can return an item
 - f. Can download Kindle app to compatible device
 - g. Can add a KLU checkout to the Kindle app through Amazon
31. Libby app
- a. Can download Libby app to compatible device
 - b. Can add KLU to "Your Libraries"
 - c. Can add a card
 - d. Can link a second card

Branch Manager

- e. Can switch between two linked cards
 - f. Can search for and borrow an item
 - g. Can display book details (e.g. length of audiobook)
 - h. Can open and change reading settings of an ebook (font size, lighting, book design)
 - i. Can download items to Libby
 - j. Can change the loan period of an item
 - k. Can limit search by format (ebook, eaudiobook, etc.)
 - l. Can limit search to available titles only
 - m. Can limit search to Kindle-compatible items only
 - n. Can send borrowed titles to Kindle app/device
 - o. Can place and suspend holds
 - p. Can adjust download settings
 - q. Can return a title
 - r. Can find list of loans and holds
 - s. Can view place in line for a hold
32. Miscellaneous web sites
- a. Can submit a trouble ticket (for technology help)
 - b. Can submit an item request (for purchase or ILL)
 - c. Can create/edit reservations for meetings using online
 - d. Can log a study room use (Fort Thomas only)
 - e. Can locate materials at other libraries using WorldCat
33. Microsoft Office Basics (Word, Excel, PowerPoint, or Publisher)
- a. Can create a new document
 - b. Can open and close a document
 - c. Can save files in different formats (.docx, .xlsx, .pdf, etc.)
 - d. Can print preview and print only selected pages or selected text of a document
 - e. Can copy/cut and paste
 - f. Can format fonts (color, font used, size, bold, italicize, underline)
 - g. Can format paragraphs (line spacing, indents)
 - h. Can format document (margins, orientation, columns)
 - i. Can use spell check
 - j. Can use find and replace commands
 - k. Can use undo and redo
34. Microsoft Word
- a. Can create numbered and bulleted lists
 - b. Can insert an image or clip art
 - c. Can use Microsoft templates
35. Microsoft Excel

Branch Manager

- a. Can format cells (number format, alignment, border, fill)
 - b. Can adjust row height
 - c. Can adjust column width
 - d. Can sort fields
 - e. Can create multiple sheets in a workbook and toggle between them
 - f. Can edit information in a cell
36. Microsoft PowerPoint
- a. Can create, add, edit, copy, delete slides
 - b. Can view a slideshow in normal, slide sorter, reading, and slideshow view
37. Microsoft Publisher
- a. Can insert text boxes
 - b. Can insert an image or clip art
38. Internet browsers
- a. Can use forward and back buttons
 - b. Can refresh the page
 - c. Can complete a search
 - d. Can open/close multiple tabs
 - e. Can navigate between tabs
 - f. Can print using embedded icons (e.g. Adobe PDF)
 - g. Can upload a file (e.g. resume to a job application site)
 - h. Can save or copy an image
 - i. Can add a site to favorites and favorite bar
 - j. Can set the home page
 - k. Can play, pause, and change the volume of an embedded video
 - l. Can download a file and identify the download location
 - m. Can disable pop-up blocker in web browsers
39. Printing – basics
- a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - b. Can use print preview (when available)
 - c. On a public Internet computer can send a black/white or color print job to the PC Reservation print release station
 - d. Can choose between printers
40. Printing – receipt printers
- a. Can turn on/off
 - b. Can change paper
41. Printing – Dymo label printer
- a. Can change paper
 - b. Can print spine label

Branch Manager

42. Printing –copier/printer/scanner/fax
 - a. Knows where main power switch is located
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can copy in black/white or color
 - f. Can enlarge and reduce
 - g. Can use Preview feature
 - h. Can use Card Shot feature
 - i. Can make single-sided or double-sided copies
 - j. Able to use any tray for copying and copy to all paper sizes
 - k. Can send a fax
 - l. Can scan and email documents in black/white or color
 - m. Can make an image lighter or darker
 - n. Knows procedure for calling Millennium for service
 - o. Knows what bills/coins are accepted by the coin-op
 - p. Can use bypass key
43. Printing – public printer
 - a. Can turn the printer on/off
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can clear error messages from printer screen
 - f. Knows procedure for calling Millennium for service
 - g. Knows what bills/coins are accepted by the coin-op
 - h. Can use bypass key
44. Public Laptops (Alexandria and Fort Thomas only)
 - a. Can override filter
 - b. Can adjust volume
 - c. Can assist a patron with choosing black/white or color printer and submit print job
 - d. Knows the difference between closing client and logging in as super user and can do both
 - e. Can end session
 - f. Can lock a computer
 - g. Can check condition of laptop and peripheral equipment
 - h. Can connect laptop to charger
45. Printing – PC Reservation print release station
 - a. Can view patron's print jobs via patron barcode

Branch Manager

- b. Can view entire print queue for all print jobs
 - c. Can preview a print job
 - d. Can release single or multiple print jobs
 - e. Can delete single or multiple print jobs
 - f. Can override payment with staff password
 - g. Can override payment with bypass key
 - h. Can close PC Reservation program in order to shut down computer
46. BookScan Station
- a. Can turn on/off scanner and computer
 - b. Can scan documents to the computer in color or black/white
 - c. Can rotate documents on-screen
 - d. Can delete a scanned image
 - e. Can scan to fax, USB, printer, email, Google Drive, phone/tablet
 - f. Can send a fax in color
 - g. Can set up email or print confirmation
 - h. Can create a cover page
 - i. Knows procedure for calling Millennium for service
 - j. Knows what bills/coins are accepted by the coin-op
 - k. Knows when fax/email jobs should be split into multiple jobs due to number of pages, page content, etc.
 - l. Can use bypass key
47. Public Internet computers
- a. Can assist a patron with logging into the computer
 - b. Can override filter
 - c. Knows the difference between closing client and logging in as super user and can do both
 - d. Can end a session
 - e. Can lock a computer
 - f. Can adjust volume
 - g. Can assist a patron with choosing black/white or color printer and submit print job via Envisionware
 - h. Knows purpose of NTouch Videophone software and how to use it
48. AWE computers
- a. Can power on/shutdown AWE computers
49. Digital marquee
- a. Can create a new message
 - b. Can open and edit existing messages
 - c. Can add a text box
 - d. Can change text font, size and color

Branch Manager

- e. Can change background
 - f. Can preview messages
 - g. Can create and save a message to a specific category
 - h. Can schedule and remove messages
 - i. Can update schedule
 - j. Can override all messages on a playlist
 - k. Can import graphics/add an image
 - l. Can set default text/effects properties
 - m. Can set hold time for messages
50. Wifi
- a. Can connect devices to public wifi
 - b. Can connect devices to staff wifi
51. Equipment – Projector
- a. Can turn on/off
 - b. Can connect laptop to projector and mirror laptop screen
 - c. Can change size of the projected image
 - d. Can focus projected image (tabletop projectors only)
 - e. Can adjust height
52. Equipment – Televisions
- a. Can turn on/off
 - b. Can connect DVD player and play DVD
 - c. Can connect laptop and mirror the screen
 - d. Can wirelessly connect devices such as a tablet, laptop, or smartphone to smart TV (Fort Thomas only)
 - e. Can mirror a device such as a tablet or smartphone to Apple TV
 - f. Can select various inputs (HDMI, AV, etc.)
 - g. Can display live programming on TVs with antenna (e.g. weather)
 - h. Can change channel
 - i. Can adjust volume
53. Equipment – Security camera hardware/software
- a. Can launch security camera software
 - b. Can view live feeds on all cameras at all locations
 - c. Can search previously recorded footage
 - d. Can print images to file with incident reports
 - e. Can save video footage to a flash drive
54. Equipment – Miscellaneous
- a. Can operate shredder
 - b. Can take photos with digital camera or cell phone
 - c. Can operate ZappBug Oven

Branch Manager

- d. Can arm and disarm emergency door alarms
 - e. Can arm and disarm AED door alarm
 - f. Can operate AED
55. Thermostats (Fort Thomas, Cold Spring, Alexandria)
- a. Can access thermostat website
 - b. Adjust thermostats at any branch using the thermostat website
 - c. Set a temporary or permanent temperature hold
 - d. Knows difference between set temperature and hold temp
56. BAS software (Newport)
- a. Can access BAS software
 - b. Can log in
 - c. Can create and change schedules
 - d. Change HVAC units from Global to Operator to Local and know what each setting means
 - e. Change set point temperatures for individual heat pumps
 - f. Can adjust fans in ventilation portion
57. Mobile Hotspot
- a. Can turn on and off
 - b. Knows the signal name
 - c. Knows the password
 - d. Can connect to hotspot with a mobile device
58. RB Digital magazines
- a. Can locate on CCPL website
 - b. Can create a new account and sign in
 - c. Can install RB Digital app to compatible device
 - d. Can checkout, download, and view title in RB Digital app
59. EBSCO databases (any research database such as MasterFILE Premier)
- a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can search for a topic
 - d. Can tell the difference between full text entries and citations only
 - e. Can limit search results to full text
 - f. Can sort results by date
 - g. Can email an article/attachment
 - h. Can retrieve a list of all articles in a specific magazine/journal issue (e.g. Nov 2016 National Geographic)
 - i. Can find a full-text newspaper article that mentions a northern Kentucky city/town.
60. NovelList

Branch Manager

- a. Can locate on the CCPL website
 - b. Can explain to patron how to access from home
 - c. Can identify read-a-likes based on a title or author
 - d. Can limit results based on age of audience
 - e. Can limit results based on grade level, lexile range, or accelerated reader book level number (e.g. 4.2)
 - f. Can find book discussion guides
 - g. Can find books by Appeal and create your own Appeal Mix
 - h. Can sign up for NovelList newsletters
61. Mango Languages
- a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can create an account and log in
 - d. Can start a course
 - e. Can use the translate feature
 - f. Can track user activity
62. Consumer Reports
- a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can find product ratings
 - d. Can filter ratings by cost and score
 - e. Can sort results by price
 - f. Can compare three models of a product
 - g. Can find My Benefits and use the Car Recall Tracker
63. Gale Courses
- a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can explain service (as if to a patron)
 - d. Can identify the New, Popular, and Featured courses
 - e. Can find courses on basic computer skills
64. Learning Express Library
- a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can find the Citizenship practice test
 - d. Can find the Introduction to the GED test
 - e. Can find ACT practice tests
 - f. Can find the GRE practice tests
 - g. Can find Resume Builder
 - h. Can find career match quizzes

Branch Manager

65. Miscellaneous tech
- a. Can install and configure library app on a mobile device
 - b. Knows the difference between streaming and downloading
 - c. Can turn a mobile device on/off
 - d. Can increase or decrease the volume or mute a mobile device
 - e. Can close all apps on a mobile device
 - f. Can use thermal laminator

Branch Services Assistant

Created 28 Mar 2018
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can set up automatic out-of-office reply
 - e. Can change password
 - f. Can change email signature
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate work schedules
 - d. Can locate performance review forms
 - e. Can locate Personnel Policies
 - f. Can locate branch staff list
 - g. Can locate emergency contact form
 - h. Can locate core competency checklist
 - i. Can locate applicable training manuals and guidelines
 - j. Can change password
 - k. Can open documents (e.g. performance review forms)
4. Litmos
 - a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started

Branch Services Assistant

5. Basic computer use
 - a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can minimize, maximize or resize a window
 - e. Can restart public relations device at Patron Services desk
 - f. Can move, rename, and delete files
 - g. Can create a folder
 - h. Can identify properties of a file including size, date created, and date last modified
6. Polaris – Basics
 - a. Can start, logon, logoff, and exit Polaris client
 - b. Can load entire search list when Polaris loads only partial results
7. Polaris – Searching
 - a. Can search bibliographic records
 - b. Can search item records
 - c. Knows the difference between bibliographic and item records
 - d. Can search for items by common fields: title, author, keyword, series, barcode
 - e. Can find a patron registration by using patron name or barcode
 - f. Can sort search results by author, date and format
8. Polaris – Record sets
 - a. Can create an item record set
 - b. Can add item records to a record set
 - c. Can find and access a record set
 - d. Can remove items from a record set
 - e. Can delete a record set
 - f. Can bulk change item record sets
 - g. Can properly bulk change weeding item record set
 - h. Knows how to assign the correct ownership level to record sets
9. Polaris – Patron registration
 - a. Can create a new patron registration
 - b. Knows how to determine correct statistical class
 - c. Can delete a patron registration
 - d. Can update a patron registration
 - e. Can reset PIN
 - f. Can add patron photo

Branch Services Assistant

- g. Can turn on a patron's reading history – knows how long the reading history is kept, how many items can be in the list, and what happens when reading history is turned off
- h. Can enable eReceipts
- 10. Polaris – Patron notes and blocks
 - a. Can add a library-assigned or free text patron block
 - b. Can delete a patron block
 - c. Can add a blocking or non-blocking note
 - d. Can delete a blocking or non-blocking note
 - e. Knows what to enter in a patron note field after submitting an item request on behalf of patron
 - f. Knows what kind of patron note to enter and what text to enter after patron signs a laptop user agreement (Fort Thomas and Alexandria)
- 11. Polaris – Reports
 - a. Can run and print the Request Manager report (pick list)
 - b. Can run and print the financial report for balancing cash drawer
 - c. Can run, post, and print fines Z-fold mailer
 - d. Can run, post, and print holds Z-fold mailer
 - e. Can run, post, and print billing Z-fold mailer
 - f. Can run, post, and print overdue Z-fold mailer
 - g. Knows how to re-print daily notices (e.g. in the event of printer error)
- 12. Polaris – Check out/renewal
 - a. Can open check out screen
 - b. Can process check out blocks and messages
 - c. Can check out items to a patron
 - d. Can print check out receipt
 - e. Can view items checked out to a patron
 - f. Knows how to assign a special loan period and under what conditions
 - g. Can renew all items on a patron account
 - h. Can renew partial list of items on a patron account
 - i. Can determine how many times an item has been renewed
 - j. Can identify how many renewals are remaining
 - k. Knows when auto-renewal takes place and the reasons (3) why the renewal may be denied
 - l. Can print a list of all items out
 - m. Can reset due date
- 13. Polaris – Check in
 - a. Can check in on normal mode
 - b. Can check in on bulk mode

Branch Services Assistant

- c. Can check in on in-house mode
 - d. Can set free days on check in
 - e. Knows difference between grace period and free days
 - f. Can process check in messages and blocks
 - g. Can print check in receipt
14. Polaris – Patron accounting
- a. Can view a patron's charges
 - b. Can process cash or check payment in full
 - c. Can process cash or check partial payment
 - d. Can waive all charges
 - e. Can waive partial charges
 - f. Can process credit card payment in full
 - g. Can process credit card partial payment
 - h. Can process payment from credit
 - i. Can view a patron's notice history
 - j. Can create a charge on a patron's account
 - k. Can manually create a credit on a patron's account
 - l. Can view a patron's financial transaction history
 - m. Can determine what form of payment a patron used to pay a charge (e.g. cash, credit card, etc.)
 - n. Knows the procedure for refunding a credit when the original charge was paid by cash/check
 - o. Knows the procedure for refunding a credit when the original charge was paid by credit card
 - p. Knows policy on allowing patrons to pay \$1 per computer use
15. Polaris – Claims and lost items
- a. Can set an item to Claim Returned
 - b. Can set an item to Claim Never Had
 - c. Can estimate fines for a patron on overdue items that have not been returned
 - d. Can declare an item lost
 - e. Can find the price of a lost item for a patron
 - f. Can resolve a lost and un-paid item
 - g. Can resolve a lost and paid item
 - h. Can resolve a withdrawn item that has been returned
 - i. Can resolve a deleted item that has been returned
16. Polaris – Holds
- a. Can place a bibliographic-level hold on an item
 - b. Can place an item-level hold on an item (and knows when it is appropriate to do so)

Branch Services Assistant

- c. Can view a patron's hold list
 - d. Can cancel a hold
 - e. Can delete a hold
 - f. Knows what the following holds terms mean: active, cancelled, held, inactive, pending, not-supplied
 - g. Can view holds queue
 - h. Can inactivate a hold request
 - i. Can reactivate a hold request
 - j. Can group and ungroup holds
 - k. Can change pickup location on a hold with a status of Active, Inactive, Pending, or Held
17. Polaris – Item records
- a. Can change an item circulation status to in-repair, missing, or withdrawn
 - b. Know when to check/uncheck boxes in item records (non-circulating, display in PAC, loanable outside system, holdable)
 - c. Can determine item availability
 - d. Can find item due date
 - e. Can find last check in date
 - f. Can find item check out date
 - g. Can view and interpret an item's circulation history
 - h. Can change the barcode number of an item
 - i. Can find the current borrower information on a checked out item
 - j. Can find last borrower information on an item
 - k. Can add a library assigned or free text block to an item
 - l. Can change loan periods (e.g. 3 days to 7 days for DVDs)
18. Polaris – Serials
- a. Can check in newspapers and magazines
 - b. Can uncheck in newspapers and magazines
 - c. Can combine magazine issues
 - d. Can add/predict more magazine issues
19. Polaris – Off-line
- a. Can log into Polaris off-line
 - b. Can log off Polaris off-line
20. Public Access Catalog
- a. Can search for items
 - b. Can search for items by Accelerated Reader or Lexile information (e.g. Lexile score, AR interest level, book level, or point level)
 - c. Can narrow search by type of material and
 - d. Can help a patron log in to account

Branch Services Assistant

- e. Can help a patron place a hold
- f. Can help a patron make a payment
- 21. Library website
 - a. Can register a patron for a program
 - b. Can submit request for one-on-one technology training for patron
 - c. Can sign up a patron for the library newsletter
 - d. Knows where to direct a patron to sign up for a digital only library card
 - e. Knows where to direct a patron to apply to use a meeting/study room
 - f. Knows where to direct a patron to apply for a job or volunteer position
 - g. Knows where to direct a patron to sign up for book recommendations by email
- 22. Library telephone system
 - a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail
- 23. Kentucky Libraries Unbound (native interface)
 - a. Can navigate to website
 - b. Can find help and troubleshooting pages
 - c. Can sign in
 - d. Can search for items
 - e. Can check out items
 - f. Can determine format of items (audio, ebook, Kindle, video) and understand the differences
 - g. Can determine number of copies and availability of an item
 - h. Can place a hold on an item
 - i. Can view items checked out
 - j. Can view holds
 - k. Knows about the Advantage collection and understands how it works in relation to the consortium collection
 - l. Can limit search results by format, maturity, and availability
 - m. Can change default lending periods
- 24. Kentucky Libraries Unbound (Public Access Catalog)
 - a. Can search for items
 - b. Can check out items
 - c. Can determine format of items (audio, book, video)
 - d. Can place a hold on an item

Branch Services Assistant

25. Overdrive app
 - a. Can download Overdrive app to compatible device
 - b. Can add KLU to "My Libraries"
 - c. Can sign in to KLU account
 - d. Can download items to device
 - e. Can return an item
 - f. Can download Kindle app to compatible device
 - g. Can add a KLU checkout to the Kindle app through Amazon
26. Libby app
 - a. Can download Libby app to compatible device
 - b. Can add KLU to "Your Libraries"
 - c. Can add a card
 - d. Can link a second card
 - e. Can switch between two linked cards
 - f. Can search for and borrow an item
 - g. Can display book details (e.g. length of audiobook)
 - h. Can open and change reading settings of an ebook (font size, lighting, book design)
 - i. Can download items to Libby
 - j. Can change the loan period of an item
 - k. Can limit search by format (ebook, eaudiobook, etc.)
 - l. Can limit search to available titles only
 - m. Can limit search to Kindle-compatible items only
 - n. Can send borrowed titles to Kindle app/device
 - o. Can place and suspend holds
 - p. Can adjust download settings
 - q. Can return a title
 - r. Can find list of loans and holds
 - s. Can view place in line for a hold
27. Miscellaneous web sites
 - a. Can submit a trouble ticket (for technology help)
 - b. Can submit an item request (for purchase or ILL)
 - c. Can create/edit reservations for meetings using online calendars
 - d. Can locate materials at other libraries using WorldCat
28. Microsoft Office Basics (Word, Excel, PowerPoint, or Publisher)
 - a. Can create a new document
 - b. Can open and close a document
 - c. Can save files in different formats (.docx, .xlsx, .pdf, etc.)
 - d. Can print preview and print only selected pages or selected text of a document

Branch Services Assistant

- e. Can copy/cut and paste
 - f. Can format fonts (color, font used, size, bold, italicize, underline)
 - g. Can format paragraphs (line spacing, indents)
 - h. Can format document (margins, orientation, columns)
 - i. Can use spell check
 - j. Can use find and replace commands
 - k. Can use undo and redo
29. Microsoft Word
- a. Can create numbered and bulleted lists
 - b. Can insert an image or clip art
 - c. Can use Microsoft templates
30. Microsoft Excel
- a. Can format cells (number format, alignment, border, fill)
 - b. Can adjust row height
 - c. Can adjust column width
 - d. Can sort fields
31. Microsoft PowerPoint
- a. Can create, add, edit, copy, delete slides
 - b. Can view a slideshow in normal, slide sorter, reading, and slideshow view
32. Microsoft Publisher
- a. Can insert text boxes
 - b. Can insert an image or clip art
33. Internet browsers
- a. Can use forward and back buttons
 - b. Can refresh the page
 - c. Can complete a search
 - d. Can open/close multiple tabs
 - e. Can navigate between tabs
 - f. Can print using embedded icons (e.g. Adobe PDF)
 - g. Can upload a file (e.g. resume to a job application site)
 - h. Can save or copy an image
 - i. Can add a site to favorites and favorite bar
 - j. Can set the home page
 - k. Can play, pause, and change the volume of an embedded video
 - l. Can download a file and identify the download location
 - m. Can disable pop-up blocker in web browsers
34. Printing – basics
- a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs

Branch Services Assistant

- b. Can use print preview (when available)
- c. Can choose between printers
- 35. Printing – receipt printers
 - a. Can turn on/off
 - b. Can change paper
- 36. Printing – Dymo label printer
 - a. Can change paper
 - b. Can print spine label
- 37. Public copier/printer/scanner/fax machine
 - a. Knows where main power switch is located
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can copy in black/white or color
 - f. Can enlarge and reduce
 - g. Can make single-sided or double-sided copies
 - h. Able to use any tray for copying and copy to all paper sizes
 - i. Can send a fax
 - j. Knows when fax/email jobs should be split into multiple jobs due to number of pages, page content, etc.
 - k. Can scan and email documents in black/white or color
 - l. Can scan documents to a USB drive
 - m. Can delete scanned documents
 - n. Can make an image lighter or darker
 - o. Can clear error messages from screen
 - p. Can view patron's print jobs by laptop name and number
 - q. Can release patron's print job
 - r. Can delete a print job
 - s. Can override payment with bypass key
 - t. Knows procedure for calling Millennium for service
 - u. Knows what bills/coins are accepted by the coin-op
- 38. Public Laptops (Alexandria and Fort Thomas only)
 - a. Can override filter
 - b. Can adjust volume
 - c. Can assist a patron with choosing black/white or color printer and submit print job
 - d. Knows the difference between closing client and logging in as super user and can do both.
 - e. Can end session

Branch Services Assistant

- f. Can lock a computer
 - g. Can check condition of laptop and peripheral equipment
 - h. Can connect laptop to charger
39. Wifi
- a. Can connect devices to public wifi
 - b. Can connect devices to staff wifi
40. Equipment – Televisions
- a. Can turn on/off
 - b. Can connect laptop and mirror the screen
 - c. Can select various inputs (HDMI, AV, etc.)
 - d. Can display live programming on TVs with antenna (e.g. weather)
 - e. Can change channel
 - f. Can adjust volume
41. Equipment – Security camera hardware/software
- a. Can launch security camera software
 - b. Can view live feeds on all cameras at home branch
 - c. Can save video footage to a flash drive
42. Equipment – Projector
- a. Can turn on/off
 - b. Can connect laptop to projector and mirror laptop screen
 - c. Can change size of the projected image
 - d. Can focus projected image (tabletop projectors only)
 - e. Can adjust height
43. Equipment – Miscellaneous
- a. Can operate shredder
 - b. Can take photos with digital camera or cell phone
 - c. Can arm and disarm emergency door alarms
 - d. Can arm and disarm AED door alarm
 - e. Can operate AED
44. Thermostats (Fort Thomas, Cold Spring, Alexandria)
- a. Set a temporary or permanent temperature hold
 - b. Knows difference between set temperature and hold temp
45. RB Digital magazines
- a. Can locate on CCPL website
 - b. Can create a new account and sign in
 - c. Can install RB Digital app to compatible device
 - d. Can checkout, download, and view title in RB Digital app
46. EBSCO databases (any research database such as MasterFILE Premier)
- a. Can locate on CCPL website

Branch Services Assistant

- b. Can explain to patron how to access from home
 - c. Can search for a topic
 - d. Can tell the difference between full text entries and citations only
 - e. Can limit search results to full text
 - f. Can sort results by date
 - g. Can email an article/attachment
 - h. Can retrieve a list of all articles in a specific magazine/journal issue (e.g. Nov 2016 National Geographic)
 - i. Can find a full-text newspaper article that mentions a northern Kentucky city/town
47. NoveList
- a. Can locate on the CCPL website
 - b. Can explain to patron how to access from home
 - c. Can identify read-a-likes based on a title or author
 - d. Can limit results based on age of audience
 - e. Can limit results based on grade level, lexile range, or accelerated reader book level number (e.g. 4.2)
 - f. Can find book discussion guides
 - g. Can find books by Appeal and create your own Appeal Mix
 - h. Can sign up for NoveList newsletters
48. Mango Languages
- a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can create an account and log in
 - d. Can start a course
 - e. Can use the translate feature
 - f. Can track user activity
49. Consumer Reports
- a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can find product ratings
 - d. Can filter ratings by cost and score
 - e. Can sort results by price
 - f. Can compare three models of a product
 - g. Can find My Benefits and use the Car Recall Tracker
50. Gale Courses
- a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can explain service (as if to a patron)

Branch Services Assistant

- d. Can identify the New, Popular, and Featured courses
 - e. Can find courses on basic computer skills
51. Learning Express Library
- a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can find the Citizenship practice test
 - d. Can find the Introduction to the GED test
 - e. Can find ACT practice tests
 - f. Can find the GRE practice tests
 - g. Can find Resume Builder
 - h. Can find career match quizzes
52. Miscellaneous tech
- a. Can install and configure library app on a mobile device
 - b. Knows the difference between streaming and downloading
 - c. Can turn a mobile device on/off
 - d. Can increase or decrease the volume or mute a mobile device
 - e. Can close all apps on a mobile device
 - f. Can send an email to participants

Branch Supervisor

Created 28 Mar 2018
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO (add for all staff)
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
 - i. Can approve or deny time off requests of employees
 - j. Can approve timesheets of employees
 - k. Can generate report of hours worked by part-time employees
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change password
 - e. Can set up automatic out-of-office reply
 - f. Can change email signature
 - g. Can manage email contacts
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate work schedules
 - d. Can locate performance review forms
 - e. Can locate Personnel Policies
 - f. Can locate branch staff list
 - g. Can locate emergency contact form
 - h. Can locate core competency checklist
 - i. Can locate applicable training manuals and guidelines
 - j. Can change password
 - k. Can add new pages
 - l. Can add and edit content
 - m. Can upload and link to uploaded files or images

Branch Supervisor

- n. Can open documents (e.g. performance review forms)
- 4. Litmos
 - a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started
 - f. Can switch between Learner and Team Leader/Admin views
- 5. Basic computer use
 - a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can minimize, maximize or resize a window
 - e. Can diagnose basic computer problems
 - f. Understands basic password security and password creation
 - g. Can restart public relations device at Patron Services desk
 - h. Can move, rename, and delete files
 - i. Can create a folder
 - j. Can identify properties of a file including size, date created, and date last modified
- 6. Polaris – Basics
 - a. Can start, logon, logoff, and exit Polaris client
 - b. Can load entire search list when Polaris loads only partial results
- 7. Polaris – Searching
 - a. Can search bibliographic records
 - b. Can search item records
 - c. Knows the difference between bibliographic and item records
 - d. Can search for items by common fields: title, author, keyword, series, barcode
 - e. Can find a patron registration by using patron name or barcode
 - f. Can sort search results by author, date and format
- 8. Polaris – Record sets
 - a. Can create an item record set
 - b. Can add item records to a record set
 - c. Can find and access a record set
 - d. Can remove items from a record set
 - e. Can delete a record set
 - f. Can bulk change item record sets

Branch Supervisor

- g. Can properly bulk change weeding item record set
- h. Knows how to assign the correct ownership level to record sets
- 9. Polaris – Patron registration
 - a. Can create a new patron registration
 - b. Knows how to determine correct statistical class
 - c. Can delete a patron registration
 - d. Can update a patron registration
 - e. Can reset PIN
 - f. Can add patron photo
 - g. Can turn on a patron's reading history – knows how long the reading history is kept, how many items can be in the list, and what happens when reading history is turned off
 - h. Can enable eReceipts
- 10. Polaris – Patron notes and blocks
 - a. Can add a library-assigned or free text patron block
 - b. Can delete a patron block
 - c. Can add a blocking or non-blocking note
 - d. Can delete a blocking or non-blocking note
 - e. Knows what to enter in a patron note field after submitting an item request on behalf of patron
 - f. Knows what kind of patron note to enter and what text to enter after patron signs a laptop user agreement (Fort Thomas and Alexandria)
- 11. Polaris – Reports
 - a. Can run and print the Request Manager report (pick list)
 - b. Can run and print the financial report for balancing cash drawer
 - c. Can run, post, and print fines Z-fold mailer
 - d. Can run, post, and print holds Z-fold mailer
 - e. Can run, post, and print billing Z-fold mailer
 - f. Can run, post, and print overdue Z-fold mailer
 - g. Knows how to re-print daily notices (e.g. in the event of printer error)
 - h. Can find, open, and complete branch statistical report
 - i. Can run patron register report
 - j. Can run in-house report
- 12. Polaris – Check out/renewal
 - a. Can open check out screen
 - b. Can process check out blocks and messages
 - c. Can check out items to a patron
 - d. Can print check out receipt
 - e. Can view items checked out to a patron

Branch Supervisor

- f. Knows how to assign a special loan period and under what conditions
 - g. Can renew all items on a patron account
 - h. Can renew partial list of items on a patron account
 - i. Can determine how many times an item has been renewed
 - j. Can identify how many renewals are remaining
 - k. Knows when auto-renewal takes place and the reasons (3) why the renewal may be denied
 - l. Can print a list of all items out
 - m. Can reset due date
13. Polaris – Check in
- a. Can check in on normal mode
 - b. Can check in on bulk mode
 - c. Can check in on in-house mode
 - d. Can set free days on check in
 - e. Knows difference between grace period and free days
 - f. Can process check in messages and blocks
 - g. Can print check in receipt
14. Polaris – Patron accounting
- a. Can view a patron's charges
 - b. Can process cash or check payment in full
 - c. Can process cash or check partial payment
 - d. Can waive all charges
 - e. Can waive partial charges
 - f. Can process credit card payment in full
 - g. Can process credit card partial payment
 - h. Can process payment from credit
 - i. Can view a patron's notice history
 - j. Can create a charge on a patron's account
 - k. Can manually create a bill
 - l. Can manually create a credit on a patron's account
 - m. Can view a patron's financial transaction history
 - n. Can determine what form of payment a patron used to pay a charge (e.g. cash, credit card, etc.)
 - o. Knows the procedure for refunding a credit when the original charge was paid by cash/check
 - p. Knows the procedure for refunding a credit when the original charge was paid by credit card
 - q. Knows policy on allowing patrons to pay \$1 per computer use
15. Polaris – Claims and lost items

Branch Supervisor

- a. Can set an item to Claim Returned
 - b. Can set an item to Claim Never Had
 - c. Knows procedure for processing a Claim Returned item that is not returned
 - d. Knows procedure for processing a Claim Never Had item that is not returned
 - e. Can estimate fines for a patron on overdue items that have not been returned
 - f. Can declare an item lost
 - g. Can find the price of a lost item for a patron
 - h. Can resolve a lost and un-paid item
 - i. Can resolve a lost and paid item
 - j. Can resolve a withdrawn item that has been returned
 - k. Can resolve a deleted item that has been returned
16. Polaris – Holds
- a. Can place a bibliographic-level hold on an item
 - b. Can place an item-level hold on an item (and knows when it is appropriate to do so)
 - c. Can view a patron's hold list
 - d. Can cancel a hold
 - e. Can delete a hold
 - f. Knows what the following holds terms mean: active, cancelled, held, inactive, pending, not-supplied
 - g. Can view holds queue
 - h. Can shuffle holds queue
 - i. Can inactivate a hold request
 - j. Can reactivate a hold request
 - k. Can group and ungroup holds
 - l. Can change pickup location on a hold with a status of Active, Inactive, Pending, or Held
17. Polaris – Item records
- a. Can change an item circulation status to in-repair, missing, or withdrawn
 - b. Know when to check/uncheck boxes in item records (non-circulating, display in PAC, loanable outside system, holdable)
 - c. Can determine item availability
 - d. Can find item due date
 - e. Can find last check in date
 - f. Can find item check out date
 - g. Can view and interpret an item's circulation history
 - h. Can change the barcode number of an item
 - i. Can find the current borrower information on a checked out item
 - j. Can find last borrower information on an item

Branch Supervisor

- k. Can add a library assigned or free text block to an item
- l. Can change loan periods (e.g. 3 days to 7 days for DVDs)
- 18. Polaris – Serials
 - a. Can check in newspapers and magazines
 - b. Can uncheck in newspapers and magazines
 - c. Can combine magazine issues
 - d. Can add/predict more magazine issues
- 19. Polaris – Off-line
 - a. Can log into Polaris off-line
 - b. Can log off Polaris off-line
- 20. Public Access Catalog
 - a. Can search for items
 - b. Can search for items by Accelerated Reader or Lexile information (e.g. Lexile score, AR interest level, book level, or point level)
 - c. Can narrow search by type of material and
 - d. Can help a patron log in to account
 - e. Can help a patron place a hold
 - f. Can help a patron make a payment
- 21. Unique Management System
 - a. Can log in to Unique's website
 - b. Can search for and locate patron account
 - c. Can update patron information
 - d. Can view transaction history
 - e. Can determine status of an account
- 22. Library website
 - a. Can register a patron for a program
 - b. Can submit request for one-on-one technology training for patron
 - c. Can sign up a patron for the library newsletter
 - d. Knows where to direct a patron to sign up for a digital only library card
 - e. Knows where to direct a patron to apply to use a meeting/study room
 - f. Knows where to direct a patron to apply for a job or volunteer position
 - g. Knows where to direct a patron to sign up for book recommendations by email
- 23. Library telephone system
 - a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail

Branch Supervisor

- g. Can delete voicemail
 - h. Can change personal voicemail message
 - i. Can access personal voicemail messages remotely
24. Event Calendar
- a. Can log in and search for programs
 - b. Can view registrations/bookings for an event
 - c. Can create a new event
 - d. Can duplicate an event
 - e. Can insert an image
 - f. Can add a hyperlink
 - g. Can set event category, PR category, and reporting category
 - h. Can select appropriate booking and attendee form
 - i. Can publish event or save draft
 - j. Can edit events
 - k. Can delete an event
 - l. Can enter final attendance
 - m. Can preview an event on the website
 - n. Can enable registration for an event and set registration and wait list limits
 - o. Can set booking cut-off date
 - p. Can edit/delete bookings
 - q. Knows how to export bookings to generate participant list
 - r. Can send an email to registrants
25. Kentucky Libraries Unbound (native interface)
- a. Can navigate to website
 - b. Can find help and troubleshooting pages
 - c. Can sign in
 - d. Can search for items
 - e. Can check out items
 - f. Can determine format of items (audio, ebook, Kindle, video) and understand the differences
 - g. Can determine number of copies and availability of an item
 - h. Can place a hold on an item
 - i. Can view items checked out
 - j. Can view holds
 - k. Knows about the Advantage collection and understands how it works in relation to the consortium collection
 - l. Can limit search results by format, maturity, and availability
 - m. Can change default lending periods
26. Kentucky Libraries Unbound (Public Access Catalog)

Branch Supervisor

- a. Can search for items
 - b. Can check out items
 - c. Can determine format of items (audio, book, video)
 - d. Can place a hold on an item
27. Overdrive app
- a. Can download Overdrive app to compatible device
 - b. Can add KLU to "My Libraries"
 - c. Can sign in to KLU account
 - d. Can download items to device
 - e. Can return an item
 - f. Can download Kindle app to compatible device
 - g. Can add a KLU checkout to the Kindle app through Amazon
28. Libby app
- a. Can download Libby app to compatible device
 - b. Can add KLU to "Your Libraries"
 - c. Can add a card
 - d. Can link a second card
 - e. Can switch between two linked cards
 - f. Can search for and borrow an item
 - g. Can display book details (e.g. length of audiobook)
 - h. Can open and change reading settings of an ebook (font size, lighting, book design)
 - i. Can download items to Libby
 - j. Can change the loan period of an item
 - k. Can limit search by format (ebook, eaudiobook, etc.)
 - l. Can limit search to available titles only
 - m. Can limit search to Kindle-compatible items only
 - n. Can send borrowed titles to Kindle app/device
 - o. Can place and suspend holds
 - p. Can adjust download settings
 - q. Can return a title
 - r. Can find list of loans and holds
 - s. Can view place in line for a hold
29. Miscellaneous web sites
- a. Can submit a trouble ticket (for technology help)
 - b. Can submit an item request (for purchase or ILL)
 - c. Can create/edit reservations for meetings using online calendars
 - d. Can locate materials at other libraries using WorldCat
30. Microsoft Office Basics (Word, Excel, PowerPoint, or Publisher)

Branch Supervisor

- a. Can create a new document
 - b. Can open and close a document
 - c. Can save files in different formats (.docx, .xlsx, .pdf, etc.)
 - d. Can print preview and print only selected pages or selected text of a document
 - e. Can copy/cut and paste
 - f. Can format fonts (color, font used, size, bold, italicize, underline)
 - g. Can format paragraphs (line spacing, indents)
 - h. Can format document (margins, orientation, columns)
 - i. Can use spell check
 - j. Can use find and replace commands
 - k. Can use undo and redo
31. Microsoft Word
- a. Can create numbered and bulleted lists
 - b. Can insert an image or clip art
 - c. Can use Microsoft templates
32. Microsoft Excel
- a. Can format cells (number format, alignment, border, fill)
 - b. Can adjust row height
 - c. Can adjust column width
 - d. Can sort fields
33. Microsoft PowerPoint
- a. Can create, add, edit, copy, delete slides
 - b. Can view a slideshow in normal, slide sorter, reading, and slideshow view
34. Microsoft Publisher
- a. Can insert text boxes
 - b. Can insert an image or clip art
35. Internet browsers
- a. Can use forward and back buttons
 - b. Can refresh the page
 - c. Can complete a search
 - d. Can open/close multiple tabs
 - e. Can navigate between tabs
 - f. Can print using embedded icons (e.g. Adobe PDF)
 - g. Can upload a file (e.g. resume to a job application site)
 - h. Can save or copy an image
 - i. Can add a site to favorites and favorite bar
 - j. Can set the home page
 - k. Can play, pause, and change the volume of an embedded video
 - l. Can download a file and identify the download location

Branch Supervisor

- m. Can disable pop-up blocker in web browsers
- 36. Printing – basics
 - a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - b. Can use print preview (when available)
 - c. Can choose between printers
- 37. Printing – receipt printers
 - a. Can turn on/off
 - b. Can change paper
- 38. Printing – Dymo label printer
 - a. Can change paper
 - b. Can print spine label
- 39. Public copier/printer/scanner/fax machine
 - a. Knows where main power switch is located
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can copy in black/white or color
 - f. Can enlarge and reduce
 - g. Can make single-sided or double-sided copies
 - h. Able to use any tray for copying and copy to all paper sizes
 - i. Can send a fax
 - j. Knows when fax/email jobs should be split into multiple jobs due to number of pages, page content, etc.
 - k. Can scan and email documents in black/white or color
 - l. Can scan documents to a USB drive
 - m. Can delete scanned documents
 - n. Can make an image lighter or darker
 - o. Can clear error messages from screen
 - p. Can view patron's print jobs by laptop name and number
 - q. Can release patron's print job
 - r. Can delete a print job
 - s. Can override payment with bypass key
 - t. Knows procedure for calling Millennium for service
 - u. Knows what bills/coins are accepted by the coin-op
- 40. Public Laptops
 - a. Can disable Deepfreeze
 - b. Can re-enable Deepfreeze
 - c. Can override filter

Branch Supervisor

- d. Can adjust volume
 - e. Can assist a patron with choosing black/white or color printer and submit print job
 - f. Knows the difference between closing client and logging in as super user and can do both.
 - g. Can end session
 - h. Can lock a computer
 - i. Can check condition of laptop and peripheral equipment
 - j. Can connect laptop to charger
41. Wifi
- a. Can connect devices to public wifi
 - b. Can connect devices to staff wifi
42. Equipment – Televisions
- a. Can turn on/off
 - b. Can connect laptop and mirror the screen
 - c. Can select various inputs (HDMI, AV, etc.)
 - d. Can display live programming on TVs with antenna (e.g. weather)
 - e. Can change channel
 - f. Can adjust volume
43. Equipment – Security camera hardware/software
- a. Can launch security camera software
 - b. Can view live feeds on all cameras at all locations
 - c. Can search previously recorded footage
 - d. Can print images to file with incident reports
 - e. Can save video footage to a flash drive
44. Equipment – Projector
- a. Can turn on/off
 - b. Can connect laptop to projector and mirror laptop screen
 - c. Can change size of the projected image
 - d. Can focus projected image (tabletop projectors only)
 - e. Can adjust height
45. Equipment – Miscellaneous
- a. Can operate shredder
 - b. Can take photos with digital camera or cell phone
 - c. Can arm and disarm emergency door alarms
 - d. Can arm and disarm AED door alarm
 - e. Can operate AED
46. Thermostats (Fort Thomas, Cold Spring, Alexandria)
- a. Can access thermostat website

Branch Supervisor

- b. Adjust thermostats at any branch using the thermostat website
 - c. Set a temporary or permanent temperature hold
 - d. Knows difference between set temperature and hold temp
47. RB Digital magazines
- a. Can locate on CCPL website
 - b. Can create a new account and sign in
 - c. Can install RB Digital app to compatible device
 - d. Can checkout, download, and view title in RB Digital app
48. EBSCO databases (any research database such as MasterFILE Premier)
- a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can search for a topic
 - d. Can tell the difference between full text entries and citations only
 - e. Can limit search results to full text
 - f. Can sort results by date
 - g. Can email an article/attachment
 - h. Can retrieve a list of all articles in a specific magazine/journal issue (e.g. Nov 2016 National Geographic)
 - i. Can find a full-text newspaper article that mentions a northern Kentucky city/town
49. NovelList
- a. Can locate on the CCPL website
 - b. Can explain to patron how to access from home
 - c. Can identify read-a-likes based on a title or author
 - d. Can limit results based on age of audience
 - e. Can limit results based on grade level, lexile range, or accelerated reader book level number (e.g. 4.2)
 - f. Can find book discussion guides
 - g. Can find books by Appeal and create your own Appeal Mix
 - h. Can sign up for NovelList newsletters
50. Mango Languages
- a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can create an account and log in
 - d. Can start a course
 - e. Can use the translate feature
 - f. Can track user activity
51. Consumer Reports
- a. Can locate on CCPL website

Branch Supervisor

- b. Can explain to patron how to access from home
 - c. Can find product ratings
 - d. Can filter ratings by cost and score
 - e. Can sort results by price
 - f. Can compare three models of a product
 - g. Can find My Benefits and use the Car Recall Tracker
52. Gale Courses
- a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can explain service (as if to a patron)
 - d. Can identify the New, Popular, and Featured courses
 - e. Can find courses on basic computer skills
53. Learning Express Library
- a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can find the Citizenship practice test
 - d. Can find the Introduction to the GED test
 - e. Can find ACT practice tests
 - f. Can find the GRE practice tests
 - g. Can find Resume Builder
 - h. Can find career match quizzes
54. Miscellaneous tech
- a. Can install and configure library app on a mobile device
 - b. Knows the difference between streaming and downloading
 - c. Can turn a mobile device on/off
 - d. Can increase or decrease the volume or mute a mobile device
 - e. Can close all apps on a mobile device
 - g. Can use thermal laminator

Children's Programmer

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can reset forgotten passwords for pay stubs
 - g. Can approve individual timesheet
 - h. Can retrieve electronic pay stubs and W2s
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change password
 - e. Can set up automatic out-of-office reply
 - f. Can create and add to a mailing list
 - g. Can create, edit, and time events in staff and personal calendar
 - h. Can change email signature
 - i. Can manage email contacts
 - j. Can subscribe and unsubscribe to email listservs
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms
 - d. Can locate Personnel Policies
 - e. Can locate branch staff list
 - f. Can locate emergency contact form
 - g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines
 - i. Can change password
 - j. Can add new pages
 - k. Can add and edit content
 - l. Can download documents
 - m. Can open documents (e.g. performance review forms)

Children's Programmer

4. Litmos
 - a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started
5. Basic computer use
 - a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can locate files/folders
 - e. Can minimize, maximize or resize a window
 - f. Can diagnose basic computer problems
 - g. Understands basic password security and password creation
 - h. Can move, rename, and delete files
 - i. Can create a folder
 - j. Can identify properties of a file including size, date created, and date last modified
6. Polaris – Basics
 - a. Can start, logon, logoff, and exit Polaris client
 - b. Can load entire search list when Polaris loads only partial results
7. Polaris – Searching
 - a. Can search bibliographic records
 - b. Can search item records
 - c. Knows the difference between bibliographic and item records
 - d. Can search for items by common fields: title, author, keyword, series, barcode
 - e. Can find a patron registration by using patron name or barcode
 - f. Can sort search results by author, date and format
8. Polaris – Patron registration
 - a. Can update a patron registration
 - b. Can reset PIN
 - c. Can turn on a patron's reading history – knows how long the reading history is kept, how many items can be in the list, and what happens when reading history is turned off
9. Polaris – Patron notes and blocks
 - a. Can add a library-assigned or free text patron block
 - b. Can delete a patron block
 - c. Can add a blocking or non-blocking note

Children's Programmer

- d. Can delete a blocking or non-blocking note
 - e. Knows what to enter in a patron note field after submitting an item request on behalf of patron
 - f. Knows what kind of patron note to enter and what text to enter after patron signs a laptop user agreement (Fort Thomas and Alexandria)
10. Polaris – Check out/renewal
- a. Can open check out screen
 - b. Can check out items to a patron
 - c. Can view items checked out to a patron
 - d. Can renew all items on a patron account
 - e. Can renew partial list of items on a patron account
11. Polaris – Check in
- a. Can check in on normal mode
 - b. Can check in on in-house mode
12. Polaris – Patron accounting
- a. Can view a patron's charges
 - b. Can process cash payment in full
 - c. Can process cash partial payment
 - d. Knows policy on allowing patrons to pay \$1 per computer use
13. Polaris – Holds
- a. Can place a bibliographic-level hold on an item
 - b. Can place an item-level hold on an item (and knows when it is appropriate to do so)
 - c. Can view a patron's hold list
 - d. Can cancel a hold
 - e. Can delete a hold
 - f. Knows what the following holds terms mean: active, cancelled, held, inactive, pending, not-supplied
 - g. Can view holds queue
 - h. Can inactivate a hold request
 - i. Can reactivate a hold request
 - j. Can group and ungroup holds
 - k. Can change pickup location on a hold with a status of Active, Inactive, Pending, or Held
14. Polaris – Item records
- a. Can change an item circulation status to in-repair, missing, or withdrawn
 - b. Know when to check/uncheck boxes in item records (non-circulating, display in PAC, loanable outside system, holdable)
 - c. Can determine item availability

Children's Programmer

- d. Can find item due date
 - e. Can find last check in date
 - f. Can find item check out date
 - g. Can view and interpret an item's circulation history
 - h. Can find the current borrower information on a checked out item
 - i. Can find last borrower information on an item
15. Public Access Catalog
- a. Can search for items
 - b. Can search for items by Accelerated Reader or Lexile information (e.g. Lexile score, AR interest level, book level, or point level)
 - c. Can narrow search by type of material and branch
16. Library website
- a. Can register a patron for a program
 - b. Can submit request for one-on-one technology training for patron
 - c. Can sign up a patron for the library newsletter
 - d. Knows where to direct a patron to sign up for a digital only library card
 - e. Knows where to direct a patron to apply to use a meeting/study room
 - f. Knows where to direct a patron to apply for a job or volunteer position
 - g. Knows where to direct a patron to sign up for book recommendations by email
17. Library telephone system
- a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail
 - h. Can change personal voicemail message
18. PC Reservation (staff client on Information Services desk PCs)
- a. Can create a guest pass
 - b. Can view PC status
 - c. Can determine name of patron logged on each computer
 - d. Can extend a session by adding time
 - e. Can end a session
 - f. Can send a message
 - g. Can create a reservation
 - h. Can cancel a reservation
 - i. Can unlock a computer that has been locked by a patron
 - j. Can mark a computer out of service

Children's Programmer

19. PC Reservation Station
 - a. Can assist patrons in making reservations
20. Event Calendar
 - a. Can log in and search for programs
 - b. Can view registrations/bookings for an event
 - c. Can create a new event
 - d. Can duplicate an event
 - e. Can insert an image
 - f. Can add a hyperlink
 - g. Can set event category, PR category, and reporting category
 - h. Can select appropriate booking and attendee form
 - i. Can publish event or save draft
 - j. Can edit events
 - k. Can delete an event
 - l. Can enter final attendance
 - m. Can preview an event on the website
 - n. Can enable registration for an event and set registration and wait list limits
 - o. Can set booking cut-off date
 - p. Can edit/delete bookings
 - q. Knows how to export bookings to generate participant list
 - r. Can send an email to registrants
21. Miscellaneous web sites
 - a. Can submit a trouble ticket (for technology help)
 - b. Can submit an item request (for purchase or ILL)
 - c. Can create/edit reservations for meetings using online calendars
 - d. Can log a study room use (Fort Thomas only)
 - e. Can locate materials at other libraries using WorldCat
22. Microsoft Office Basics (Word, Excel, PowerPoint, or Publisher)
 - a. Can create a new document
 - b. Can open and close a document
 - c. Can save files in different formats (.docx, .xlsx, .pdf, etc.)
 - d. Can print preview and print only selected pages or selected text of a document
 - e. Can copy/cut and paste
 - f. Can format fonts (color, font used, size, bold, italicize, underline)
 - g. Can format paragraphs (line spacing, indents)
 - h. Can format document (margins, orientation, columns)
 - i. Can use spell check
 - j. Can use find and replace commands
 - k. Can use undo and redo

Children's Programmer

23. Microsoft Word
 - a. Can create numbered and bulleted lists
 - b. Can insert an image or clip art
 - c. Can use Microsoft templates
24. Microsoft Excel
 - a. Can format cells (number format, alignment, border, fill)
 - b. Can adjust row height
 - c. Can adjust column width
 - d. Can sort fields
25. Microsoft PowerPoint
 - a. Can create, add, edit, copy, delete slides
 - b. Can view a slideshow in normal, slide sorter, reading, and slideshow view
26. Microsoft Publisher
 - a. Can insert text boxes
 - b. Can insert an image or clip art
27. Internet browsers
 - a. Can use forward and back buttons
 - b. Can refresh the page
 - c. Can complete a search
 - d. Can open/close multiple tabs
 - e. Can navigate between tabs
 - f. Can print using embedded icons (e.g. Adobe PDF)
 - g. Can upload a file (e.g. resume to a job application site)
 - h. Can save or copy an image
 - i. Can add a site to favorites and favorite bar
 - j. Can set the home page
 - k. Can play, pause, and change the volume of an embedded video
 - l. Can download a file and identify the download location
 - m. Can disable pop-up blocker in web browsers
28. Printing – basics
 - a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - b. Can use print preview (when available)
 - c. On a public Internet computer can send a black/white or color print job to the PC Reservation print release station
 - d. Can choose between printers
29. Printing – copier/printer/scanner/fax
 - a. Knows where main power switch is located
 - b. Can load paper

Children's Programmer

- c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can copy in black/white or color
 - f. Can enlarge and reduce
 - g. Can use Preview feature
 - h. Can use Card shot feature
 - i. Can make single-sided or double-sided copies
 - j. Able to use any tray for copying and copy to all paper sizes
 - k. Can send a fax
 - l. Can scan and email documents in black/white or color
 - m. Can make an image lighter or darker
 - n. Knows procedure for calling Millennium for service
30. Printing – public printer
- a. Can turn the printer on/off
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can clear error messages from printer screen
 - f. Knows procedure for calling Millennium for service
 - g. Knows what bills/coins are accepted by the coin-op
 - h. Can use bypass key
31. Printing – PC Reservation print release station
- a. Can view patron's print jobs via patron barcode
 - b. Can view entire print queue for all print jobs
 - c. Can preview a print job
 - d. Can release single or multiple print jobs
 - e. Can delete single or multiple print jobs
 - f. Can override payment with staff password
 - g. Can override payment with bypass key
 - h. Can close PC Reservation program in order to shut down computer
32. BookScan Station
- a. Can turn on/off scanner and computer
 - b. Can scan documents to the computer in color or black/white
 - c. Can rotate documents on-screen
 - d. Can delete a scanned image
 - e. Can scan to fax, USB, printer, email, Google Drive, phone/tablet
 - f. Can send a fax in color
 - g. Can set up email or print confirmation
 - h. Can create a cover page

Children's Programmer

- i. Knows procedure for calling Millennium for service
 - j. Knows what bills/coins are accepted by the coin-op
 - k. Knows when fax/email jobs should be split into multiple jobs due to number of pages, page content, etc.
 - l. Can use bypass key
33. Public Internet computers
- a. Can assist a patron with logging into the computer
 - b. Can override filter
 - c. Knows the difference between closing client and logging in as super user and can do both
 - d. Can end a session
 - e. Can lock a computer
 - f. Can adjust volume
 - g. Can assist a patron with choosing black/white or color printer and submit print job via Envisionware
 - h. Knows purpose of NTouch Videophone software and how to use it
34. AWE computers
- a. Can power on/shutdown AWE computers
35. Wifi
- a. Can connect devices to public wifi
 - b. Can connect devices to staff wifi
36. Equipment – Projector
- a. Can turn on/off
 - b. Can connect laptop to projector and mirror laptop screen
 - c. Can change size of the projected image
 - d. Can focus projected image (tabletop projectors only)
 - e. Can adjust height
37. Equipment – Televisions
- a. Can turn on/off
 - b. Can connect DVD player and play DVD
 - c. Can connect laptop and mirror the screen
 - d. Can wirelessly connect devices such as a tablet, laptop, or smartphone to smart TV (Fort Thomas only)
 - e. Can mirror a device such as a tablet or smartphone to Apple TV
 - f. Can select various inputs (HDMI, AV, etc.)
 - g. Can display live programming on TVs with antenna (e.g. weather)
 - h. Can change channel
 - i. Can adjust volume
38. Equipment – Miscellaneous

Children's Programmer

- a. Can operate shredder
- b. Can take photos with digital camera or cell phone
- c. Can arm and disarm emergency door alarms
- d. Can arm and disarm AED door alarm
- e. Can operate AED
- f. Can use thermal laminator

Children's Services Librarian

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
 - i. Can approve or deny time off requests of employees
 - j. Can approve timesheets of employees
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can set up automatic out-of-office reply
 - e. Can change password
 - f. Can create and add to a mailing list
 - g. Can change email signature
 - h. Can manage email contacts
 - i. Can subscribe and unsubscribe to email listservs
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms
 - d. Can locate Personnel Policies
 - e. Can locate branch staff list
 - f. Can locate emergency contact form
 - g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines
 - i. Can change password
 - j. Can add new pages
 - k. Can add and edit content
 - l. Can upload and link to uploaded files or images

Children's Services Librarian

- m. Can open documents (e.g. performance review forms)
- 4. Litmos
 - a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started
 - f. Can switch between Learner and Team Leader/Admin views
- 5. Basic computer use
 - a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can locate files/folders
 - e. Can minimize, maximize or resize a window
 - f. Can diagnose basic computer problems
 - g. Understands basic password security and password creation
 - h. Can move, rename, and delete files
 - i. Can create a folder
 - j. Can identify properties of a file including size, date created, and date last modified
- 6. Polaris – Basics
 - a. Can start, logon, logoff, and exit Polaris client
 - b. Can load entire search list when Polaris loads only partial results
- 7. Polaris – Searching
 - a. Can search bibliographic records
 - b. Can search item records
 - c. Knows the difference between bibliographic and item records
 - d. Can search for items by common fields: title, author, keyword, series, barcode
 - e. Can find a patron registration by using patron name or barcode
 - f. Can sort search results by author, date and format
- 8. Polaris – Record sets
 - a. Can create an item record set
 - b. Can add item records to a record set
 - c. Can find and access a record set
 - d. Can remove items from a record set
 - e. Can delete a record set
 - f. Can bulk change item record sets
 - g. Can properly bulk change weeding item record sets

Children's Services Librarian

- h. Knows how to assign the correct ownership level to record sets
- 9. Polaris – Patron registration
 - a. Can update a patron registration
 - b. Can reset PIN
 - c. Can turn on a patron's reading history – knows how long the reading history is kept, how many items can be in the list, and what happens when reading history is turned off
- 10. Polaris – Patron notes and blocks
 - a. Can add a library-assigned or free text patron block
 - b. Can delete a patron block
 - c. Can add a blocking or non-blocking note
 - d. Can delete a blocking or non-blocking note
 - e. Knows what to enter in a patron note field after submitting an item request on behalf of patron
 - f. Knows what kind of patron note to enter and what text to enter after patron signs a laptop user agreement (Fort Thomas and Alexandria)
- 11. Polaris – Check out/renewal
 - a. Can open check out screen
 - b. Can check out items to a patron
 - c. Can view items checked out to a patron
 - d. Can renew all items on a patron account
 - e. Can renew partial list of items on a patron account
- 12. Polaris – Check in
 - a. Can check in on normal mode
 - b. Can check in on in-house mode
- 13. Polaris – Patron accounting
 - a. Can view a patron's charges
 - b. Can process cash payment in full
 - c. Can process cash partial payment
 - d. Knows policy on allowing patrons to pay \$1 per computer use
- 14. Polaris – Holds
 - a. Can place a bibliographic-level hold on an item
 - b. Can place an item-level hold on an item (and knows when it is appropriate to do so)
 - c. Can view a patron's hold list
 - d. Can cancel a hold
 - e. Can delete a hold
 - f. Knows what the following holds terms mean: active, cancelled, held, inactive, pending, not-supplied

Children's Services Librarian

- g. Can view holds queue
 - h. Can inactivate a hold request
 - i. Can reactivate a hold request
 - j. Can group and ungroup holds
 - k. Can change pickup location on a hold with a status of Active, Inactive, Pending, or Held
15. Polaris – Item records
- a. Can change an item circulation status to in-repair, missing, or withdrawn
 - b. Know when to check/uncheck boxes in item records (non-circulating, display in PAC, loanable outside system, holdable)
 - c. Can determine item availability
 - d. Can find item due date
 - e. Can find last check in date
 - f. Can find item check out date
 - g. Can view and interpret an item's circulation history
 - h. Can find the current borrower information on a checked out item
 - i. Can find last borrower information on an item
16. Public Access Catalog
- a. Can search for items
 - b. Can search for items by Accelerated Reader or Lexile information (e.g. Lexile score, AR interest level, book level, or point level)
 - c. Can narrow search by type of material and branch
 - d. Can help a patron log in to account
 - e. Can help a patron place a hold
 - f. Can help a patron make a payment
17. Cloud storage (e.g. Google Drive, Dropbox)
- a. Understands cloud storage and can explain its use
 - b. Can create, access, edit and delete docs in cloud storage
18. Library website
- a. Can register a patron for a program
 - b. Can submit request for one-on-one technology training for patron
 - c. Can sign up a patron for the library newsletter
 - d. Knows where to direct a patron to sign up for a digital only library card
 - e. Knows where to direct a patron to apply to use a meeting/study room
 - f. Knows where to direct a patron to apply for a job or volunteer position
 - g. Knows where to direct a patron to sign up for book recommendations by email
19. Library telephone system
- a. Can answer incoming calls
 - b. Can transfer calls

Children's Services Librarian

- c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail
 - h. Can change personal voicemail message
 - i. Can access personal voicemail messages remotely
20. PC Reservation (staff client on Information Services desk PCs)
- a. Can create a guest pass
 - b. Can view PC status
 - c. Can determine name of patron logged on each computer
 - d. Can extend a session by adding time
 - e. Can end a session
 - f. Can send a message
 - g. Can create a reservation
 - h. Can cancel a reservation
 - i. Can unlock a computer that has been locked by a patron
 - j. Can mark a computer out of service
21. PC Reservation Station
- a. Can assist patrons in making reservations
22. Event Calendar
- a. Can log in and search for programs
 - b. Can view registrations/bookings for an event
 - c. Can create a new event
 - d. Can duplicate an event
 - e. Can insert an image
 - f. Can add a hyperlink
 - g. Can set event category, PR category, and reporting category
 - h. Can select appropriate booking and attendee form
 - i. Can publish event or save draft
 - j. Can edit events
 - k. Can delete an event
 - l. Can enter final attendance
 - m. Can preview an event on the website
 - n. Can enable registration for an event and set registration and wait list limits
 - o. Can set booking cut-off date
 - p. Can edit/delete bookings
 - q. Knows how to export bookings to generate participant list
 - r. Can send an email to registrants

Children's Services Librarian

23. Miscellaneous web sites
 - a. Can submit a trouble ticket (for technology help)
 - b. Can submit an item request (for purchase or ILL)
 - c. Can create/edit reservations for meetings using online calendars
 - d. Can log a study room use (Fort Thomas only)
 - e. Can locate materials at other libraries using WorldCat
24. Microsoft Office Basics (Word, Excel, PowerPoint, or Publisher)
 - a. Can create a new document
 - b. Can open and close a document
 - c. Can save files in different formats (.docx, .xlsx, .pdf, etc.)
 - d. Can print preview and print only selected pages or selected text of a document
 - e. Can copy/cut and paste
 - f. Can format fonts (color, font used, size, bold, italicize, underline)
 - g. Can format paragraphs (line spacing, indents)
 - h. Can format document (margins, orientation, columns)
 - i. Can use spell check
 - j. Can use find and replace commands
 - k. Can use undo and redo
25. Microsoft Word
 - a. Can create numbered and bulleted lists
 - b. Can insert an image or clip art
 - c. Can use Microsoft templates
26. Microsoft Excel
 - a. Can format cells (number format, alignment, border, fill)
 - b. Can adjust row height
 - c. Can adjust column width
 - d. Can sort fields
27. Microsoft PowerPoint
 - a. Can create, add, edit, copy, delete slides
 - b. Can view a slideshow in normal, slide sorter, reading, and slideshow view
28. Microsoft Publisher
 - a. Can insert text boxes
 - b. Can insert an image or clip art
29. Internet browsers
 - a. Can use forward and back buttons
 - b. Can refresh the page
 - c. Can complete a search
 - d. Can open/close multiple tabs
 - e. Can navigate between tabs

Children's Services Librarian

- f. Can print using embedded icons (e.g. Adobe PDF)
 - g. Can upload a file (e.g. resume to a job application site)
 - h. Can save or copy an image
 - i. Can add a site to favorites and favorite bar
 - j. Can set the home page
 - k. Can play, pause, and change the volume of an embedded video
 - l. Can download a file and identify the download location
 - m. Can disable pop-up blocker in web browsers
30. Printing – basics
- a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - b. Can use print preview (when available)
 - c. On a public Internet computer can send a black/white or color print job to the PC Reservation print release station
 - d. Can choose between printers
31. Printing – copier/printer/scanner/fax
- a. Knows where main power switch is located
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can copy in black/white or color
 - f. Can enlarge and reduce
 - g. Can use Preview feature
 - h. Can use Card Shot feature
 - i. Can make single-sided or double-sided copies
 - j. Able to use any tray for copying and copy to all paper sizes
 - k. Can send a fax
 - l. Can scan and email documents in black/white or color
 - m. Can make an image lighter or darker
 - n. Knows procedure for calling Millennium for service
32. Printing – public printer
- a. Can turn the printer on/off
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can clear error messages from printer screen
 - f. Knows procedure for calling Millennium for service
 - g. Knows what bills/coins are accepted by the coin-op
 - h. Can use bypass key

Children's Services Librarian

33. Public Laptops (Alexandria and Fort Thomas only)
 - a. Can override filter
 - b. Can adjust volume
 - c. Can assist a patron with choosing black/white or color printer and submit print job
 - d. Knows the difference between closing client and logging in as super user and can do both
 - e. Can end session
 - f. Can lock a computer
 - g. Can check condition of laptop and peripheral equipment
 - h. Can connect laptop to charger
34. Printing – PC Reservation print release station
 - a. Can view patron's print jobs via patron barcode
 - b. Can view entire print queue for all print jobs
 - c. Can preview a print job
 - d. Can release single or multiple print jobs
 - e. Can delete single or multiple print jobs
 - f. Can override payment with staff password
 - g. Can override payment with bypass key
 - h. Can close PC Reservation program in order to shut down computer
35. BookScan Station
 - a. Can turn on/off scanner and computer
 - b. Can scan documents to the computer in color or black/white
 - c. Can rotate documents on-screen
 - d. Can delete a scanned image
 - e. Can scan to fax, USB, printer, email, Google Drive, phone/tablet
 - f. Can send a fax in color
 - g. Can set up email or print confirmation
 - h. Can create a cover page
 - i. Knows procedure for calling Millennium for service
 - j. Knows what bills/coins are accepted by the coin-op
 - k. Knows when fax/email jobs should be split into multiple jobs due to number of pages, page content, etc.
 - l. Can use bypass key
36. Public Internet computers
 - a. Can assist a patron with logging into the computer
 - b. Can override filter
 - c. Knows the difference between closing client and logging in as super user and can do both

Children's Services Librarian

- d. Can end a session
 - e. Can lock a computer
 - f. Can adjust volume
 - g. Can assist a patron with choosing black/white or color printer and submit print job via Envisionware
 - h. Knows purpose of NTouch Videophone software and how to use it
37. AWE computers
- a. Can power on/shutdown AWE computers
 - b. Can collect usage statistics
38. Wifi
- a. Can connect devices to public wifi
 - b. Can connect devices to staff wifi
39. Equipment – Projector
- a. Can turn on/off
 - b. Can connect laptop to projector and mirror laptop screen
 - c. Can change size of the projected image
 - d. Can focus projected image (tabletop projectors only)
 - e. Can adjust height
40. Equipment – Televisions
- a. Can turn on/off
 - b. Can connect DVD player and play DVD
 - c. Can connect laptop and mirror the screen
 - d. Can wirelessly connect devices such as a tablet, laptop, or smartphone to smart TV (Fort Thomas only)
 - e. Can mirror a device such as a tablet or smartphone to Apple TV
 - f. Can select various inputs (HDMI, AV, etc.)
 - g. Can display live programming on TVs with antenna (e.g. weather)
 - h. Can change channel
 - i. Can adjust volume
41. Equipment – Miscellaneous
- a. Can operate shredder
 - b. Can take photos with digital camera or cell phone
 - c. Can arm and disarm emergency door alarms
 - d. Can arm and disarm AED door alarm
 - e. Can operate AED
 - f. Can use thermal laminator

Collection Services Assistant

Created 23 Dec 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change password
 - e. Can set up automatic out-of-office reply
 - f. Can change password
 - g. Can change email signature
 - h. Can manage email contacts
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms
 - d. Can locate Personnel Policies
 - e. Can locate department staff list
 - f. Can locate emergency contact form
 - g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines
 - i. Can change password
 - j. Can open documents (e.g. performance review forms)
4. Litmos
 - a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started

Collection Services Assistant

5. Basic computer use
 - a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can minimize, maximize or resize a window
6. Polaris – Acquisitions
 - a. Create, access, edit, and delete invoices and invoice line items (ILI)
 - b. Create, access, edit and delete items records
 - c. Distribute charges and credits and assign categories to charges and credits
 - d. Create, access, and edit Supplier records
 - e. Create, access, edit, and delete bibliographic records
7. Polaris – Serials
 - a. Create, access, edit, and delete serials holding records
 - b. Create, access, edit, and delete issue/part records
 - c. Create, access, edit, and delete check-in records
 - d. Create, access, and edit subscription records
8. Vendor webpages
 - a. Create, place, and track orders
 - b. Where applicable, determine if site has stock of materials, or will need to wait for an order to be received before shipping
9. Microsoft Office Basics (Word, Excel, PowerPoint, or Publisher)
 - a. Can create a new document
 - b. Can open and close a document
 - c. Can save a file to a specific location using "save as"
 - d. Can print preview and print only selected pages or selected text of a document
 - e. Can copy/cut and paste
 - f. Can format fonts (color, font used, size, bold, italicize, underline)
 - g. Can format paragraphs (line spacing, indents)
 - h. Can format document (margins, orientation, columns)
 - i. Can use spell check
 - j. Can use find and replace commands
 - k. Can use undo and redo
10. Microsoft Word
 - a. Can create numbered and bulleted lists
 - b. Can insert an image or clip art
 - c. Can use Microsoft templates
11. Microsoft Excel

Collection Services Assistant

- a. Can format cells (number format, alignment, border, fill)
 - b. Can adjust row height
 - c. Can adjust column width
 - d. Can sort fields
 - e. Can change the format (Microsoft "Category") of a cell
 - f. Can create, edit, and delete formulas
12. Library telephone system
- a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail
 - h. Change voicemail message
13. Internet browsers
- a. Can use forward and back buttons
 - b. Can refresh the page
 - c. Can complete a search
 - d. Can open/close multiple tabs
 - e. Can navigate between tabs
 - f. Can print using embedded icons (e.g. Adobe PDF)
 - g. Can upload a file (e.g. resume to a job application site)
 - h. Can save or copy an image
14. Printing – basics
- a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - b. Can use print preview (when available)
 - c. Can choose between printers

Collection Services Coordinator

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
 - i. Can approve or deny time off requests of employees
 - j. Can approve timesheets of employees
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can set up automatic out-of-office reply
 - e. Can change password
 - f. Can change email signature
 - g. Can manage email contacts
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms
 - d. Can locate Personnel Policies
 - e. Can locate branch staff list
 - f. Can locate emergency contact form
 - g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines
 - i. Can change password
 - j. Can add new pages
 - k. Can add and edit content
 - l. Can upload and link to uploaded files or images
 - m. Can open documents (e.g. performance review forms)
4. Litmos

Collection Services Coordinator

- a. Can reset forgotten username/password
- b. Can find and take courses from the Course Library
- c. Can view completed courses
- d. Can view/download achievement certificates
- e. Can view courses that are in progress, overdue, or not started
- f. Can switch between Learner and Team Leader/Admin views
5. Basic computer use
 - a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can minimize, maximize or resize a window
6. Polaris – Basics
 - a. Can start, logon, logoff, and exit Polaris client
 - b. Can load entire search list when Polaris loads only partial results
7. Polaris – Acquisitions
 - a. Create, access, edit, and delete purchase orders (PO) and purchase order line items (POLI)
 - b. Create, access, edit and delete item records POLIs
 - c. Create, access, and edit PO in Polaris
 - d. Distribute charges and credits and assign categories to charges and credits
 - e. Create, access and edit Fund records
 - f. Create, access, and edit Supplier records
8. Polaris – Cataloging
 - a. Access bibliographic record templates
 - b. Access item record templates
 - c. Create, access, and edit bibliographic records, from scratch or using template
 - d. Overwrite poor bibliographic record with better bibliographic record
 - e. Create, access, and edit item records.
 - f. Can place free text block on item record
 - g. Edit groups of bibliographic records and item records with record sets
9. Polaris – Searching
 - a. Can search bibliographic records
 - b. Can search item records
 - c. Knows the difference between bibliographic and item records
 - d. Can search for items by common fields: title, author, keyword, series, barcode
 - e. Can find a patron registration by using patron name or barcode
10. Polaris – Record sets
 - a. Can create an item record set

Collection Services Coordinator

- b. Can add item records to a record set
 - c. Can find and access a record set
 - d. Can remove items from a record set
 - e. Can delete a record set
 - f. Can bulk change item record sets
11. Polaris – Patron notes and blocks
- a. Can add a library-assigned or free text patron block
 - b. Can delete a patron block
 - c. Can add a blocking or non-blocking note
 - d. Can delete a blocking or non-blocking note
12. Polaris – Holds
- a. Can place a bibliographic-level hold on an item
 - b. Can place an item-level hold on an item (and knows when it is appropriate to do so)
 - c. Can view a patron's hold list
 - d. Can cancel a hold
 - e. Can delete a hold
 - f. Knows what the following holds terms mean: active, cancelled, held, inactive, pending, not-supplied
 - g. Can view holds queue
 - h. Can inactivate a hold request
 - i. Can reactivate a hold request
 - j. Can group and ungroup holds
 - k. Can change pickup location on a hold with a status of Active, Inactive, Pending, or Held
13. Polaris – Item records
- a. Can change an item circulation status to in-repair, missing, or withdrawn
 - b. Know when to check/uncheck boxes in item records (non-circulating, display in PAC, loanable outside system, holdable)
 - c. Can determine item availability
 - d. Can find item due date
 - e. Can find last check in date
 - f. Can find item check out date
 - g. Can view and interpret an item's circulation history
 - h. Can find the current borrower information on a checked out item
 - i. Can find last borrower information on an item
 - j. Can add a library assigned or free text block to an item
14. Polaris – Find Tool

Collection Services Coordinator

- a. Use the Find Tool in acquisitions, cataloging, patron services, and circulation subsystems to retrieve records and information
- b. Run SQL queries
- 15. SimplyReports
 - a. Create and execute data queries on SimplyReports
- 16. Vendor websites
 - a. Create, submit, and track orders
- 17. Overdrive.com
 - a. Can identify format type displayed
 - b. Can read and understand displayed ownership information for titles
 - c. Can create and populate carts
 - d. Can access collection usage information: current waiting list, circulation activity, collection statistics
 - e. Can navigate purchases and subscriptions: purchase order history, recalled content
 - f. Can access user statistics: search checkouts, new user registrations, unique user activity
 - g. Can provide end-user support: manage holds, return titles, reset downloads
- 18. Public Access Catalog
 - a. Can search for items
- 19. Library telephone system
 - a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail
 - h. Can change personal voicemail message
- 20. Kentucky Libraries Unbound (native interface)
 - a. Can navigate to website
 - b. Can find help and troubleshooting pages
 - c. Can sign in
 - d. Can search for items
 - e. Can determine format of items (audio, ebook, Kindle, video) and understand the differences
 - f. Can determine number of copies and availability of an item
 - g. Knows about the Advantage collection and understands how it works in relation to the consortium collection

Collection Services Coordinator

- h. Can limit search results by format, maturity, and availability
- i. Can change default lending periods
- j. Can log in to KLU Marketplace and access and run reports
- 21. Kentucky Libraries Unbound (Public Access Catalog)
 - a. Can search for items
 - b. Can check out items
 - c. Can determine format of items (audio, book, video)
- 22. Miscellaneous web sites
 - a. Can submit a trouble ticket (for technology help)
 - b. Can create/edit reservations for meetings using online calendars
- 23. Microsoft Office Basics (Word, Excel, PowerPoint, or Publisher)
 - a. Can create a new document
 - b. Can open and close a document
 - c. Can save a file to a specific location using "save as"
 - d. Can print preview and print only selected pages or selected text of a document
 - e. Can copy/cut and paste
 - f. Can format fonts (color, font used, size, bold, italicize, underline)
 - g. Can format paragraphs (line spacing, indents)
 - h. Can format document (margins, orientation, columns)
 - i. Can use spell check
 - j. Can use find and replace commands
 - k. Can use undo and redo
- 24. Microsoft Word
 - a. Can create numbered and bulleted lists
 - b. Can insert an image or clip art
 - c. Can use Microsoft templates
- 25. Microsoft Excel
 - a. Can format cells (number format, alignment, border, fill)
 - b. Can adjust row height
 - c. Can adjust column width
 - d. Can sort fields
- 26. Microsoft PowerPoint
 - a. Can create, add, edit, copy, delete slides
 - b. Can view a slideshow in normal, slide sorter, reading, and slideshow view
- 27. Internet browsers
 - a. Can use forward and back buttons
 - b. Can refresh the page
 - c. Can complete a search
 - d. Can open/close multiple tabs

Collection Services Coordinator

- e. Can navigate between tabs
 - f. Can print using embedded icons (e.g. Adobe PDF)
 - g. Can upload a file (e.g. resume to a job application site)
 - h. Can save or copy an image
28. Printing – basics
- a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - b. Can use print preview (when available)
 - c. Can choose between printers
29. Printing – copier/printer/scanner
- a. Knows where main power switch is located
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can copy in black/white or color
 - f. Can enlarge and reduce
 - g. Can make single-sided or double-sided copies
 - h. Able to use any tray for copying and copy to all paper sizes
 - i. Can scan and email documents in black/white or color
 - j. Can make an image lighter or darker
30. Wifi
- a. Can connect devices to public wifi
 - b. Can connect devices to staff wifi
31. Equipment – Miscellaneous
- a. Can operate shredder
 - b. Can take photos with digital camera or cell phone
 - c. Can arm and disarm emergency door alarms
 - d. Can arm and disarm AED door alarm
 - e. Can operate AED

Collection Services Librarian

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change password
 - e. Can set up automatic out-of-office reply
 - f. Can change email signature
 - g. Can manage email contacts
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate performance review forms
 - c. Can locate Personnel Policies
 - d. Can locate branch staff list
 - e. Can locate emergency contact form
 - f. Can locate core competency checklist
 - g. Can locate applicable training manuals and guidelines
 - h. Can change password
 - i. Can add new pages
 - j. Can add and edit content
 - k. Can upload and link to uploaded files or images
 - l. Can open documents (e.g. performance review forms)
4. Litmos
 - a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses

Collection Services Librarian

- d. Can view/download achievement certificates
- e. Can view courses that are in progress, overdue, or not started
- 5. Basic computer use
 - a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can minimize, maximize or resize a window
- 6. Polaris – Basics
 - a. Can start, logon, logoff, and exit Polaris client
 - b. Can load entire search list when Polaris loads only partial results
- 7. Polaris – Acquisitions
 - a. Create, access, edit, and delete purchase orders (PO) and purchase order line items (POLI)
 - b. Create, access, edit and delete item records POLIs
 - c. Create, access, and edit PO in Polaris
- 8. Polaris – Cataloging
 - a. Create, access, edit and delete bibliographic records, from scratch or using template
 - b. Overwrite poor bibliographic record with better bibliographic record
 - c. Create, access, edit, and delete item records. Edit especially call number, collection, material type, loan period, fine code, renewal limit, and statistical code
 - d. Can place free text block on item record
 - e. Edit groups of bibliographic records and item records with record sets
- 9. Polaris – Searching
 - a. Can search bibliographic records
 - b. Can search item records
 - c. Knows the difference between bibliographic and item records
 - d. Can search for items by common fields: title, author, keyword, series, barcode
 - e. Can find a patron registration by using patron name or barcode
- 10. Polaris – Record sets
 - a. Can create an item record set
 - b. Can add item records to a record set
 - c. Can find and access a record set
 - d. Can remove items from a record set
 - e. Can delete a record set
- 11. Polaris – Patron notes and blocks
 - a. Can add a library-assigned or free text patron block

Collection Services Librarian

- b. Can delete a patron block
 - c. Can add a blocking or non-blocking note
 - d. Can delete a blocking or non-blocking note
12. Polaris – Holds
- a. Can place a bibliographic-level hold on an item
 - b. Can place an item-level hold on an item (and knows when it is appropriate to do so)
 - c. Can view a patron's hold list
 - d. Can cancel a hold
 - e. Can delete a hold
 - f. Knows what the following holds terms mean: active, cancelled, held, inactive, pending, not-supplied
 - g. Can view holds queue
 - h. Can inactivate a hold request
 - i. Can reactivate a hold request
 - j. Can group and ungroup holds
13. Polaris – Item records
- a. Can change an item circulation status to in-repair, missing, or withdrawn
 - b. Know when to check/uncheck boxes in item records (non-circulating, display in PAC, loanable outside system, holdable)
 - c. Can determine item availability
 - d. Can find item due date
 - e. Can find last check in date
 - f. Can find item check out date
 - g. Can view and interpret an item's circulation history
 - h. Can find the current borrower information on a checked out item
 - i. Can find last borrower information on an item
14. Vendor websites
- a. Create, submit, and track orders
15. Overdrive.com
- a. Can identify format type displayed
 - b. Can read and understand displayed ownership information for titles
 - c. Can create and populate carts
16. Public Access Catalog
- a. Can search for items
17. Library telephone system
- a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold

Collection Services Librarian

- d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail
 - h. Can change personal voicemail message
18. Kentucky Libraries Unbound (native interface)
- a. Can navigate to website
 - b. Can find help and troubleshooting pages
 - c. Can sign in
 - d. Can search for items
 - e. Can determine format of items (audio, ebook, Kindle, video) and understand the differences
 - f. Can determine number of copies and availability of an item
 - g. Knows about the Advantage collection and understands how it works in relation to the consortium collection
 - h. Can limit search results by format, maturity, and availability
 - i. Can change default lending periods
19. Kentucky Libraries Unbound (Public Access Catalog)
- a. Can search for items
 - b. Can check out items
 - c. Can determine format of items (audio, book, video)
20. Miscellaneous web sites
- a. Can submit a trouble ticket (for technology help)
 - b. Can create/edit reservations for meetings using online calendars
21. Microsoft Office Basics (Word, Excel, PowerPoint, or Publisher)
- a. Can create a new document
 - b. Can open and close a document
 - c. Can save files in different formats (.docx, .xlsx, .pdf, etc.)
 - d. Can print preview and print only selected pages or selected text of a document
 - e. Can copy/cut and paste
 - f. Can format fonts (color, font used, size, bold, italicize, underline)
 - g. Can format paragraphs (line spacing, indents)
 - h. Can format document (margins, orientation, columns)
 - i. Can use spell check
 - j. Can use find and replace commands
 - k. Can use undo and redo
22. Microsoft Word
- a. Can create numbered and bulleted lists
 - b. Can insert an image or clip art

Collection Services Librarian

- c. Can use Microsoft templates
- 23. Microsoft Excel
 - a. Can format cells (number format, alignment, border, fill)
 - b. Can adjust row height
 - c. Can adjust column width
 - d. Can sort fields
- 24. Microsoft PowerPoint
 - a. Can create, add, edit, copy, delete slides
 - b. Can view a slideshow in normal, slide sorter, reading, and slideshow view
- 25. Microsoft Publisher
 - a. Can insert text boxes
 - b. Can insert an image or clip art
- 26. Internet browsers
 - a. Can use forward and back buttons
 - b. Can refresh the page
 - c. Can complete a search
 - d. Can open/close multiple tabs
 - e. Can navigate between tabs
 - f. Can print using embedded icons (e.g. Adobe PDF)
 - g. Can upload a file (e.g. resume to a job application site)
 - h. Can save or copy an image
- 27. Printing – basics
 - a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - b. Can use print preview (when available)
 - c. Can choose between printers
- 28. Printing – copier/printer/scanner/fax
 - a. Knows where main power switch is located
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can copy in black/white or color
 - f. Can enlarge and reduce
 - g. Can make single-sided or double-sided copies
 - h. Able to use any tray for copying and copy to all paper sizes
 - i. Can scan and email documents in black/white or color
 - j. Can make an image lighter or darker
- 29. Wifi
 - a. Can connect devices to public wifi

Collection Services Librarian

- b. Can connect devices to staff wifi
- 30. Equipment – Projector
 - a. Can turn on/off
 - b. Can connect laptop to projector and mirror laptop screen
 - c. Can change size of the projected image
 - d. Can focus projected image (tabletop projectors only)
 - e. Can adjust height
- 31. Equipment – Miscellaneous
 - a. Can operate shredder
 - b. Can arm and disarm emergency door alarms
 - c. Can arm and disarm AED door alarm
 - d. Can operate AED

Custodian

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change password
 - e. Can change email signature
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms
 - d. Can locate Personnel Policies
 - e. Can locate branch staff list
 - f. Can locate emergency contact form
 - g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines
 - i. Can change password
 - j. Can open documents (e.g. performance review forms)
4. Litmos
 - a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started

Digital Marketing Coordinator

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change password
 - e. Can set up automatic out-of-office reply
 - f. Can create and add to a mailing list
 - g. Can change email signature
 - h. Can manage email contacts
 - i. Can archive email documents as necessary
 - j. Can subscribe and unsubscribe to email listservs
 - k. Can diagnose email issues like returned mail
 - l. Can log in to Barracuda website and manage quarantined messages (e.g. deliver, whitelist, block, delete, download, open)
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms
 - d. Can locate Personnel Policies
 - e. Can locate branch staff list
 - f. Can locate emergency contact form
 - g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines
 - i. Can change password
 - j. Can add new pages

Digital Marketing Coordinator

- k. Can add and edit content
 - l. Can upload and link to uploaded files or images
 - m. Can open documents (e.g. performance review forms)
 - n. Can overwrite existing files
 - o. Can link to other pages and outside websites
 - p. Can create tables
 - q. Can search for particular documents
 - r. Can download a form, save it locally, and modify form as needed
4. Litmos
- a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started
5. Basic computer use
- a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can locate files/folders
 - e. Can save files using a standardized file format and using a logical filing system
 - f. Can diagnose basic computer problems
 - g. Can run and update software
 - h. Understands basic password security and password creation
 - i. Can restart public relations device at Patron Services desk
6. WordPress
- a. Can create/edit blog posts
 - b. Can create/edit webpages
 - c. Can upload files and media
 - d. Can embed videos
 - e. Can add, delete or change website menu options
 - f. Can link to uploaded files and outside websites
 - g. Can add/delete plugins
 - h. Can update plugins and WordPress
7. Social Media
- a. Create, edit or delete a social media post (Facebook, Instagram, and Twitter)
 - b. Create, edit or delete a Facebook photo album
 - c. Change social media cover/profile photos
 - d. Purchase, schedule and target Facebook advertising

Digital Marketing Coordinator

- e. Create, delete or edit Facebook admins
 - f. Respond to direct messages on social media
 - g. Highlight a Facebook message
 - h. Add Facebook events
 - i. Understand, digest and report on social media insights
 - j. Edit the social media account details
 - k. Create, edit or delete tweet
 - l. Favorite/retweet a tweet
 - m. Report a post or account
 - n. Follow or unfollow an account on social media
 - o. Respond to social media comments
8. General design
- a. Search for free fonts and be able to download and share with PR and Marketing colleagues
9. PhotoShop
- a. Resize a photo
 - b. Create a website banner
 - c. Add and edit text
 - d. Know how to save photos in different formats (tiff, jpeg, png, psd) and know which formats are best for various uses
10. Bookletters
- a. Can create a custom booklist
 - b. Can edit/delete current booklists
 - c. Can display a booklist on the website
11. App
- d. Can access support portal and submit a support ticket
 - e. Can offer solutions to common issues that patrons may have
 - f. Understand, digest and report on app insights
12. Cerkl
- a. Can create content stories
 - b. Can edit/delete content stories
 - c. Can add subscribers
 - d. Can access Statistics Dashboard
13. Animoto
- a. Can edit Animoto video (delete/add slides, add photos/videos, change slide duration)
 - b. Can download Animoto video with highest available resolution (1080p)
 - c. Can insert Animoto video into Circ Signage PowerPoint
14. KeePass

Digital Marketing Coordinator

- a. Can access Digital Marketing KeePass for list of current online accounts and passwords
- 15. Library telephone system
 - a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail
 - h. Can change personal voicemail message
- 16. Event Calendar
 - a. Can log in and search for programs
 - b. Can view registrations/bookings for an event
 - c. Can create a new event
 - d. Can duplicate an event
 - e. Can insert an image
 - f. Can add a hyperlink
 - g. Can set event category, PR category, and reporting category
 - h. Can select appropriate booking and attendee form
 - i. Can publish event or save draft
 - j. Can edit events
 - k. Can delete an event
 - l. Can enter final attendance
 - m. Can preview an event on the website
 - n. Can enable registration for an event and set registration and wait list limits
 - o. Can set booking cut-off date
 - p. Can edit/delete bookings
 - q. Knows how to export bookings to generate participant list
 - r. Can send an email to registrants
 - s. Can access statistical data on program attendance
- 17. Miscellaneous web sites
 - a. Can submit a trouble ticket (for technology help)
- 18. Microsoft Office Basics (Word, Excel, PowerPoint, or Publisher)
 - a. Can create a new document
 - b. Can open and close a document
 - c. Can save files in different formats (.docx, .xlsx, .pdf, etc.)
 - d. Can print preview and print only selected pages of a document
 - e. Can copy/cut and paste

Digital Marketing Coordinator

- f. Can format paragraphs (line spacing, indents)
 - g. Can format fonts (color, font used, size, bold, italicize, underline)
 - h. Can use spell check
 - i. Can format document (margins, orientation, columns)
 - j. Can use find and replace commands
 - k. Can use undo and redo
19. Microsoft Word
- a. Can create numbered and bulleted lists
 - b. Can insert an image or clip art
20. Microsoft Excel
- a. Can format cells (number format, alignment, border, fill)
 - b. Can adjust row height
 - c. Can adjust column width
 - d. Can sort fields
 - e. Can create multiple sheets in a workbook and toggle between them
 - f. Can edit information in a cell
21. Microsoft PowerPoint
- a. Can create, add, edit, copy, delete slides
 - b. Can view a slideshow
 - c. Can insert a video into a slide
22. Internet browsers
- a. Can use forward and back buttons
 - b. Can refresh the page
 - c. Can complete a search
 - d. Can open/close multiple tabs
 - e. Can navigate between tabs
 - f. Can print using embedded icons (e.g. Adobe PDF)
 - g. Can upload a file (e.g. resume to a job application site)
 - h. Can save or copy an image
23. Printing – basics
- a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - b. Can use print preview (when available)
 - c. Can choose between printers
24. Printing – copier/printer/scanner/fax
- a. Knows where main power switch is located
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner

Digital Marketing Coordinator

- e. Can copy in black/white or color
 - f. Can enlarge and reduce
 - g. Can make single-sided or double-sided copies
 - h. Able to use any tray for copying and copy to all paper sizes
 - i. Can send a fax
 - j. Can scan and email documents in black/white or color
 - k. Can make an image lighter or darker
25. Wifi
- a. Can connect devices to public wifi
 - b. Can connect devices to staff wifi
26. Equipment – Miscellaneous
- a. Can operate shredder
 - b. Can take photos with digital camera or cell phone
 - c. Can operate AED
27. Digital marquee
- a. Can create a new message
 - b. Can open and edit existing messages
 - c. Can add a text box
 - d. Can change text font, size and color
 - e. Can change background
 - f. Can preview messages
 - g. Can create and save a message to a specific category
 - h. Can schedule and remove messages
 - i. Can update schedule
 - j. Can override all messages on a playlist
 - k. Can import graphics/add an image
 - l. Can set default text/effects properties
 - m. Can set hold time for messages

Early Literacy Outreach Librarian

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
 - i. Can approve or deny time off requests of employees
 - j. Can approve timesheets of employees
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can set up automatic out-of-office reply
 - e. Can change password
 - f. Can change email signature
 - g. Can manage email contacts
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms
 - d. Can locate Personnel Policies
 - e. Can locate branch staff list
 - f. Can locate emergency contact form
 - g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines
 - i. Can change password
 - j. Can add new pages
 - k. Can add and edit content
 - l. Can upload and link to uploaded files or images
 - m. Can open documents (e.g. performance review forms)
4. Litmos

Early Literacy Outreach Librarian

- a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started
 - f. Can switch between Learner and Team Leader/Admin views
5. Basic computer use
- a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can minimize, maximize or resize a window
6. Polaris – Basics
- a. Can start, logon, logoff, and exit Polaris client
 - b. Can load entire search list when Polaris loads only partial results
7. Polaris – Searching
- a. Can search bibliographic records
 - b. Can search item records
 - c. Knows the difference between bibliographic and item records
 - d. Can search for items by common fields: title, author, keyword, series, barcode
 - e. Can find a patron registration by using patron name or barcode
 - f. Can sort search results by author, date and format
8. Polaris – Record sets
- a. Can create an item record set
 - b. Can add item records to a record set
 - c. Can find and access a record set
 - d. Can remove items from a record set
 - e. Can delete a record set
 - f. Can bulk change item record sets
9. Polaris – Patron registration
- a. Can create a new patron registration
 - b. Can delete a patron registration
 - c. Can update a patron registration
 - d. Can reset PIN
10. Polaris – Patron notes and blocks
- a. Can add a library-assigned or free text patron block
 - b. Can delete a patron block
 - c. Can add a blocking or non-blocking note
 - d. Can delete a blocking or non-blocking note

Early Literacy Outreach Librarian

11. Polaris – Check out/renewal
 - a. Can open check out screen
 - b. Can process check out blocks and messages
 - c. Can check out items to a patron
 - d. Can print check out receipt
 - e. Can view items checked out to a patron
 - f. Knows how to assign a special loan period and under what conditions
 - g. Can renew all items on a patron account
 - h. Can renew partial list of items on a patron account
 - i. Can print a list of all items out
12. Polaris – Check in
 - a. Can check in on normal mode
 - b. Can process check in messages and blocks
 - c. Can print check in receipt
13. Polaris – Patron accounting
 - a. Can view a patron's charges
 - b. Can waive all charges
 - c. Can waive partial charges
 - d. Can create a charge on a patron's account
 - e. Can view a patron's notice history
 - f. Can view a patron's financial transaction history
14. Polaris – Claims and lost items
 - a. Can set an item to Claim Returned
 - b. Can set an item to Claim Never Had
 - c. Can estimate fines for a patron on overdue items that have not been returned
 - d. Can declare an item lost
 - e. Can find the price of a lost item for a patron
 - f. Can resolve a lost and un-paid item
 - g. Can resolve a lost and paid item
 - h. Can resolve a withdrawn item that has been returned
 - i. Can resolve a deleted item that has been returned
15. Polaris – Holds
 - a. Can place a bibliographic-level hold on an item
 - b. Can place an item-level hold on an item (and knows when it is appropriate to do so)
 - c. Can view a patron's hold list
 - d. Can cancel a hold
 - e. Can delete a hold

Early Literacy Outreach Librarian

- f. Knows what the following holds terms mean: active, cancelled, held, inactive, pending, not-supplied
 - g. Can view holds queue
 - h. Can inactivate a hold request
 - i. Can reactivate a hold request
 - j. Can group and ungroup holds
16. Polaris – Item records
- a. Can change an item circulation status to in-repair, missing, or withdrawn
 - b. Know when to check/uncheck boxes in item records (non-circulating, display in PAC, loanable outside system, holdable)
 - c. Can determine item availability
 - d. Can find item due date
 - e. Can find last check in date
 - f. Can find item check out date
 - g. Can view and interpret an item’s circulation history
 - h. Can change the barcode number of an item
 - i. Can find the current borrower information on a checked out item
 - j. Can find last borrower information on an item
 - k. Can add a library assigned or free text block to an item
17. Public Access Catalog
- a. Can search for items
 - b. Can search for items by Accelerated Reader or Lexile information (e.g. Lexile score, AR interest level, book level, or point level)
 - c. Can narrow search by type of material and branch
 - d. Can help a patron log in to account
 - e. Can help a patron place a hold
 - f. Can help a patron make a payment
18. Library website
- a. Can register a patron for a program
 - b. Can submit request for one-on-one technology training for patron
 - c. Can sign up a patron for the library newsletter
 - d. Knows where to direct a patron to sign up for a digital only library card
 - e. Knows where to direct a patron to apply to use a meeting/study room
 - f. Knows where to direct a patron to apply for a job or volunteer position
 - g. Knows where to direct a patron to sign up for book recommendations by email
19. Library telephone system
- a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold

Early Literacy Outreach Librarian

- d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail
 - h. Can change personal voicemail message
20. Event Calendar
- a. Can log in and search for programs
 - b. Can view registrations/bookings for an event
 - c. Can create a new event
 - d. Can duplicate an event
 - e. Can set event category, PR category, and reporting category
 - f. Can publish event or save draft
 - g. Can edit events
 - h. Can delete an event
 - i. Can enter final attendance
21. Miscellaneous web sites
- a. Can submit a trouble ticket (for technology help)
 - b. Can submit an item request (for purchase or ILL)
22. Microsoft Office Basics (Word, Excel, PowerPoint, or Publisher)
- a. Can create a new document
 - b. Can open and close a document
 - c. Can save files in different formats (.docx, .xlsx, .pdf, etc.)
 - d. Can print preview and print only selected pages or selected text of a document
 - e. Can copy/cut and paste
 - f. Can format fonts (color, font used, size, bold, italicize, underline)
 - g. Can format paragraphs (line spacing, indents)
 - h. Can format document (margins, orientation, columns)
 - i. Can use spell check
 - j. Can use find and replace commands
 - k. Can use undo and redo
23. Microsoft Word
- a. Can create numbered and bulleted lists
 - b. Can insert an image or clip art
 - c. Can use Microsoft templates
24. Microsoft Excel
- a. Can format cells (number format, alignment, border, fill)
 - b. Can adjust row height
 - c. Can adjust column width
 - d. Can sort fields

Early Literacy Outreach Librarian

25. Microsoft PowerPoint
 - a. Can create, add, edit, copy, delete slides
 - b. Can view a slideshow in normal, slide sorter, reading, and slideshow view
26. Microsoft Publisher
 - a. Can insert text boxes
 - b. Can insert an image or clip art
27. Internet browsers
 - a. Can use forward and back buttons
 - b. Can refresh the page
 - c. Can complete a search
 - d. Can open/close multiple tabs
 - e. Can navigate between tabs
 - f. Can print using embedded icons (e.g. Adobe PDF)
 - g. Can upload a file (e.g. resume to a job application site)
 - h. Can save or copy an image
28. Printing – basics
 - a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - b. Can use print preview (when available)
 - c. Can choose between printers
29. Printing – copier/printer/scanner/fax
 - a. Knows where main power switch is located
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can copy in black/white or color
 - f. Can enlarge and reduce
 - g. Can make single-sided or double-sided copies
 - h. Able to use any tray for copying and copy to all paper sizes
 - i. Can scan and email documents in black/white or color
 - j. Can make an image lighter or darker
30. Wifi
 - a. Can connect devices to public wifi
 - b. Can connect devices to staff wifi
31. Equipment – Projector
 - a. Can turn on/off
 - b. Can connect laptop to projector and mirror laptop screen
 - c. Can change size of the projected image
 - d. Can focus projected image (tabletop projectors only)

Early Literacy Outreach Librarian

- e. Can adjust height
- 32. Equipment – Televisions
 - a. Can turn on/off
 - b. Can connect DVD player and play DVD
 - c. Can connect laptop and mirror the screen
 - d. Can mirror a device such as a tablet or smartphone to Apple TV
 - e. Can select various inputs (HDMI, AV, etc.)
 - f. Can change channel
 - g. Can adjust volume
- 33. Equipment – Miscellaneous
 - a. Can operate shredder
 - b. Can take photos with digital camera or cell phone
 - c. Can arm and disarm emergency door alarms
 - d. Can operate AED

Early Literacy Outreach Programmer

Created 17 Aug 2016

Revised 1 May 2019

Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can set up automatic out-of-office reply
 - e. Can change password
 - f. Can change email signature
 - g. Can manage email contacts
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms
 - d. Can locate Personnel Policies
 - e. Can locate branch staff list
 - f. Can locate emergency contact form
 - g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines
 - i. Can change password
 - j. Can add new pages
 - k. Can add and edit content
 - l. Can upload and link to uploaded files or images
 - m. Can open documents (e.g. performance review forms)
4. Litmos
 - a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library

Early Literacy Outreach Programmer

- c. Can view completed courses
- d. Can view/download achievement certificates
- e. Can view courses that are in progress, overdue, or not started
- 5. Basic computer use
 - a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can minimize, maximize or resize a window
- 6. Polaris – Basics
 - a. Can start, logon, logoff, and exit Polaris client
 - b. Can load entire search list when Polaris loads only partial results
- 7. Polaris – Searching
 - a. Can search bibliographic records
 - b. Can search item records
 - c. Knows the difference between bibliographic and item records
 - d. Can search for items by common fields: title, author, keyword, series, barcode
 - e. Can find a patron registration by using patron name or barcode
 - f. Can sort search results by author, date and format
- 8. Polaris – Record sets
 - a. Can create an item record set
 - b. Can add item records to a record set
 - c. Can find and access a record set
 - d. Can remove items from a record set
 - e. Can delete a record set
 - f. Can bulk change item record sets
- 9. Polaris – Patron registration
 - a. Can create a new patron registration
 - b. Can delete a patron registration
 - c. Can update a patron registration
 - d. Can reset PIN
- 10. Polaris – Patron notes and blocks
 - a. Can add a library-assigned or free text patron block
 - b. Can delete a patron block
 - c. Can add a blocking or non-blocking note
 - d. Can delete a blocking or non-blocking note
- 11. Polaris – Check out/renewal
 - a. Can open check out screen
 - b. Can process check out blocks and messages

Early Literacy Outreach Programmer

- c. Can check out items to a patron
 - d. Can print check out receipt
 - e. Can view items checked out to a patron
 - f. Knows how to assign a special loan period and under what conditions
 - g. Can renew all items on a patron account
 - h. Can renew partial list of items on a patron account
 - i. Can print a list of all items out
12. Polaris – Check in
- a. Can check in on normal mode
 - b. Can process check in messages and blocks
 - c. Can print check in receipt
13. Polaris – Patron accounting
- a. Can view a patron's charges
 - b. Can waive all charges
 - c. Can waive partial charges
 - d. Can create a charge on a patron's account
 - e. Can view a patron's notice history
 - f. Can view a patron's financial transaction history
14. Polaris – Claims and lost items
- a. Can set an item to Claim Returned
 - b. Can set an item to Claim Never Had
 - c. Can estimate fines for a patron on overdue items that have not been returned
 - d. Can declare an item lost
 - e. Can find the price of a lost item for a patron
 - f. Can resolve a lost and un-paid item
 - g. Can resolve a lost and paid item
 - h. Can resolve a withdrawn item that has been returned
 - i. Can resolve a deleted item that has been returned
15. Polaris – Holds
- a. Can place a bibliographic-level hold on an item
 - b. Can place an item-level hold on an item (and knows when it is appropriate to do so)
 - c. Can view a patron's hold list
 - d. Can cancel a hold
 - e. Can delete a hold
 - f. Knows what the following holds terms mean: active, cancelled, held, inactive, pending, not-supplied
 - g. Can view holds queue
 - h. Can inactivate a hold request

Early Literacy Outreach Programmer

- i. Can reactivate a hold request
- j. Can group and ungroup holds
- 16. Polaris – Item records
 - a. Can change an item circulation status to in-repair, missing, or withdrawn
 - b. Know when to check/uncheck boxes in item records (non-circulating, display in PAC, loanable outside system, holdable)
 - c. Can determine item availability
 - d. Can find item due date
 - e. Can find last check in date
 - f. Can find item check out date
 - g. Can view and interpret an item’s circulation history
 - h. Can change the barcode number of an item
 - i. Can find the current borrower information on a checked out item
 - j. Can find last borrower information on an item
 - k. Can add a library assigned or free text block to an item
- 17. Public Access Catalog
 - a. Can search for items
 - b. Can search for items by Accelerated Reader or Lexile information (e.g. Lexile score, AR interest level, book level, or point level)
 - c. Can narrow search by type of material and branch
 - d. Can help a patron log in to account
 - e. Can help a patron place a hold
 - f. Can help a patron make a payment
- 18. Library website
 - a. Can register a patron for a program
 - b. Can submit request for one-on-one technology training for patron
 - c. Can sign up a patron for the library newsletter
 - d. Knows where to direct a patron to sign up for a digital only library card
 - e. Knows where to direct a patron to apply to use a meeting/study room
 - f. Knows where to direct a patron to apply for a job or volunteer position
 - g. Knows where to direct a patron to sign up for book recommendations by email
- 19. Library telephone system
 - a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail

Early Literacy Outreach Programmer

- h. Can change personal voicemail message
- 20. Event Calendar
 - a. Can log in and search for programs
 - b. Can view registrations/bookings for an event
 - c. Can create a new event
 - d. Can duplicate an event
 - e. Can set event category, PR category, and reporting category
 - f. Can publish event or save draft
 - g. Can edit events
 - h. Can delete an event
 - i. Can enter final attendance
- 21. Miscellaneous web sites
 - a. Can submit a trouble ticket (for technology help)
 - b. Can submit an item request (for purchase or ILL)
- 22. Microsoft Office Basics (Word, Excel, PowerPoint, or Publisher)
 - a. Can create a new document
 - b. Can open and close a document
 - c. Can save files in different formats (.docx, .xlsx, .pdf, etc.)
 - d. Can print preview and print only selected pages or selected text of a document
 - e. Can copy/cut and paste
 - f. Can format fonts (color, font used, size, bold, italicize, underline)
 - g. Can format paragraphs (line spacing, indents)
 - h. Can format document (margins, orientation, columns)
 - i. Can use spell check
 - j. Can use find and replace commands
 - k. Can use undo and redo
- 23. Microsoft Word
 - a. Can create numbered and bulleted lists
 - b. Can insert an image or clip art
 - c. Can use Microsoft templates
- 24. Microsoft Excel
 - a. Can format cells (number format, alignment, border, fill)
 - b. Can adjust row height
 - c. Can adjust column width
 - d. Can sort fields
- 25. Microsoft PowerPoint
 - a. Can create, add, edit, copy, delete slides
 - b. Can view a slideshow in normal, slide sorter, reading, and slideshow view
- 26. Microsoft Publisher

Early Literacy Outreach Programmer

- a. Can insert text boxes
- b. Can insert an image or clip art
- 27. Internet browsers
 - a. Can use forward and back buttons
 - b. Can refresh the page
 - c. Can complete a search
 - d. Can open/close multiple tabs
 - e. Can navigate between tabs
 - f. Can print using embedded icons (e.g. Adobe PDF)
 - g. Can upload a file (e.g. resume to a job application site)
 - h. Can save or copy an image
- 28. Printing – basics
 - a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - b. Can use print preview (when available)
 - c. Can choose between printers
- 29. Printing – copier/printer/scanner/fax
 - a. Knows where main power switch is located
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can copy in black/white or color
 - f. Can enlarge and reduce
 - g. Can make single-sided or double-sided copies
 - h. Able to use any tray for copying and copy to all paper sizes
 - i. Can scan and email documents in black/white or color
 - j. Can make an image lighter or darker
- 30. Wifi
 - a. Can connect devices to public wifi
 - b. Can connect devices to staff wifi
- 31. Equipment – Projector
 - a. Can turn on/off
 - b. Can connect laptop to projector and mirror laptop screen
 - c. Can change size of the projected image
 - d. Can focus projected image (tabletop projectors only)
 - e. Can adjust height
- 32. Equipment – Televisions
 - a. Can turn on/off
 - b. Can connect DVD player and play DVD

Early Literacy Outreach Programmer

- c. Can connect laptop and mirror the screen
 - d. Can mirror a device such as a tablet or smartphone to Apple TV
 - e. Can select various inputs (HDMI, AV, etc.)
 - f. Can change channel
 - g. Can adjust volume
33. Equipment – Miscellaneous
- a. Can operate shredder
 - b. Can take photos with digital camera or cell phone
 - c. Can arm and disarm emergency door alarms
 - d. Can operate AED

Facilities Specialist

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
 - i. Can approve or deny time off requests of employees
 - j. Can approve timesheets of employees
 - k. Can generate report of hours worked by part-time employees
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change password
 - e. Can set up automatic out-of-office reply
 - f. Can change email signature
 - g. Can manage email contacts
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms
 - d. Can locate Personnel Policies
 - e. Can locate branch staff list
 - f. Can locate emergency contact form
 - g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines
 - i. Can change password
 - j. Can add and edit content
 - k. Can open documents (e.g. performance review forms)
4. Litmos
 - a. Can reset forgotten username/password

Facilities Specialist

- b. Can find and take courses from the Course Library
- c. Can view completed courses
- d. Can view/download achievement certificates
- e. Can view courses that are in progress, overdue, or not started
- f. Can switch between Learner and Team Leader/Admin views
- 5. Basic computer use
 - a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can minimize, maximize or resize a window
- 6. Miscellaneous web sites
 - a. Can submit a trouble ticket (for technology help)
- 7. Microsoft Office Basics (Word, Excel, PowerPoint, or Publisher)
 - a. Can create a new document
 - b. Can open and close a document
 - c. Can save files in different formats (.docx, .xlsx, .pdf, etc.)
 - d. Can print preview and print only selected pages or selected text of a document
 - e. Can copy/cut and paste
 - f. Can format fonts (color, font used, size, bold, italicize, underline)
 - g. Can format paragraphs (line spacing, indents)
 - h. Can format document (margins, orientation, columns)
 - i. Can use spell check
 - j. Can use find and replace commands
 - k. Can use undo and redo
- 8. Printing – basics
 - a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - b. Can use print preview (when available)
 - c. Can choose between printers
- 9. Printing – copier/printer/scanner/fax
 - a. Knows where main power switch is located
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can copy in black/white or color
 - f. Can enlarge and reduce
 - g. Can make single-sided or double-sided copies
 - h. Able to use any tray for copying and copy to all paper sizes

Facilities Specialist

- i. Can scan and email documents in black/white or color
- j. Can make an image lighter or darker
- 10. Equipment – Security camera hardware/software
 - a. Can launch security camera software
 - b. Can view live feeds on all cameras at all locations
 - c. Can search previously recorded footage
 - d. Can print images to file with incident reports
- 11. Equipment – Miscellaneous
 - a. Can arm and disarm emergency door alarms
 - b. Can arm and disarm AED door alarm
 - c. Can operate AED
- 12. Smartphone
 - a. Make/receive calls
 - b. Make/receive text messages
 - c. Take photos and send images from cell phone
 - d. Access voicemail
 - e. Check and respond to emails
 - f. Manage online calendar
- 13. Thermostats (Fort Thomas and Cold Spring)
 - a. Can access thermostat website
 - b. Adjust thermostats at any branch using the thermostat website
 - c. Set a temporary or permanent temperature hold
 - d. Knows difference between set temperature and hold temp
 - e. Can program thermostats to connect to wifi
 - f. Can grant user access to thermostat website
 - g. Can change notification settings for thermostat events
 - h. Can add/delete a thermostat from the system
- 14. BAS software (Newport)
 - a. Can access BAS software
 - b. Can log in
 - c. Can create and change schedules
 - d. Change HVAC units from Global to Operator to Local and know what each setting means
 - e. Change set point temperatures for individual heat pumps
 - f. Can adjust fans in ventilation portion
- 15. Library Express
 - a. Can open all lockers
 - b. Can assign lockers to patrons
 - c. Can delete patrons from assigned lockers

Human Resources Manager

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
 - i. Can approve or deny time off requests of employees
 - j. Can approve timesheets of employees
 - k. Can prepare payroll for submission to PayOptions
 - l. Can review timecards after approved by supervisors
 - m. Can process payroll online through PayOptions
 - n. Can generate report of hours worked by part-time employees to determine PTO eligibility
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change password
 - e. Can set up automatic out-of-office reply
 - f. Can change email signature
 - g. Can manage email contacts
3. Wiki
 - a. Can reset forgotten password
 - b. Can log in to the wiki
 - c. Can locate work schedules
 - d. Can locate job description
 - e. Can locate performance review forms
 - f. Can locate Personnel Policies
 - g. Can locate branch staff list
 - h. Can locate emergency contact form
 - i. Can locate core competency checklist

Human Resources Manager

- j. Can locate applicable training manuals and guidelines
 - k. Can change password
 - l. Can add new pages
 - m. Can add and edit content
 - n. Can upload and link to uploaded files or images
 - o. Can open documents (e.g. performance review forms)
4. Litmos
- a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started
 - f. Can switch between Learner and Team Leader/Admin views
 - g. Can create, edit, and delete courses/learning paths
 - h. Can create, edit, and delete quizzes
 - i. Can create and upload a certificate
 - j. Can assign courses/learning paths to individuals/teams
 - k. Can run reports
 - l. Can add, edit, and delete teams/users
5. Basic computer use
- a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can minimize, maximize or resize a window
6. Library telephone system
- a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail
 - h. Can change personal voicemail message
 - i. Can access personal voicemail messages remotely
7. Miscellaneous web sites
- a. Can submit a trouble ticket (for technology help)
8. Microsoft Office Basics (Word, Excel, PowerPoint, or Publisher)
- a. Can create a new document

Human Resources Manager

- b. Can open and close a document
 - c. Can save files in different formats (.docx, .xlsx, .pdf, etc.)
 - d. Can print preview and print only selected pages or selected text of a document
 - e. Can copy/cut and paste
 - f. Can format fonts (color, font used, size, bold, italicize, underline)
 - g. Can format paragraphs (line spacing, indents)
 - h. Can format document (margins, orientation, columns)
 - i. Can use spell check
 - j. Can use find and replace commands
 - k. Can use undo and redo
9. Microsoft Word
- a. Can create numbered and bulleted lists
 - b. Can insert an image or clip art
 - c. Can use Microsoft templates
10. Microsoft Excel
- a. Can format cells (number format, alignment, border, fill)
 - b. Can adjust row height
 - c. Can adjust column width
 - d. Can sort fields
11. Microsoft PowerPoint
- a. Can create, add, edit, copy, delete slides
 - b. Can view a slideshow in normal, slide sorter, reading, and slideshow view
12. Microsoft Publisher
- a. Can insert text boxes
 - b. Can insert an image or clip art
13. Internet browsers
- a. Can use forward and back buttons
 - b. Can refresh the page
 - c. Can complete a search
 - d. Can open/close multiple tabs
 - e. Can navigate between tabs
 - f. Can print using embedded icons (e.g. Adobe PDF)
 - g. Can upload a file (e.g. resume to a job application site)
 - h. Can save or copy an image
14. Printing – basics
- a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - b. Can use print preview (when available)
 - c. Can choose between printers

Human Resources Manager

15. Printing – copier/printer/scanner/fax
 - a. Knows where main power switch is located
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can copy in black/white or color
 - f. Can enlarge and reduce
 - g. Can make single-sided or double-sided copies
 - h. Able to use any tray for copying and copy to all paper sizes
 - i. Can send a fax
 - j. Can scan and email documents in black/white or color
 - k. Can make an image lighter or darker
 - l. Knows procedure for calling Millennium for service
16. Wifi
 - a. Can connect devices to public wifi
 - b. Can connect devices to staff wifi
17. Equipment – Miscellaneous
 - a. Can operate shredder
 - b. Can take photos with digital camera or cell phone
18. Job Postings
 - a. Can create job postings on the website of these organizations – KDLA, SWON Libraries, UK, Kentucky Career Center, Jobs NKY, NKU Career Services
19. Background checks
 - a. Can submit employee background check requests through McDowell Agency
 - b. Can submit volunteer background checks through Kentucky Court of Justice
20. Benefits Administration Insurance
 - a. Can administer medical/vision benefits through Anthem
 - b. Can administer dental benefits through Dental Care Plus
 - c. Can administer One America benefits
 - d. Can administer Colonial Life benefits
21. Human Resources Reporting
 - a. Can report employment statistics via Bureau of Labor Statistics site
 - b. Can complete Kentucky Retirement System (KRS) monthly wage report

Information Services Assistant

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change password
 - e. Can change email signature
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms
 - d. Can locate Personnel Policies
 - e. Can locate branch staff list
 - f. Can locate emergency contact form
 - g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines
 - i. Can change password
 - j. Can open documents (e.g. performance review forms)
4. Litmos
 - a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started
5. Basic computer use

Information Services Assistant

- a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can locate files/folders
 - e. Can minimize, maximize or resize a window
 - f. Can diagnose basic computer problems
 - g. Understands basic password security and password creation
 - h. Can move, rename, and delete files
 - i. Can create a folder
 - j. Can identify properties of a file including size, date created, and date last modified
6. Polaris – Basics
 - a. Can start, logon, logoff, and exit Polaris client
 - b. Can load entire search list when Polaris loads only partial results
 7. Polaris – Searching
 - a. Can search bibliographic records
 - b. Can search item records
 - c. Knows the difference between bibliographic and item records
 - d. Can search for items by common fields: title, author, keyword, series, barcode
 - e. Can find a patron registration by using patron name or barcode
 - f. Can sort search results by author, date and format
 8. Polaris – Patron registration
 - a. Can update a patron registration
 - b. Can reset PIN
 - c. Can turn on a patron's reading history – knows how long the reading history is kept, how many items can be in the list, and what happens when reading history is turned off
 9. Polaris – Patron notes and blocks
 - a. Can add a library-assigned or free text patron block
 - b. Can delete a patron block
 - c. Can add a blocking or non-blocking note
 - d. Can delete a blocking or non-blocking note
 - e. Knows what to enter in a patron note field after submitting an item request on behalf of patron
 - f. Knows what kind of patron note to enter and what text to enter after patron signs a laptop user agreement (Fort Thomas and Alexandria)
 10. Polaris – Check out/renewal
 - a. Can open check out screen

Information Services Assistant

- b. Can check out items to a patron
 - c. Can view items checked out to a patron
 - d. Can renew all items on a patron account
 - e. Can renew partial list of items on a patron account
11. Polaris – Check in
- a. Can check in on normal mode
 - b. Can check in on in-house mode
12. Polaris – Patron accounting
- a. Can view a patron's charges
 - b. Can process cash payment in full
 - c. Can process cash partial payment
 - d. Knows policy on allowing patrons to pay \$1 per computer use
13. Polaris – Holds
- a. Can place a bibliographic-level hold on an item
 - b. Can place an item-level hold on an item (and knows when it is appropriate to do so)
 - c. Can view a patron's hold list
 - d. Can cancel a hold
 - e. Can delete a hold
 - f. Knows what the following holds terms mean: active, cancelled, held, inactive, pending, not-supplied
 - g. Can view holds queue
 - h. Can inactivate a hold request
 - i. Can reactivate a hold request
 - j. Can group and ungroup holds
 - k. Can change pickup location on a hold with a status of Active, Inactive, Pending, or Held
14. Polaris – Item records
- a. Can change an item circulation status to in-repair, missing, or withdrawn
 - b. Know when to check/uncheck boxes in item records (non-circulating, display in PAC, loanable outside system, holdable)
 - c. Can determine item availability
 - d. Can find item due date
 - e. Can find last check in date
 - f. Can find item check out date
 - g. Can view and interpret an item's circulation history
 - h. Can find the current borrower information on a checked out item
 - i. Can find last borrower information on an item
15. Public Access Catalog

Information Services Assistant

- a. Can search for items
 - b. Can search for items by Accelerated Reader or Lexile information (e.g. Lexile score, AR interest level, book level, or point level)
 - c. Can narrow search by type of material and branch
 - d. Can help a patron log in to account
 - e. Can help a patron place a hold
 - f. Can help a patron make a payment
16. Cloud storage (e.g. Google Drive, Dropbox)
- a. Understands cloud storage and can explain its use
 - b. Can create, access, edit and delete docs in cloud storage
17. Library website
- a. Can register a patron for a program
 - b. Can submit request for one-on-one technology training for patron
 - c. Can sign up a patron for the library newsletter
 - d. Knows where to direct a patron to sign up for a digital only library card
 - e. Knows where to direct a patron to apply to use a meeting/study room
 - f. Knows where to direct a patron to apply for a job or volunteer position
 - g. Knows where to direct a patron to sign up for book recommendations by email
18. Library telephone system
- a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail
19. PC Reservation (staff client on reference desk PCs)
- a. Can create a guest pass
 - b. Can view PC status
 - c. Can determine name of patron logged on each computer
 - d. Can extend a session by adding time
 - e. Can end a session
 - f. Can send a message
 - g. Can create a reservation
 - h. Can cancel a reservation
 - i. Can unlock a computer that has been locked by a patron
 - j. Can mark a computer out of service
20. PC Reservation Station
- a. Can assist patrons in making reservations

Information Services Assistant

21. Kentucky Libraries Unbound (native interface)
 - a. Can navigate to website
 - b. Can find help and troubleshooting pages
 - c. Can sign in
 - d. Can search for items
 - e. Can check out items
 - f. Can determine format of items (audio, ebook, Kindle, video) and understand the differences
 - g. Can determine number of copies and availability of an item
 - h. Can place a hold on an item
 - i. Can view items checked out
 - j. Can view holds
 - k. Knows about the Advantage collection and understands how it works in relation to the consortium collection
 - l. Can limit search results by format, maturity, and availability
 - m. Can change default lending periods
22. Kentucky Libraries Unbound (Public Access Catalog)
 - a. Can search for items
 - b. Can check out items
 - c. Can determine format of items (audio, book, video)
 - d. Can place a hold on an item
23. Overdrive app
 - a. Can download Overdrive app to compatible device
 - b. Can add KLU to "My Libraries"
 - c. Can sign in to KLU account
 - d. Can download items to device
 - e. Can return an item
 - f. Can download Kindle app to compatible device
 - g. Can add a KLU checkout to the Kindle app through Amazon
24. Libby app
 - a. Can download Libby app to compatible device
 - b. Can add KLU to "Your Libraries"
 - c. Can add a card
 - d. Can link a second card
 - e. Can switch between two linked cards
 - f. Can search for and borrow an item
 - g. Can display book details (e.g. length of audiobook)
 - h. Can open and change reading settings of an ebook (font size, lighting, book design)

Information Services Assistant

- i. Can download items to Libby
 - j. Can change the loan period of an item
 - k. Can limit search by format (ebook, eaudiobook, etc.)
 - l. Can limit search to available titles only
 - m. Can limit search to Kindle-compatible items only
 - n. Can send borrowed titles to Kindle app/device
 - o. Can place and suspend holds
 - p. Can adjust download behavior
 - q. Can return a title
 - r. Can find list of loans and holds
 - s. Can view place in line for a hold
25. Miscellaneous web sites
- a. Can submit a trouble ticket (for technology help)
 - b. Can submit an item request (for purchase or ILL)
 - c. Can create/edit reservations for meetings using online calendars
 - d. Can log a study room use (Fort Thomas only)
 - e. Can locate materials at other libraries using WorldCat
26. Microsoft Office Basics (Word, Excel, PowerPoint, or Publisher)
- a. Can create a new document
 - b. Can open and close a document
 - c. Can save files in different formats (.docx, .xlsx, .pdf, etc.)
 - d. Can print preview and print only selected pages or selected text of a document
 - e. Can copy/cut and paste
 - f. Can format fonts (color, font used, size, bold, italicize, underline)
 - g. Can format paragraphs (line spacing, indents)
 - h. Can format document (margins, orientation, columns)
 - i. Can use spell check
 - j. Can use find and replace commands
 - k. Can use undo and redo
27. Microsoft Word
- a. Can create numbered and bulleted lists
 - b. Can insert an image or clip art
 - c. Can use Microsoft templates
28. Microsoft Excel
- a. Can format cells (number format, alignment, border, fill)
 - b. Can adjust row height
 - c. Can adjust column width
 - d. Can sort fields
29. Microsoft PowerPoint

Information Services Assistant

- a. Can create, add, edit, copy, delete slides
 - b. Can view a slideshow in normal, slide sorter, reading, and slideshow view
30. Microsoft Publisher
- a. Can insert text boxes
 - b. Can insert an image or clip art
31. Internet browsers
- a. Can use forward and back buttons
 - b. Can refresh the page
 - c. Can complete a search
 - d. Can open/close multiple tabs
 - e. Can navigate between tabs
 - f. Can print using embedded icons (e.g. Adobe PDF)
 - g. Can upload a file (e.g. resume to a job application site)
 - h. Can save or copy an image
 - i. Can add a site to favorites and favorite bar
 - j. Can set the home page
 - k. Can play, pause, and change the volume of an embedded video
 - l. Can download a file and identify the download location
 - m. Can disable pop-up blocker in web browsers
32. Printing – basics
- a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - b. Can use print preview (when available)
 - c. On a public Internet computer can send a black/white or color print job to the PC Reservation print release station
 - d. Can choose between printers
33. Printing – receipt printers
- a. Can turn on/off
 - b. Can change paper
34. Printing – copier/printer/scanner/fax
- a. Knows where main power switch is located
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can copy in black/white or color
 - f. Can enlarge and reduce
 - g. Can use Preview feature
 - h. Can use Card Shot feature
 - i. Can make single-sided or double-sided copies

Information Services Assistant

- j. Able to use any tray for copying and copy to all paper sizes
 - k. Can send a fax
 - l. Can scan and email documents in black/white or color
 - m. Can make an image lighter or darker
 - n. Knows procedure for calling Millennium for service
 - o. Knows what bills/coins are accepted by the coin-op
 - p. Can use bypass key
35. Printing – public printer
- a. Can turn the printer on/off
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can clear error messages from printer screen
 - f. Knows procedure for calling Millennium for service
 - g. Knows what bills/coins are accepted by the coin-op
 - h. Can use bypass key
36. Printing – PC Reservation print release station
- a. Can view patron's print jobs via patron barcode
 - b. Can view entire print queue for all print jobs
 - c. Can preview a print job
 - d. Can release single or multiple print jobs
 - e. Can delete single or multiple print jobs
 - f. Can override payment with staff password
 - g. Can override payment with bypass key
 - h. Can close PC Reservation program in order to shut down computer
37. BookScan Station
- a. Can turn on/off scanner and computer
 - b. Can scan documents to the computer in color or black/white
 - c. Can rotate documents on-screen
 - d. Can delete a scanned image
 - e. Can scan to fax, USB, printer, email, Google Drive, phone/tablet
 - f. Can send a fax in color
 - g. Can set up email or print confirmation
 - h. Can create a cover page
 - i. Knows procedure for calling Millennium for service
 - j. Knows what bills/coins are accepted by the coin-op
 - k. Knows when fax/email jobs should be split into multiple jobs due to number of pages, page content, etc.
 - l. Can use bypass key

Information Services Assistant

38. Public Internet computers
 - a. Can assist a patron with logging into the computer
 - b. Can override filter
 - c. Knows the difference between closing client and logging in as super user and can do both
 - d. Can end a session
 - e. Can lock a computer
 - f. Can adjust volume
 - g. Can assist a patron with choosing black/white or color printer and submit print job via Envisionware
 - h. Knows purpose of NTouch Videophone software and how to use it
39. AWE computers
 - a. Can power on/shutdown AWE computers
40. Wifi
 - a. Can connect devices to public wifi
 - b. Can connect devices to staff wifi
41. Equipment – Projector
 - a. Can turn on/off
 - b. Can connect laptop to projector and mirror laptop screen
 - c. Can change size of the projected image
 - d. Can focus projected image (tabletop projectors only)
 - e. Can adjust height
42. Equipment – Televisions
 - a. Can turn on/off
 - b. Can connect DVD player and play DVD
 - c. Can connect laptop and mirror the screen
 - d. Can wirelessly connect devices such as a tablet, laptop, or smartphone to smart TV (Fort Thomas only)
 - e. Can mirror a device such as a tablet or smartphone to Apple TV
 - f. Can select various inputs (HDMI, AV, etc.)
 - g. Can display live programming on TVs with antenna (e.g. weather)
 - h. Can change channel
 - i. Can adjust volume
43. Equipment – Miscellaneous
 - a. Can operate shredder
 - b. Can take photos with digital camera or cell phone
 - c. Can arm and disarm emergency door alarms
 - d. Can arm and disarm AED door alarm
 - e. Can operate AED

Information Services Assistant

44. RB Digital magazines
 - a. Can locate on CCPL website
 - b. Can create a new account and sign in
 - c. Can install RB Digital app to compatible device
 - d. Can checkout, download, and view title in RB Digital app
45. EBSCO databases (any research database such as MasterFILE Premier)
 - a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can search for a topic
 - d. Can tell the difference between full text entries and citations only
 - e. Can limit search results to full text
 - f. Can sort results by date
 - g. Can email an article/attachment
 - h. Can retrieve a list of all articles in a specific magazine/journal issue (e.g. Nov 2016 National Geographic)
 - i. Can find a full-text newspaper article that mentions a northern Kentucky city/town.
46. NovelList
 - a. Can locate on the CCPL website
 - b. Can explain to patron how to access from home
 - c. Can identify read-a-likes based on a title or author
 - d. Can limit results based on age of audience
 - e. Can limit results based on grade level, lexile range, or accelerated reader book level number (e.g. 4.2)
 - f. Can find book discussion guides
 - g. Can find books by Appeal and create your own Appeal Mix
 - h. Can sign up for NovelList newsletters
47. Mango Languages
 - a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can create an account and log in
 - d. Can start a course
 - e. Can use the translate feature
 - f. Can track user activity
48. Consumer Reports
 - a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can find product ratings
 - d. Can filter ratings by cost and score

Information Services Assistant

- e. Can sort results by price
 - f. Can compare three models of a product
 - g. Can find My Benefits and use the Car Recall Tracker
49. Gale Courses
- a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can explain service (as if to a patron)
 - d. Can identify the New, Popular, and Featured courses
 - e. Can find courses on basic computer skills
50. Learning Express Library
- a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can find the Citizenship practice test
 - d. Can find the Introduction to the GED test
 - e. Can find ACT practice tests
 - f. Can find the GRE practice tests
 - g. Can find Resume Builder
 - h. Can find career match quizzes
51. Miscellaneous tech
- a. Can install and configure library app on a mobile device
 - b. Knows the difference between streaming and downloading
 - c. Can turn a mobile device on/off
 - d. Can increase or decrease the volume or mute a mobile device
 - e. Can close all apps on a mobile device
 - f. Can use thermal laminator

Information Services Librarian

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change password
 - e. Can change email signature
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms
 - d. Can locate Personnel Policies
 - e. Can locate branch staff list
 - f. Can locate emergency contact form
 - g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines
 - i. Can change password
 - j. Can open documents (e.g. performance review forms)
4. Litmos
 - a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started
5. Basic computer use

Information Services Librarian

- a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can locate files/folders
 - e. Can minimize, maximize or resize a window
 - f. Can diagnose basic computer problems
 - g. Understands basic password security and password creation
 - h. Can move, rename, and delete files
 - i. Can create a folder
 - j. Can identify properties of a file including size, date created, and date last modified
6. Polaris – Basics
 - a. Can start, logon, logoff, and exit Polaris client
 - b. Can load entire search list when Polaris loads only partial results
 7. Polaris – Searching
 - a. Can search bibliographic records
 - b. Can search item records
 - c. Knows the difference between bibliographic and item records
 - d. Can search for items by common fields: title, author, keyword, series, barcode
 - e. Can find a patron registration by using patron name or barcode
 - f. Can sort search results by author, date and format
 8. Polaris – Patron registration
 - a. Can update a patron registration
 - b. Can reset PIN
 - c. Can turn on a patron's reading history – knows how long the reading history is kept, how many items can be in the list, and what happens when reading history is turned off
 9. Polaris – Patron notes and blocks
 - a. Can add a library-assigned or free text patron block
 - b. Can delete a patron block
 - c. Can add a blocking or non-blocking note
 - d. Can delete a blocking or non-blocking note
 - e. Knows what to enter in a patron note field after submitting an item request on behalf of patron
 10. Polaris – Check out/renewal
 - a. Can open check out screen
 - b. Can check out items to a patron
 - c. Can view items checked out to a patron

Information Services Librarian

- d. Can renew all items on a patron account
- e. Can renew partial list of items on a patron account
- 11. Polaris – Check in
 - a. Can check in on normal mode
 - b. Can check in on in-house mode
- 12. Polaris – Patron accounting
 - a. Can view a patron's charges
 - b. Can process cash payment in full
 - c. Can process cash partial payment
 - d. Knows policy on allowing patrons to pay \$1 per computer use
- 13. Polaris – Holds
 - a. Can place a bibliographic-level hold on an item
 - b. Can place an item-level hold on an item (and knows when it is appropriate to do so)
 - c. Can view a patron's hold list
 - d. Can cancel a hold
 - e. Can delete a hold
 - f. Knows what the following holds terms mean: active, cancelled, held, inactive, pending, not-supplied
 - g. Can view holds queue
 - h. Can inactivate a hold request
 - i. Can reactivate a hold request
 - j. Can group and ungroup holds
 - k. Can change pickup location on a hold with a status of Active, Inactive, Pending, or Held
- 14. Polaris – Item records
 - a. Can change an item circulation status to in-repair, missing, or withdrawn
 - b. Know when to check/uncheck boxes in item records (non-circulating, display in PAC, loanable outside system, holdable)
 - c. Can determine item availability
 - d. Can find item due date
 - e. Can find last check in date
 - f. Can find item check out date
 - g. Can view and interpret an item's circulation history
 - h. Can find the current borrower information on a checked out item
 - i. Can find last borrower information on an item
- 15. Public Access Catalog
 - a. Can search for items

Information Services Librarian

- b. Can search for items by Accelerated Reader or Lexile information (e.g. Lexile score, AR interest level, book level, or point level)
 - c. Can narrow search by type of material and branch
 - d. Can help a patron log in to account
 - e. Can help a patron place a hold
 - f. Can help a patron make a payment
16. Cloud storage (e.g. Google Drive, Dropbox)
- a. Understands cloud storage and can explain its use
 - b. Can create, access, edit and delete docs in cloud storage
17. Library website
- a. Can register a patron for a program
 - b. Can submit request for one-on-one technology training for patron
 - c. Can sign up a patron for the library newsletter
 - d. Knows where to direct a patron to sign up for a digital only library card
 - e. Knows where to direct a patron to apply to use a meeting/study room
 - f. Knows where to direct a patron to apply for a job or volunteer position
 - g. Knows where to direct a patron to sign up for book recommendations by email
18. Library telephone system
- a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail
19. PC Reservation (staff client on reference desk PCs)
- a. Can create a guest pass
 - b. Can view PC status
 - c. Can determine name of patron logged on each computer
 - d. Can extend a session by adding time
 - e. Can end a session
 - f. Can send a message
 - g. Can create a reservation
 - h. Can cancel a reservation
 - i. Can unlock a computer that has been locked by a patron
 - j. Can mark a computer out of service
20. PC Reservation Station
- a. Can assist patrons in making reservations
21. Kentucky Libraries Unbound (native interface)

Information Services Librarian

- a. Can navigate to website
 - b. Can find help and troubleshooting pages
 - c. Can sign in
 - d. Can search for items
 - e. Can check out items
 - f. Can determine format of items (audio, ebook, Kindle, video) and understand the differences
 - g. Can determine number of copies and availability of an item
 - h. Can place a hold on an item
 - i. Can view items checked out
 - j. Can view holds
 - k. Knows about the Advantage collection and understands how it works in relation to the consortium collection
 - l. Can limit search results by format, maturity, and availability
 - m. Can change default lending periods
22. Kentucky Libraries Unbound (Public Access Catalog)
- a. Can search for items
 - b. Can check out items
 - c. Can determine format of items (audio, book, video)
 - d. Can place a hold on an item
23. Overdrive app
- a. Can download Overdrive app to compatible device
 - b. Can add KLU to "My Libraries"
 - c. Can sign in to KLU account
 - d. Can download items to device
 - e. Can return an item
 - f. Can download Kindle app to compatible device
 - g. Can add a KLU checkout to the Kindle app through Amazon
24. Libby app
- a. Can download Libby app to compatible device
 - b. Can add KLU to "Your Libraries"
 - c. Can add a card
 - d. Can link a second card
 - e. Can switch between two linked cards
 - f. Can search for and borrow an item
 - g. Can display book details (e.g. length of audiobook)
 - h. Can open and change reading settings of an ebook (font size, lighting, book design)
 - i. Can download items to Libby

Information Services Librarian

- j. Can change the loan period of an item
 - k. Can limit search by format (ebook, eaudiobook, etc.)
 - l. Can limit search to available titles only
 - m. Can limit search to Kindle-compatible items only
 - n. Can send borrowed titles to Kindle app/device
 - o. Can place and suspend holds
 - p. Can adjust download behavior
 - q. Can return a title
 - r. Can find list of loans and holds
 - s. Can view place in line for a hold
25. Miscellaneous web sites
- a. Can submit a trouble ticket (for technology help)
 - b. Can submit an item request (for purchase or ILL)
 - c. Can create/edit reservations for meetings using online calendars
 - d. Can log a study room use (Fort Thomas only)
 - e. Can locate materials at other libraries using WorldCat
26. Microsoft Office Basics (Word, Excel, PowerPoint, or Publisher)
- a. Can create a new document
 - b. Can open and close a document
 - c. Can save files in different formats (.docx, .xlsx, .pdf, etc.)
 - d. Can print preview and print only selected pages or selected text of a document
 - e. Can copy/cut and paste
 - f. Can format fonts (color, font used, size, bold, italicize, underline)
 - g. Can format paragraphs (line spacing, indents)
 - h. Can format document (margins, orientation, columns)
 - i. Can use spell check
 - j. Can use find and replace commands
 - k. Can use undo and redo
27. Microsoft Word
- a. Can create numbered and bulleted lists
 - b. Can insert an image or clip art
 - c. Can use Microsoft templates
28. Microsoft Excel
- a. Can format cells (number format, alignment, border, fill)
 - b. Can adjust row height
 - c. Can adjust column width
 - d. Can sort fields
29. Microsoft PowerPoint
- a. Can create, add, edit, copy, delete slides

Information Services Librarian

- b. Can view a slideshow in normal, slide sorter, reading, and slideshow view
- 30. Microsoft Publisher
 - a. Can insert text boxes
 - b. Can insert an image or clip art
- 31. Internet browsers
 - a. Can use forward and back buttons
 - b. Can refresh the page
 - c. Can complete a search
 - d. Can open/close multiple tabs
 - e. Can navigate between tabs
 - f. Can print using embedded icons (e.g. Adobe PDF)
 - g. Can upload a file (e.g. resume to a job application site)
 - h. Can save or copy an image
 - i. Can add a site to favorites and favorite bar
 - j. Can set the home page
 - k. Can play, pause, and change the volume of an embedded video
 - l. Can download a file and identify the download location
 - m. Can disable pop-up blocker in web browsers
- 32. Printing – basics
 - a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - b. Can use print preview (when available)
 - c. On a public Internet computer can send a black/white or color print job to the PC Reservation print release station
 - d. Can choose between printers
- 33. Printing – receipt printers
 - a. Can turn on/off
 - b. Can change paper
- 34. Printing – copier/printer/scanner/fax
 - a. Knows where main power switch is located
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can copy in black/white or color
 - f. Can enlarge and reduce
 - g. Can use Preview feature
 - h. Can use Card Shot feature
 - i. Can make single-sided or double-sided copies
 - j. Able to use any tray for copying and copy to all paper sizes

Information Services Librarian

- k. Can send a fax
 - l. Can scan and email documents in black/white or color
 - m. Can make an image lighter or darker
 - n. Knows procedure for calling Millennium for service
 - o. Knows what bills/coins are accepted by the coin-op
 - p. Can use bypass key
35. Printing – public printer
- a. Can turn the printer on/off
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can clear error messages from printer screen
 - f. Knows procedure for calling Millennium for service
 - g. Knows what bills/coins are accepted by the coin-op
 - h. Can use bypass key
36. Printing – PC Reservation print release station
- a. Can view patron's print jobs via patron barcode
 - b. Can view entire print queue for all print jobs
 - c. Can preview a print job
 - d. Can release single or multiple print jobs
 - e. Can delete single or multiple print jobs
 - f. Can override payment with staff password
 - g. Can override payment with bypass key
 - h. Can close PC Reservation program in order to shut down computer
37. BookScan Station
- a. Can turn on/off scanner and computer
 - b. Can scan documents to the computer in color or black/white
 - c. Can rotate documents on-screen
 - d. Can delete a scanned image
 - e. Can scan to fax, USB, printer, email, Google Drive, phone/tablet
 - f. Can send a fax in color
 - g. Can set up email or print confirmation
 - h. Can create a cover page
 - i. Knows procedure for calling Millennium for service
 - j. Knows what bills/coins are accepted by the coin-op
 - k. Knows when fax/email jobs should be split into multiple jobs due to number of pages, page content, etc.
 - l. Can use bypass key
38. Public Internet computers

Information Services Librarian

- a. Can assist a patron with logging into the computer
 - b. Can override filter
 - c. Knows the difference between closing client and logging in as super user and can do both
 - d. Can end a session
 - e. Can lock a computer
 - f. Can adjust volume
 - g. Can assist a patron with choosing black/white or color printer and submit print job via Envisionware
 - h. Knows purpose of NTouch Videophone software and how to use it
39. AWE computers
- a. Can power on/shutdown AWE computers
40. Wifi
- a. Can connect devices to public wifi
 - b. Can connect devices to staff wifi
41. Equipment – Projector
- a. Can turn on/off
 - b. Can connect laptop to projector and mirror laptop screen
 - c. Can change size of the projected image
 - d. Can focus projected image (tabletop projectors only)
 - e. Can adjust height
42. Equipment – Televisions
- a. Can turn on/off
 - b. Can connect DVD player and play DVD
 - c. Can connect laptop and mirror the screen
 - d. Can wirelessly connect devices such as a tablet, laptop, or smartphone to smart TV (Fort Thomas only)
 - e. Can mirror a device such as a tablet or smartphone to Apple TV
 - f. Can select various inputs (HDMI, AV, etc.)
 - g. Can display live programming on TVs with antenna (e.g. weather)
 - h. Can change channel
 - i. Can adjust volume
43. Equipment – Miscellaneous
- a. Can operate shredder
 - b. Can take photos with digital camera or cell phone
 - c. Can arm and disarm emergency door alarms
 - d. Can arm and disarm AED door alarm
 - e. Can operate AED
44. RB Digital magazines

Information Services Librarian

- a. Can locate on CCPL website
 - b. Can create a new account and sign in
 - c. Can install RB Digital app to compatible device
 - d. Can checkout, download, and view title in RB Digital app
45. EBSCO databases (any research database such as MasterFILE Premier)
- a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can search for a topic
 - d. Can tell the difference between full text entries and citations only
 - e. Can limit search results to full text
 - f. Can sort results by date
 - g. Can email an article/attachment
 - h. Can retrieve a list of all articles in a specific magazine/journal issue (e.g. Nov 2016 National Geographic)
 - i. Can find a full-text newspaper article that mentions a northern Kentucky city/town.
46. NovelList
- a. Can locate on the CCPL website
 - b. Can explain to patron how to access from home
 - c. Can identify read-a-likes based on a title or author
 - d. Can limit results based on age of audience
 - e. Can limit results based on grade level, lexile range, or accelerated reader book level number (e.g. 4.2)
 - f. Can find book discussion guides
 - g. Can find books by Appeal and create your own Appeal Mix
 - h. Can sign up for NovelList newsletters
47. Mango Languages
- a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can create an account and log in
 - d. Can start a course
 - e. Can use the translate feature
 - f. Can track user activity
48. Consumer Reports
- a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can find product ratings
 - d. Can filter ratings by cost and score
 - e. Can sort results by price

Information Services Librarian

- f. Can compare three models of a product
- g. Can find My Benefits and use the Car Recall Tracker
- 49. Gale Courses
 - a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can explain service (as if to a patron)
 - d. Can identify the New, Popular, and Featured courses
 - e. Can find courses on basic computer skills
- 50. Learning Express Library
 - a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can find the Citizenship practice test
 - d. Can find the Introduction to the GED test
 - e. Can find ACT practice tests
 - f. Can find the GRE practice tests
 - g. Can find Resume Builder
 - h. Can find career match quizzes
- 51. Miscellaneous tech
 - a. Can install and configure library app on a mobile device
 - b. Knows the difference between streaming and downloading
 - c. Can turn a mobile device on/off
 - d. Can increase or decrease the volume or mute a mobile device
 - e. Can close all apps on a mobile device
 - f. Can use thermal laminator

Information Technology Coordinator

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change passwords
 - e. Can set up automatic out-of-office reply
 - f. Can change email signature
 - g. Can manage email contacts
 - h. Can monitor server logs
 - i. Can create new accounts
 - j. Can delete accounts
 - k. Can disable accounts
 - l. Can perform upgrades as needed
 - m. Can maintain security of mail server
 - n. Can log in to Barracuda website and manage quarantined messages (e.g. deliver, whitelist, block, delete, download, open)
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms
 - d. Can locate Personnel Policies
 - e. Can locate branch staff list
 - f. Can locate emergency contact form
 - g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines

Information Technology Coordinator

- i. Can change password
 - j. Can add new pages
 - k. Can add and edit content
 - l. Can upload and link to uploaded files or images
 - m. Can open documents (e.g. performance review forms)
 - n. Can create new users
 - o. Can block users
4. Litmos
- a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started
5. Basic computer use
- a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can minimize, maximize or resize a window
 - e. Can minimize, maximize or resize a window
 - f. Can save files using a standardized file format and using a logical filing system
 - g. Can diagnose basic computer problems
 - h. Can run and update software
 - i. Understands basic password security and password creation
 - j. Can restart public relations device at Patron Services desk
 - k. Can move, rename, and delete files
 - l. Can create a folder
 - m. Can identify properties of a file including size, date created, and date last modified
6. Polaris
- a. Can start, logon, logoff, and exit Polaris client
 - b. Can provide first level of support for ILS
 - c. Can open support tickets
7. Library telephone system
- a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls

Information Technology Coordinator

- f. Can check voicemail
 - g. Can delete voicemail
 - h. Can change personal voicemail message
8. PC Reservation
- a. Can install updates
 - b. Can compact and prune database every other month
 - c. Can adjust time schedule for computers based on closing changes and Daylight savings time
9. Microsoft Office Basics (Word, Excel, PowerPoint, or Publisher)
- a. Can create a new document
 - b. Can open and close a document
 - c. Can save files in different formats (.docx, .xlsx, .pdf, etc.)
 - d. Can print preview and print only selected pages or selected text of a document
 - e. Can copy/cut and paste
 - f. Can format fonts (color, font used, size, bold, italicize, underline)
 - g. Can format paragraphs (line spacing, indents)
 - h. Can format document (margins, orientation, columns)
 - i. Can use spell check
 - j. Can use find and replace commands
 - k. Can use undo and redo
10. Microsoft Word
- a. Can create numbered and bulleted lists
 - b. Can insert an image or clip art
 - c. Can use Microsoft templates
 - d. Can create and maintain a table of contents
11. Microsoft Excel
- a. Can format cells (number format, alignment, border, fill)
 - b. Can adjust row height
 - c. Can adjust column width
 - d. Can sort fields
 - e. Can change the color of a cell
 - f. Can create multiple sheets in a workbook and toggle between them
 - g. Can edit information in a cell
12. Microsoft PowerPoint
- a. Can create, add, edit, copy, delete slides
 - b. Can view a slideshow in normal, slide sorter, reading, and slideshow view
13. Microsoft Publisher
- a. Can insert text boxes
 - b. Can insert an image or clip art

Information Technology Coordinator

14. Internet browsers
 - a. Can use forward and back buttons
 - b. Can refresh the page
 - c. Can complete a search
 - d. Can open/close multiple tabs
 - e. Can navigate between tabs
 - f. Can print using embedded icons (e.g. Adobe PDF)
 - g. Can upload a file (e.g. resume to a job application site)
 - h. Can save or copy an image
15. Printing – basics
 - a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - b. Can use print preview (when available)
 - c. On a public Internet computer can send a black/white or color print job to the PC Reservation print release station
 - d. Can choose between printers
16. Wifi
 - a. Can connect devices to public wifi
 - b. Can connect devices to staff wifi
 - c. Can maintain wireless network
 - d. Can troubleshoot wireless connectivity issues
17. Equipment – Security camera hardware/software
 - a. Can launch security camera software
 - b. Can view live feeds on all cameras at all locations
 - c. Can search previously recorded footage
 - d. Can print images to file with incident reports
 - e. Can save video footage to a flash drive
18. BAS software (Newport)
 - a. Can maintain connectivity to BAS software
 - b. Can create accounts
19. Touch Tone Tales
 - a. Can change story weekly
 - b. Can install all security updates
20. Linux Servers
 - a. Can monitor server logs
 - b. Can install all security patches
 - c. Can upgrade to latest version of Ubuntu Linux
 - d. Can SSH into Linus servers
 - e. Can navigate in Linus via the command line

Information Technology Coordinator

- f. Can maintain security
- 21. HP Procurve Switches
 - a. Can monitor switch ports for errors
 - b. Can secure switches
 - c. Can perform installation and general configuration
 - d. Can navigate switches from command line
- 22. WebSense Filtering
 - a. Can maintain Internet filtering with WebSense proxy in accordance with CIPA
 - b. Can upgrade as needed
 - c. Can add and delete sites blocked by filter
- 23. Public Computers
 - a. Can install all updates
 - b. Can install and manage LPT1
 - c. Can install and manage Deep Freeze
 - d. Can install and manage Fortres 101
- 24. Windows Servers
 - a. Can monitor server logs
 - b. Can install security updates
 - c. Can maintain optimal server performance
 - d. Can troubleshoot any issues reported or found in logs
 - e. Can verify backups for Symantec SSR
 - f. Can reboot servers periodically
 - g. Can run consistency check on hard drives periodically
 - h. Can defragment hard drives weekly
 - i. Can maintain security to servers
 - j. Can create Active Directory user
 - k. Can delete Active Directory user
 - l. Can disable Active Directory user
 - m. Can map network drive
 - n. Can create print queue
 - o. Can create network share
 - p. Can RDP into Windows servers
- 25. e-Rate
 - a. Can file form 470 online
 - b. Can file form 471 online
 - c. Can file form 486 online
 - d. Can file BEAR form online
- 26. Watchguard Firewall
 - a. Can monitor logs

Information Technology Coordinator

- b. Can upgrade firmware
 - c. Can create or delete new policies as needed
 - d. Can open ports for third party vendors
 - e. Can maintain security
27. WordPress
- a. Can install security updates
 - b. Can upgrade as needed
 - c. Can maintain security of web server
 - d. Can install plugins
28. Desktops
- a. Can install updates
 - b. Can install Windows 10 64bit
 - c. Can troubleshoot computing issues
 - d. Can deploy new computers configured with standard CCPL desktop
29. Cisco Routers
- a. Can configure interfaces, speed, duplex, etc.
 - b. Can navigate Cisco routers from command line
 - c. Can troubleshoot routing issues
 - d. Can secure routers
30. Backups
- a. Can maintain backups of all servers using Symantec SSR
31. Hype-V
- a. Can stop and start virtual servers
32. KeePass
- a. Can maintain list of current online accounts and passwords
33. Help Desk Ticketing System
- a. Can login to ticketing system
 - b. Can close tickets when problem is resolved
 - c. Can report number of closed tickets on monthly report
34. Smartphone
- a. Make/receive calls
 - b. Make/receive text messages
 - c. Access voicemail
 - d. Check and respond to emails
 - e. Manage online calendar

Interlibrary Loan Specialist

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change password
 - e. Can set up automatic out-of-office reply
 - f. Can change email signature
 - g. Can manage email contacts
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms
 - d. Can locate Personnel Policies
 - e. Can locate branch staff list
 - f. Can locate emergency contact form
 - g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines
 - i. Can change password
 - j. Can open documents (e.g. performance review forms)
4. Litmos
 - a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started

Interlibrary Loan Specialist

5. Basic computer use
 - a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can minimize, maximize or resize a window
6. Polaris – Basics
 - a. Can start, logon, logoff, and exit Polaris client
 - b. Can load entire search list when Polaris loads only partial results
7. Polaris – Searching
 - a. Can search bibliographic records
 - b. Can search item records
 - c. Knows the difference between bibliographic and item records
 - d. Can search for items by common fields: title, author, keyword, series, barcode
8. Polaris – Record sets
 - a. Can create an item record set
 - b. Can add item records to a record set
 - c. Can find and access a record set
 - d. Can remove items from a record set
 - e. Can delete a record set
 - f. Can bulk change item record sets
9. Polaris – Patron notes and blocks
 - a. Can add a library-assigned or free text patron block
 - b. Can delete a patron block
 - c. Can add a blocking or non-blocking note
 - d. Can delete a blocking or non-blocking note
10. Polaris – Check in
 - a. Can check in on normal mode
11. Polaris – Holds
 - a. Can place a bibliographic-level hold on an item
 - b. Can place an item-level hold on an item (and knows when it is appropriate to do so)
 - c. Can view a patron's hold list
 - d. Can cancel a hold
 - e. Can delete a hold
 - f. Knows what the following holds terms mean: active, cancelled, held, inactive, pending, not-supplied
 - g. Can inactivate a hold request
 - h. Can reactivate a hold request

Interlibrary Loan Specialist

12. Polaris – Item records
 - a. Can create, access, edit, and delete an ILL item record
 - b. Can edit text box fields of ILL item record
 - c. Can adjust loan period
13. OCLC Worldshare ILL Borrowing
 - a. Can locate items using Discover Items menu
 - b. Can place borrowing request using appropriate settings
 - c. Can track borrowed items in Worldshare
14. OCLC Worldshare ILL Lending
 - a. Can navigate Lending Requests Menu
 - b. Can review new lending requests
 - c. Can supply item using appropriate settings
 - d. Can track lent items in Worldshare
15. KYVL Courier
 - a. Can locate KYVL courier information website
 - b. Can find courier schedule on website
 - c. Can locate pickup form and labeling information
 - d. Can locate and use online form to report library closed dates
16. Library telephone system
 - a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail
 - h. Can change personal voicemail message
17. Miscellaneous web sites
 - a. Can submit a trouble ticket (for technology help)
18. Microsoft Office Basics (Word, Excel, PowerPoint, or Publisher)
 - a. Can create a new document
 - b. Can open and close a document
 - c. Can save files in different formats (.docx, .xlsx, .pdf, etc.)
 - d. Can print preview and print only selected pages or selected text of a document
 - e. Can copy/cut and paste
 - f. Can format fonts (color, font used, size, bold, italicize, underline)
 - g. Can format paragraphs (line spacing, indents)
 - h. Can format document (margins, orientation, columns)
 - i. Can use spell check

Interlibrary Loan Specialist

- j. Can use find and replace commands
 - k. Can use undo and redo
19. Microsoft Excel
- a. Can format cells (number format, alignment, border, fill)
 - b. Can adjust row height
 - c. Can adjust column width
20. Printing – copier/printer/scanner/fax
- a. Knows where main power switch is located
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can copy in black/white or color
 - f. Can enlarge and reduce
 - g. Can make single-sided or double-sided copies

Library Accountant

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
 - i. Can print paid time-off reports on Library staff
 - j. Can review payroll information and print reports
 - k. Can prepare payroll as a backup to HR Coordinator
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can create, edit, and time events in personal calendar
 - e. Can change email signature
 - f. Can change password
 - g. Can set up automatic out-of-office reply
 - h. Can change email signature
 - i. Can manage email contacts
 - j. Can log in to Barracuda website and manage quarantined messages (e.g. deliver, whitelist, block, delete, download, open)
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms
 - d. Can locate Personnel Policies
 - e. Can locate branch staff list
 - f. Can locate emergency contact form
 - g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines
 - i. Can change password

Library Accountant

- j. Can add new pages
- k. Can add and edit content
- l. Can upload and link to uploaded files or images
- m. Can open documents (e.g. performance review forms)
- n. Can post budget information
- 4. Litmos
 - a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started
- 5. QuickBooks
 - a. Can pay invoices
 - b. Can print checks
 - c. Can enter deposits
 - d. Can enter fiscal year budget
 - e. Can reconcile checking accounts
 - f. Can make general ledger entries
 - g. Can perform account analysis
 - h. Can print financial statements
- 6. Polaris
 - a. Can start, logon, logoff, and exit Polaris client
 - b. Can access patron file and navigate to specific information in the patron account
 - c. Can remove credits from patron accounts
 - d. Can add notes to patron accounts
 - e. Can check collection invoice information
- 7. Online databases – Verifone, Chase Paymentech, PNC Bank, BB&T
 - a. Can access reports online for various professional financial services
- 8. Basic computer use
 - a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can minimize, maximize or resize a window
- 9. Miscellaneous web sites
 - a. Can submit a trouble ticket (for technology help)
- 10. Microsoft Office Basics (Word, Excel, PowerPoint, or Publisher)
 - a. Can create a new document
 - b. Can open and close a document

Library Accountant

- c. Can save files in different formats (.docx, .xlsx, .pdf, etc.)
 - d. Can print preview and print only selected pages or selected text of a document
 - e. Can copy/cut and paste
 - f. Can format fonts (color, font used, size, bold, italicize, underline)
 - g. Can format paragraphs (line spacing, indents)
 - h. Can format document (margins, orientation, columns)
 - i. Can use spell check
 - j. Can use find and replace commands
 - k. Can use undo and redo
11. Microsoft Word
- a. Can create numbered and bulleted lists
 - b. Can insert an image or clip art
 - c. Can use Microsoft templates
12. Microsoft Excel
- a. Can format cells (number format, alignment, border, fill)
 - b. Can adjust row height
 - c. Can adjust column width
 - d. Can sort fields
 - e. Can create multiple sheets in a workbook and toggle between them
 - f. Can edit information in a cell
13. Microsoft PowerPoint
- a. Can create, add, edit, copy, delete slides
 - b. Can view a slideshow in normal, slide sorter, reading, and slideshow view
14. Kentucky Retirement
- a. Access CCPL account and print reports
 - b. Post an electronic payment on website
 - c. Process retirement information as a backup to HR Coordinator
15. Printing – basics
- a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - b. Can use print preview (when available)
 - c. Can choose between printers
16. Printing – copier/printer/scanner/fax
- a. Knows where main power switch is located
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can copy in black/white or color
 - f. Can enlarge and reduce

Library Accountant

- g. Can make single-sided or double-sided copies
 - h. Able to use any tray for copying and copy to all paper sizes
 - i. Can send a fax
 - j. Can scan and email documents in black/white or color
 - k. Can make an image lighter or darker
 - l. Knows procedure for calling Millennium for service
17. Library telephone system
- a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail
 - h. Can change personal voicemail message
18. Internet browsers
- a. Can use forward and back buttons
 - b. Can refresh the page
 - c. Can complete a search
 - d. Can open/close multiple tabs
 - e. Can navigate between tabs
 - f. Can print using embedded icons (e.g. Adobe PDF)
 - g. Can upload a file (e.g. resume to a job application site)
 - h. Can save or copy an image
19. Wifi
- a. Can connect devices to public wifi
 - b. Can connect devices to staff wifi
20. Equipment – Miscellaneous
- a. Can operate shredder
 - b. Can take photos with digital camera or cell phone

Library Courier

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change password
 - e. Can change email signature
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms
 - d. Can locate Personnel Policies
 - e. Can locate branch staff list
 - f. Can locate emergency contact form
 - g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines
 - i. Can change password
 - j. Can open documents (e.g. performance review forms)
4. Litmos
 - a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started
5. Cell phone (installed in courier van)
 - a. Can make a call

Library Courier

- b. Can receive a call
- c. Can retrieve voicemail
- 6. Library Express
 - a. Can open all lockers
 - b. Can assign lockers to patrons
 - c. Can delete patrons from assigned lockers

Library Director

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
 - i. Can approve or deny time off requests of employees
 - j. Can approve timesheets of employees
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can set up automatic out-of-office reply
 - e. Can change password
 - f. Create, edit and time events in staff and personal calendar
 - g. Can change email signature
 - h. Can manage email contacts
 - i. Archive email documents as necessary
 - j. Can subscribe and unsubscribe to email listservs
 - k. Can diagnose email issues like returned mail
 - l. Can create new accounts
 - m. Can delete accounts
 - n. Can log in to Barracuda website and manage quarantined messages (e.g. deliver, whitelist, block, delete, download, open)
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms
 - d. Can locate Personnel Policies
 - e. Can locate branch staff list
 - f. Can locate emergency contact form

Library Director

- g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines
 - i. Can change password
 - j. Can add new pages
 - k. Can add and edit content
 - l. Can upload and link to uploaded files or images
 - m. Can open documents (e.g. performance review forms)
 - n. Can create new users
 - o. Can block users
 - p. Can protect and place watch on specific pages
 - q. Can overwrite existing files
 - r. Can link to other pages and outside websites
 - s. Can create tables
 - t. Can search for particular documents
 - u. Can download a form, save it locally, and modify form as needed
4. Litmos
- a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started
 - f. Can switch between Learner and Team Leader/Admin views
5. Basic computer use
- a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can locate files/folders
 - e. Can minimize, maximize or resize a window
 - f. Can save files using a standardized file format and using a logical filing system
 - g. Can diagnose basic computer problems
 - h. Can run and update software
 - i. Can run and update anti-virus software
 - j. Understands basic password security and password creation
 - k. Can move, rename, and delete files
 - l. Can create a folder
 - m. Can identify properties of a file including size, date created, and date last modified
6. Library website

Library Director

- a. Can upload files
 - b. Can link to uploaded files
 - c. Can perform basic navigation of administrative module
 - d. Can access password files
7. Internet browsers
- a. Can use forward and back buttons
 - b. Can refresh the page
 - c. Can complete a search
 - d. Can open/close multiple tabs
 - e. Can navigate between tabs
 - f. Can print using embedded icons (e.g. Adobe PDF)
 - g. Can upload a file (e.g. resume to a job application site)
 - h. Can save or copy an image
 - i. Can add a site to favorites and favorite bar
 - j. Can set the home page
 - k. Can play, pause, and change the volume of an embedded video
 - l. Can download a file and identify the download location
8. Social media
- a. Has basic understanding of library's social media presence(s) insomuch that can post appropriate material if needed
9. KeePass
- a. Can access list of current online accounts and passwords
10. Microsoft Office Basics (Word, Excel, PowerPoint, or Publisher)
- a. Can create a new document
 - b. Can open and close a document
 - c. Can save files in different formats (.docx, .xlsx, .pdf, etc.)
 - d. Can print preview and print only selected pages or selected text of a document
 - e. Can copy/cut and paste
 - f. Can format fonts (color, font used, size, bold, italicize, underline)
 - g. Can format paragraphs (line spacing, indents)
 - h. Can format document (margins, orientation, columns)
 - i. Can use spell check
 - j. Can use find and replace commands
 - k. Can use undo and redo
11. Microsoft Word
- a. Can create numbered and bulleted lists
 - b. Can insert an image or clip art
 - c. Can use Microsoft templates
 - d. Can create and maintain a table of contents

Library Director

12. Microsoft Excel
 - a. Can format cells (number format, alignment, border, fill)
 - b. Can adjust row height
 - c. Can adjust column width
 - d. Can sort fields
 - e. Can create multiple sheets in a workbook and toggle between them
 - f. Can edit information in a cell
 - g. Can change the format (Microsoft "Category") of a cell
 - h. Can create, edit, and delete formulas
 - i. Can create a chart
 - j. Can name a worksheet
13. Microsoft PowerPoint
 - a. Can create, add, edit, copy, delete slides
 - b. Can view a slideshow in normal, slide sorter, reading, and slideshow view
14. Microsoft Publisher
 - a. Can insert text boxes
 - b. Can insert an image or clip art
15. Printing – basics
 - f. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - g. Can use print preview (when available)
 - h. Can choose between printers
16. Printing – copier/printer/scanner/fax
 - a. Knows where main power switch is located
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can copy in black/white or color
 - f. Can enlarge and reduce
 - i. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - g. Can make single-sided or double-sided copies
 - h. Able to use any tray for copying and copy to all paper sizes
 - i. Can send a fax
 - j. Can scan and email documents in black/white or color
 - k. Can make an image lighter or darker
 - l. Knows procedure for calling Millennium for service
17. Polaris
 - a. Can start, logon, logoff, and exit Polaris client

Library Director

- b. Can access patron file and navigate to specific information in the patron account
 - c. Can waive fines
 - d. Can access reports and statistical information
18. Smartphone
- a. Make/receive calls
 - b. Make/receive text messages
 - c. Access voicemail
 - d. Check and respond to emails
 - e. Manage online calendar
19. Library telephone system
- a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail
 - h. Can change personal voicemail message
 - i. Can access personal voicemail messages remotely
20. Equipment – Security camera hardware/software
- a. Can launch security camera software
 - b. Can view live feeds on all cameras at all locations
 - c. Can search previously recorded footage
 - d. Can print images to file with incident reports
 - e. Can save video footage to a flash drive
21. Equipment – Miscellaneous
- a. Can operate shredder
 - b. Can take photos with digital camera or cell phone
 - c. Can arm and disarm emergency door alarms
 - d. Can arm and disarm AED door alarm
 - e. Can operate AED
22. BAS software (Newport)
- a. Can access BAS software
 - b. Can log in
 - c. Can create and change schedules
 - d. Change HVAC units from Global to Operator to Local and know what each setting means
 - e. Change set point temperatures for individual heat pumps
 - f. Can adjust fans in ventilation portion

Library Director

23. Windows server
 - a. Can log in
24. Linux server
 - a. Can log in
25. Wifi
 - a. Can connect devices to public wifi
 - b. Can connect devices to staff wifi
26. Event Calendar
 - a. Can log in and search for programs
 - b. Can view registrations/bookings for an event
 - c. Can create a new event
 - d. Can duplicate an event
 - e. Can insert an image
 - f. Can add a hyperlink
 - g. Can set event category, PR category, and reporting category
 - h. Can select appropriate booking and attendee form
 - i. Can publish event or save draft
 - j. Can edit events
 - k. Can delete an event
 - l. Can enter final attendance
 - m. Can preview an event on the website
 - n. Can enable registration for an event and set registration and wait list limits
 - o. Can set booking cut-off date
 - p. Can edit/delete bookings
 - q. Knows how to export bookings to generate participant list
 - r. Can send an email to registrants
 - s. Can access statistical data on program attendance

Library Page

Created 15 April 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change password
 - e. Can change email signature
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate work schedules
 - c. Can locate job description
 - d. Can locate performance review forms
 - e. Can locate Personnel Policies
 - f. Can locate branch staff list
 - g. Can locate emergency contact form
 - h. Can locate core competency checklist
 - i. Can locate applicable training manuals and guidelines
 - j. Can change password
 - k. Can open documents (e.g. performance review forms)
4. Litmos
 - a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started
5. Polaris – Check in

Library Page

- a. Can check in on in-house mode
- 6. Public Access Catalog
 - a. Can search for items
 - b. Can help a patron log in to account
 - c. Can help a patron place a hold
- 7. Printing – basics
 - a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - b. Can use print preview (when available)
- 8. Printing – copier/printer/scanner/fax
 - a. Can load paper
 - b. Can print in black/white or color
- 9. Equipment – Miscellaneous
 - a. Can operate shredder

Page Supervisor

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
 - i. Can approve or deny time off requests of employees
 - j. Can approve timesheets of employees
 - k. Can generate report of hours worked by part-time employees
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change password
 - e. Can set up automatic out-of-office reply
 - f. Can change email signature
 - g. Can manage email contacts
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate work schedules
 - c. Can locate job description
 - d. Can locate performance review forms
 - e. Can locate Personnel Policies
 - f. Can locate branch staff list
 - g. Can locate emergency contact form
 - h. Can locate core competency checklist
 - i. Can locate applicable training manuals and guidelines
 - j. Can change password
 - k. Can add new pages
 - l. Can add and edit content
 - m. Can open documents (e.g. performance review forms)

Page Supervisor

4. Litmos
 - a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started
 - f. Can switch between Learner and Team Leader/Admin views
5. Basic computer use
 - a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can minimize, maximize or resize a window
 - e. Can restart public relations device at Patron Services desk
6. Polaris – Basics
 - a. Can start, logon, logoff, and exit Polaris client
 - b. Can load entire search list when Polaris loads only partial results
7. Polaris – Searching
 - a. Can search bibliographic records
 - b. Can search item records
 - c. Knows the difference between bibliographic and item records
 - d. Can search for items by common fields: title, author, keyword, series, barcode
 - e. Can find a patron registration by using patron name or barcode
 - f. Can sort search results by author, date and format
8. Polaris – Record sets
 - a. Can create an item record set
 - b. Can add item records to a record set
 - c. Can find and access a record set
 - d. Can remove items from a record set
 - e. Can delete a record set
 - f. Can bulk change item record sets
 - g. Can properly bulk change weeding item record sets
 - h. Knows how to assign the correct ownership level to record sets
9. Polaris – Patron registration
 - a. Can create a new patron registration
 - b. Knows how to determine correct statistical class
 - c. Can delete a patron registration
 - d. Can update a patron registration
 - e. Can reset PIN

Page Supervisor

- f. Can add patron photo
 - g. Can turn on a patron's reading history – knows how long the reading history is kept, how many items can be in the list, and what happens when reading history is turned off
 - h. Can enable eReceipts
10. Polaris – Patron notes and blocks
- a. Can add a library-assigned or free text patron block
 - b. Can delete a patron block
 - c. Can add a blocking or non-blocking note
 - d. Can delete a blocking or non-blocking note
 - e. Knows what to enter in a patron note field after submitting an item request on behalf of patron
11. Polaris – Reports
- a. Can run and print the Request Manager report (pick list)
 - b. Can run and print the financial report for balancing cash drawer
 - c. Can run, post, and print fines Z-fold mailer
 - d. Can run, post, and print holds Z-fold mailer
 - e. Can run, post, and print billing Z-fold mailer
 - f. Can run, post, and print overdue Z-fold mailer
 - g. Knows how to re-print daily notices (e.g. in the event of printer error)
12. Polaris – Check out/renewal
- a. Can open check out screen
 - b. Can process check out blocks and messages
 - c. Can check out items to a patron
 - d. Can print check out receipt
 - e. Can view items checked out to a patron
 - f. Knows how to assign a special loan period and under what conditions
 - g. Can renew all items on a patron account
 - h. Can renew partial list of items on a patron account
 - i. Can determine how many times an item has been renewed
 - j. Can identify how many renewals are remaining
 - k. Knows when auto-renewal takes place and the reasons (3) why the renewal may be denied
 - l. Can print a list of all items out
 - m. Can reset due date
13. Polaris – Check in
- a. Can check in on normal mode
 - b. Can check in on bulk mode
 - c. Can check in on in-house mode

Page Supervisor

- d. Can set free days on check in
 - e. Knows difference between grace period and free days
 - f. Can process check in messages and blocks
 - g. Can print check in receipt
14. Polaris – Patron accounting
- a. Can view a patron's charges
 - b. Can process cash or check payment in full
 - c. Can process cash or check partial payment
 - d. Can waive all charges
 - e. Can waive partial charges
 - f. Can process credit card payment in full
 - g. Can process credit card partial payment
 - h. Can process payment from credit
 - i. Can view a patron's notice history
 - j. Can create a charge on a patron's account
 - k. Can manually create a credit on a patron's account
 - l. Can view a patron's financial transaction history
 - m. Can determine what form of payment a patron used to pay a charge (e.g. cash, credit card, etc.)
 - n. Knows the procedure for refunding a credit when the original charge was paid by cash/check
 - o. Knows the procedure for refunding a credit when the original charge was paid by credit card
15. Polaris – Claims and lost items
- a. Can set an item to Claim Returned
 - b. Can set an item to Claim Never Had
 - c. Can estimate fines for a patron on overdue items that have not been returned
 - d. Can declare an item lost
 - e. Can find the price of a lost item for a patron
 - f. Can resolve a lost and un-paid item
 - g. Can resolve a lost and paid item
 - h. Can resolve a withdrawn item that has been returned
 - i. Can resolve a deleted item that has been returned
16. Polaris – Holds
- a. Can place a bibliographic-level hold on an item
 - b. Can place an item-level hold on an item (and knows when it is appropriate to do so)
 - c. Can view a patron's hold list
 - d. Can cancel a hold

Page Supervisor

- e. Can delete a hold
 - f. Knows what the following holds terms mean: active, cancelled, held, inactive, pending, not-supplied
 - g. Can view holds queue
 - h. Can inactivate a hold request
 - i. Can reactivate a hold request
 - j. Can group and ungroup holds
 - k. Can change pickup location on a hold with a status of Active, Inactive, Pending, or Held
17. Polaris – Item records
- a. Can change an item circulation status to in-repair, missing, or withdrawn
 - b. Know when to check/uncheck boxes in item records (non-circulating, display in PAC, loanable outside system, holdable)
 - c. Can determine item availability
 - d. Can find item due date
 - e. Can find last check in date
 - f. Can find item check out date
 - g. Can view and interpret an item's circulation history
 - h. Can change the barcode number of an item
 - i. Can find the current borrower information on a checked out item
 - j. Can find last borrower information on an item
 - k. Can add a library assigned or free text block to an item
 - l. Can change loan periods (e.g. 3 days to 7 days for DVDs)
18. Polaris – Serials
- a. Can check in newspapers and magazines
 - b. Can uncheck in newspapers and magazines
 - c. Can combine magazine issues
 - d. Can add/predict more magazine issues
19. Polaris – Off-line
- a. Can log into Polaris off-line
 - b. Can log off Polaris off-line
20. Public Access Catalog
- a. Can search for items
 - b. Can search for items by Accelerated Reader or Lexile information (e.g. Lexile score, AR interest level, book level, or point level)
 - c. Can narrow search by type of material and branch
 - d. Can help a patron log in to account
 - e. Can help a patron place a hold
 - f. Can help a patron make a payment

Page Supervisor

21. Library website
 - a. Can register a patron for a program
 - b. Can submit request for one-on-one technology training for patron
 - c. Can sign up a patron for the library newsletter
 - d. Knows where to direct a patron to sign up for a digital only library card
 - e. Knows where to direct a patron to apply to use a meeting/study room
 - f. Knows where to direct a patron to apply for a job or volunteer position
 - g. Knows where to direct a patron to sign up for book recommendations by email
22. Library telephone system
 - a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail
 - h. Change personal voicemail greeting
23. Miscellaneous web sites
 - a. Can submit a trouble ticket (for technology help)
 - b. Can submit an item request (for purchase or ILL)
 - c. Can create/edit reservations for meetings using online calendars
24. Printing – basics
 - a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - b. Can use print preview (when available)
 - c. Can choose between printers
25. Printing –receipt printers
 - a. Can turn on/off
 - b. Can change paper
26. Printing – Dymo label printer
 - a. Can change paper
 - b. Can print spine label
27. Printing – copier/printer/scanner/fax
 - a. Knows where main power switch is located
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can copy in black/white or color
 - f. Can enlarge and reduce

Page Supervisor

- g. Can use Preview feature
 - h. Can make single-sided or double-sided copies
 - i. Able to use any tray for copying and copy to all paper sizes
 - j. Can scan and email documents in black/white or color
 - k. Can make an image lighter or darker
 - l. Knows procedure for calling Millennium for service
28. Equipment – Televisions
- a. Can turn on/off
 - b. Can select various inputs (HDMI, AV, etc.)
 - c. Can display live programming on TVs with antenna (e.g. weather)
 - d. Can change channel
 - e. Can adjust volume
29. Equipment – Azuradisc
- a. Can resurface discs
 - b. Can clean machine
30. Equipment – Security camera hardware/software
- a. Can launch security camera software
 - b. Can view live feeds on all cameras at home branch
31. Equipment – Miscellaneous
- a. Can operate shredder
 - b. Can take photos with digital camera or cell phone
 - c. Can operate ZappBug Oven
 - d. Can arm and disarm emergency door alarms
 - e. Can arm and disarm AED door alarm
 - f. Can operate AED

Patron Services Assistant

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change password
 - e. Can set up automatic out-of-office reply
 - f. Can change email signature
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate work schedules
 - c. Can locate job description
 - d. Can locate performance review forms
 - e. Can locate Personnel Policies
 - f. Can locate branch staff list
 - g. Can locate emergency contact form
 - h. Can locate core competency checklist
 - i. Can locate applicable training manuals and guidelines
 - j. Can change password
 - k. Can open documents (e.g. performance review forms)
4. Litmos
 - a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started

Patron Services Assistant

5. Basic computer use
 - a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can restart public relations device at Patron Services desk
6. Polaris – Basics
 - a. Can start, logon, logoff, and exit Polaris client
 - b. Can load entire search list when Polaris loads only partial results
7. Polaris – Searching
 - a. Can search bibliographic records
 - b. Can search item records
 - c. Knows the difference between bibliographic and item records
 - d. Can search for items by common fields: title, author, keyword, series, barcode
 - e. Can find a patron registration by using patron name or barcode
 - f. Can sort search results by author, date and format
8. Polaris – Record sets
 - a. Can create an item record set
 - b. Can add item records to a record set
 - c. Can find and access a record set
 - d. Can remove items from a record set
 - e. Can delete a record set
 - f. Can bulk change item record sets
 - g. Can properly bulk change weeding item record sets
 - h. Knows how to assign the correct ownership level to record sets
9. Polaris – Patron registration
 - a. Can create a new patron registration
 - b. Knows how to determine correct statistical class
 - c. Can delete a patron registration
 - d. Can update a patron registration
 - e. Can reset PIN
 - f. Can add patron photo
 - g. Can turn on a patron's reading history – knows how long the reading history is kept, how many items can be in the list, and what happens when reading history is turned off
 - h. Can enable eReceipts
10. Polaris – Patron notes and blocks
 - a. Can add a library-assigned or free text patron block
 - b. Can delete a patron block
 - c. Can add a blocking or non-blocking note

Patron Services Assistant

- d. Can delete a blocking or non-blocking note
 - e. Knows what to enter in a patron note field after submitting an item request on behalf of patron
11. Polaris – Reports
- a. Can run and print the Request Manager report (pick list)
 - b. Can run and print the financial report for balancing cash drawer
 - c. Can run, post, and print fines Z-fold mailer
 - d. Can run, post, and print holds Z-fold mailer
 - e. Can run, post, and print billing Z-fold mailer
 - f. Can run, post, and print overdue Z-fold mailer
 - g. Knows how to re-print daily notices (e.g. in the event of printer error)
12. Polaris – Check out/renewal
- a. Can open check out screen
 - b. Can process check out blocks and messages
 - c. Can check out items to a patron
 - d. Can print check out receipt
 - e. Can view items checked out to a patron
 - f. Knows how to assign a special loan period and under what conditions
 - g. Can renew all items on a patron account
 - h. Can renew partial list of items on a patron account
 - i. Can determine how many times an item has been renewed
 - j. Can identify how many renewals are remaining
 - k. Knows when auto-renewal takes place and the reasons (3) why the renewal may be denied
 - l. Can print a list of all items out
 - m. Can reset due date
13. Polaris – Check in
- a. Can check in on normal mode
 - b. Can check in on bulk mode
 - c. Can check in on in-house mode
 - d. Can set free days on check in
 - e. Knows difference between grace period and free days
 - f. Can process check in messages and blocks
 - g. Can print check in receipt
14. Polaris – Patron accounting
- a. Can view a patron's charges
 - b. Can process cash or check payment in full
 - c. Can process cash or check partial payment
 - d. Can waive all charges

Patron Services Assistant

- e. Can waive partial charges
 - f. Can process credit card payment in full
 - g. Can process credit card partial payment
 - h. Can process payment from credit
 - i. Can view a patron's notice history
 - j. Can create a charge on a patron's account
 - k. Can manually create a credit on a patron's account
 - l. Can view a patron's financial transaction history
 - m. Can determine what form of payment a patron used to pay a charge (e.g. cash, credit card, etc.)
 - n. Knows the procedure for refunding a credit when the original charge was paid by cash/check
 - o. Knows the procedure for refunding a credit when the original charge was paid by credit card
15. Polaris – Claims and lost items
- a. Can set an item to Claim Returned
 - b. Can set an item to Claim Never Had
 - c. Can estimate fines for a patron on overdue items that have not been returned
 - d. Can declare an item lost
 - e. Can find the price of a lost item for a patron
 - f. Can resolve a lost and un-paid item
 - g. Can resolve a lost and paid item
 - h. Can resolve a withdrawn item that has been returned
 - i. Can resolve a deleted item that has been returned
16. Polaris – Holds
- a. Can place a bibliographic-level hold on an item
 - b. Can place an item-level hold on an item (and knows when it is appropriate to do so)
 - c. Can view a patron's hold list
 - d. Can cancel a hold
 - e. Can delete a hold
 - f. Knows what the following holds terms mean: active, cancelled, held, inactive, pending, not-supplied
 - g. Can view holds queue
 - h. Can inactivate a hold request
 - i. Can reactivate a hold request
 - j. Can group and ungroup holds
 - k. Can change pickup location on a hold with a status of Active, Inactive, Pending, or Held

Patron Services Assistant

17. Polaris – Item records
 - a. Can change an item circulation status to in-repair, missing, or withdrawn
 - b. Know when to check/uncheck boxes in item records (non-circulating, display in PAC, loanable outside system, holdable)
 - c. Can determine item availability
 - d. Can find item due date
 - e. Can find last check in date
 - f. Can find item check out date
 - g. Can view and interpret an item's circulation history
 - h. Can change the barcode number of an item
 - i. Can find the current borrower information on a checked out item
 - j. Can find last borrower information on an item
 - k. Can add a library assigned or free text block to an item
 - l. Can change loan periods (e.g. 3 days to 7 days for DVDs)
18. Polaris – Serials
 - a. Can check in newspapers and magazines
 - b. Can uncheck in newspapers and magazines
 - c. Can combine magazine issues
 - d. Can add/predict more magazine issues
19. Polaris – Off-line
 - a. Can log into Polaris off-line
 - b. Can log off Polaris off-line
20. Public Access Catalog
 - a. Can search for items
 - b. Can search for items by Accelerated Reader or Lexile information (e.g. Lexile score, AR interest level, book level, or point level)
 - c. Can narrow search by type of material and branch
 - d. Can help a patron log in to account
 - e. Can help a patron place a hold
 - f. Can help a patron make a payment
21. Library website
 - a. Can register a patron for a program
 - b. Can submit request for one-on-one technology training for patron
 - c. Can sign up a patron for the library newsletter
 - d. Knows where to direct a patron to sign up for a digital only library card
 - e. Knows where to direct a patron to apply to use a meeting/study room
 - f. Knows where to direct a patron to apply for a job or volunteer position
 - g. Knows where to direct a patron to sign up for book recommendations by email
22. Library telephone system

Patron Services Assistant

- a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail
 - h. Change personal voicemail greeting
23. Miscellaneous web sites
- a. Can submit a trouble ticket (for technology help)
 - b. Can submit an item request (for purchase)
 - c. Can create/edit reservations for meetings using online calendars
24. Printing – basics
- a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - b. Can use print preview (when available)
 - c. Can choose between printers
25. Printing –receipt printers
- a. Can turn on/off
 - b. Can change paper
26. Printing – Dymo label printer
- a. Can change paper
 - b. Can print spine label
27. Printing – copier/printer/scanner/fax
- a. Knows where main power switch is located
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can copy in black/white or color
 - f. Can enlarge and reduce
 - g. Can use Preview feature
 - h. Can make single-sided or double-sided copies
 - i. Able to use any tray for copying and copy to all paper sizes
 - j. Can scan and email documents in black/white or color
 - k. Can make an image lighter or darker
 - l. Knows procedure for calling Millennium for service
28. Equipment – Televisions
- a. Can turn on/off
 - b. Can select various inputs (HDMI, AV, etc.)

Patron Services Assistant

- c. Can display live programming on TVs with antenna (e.g. weather)
- d. Can change channel
- e. Can adjust volume
- 29. Equipment – Azuradisc
 - a. Can resurface discs
 - b. Can clean machine
- 30. Equipment – Security camera hardware/software
 - a. Can launch security camera software
 - b. Can view live feeds on all cameras at home branch
- 31. Equipment – Miscellaneous
 - a. Can operate shredder
 - b. Can take photos with digital camera or cell phone
 - c. Can operate ZappBug Oven
 - d. Can arm and disarm emergency door alarms
 - e. Can arm and disarm AED door alarm
 - f. Can operate AED

Patron Services Supervisor

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
 - i. Can approve or deny time off requests of employees
 - j. Can approve timesheets of employees
 - k. Can generate report of hours worked by part-time employees
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change password
 - e. Can set up automatic out-of-office reply
 - f. Can change email signature
 - g. Can manage email contacts
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate work schedules
 - c. Can locate job description
 - d. Can locate performance review forms
 - e. Can locate Personnel Policies
 - f. Can locate branch staff list
 - g. Can locate emergency contact form
 - h. Can locate core competency checklist
 - i. Can locate applicable training manuals and guidelines
 - j. Can change password
 - k. Can add new pages
 - l. Can add and edit content
 - m. Can open documents (e.g. performance review forms)

Patron Services Supervisor

4. Litmos
 - a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started
 - f. Can switch between Learner and Team Leader/Admin views
5. Basic computer use
 - a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can exit slideshow and restart public relations computer at Patron Services desk
6. Polaris – Basics
 - a. Can start, logon, logoff, and exit Polaris client
 - b. Can load entire search list when Polaris loads only partial results
7. Polaris – Searching
 - a. Can search bibliographic records
 - b. Can search item records
 - c. Knows the difference between bibliographic and item records
 - d. Can search for items by common fields: title, author, keyword, series, barcode
 - e. Can find a patron registration by using patron name or barcode
 - f. Can sort search results by author, date and format
8. Polaris – Record sets
 - a. Can create an item record set
 - b. Can add item records to a record set
 - c. Can find and access a record set
 - d. Can remove items from a record set
 - e. Can delete a record set
 - f. Can bulk change item record sets
 - g. Can properly bulk change weeding item record sets
 - h. Knows the naming format for weeding record sets
 - i. Knows how to assign the correct ownership level to record sets
9. Polaris – Patron registration
 - a. Can create a new patron registration
 - b. Knows how to determine correct statistical class
 - c. Can delete a patron registration
 - d. Can update a patron registration
 - e. Can reset PIN

Patron Services Supervisor

- f. Can add patron photo
 - g. Can turn on a patron's reading history – knows how long the reading history is kept, how many items can be in the list, and what happens when reading history is turned off
 - h. Can enable eReceipts
10. Polaris – Patron notes and blocks
- a. Can add a library-assigned or free text patron block
 - b. Can delete a patron block
 - c. Can add a blocking or non-blocking note
 - d. Can delete a blocking or non-blocking note
 - e. Knows what to enter in a patron note field after submitting an item request on behalf of patron
11. Polaris – Reports
- a. Can run and print the Request Manager report (pick list)
 - b. Can run and print the financial report for balancing cash drawer
 - c. Can run, post, and print fines Z-fold mailer
 - d. Can run, post, and print holds Z-fold mailer
 - e. Can run, post, and print billing Z-fold mailer
 - f. Can run, post, and print overdue Z-fold mailer
 - g. Knows how to re-print daily notices (e.g. in the event of printer error)
 - h. Can find, open, and complete branch statistical report
 - i. Can run patron register report
 - j. Can run in-house report
12. Polaris – Check out/renewal
- a. Can open check out screen
 - b. Can process check out blocks and messages
 - c. Can check out items to a patron
 - d. Can print check out receipt
 - e. Can view items checked out to a patron
 - f. Knows how to assign a special loan period and under what conditions
 - g. Can renew all items on a patron account
 - h. Can renew partial list of items on a patron account
 - i. Can determine how many times an item has been renewed
 - j. Can identify how many renewals are remaining
 - k. Knows when auto-renewal takes place and the reasons (3) why the renewal may be denied
 - l. Can print a list of all items out
 - m. Can reset due date
13. Polaris – Check in

Patron Services Supervisor

- a. Can check in on normal mode
 - b. Can check in on bulk mode
 - c. Can check in on in-house mode
 - d. Can set free days on check in
 - e. Knows difference between grace period and free days
 - f. Can process check in messages and blocks
 - g. Can print check in receipt
14. Polaris – Patron accounting
- a. Can view a patron's charges
 - b. Can process cash or check payment in full
 - c. Can process cash or check partial payment
 - d. Can waive all charges
 - e. Can waive partial charges
 - f. Can process credit card payment in full
 - g. Can process credit card partial payment
 - h. Can process payment from credit
 - i. Can view a patron's notice history
 - j. Can create a charge on a patron's account
 - k. Can manually create a credit on a patron's account
 - l. Can view a patron's financial transaction history
 - m. Can determine what form of payment a patron used to pay a charge (e.g. cash, credit card, etc.)
 - n. Knows the procedure for refunding a credit when the original charge was paid by cash/check
 - o. Knows the procedure for refunding a credit when the original charge was paid by credit card
15. Polaris – Claims and lost items
- a. Can set an item to Claim Returned
 - b. Can set an item to Claim Never Had
 - c. Knows procedure for processing a Claim Returned item that is not returned
 - d. Knows procedure for processing a Claim Never Had item that is not returned
 - e. Can estimate fines for a patron on overdue items that have not been returned
 - f. Can declare an item lost
 - g. Can find the price of a lost item for a patron
 - h. Can resolve a lost and un-paid item
 - i. Can resolve a lost and paid item
 - j. Can resolve a withdrawn item that has been returned
 - k. Can resolve a deleted item that has been returned
16. Polaris – Holds

Patron Services Supervisor

- a. Can place a bibliographic-level hold on an item
 - b. Can place an item-level hold on an item (and knows when it is appropriate to do so)
 - c. Can view a patron's hold list
 - d. Can cancel a hold
 - e. Can delete a hold
 - f. Knows what the following holds terms mean: active, cancelled, held, inactive, pending, not-supplied
 - g. Can view holds queue
 - h. Can shuffle holds queue
 - i. Can inactivate a hold request
 - j. Can reactivate a hold request
 - k. Can group and ungroup holds
 - l. Can change pickup location on a hold with a status of Active, Inactive, Pending, or Held
17. Polaris – Item records
- a. Can change an item circulation status to in-repair, missing, or withdrawn
 - b. Know when to check/uncheck boxes in item records (non-circulating, display in PAC, loanable outside system, holdable)
 - c. Can determine item availability
 - d. Can find item due date
 - e. Can find last check in date
 - f. Can find item check out date
 - g. Can view and interpret an item's circulation history
 - h. Can change the barcode number of an item
 - i. Can find the current borrower information on a checked out item
 - j. Can find last borrower information on an item
 - k. Can add a library assigned or free text block to an item
 - l. Can change loan periods (e.g. 3 days to 7 days for DVDs)
18. Polaris – Serials
- a. Can check in newspapers and magazines
 - b. Can uncheck in newspapers and magazines
 - c. Can combine magazine issues
 - d. Can add/predict more magazine issues
19. Polaris – Off-line
- a. Can log into Polaris off-line
 - b. Can log off Polaris off-line
20. Public Access Catalog
- a. Can search for items

Patron Services Supervisor

- b. Can search for items by Accelerated Reader or Lexile information (e.g. Lexile score, AR interest level, book level, or point level)
 - c. Can narrow search by type of material and branch
 - d. Can help a patron log in to account
 - e. Can help a patron place a hold
 - f. Can help a patron make a payment
21. Unique Management System
- a. Can log in to Unique's website
 - b. Can search for and locate patron account
 - c. Can update patron information
 - d. Can view transaction history
 - e. Can determine status of an account
22. Library website
- a. Can register a patron for a program
 - b. Can submit request for one-on-one technology training for patron
 - c. Can sign up a patron for the library newsletter
 - d. Knows where to direct a patron to sign up for a digital only library card
 - e. Knows where to direct a patron to apply to use a meeting/study room
 - f. Knows where to direct a patron to apply for a job or volunteer position
 - g. Knows where to direct a patron to sign up for book recommendations by email
23. Library telephone system
- a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail
 - h. Change personal voicemail greeting
24. Miscellaneous web sites
- a. Can submit a trouble ticket (for technology help)
 - b. Can submit an item request (for purchase or ILL)
 - c. Can create/edit reservations for meetings using online calendars
25. Printing – basics
- a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - b. Can use print preview (when available)
 - c. Can choose between printers
26. Printing –receipt printers

Patron Services Supervisor

- a. Can turn on/off
- b. Can change paper
- 27. Printing – Dymo label printer
 - a. Can change paper
 - b. Can print spine label
- 28. Printing – copier/printer/scanner/fax
 - a. Knows where main power switch is located
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can copy in black/white or color
 - f. Can enlarge and reduce
 - g. Can use Preview feature
 - h. Can make single-sided or double-sided copies
 - i. Able to use any tray for copying and copy to all paper sizes
 - j. Can scan and email documents in black/white or color
 - k. Can make an image lighter or darker
 - l. Knows procedure for calling Millennium for service
 - m. Knows what bills/coins are accepted by the coin-op
 - n. Can use bypass key
- 29. Equipment – Televisions
 - a. Can turn on/off
 - b. Can select various inputs (HDMI, AV, etc.)
 - c. Can display live programming on TVs with antenna (e.g. weather)
 - d. Can change channel
 - e. Can adjust volume
- 30. Equipment – Azuradisc
 - a. Can resurface discs
 - b. Can clean machine
- 31. Equipment – Security camera hardware/software
 - a. Can launch security camera software
 - b. Can view live feeds on all cameras at all locations
 - c. Can search previously recorded footage
 - d. Can print images to file with incident reports
- 32. Equipment – Miscellaneous
 - a. Can operate shredder
 - b. Can take photos with digital camera or cell phone
 - c. Can operate ZappBug Oven
 - d. Can arm and disarm emergency door alarms

Patron Services Supervisor

- e. Can arm and disarm AED door alarm
- f. Can operate AED

Processing Assistant

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change password
 - e. Can set up automatic out-of-office reply
 - f. Can change email signature
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms
 - d. Can locate Personnel Policies
 - e. Can locate branch staff list
 - f. Can locate emergency contact form
 - g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines
 - i. Can change password
 - j. Can open documents (e.g. performance review forms)
4. Litmos
 - a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started
5. Basic computer use

Processing Assistant

- a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
- b. Can reboot computer
- c. Can login to staff computers
- d. Can minimize, maximize or resize a window
6. Polaris – Acquisitions
 - a. Receive Purchase Order Line Items (POLI). Create a new invoice and copy lines or copy lines to an existing invoice using the Polaris Can transfer Lines to Tool
 - b. Create, access, and edit invoice in Polaris
 - c. Distribute charges and credits and assign categories to charges and credits
 - d. Create, access, and edit an Invoice Line Item (ILI)
 - e. Create item records from ILI
7. Polaris – Cataloging
 - a. Access bibliographic record
 - b. Access item record
 - c. Link to PO, POLI, Invoice, ILI, Holds Queue from bibliographic record link in Find Tool
 - d. Check in item with Polaris hold, preferably an item owned by the same branch at which it will be picked up
8. Library telephone system
 - a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail
 - h. Can change personal voicemail message
9. Internet browsers
 - a. Can use forward and back buttons
 - b. Can refresh the page
 - c. Can complete a search
 - d. Can open/close multiple tabs
 - e. Can navigate between tabs
 - f. Can print using embedded icons (e.g. Adobe PDF)
 - g. Can upload a file (e.g. resume to a job application site)
 - h. Can save or copy an image
10. Printing – copier/printer/scanner/fax
 - a. Can turn the copier on/off

Processing Assistant

- b. Can load paper
- c. Can clear paper jams
- 11. Equipment – Miscellaneous
 - a. Can use scanner with Polaris software to scan ISBNs, UPCs, or library barcode labels to retrieve records
 - b. Can weigh package and print postage for USPS shipments

Public Relations Manager

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
 - i. Can approve or deny time off requests of employees
 - j. Can approve timesheets of employees
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change password
 - e. Can set up automatic out-of-office reply
 - f. Can create and add to a mailing list
 - g. Can change email signature
 - h. Can manage email contacts
 - i. Can archive email documents as necessary
 - j. Can subscribe and unsubscribe to email listservs
 - k. Can diagnose email issues like returned mail
 - l. Can log in to Barracuda website and manage quarantined messages (e.g. deliver, whitelist, block, delete, download, open)
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms
 - d. Can locate Personnel Policies
 - e. Can locate branch staff list
 - f. Can locate emergency contact form
 - g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines

Public Relations Manager

- i. Can change password
 - j. Can add new pages
 - k. Can add and edit content
 - l. Can upload and link to uploaded files or images
 - m. Can open documents (e.g. performance review forms)
 - n. Can search for particular documents
 - o. Can download a form, save it locally, and modify form as needed
4. Litmos
- a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started
 - f. Can switch between Learner and Team Leader/Admin views
5. Basic computer use
- a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can locate files/folders
 - e. Can minimize, maximize or resize a window
 - f. Can save files using a standardized file format and using a logical filing system
 - g. Can diagnose basic computer problems
 - h. Can run and update software
 - i. Understands basic password security and password creation
 - j. Can move, rename and delete files
 - k. Can create a folder
 - l. Can identify properties of a file including size, date created, and date last modified
6. Library telephone system
- a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail
 - h. Can change personal voicemail message
 - i. Can access personal voicemail messages remotely

Public Relations Manager

7. Event Calendar
 - a. Can log in and search for programs
 - b. Can view registrations/bookings for an event
 - c. Can create a new event
 - d. Can edit events
 - e. Can preview an event on the website
 - f. Can copy a recurring event
8. Miscellaneous web sites
 - a. Can submit a trouble ticket (for technology help)
9. Microsoft Office Basics (Word, Excel, PowerPoint, or Publisher)
 - a. Can create a new document
 - b. Can open and close a document
 - c. Can save files in different formats (.docx, .xlsx, .pdf, etc.)
 - d. Can print preview and print only selected pages or selected text of a document
 - e. Can copy/cut and paste
 - f. Can format fonts (color, font used, size, bold, italicize, underline)
 - g. Can format paragraphs (line spacing, indents)
 - h. Can format document (margins, orientation, columns)
 - i. Can use spell check
 - j. Can use find and replace commands
 - k. Can use undo and redo
10. Microsoft Word
 - a. Can create numbered and bulleted lists
 - b. Can insert an image or clip art
11. Microsoft Excel
 - a. Can format cells (number format, alignment, border, fill)
 - b. Can adjust row height
 - c. Can adjust column width
 - d. Can sort fields
 - e. Can create multiple sheets in a workbook and toggle between them
 - f. Can edit information in a cell
12. Microsoft PowerPoint
 - a. Can create, add, edit, copy, delete slides
 - b. Can view a slideshow
 - c. Can insert a video into a slide
13. Microsoft Publisher
 - a. Can insert text boxes
 - b. Can insert an image or clip art
 - c. Create and edit designs with both art and copy

Public Relations Manager

- d. Make PDF of a Publisher document
- 14. Internet browsers
 - a. Can use forward and back buttons
 - b. Can refresh the page
 - c. Can complete a search
 - d. Can open/close multiple tabs
 - e. Can navigate between tabs
 - f. Can print using embedded icons (e.g. Adobe PDF)
 - g. Can upload a file (e.g. resume to a job application site)
 - h. Can save or copy an image
- 15. Printing – basics
 - a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - b. Can use print preview (when available)
 - c. Can choose between printers
- 16. Printing – copier/printer/scanner/fax
 - a. Knows where main power switch is located
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can copy in black/white or color
 - e. Can enlarge and reduce
 - f. Can make single-sided or double-sided copies
 - g. Able to use any tray for copying and copy to all paper sizes
 - h. Can send a fax
 - i. Can scan and email documents in black/white or color
 - j. Can make an image lighter or darker
- 17. Printing – PR Specific Tasks
 - a. Be able to zip files
 - b. Be able to upload files to different servers
 - c. Be able to open, save and send files to/from Dropbox
 - d. Know how to make files print-ready
- 18. Wifi
 - a. Can connect devices to public wifi
 - b. Can connect devices to staff wifi
- 19. Equipment – Miscellaneous
 - a. Can operate shredder
 - b. Can take photos with digital camera or cell phone
 - c. Can operate AED
- 20. Library Website

Public Relations Manager

- a. Can upload files and media
 - b. Can link to uploaded files
 - c. Can create/edit blog post
 - d. Can create/edit webpage
21. Cerkl
- a. Can create content stories
 - b. Can edit/delete content stories
 - c. Can add subscribers
22. General Design
- a. Search for free fonts and be able to download and share with PR and Marketing colleagues
23. InDesign
- a. Add and delete photos and copy from InDesign formats
 - b. Create designs from a blank InDesign page (different sizes, single or multiple pages, etc.)
 - c. Save files with naming structure to prevent using older files
 - d. Create PDFs
 - e. Be able to package files and find/fix elements that need to be linked or corrected
24. Photography
- a. Know how to use different photo services (such as Thinkstock, 123RF, Getty Images, etc.)
 - b. Understand how to use vector art
 - c. Be able to convert photos from RGB to CMYK process color
 - d. Identify and change photos to high res/print quality
 - e. Be able to manipulate photos, such as to crop, lighten, change to transparent backgrounds, etc.
 - f. Know how to save photos in different formats (tiff, jpeg, png, psd) and know which formats are best for various uses
25. Digital marquee
- a. Can create a new message
 - b. Can open and edit existing messages
 - c. Can add a text box
 - d. Can change text font, size and color
 - e. Can change background
 - f. Can preview messages
 - g. Can create and save a message to a specific playlist
 - h. Can schedule and remove messages
 - i. Can update schedule
 - j. Can override all messages on a playlist

Public Relations Manager

- k. Can import graphics/add an image
 - l. Can set default text/effects properties
26. Animoto
- a. Can edit Animoto video (delete/add slides, add photos/videos, change slide duration)
 - b. Can download Animoto video with highest available resolution (1080p)
 - c. Can insert Animoto video into Circ Signage PowerPoint

Public Relations Specialist

Created 15 April 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change password
 - e. Can set up automatic out-of-office reply
 - f. Can change email signature
 - g. Can manage email contacts
 - h. Can archive email documents as necessary
 - i. Can subscribe and unsubscribe to email listservs
 - j. Can diagnose email issues like returned mail
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms
 - d. Can locate Personnel Policies
 - e. Can locate branch staff list
 - f. Can locate emergency contact form
 - g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines
 - i. Can change password
 - j. Can open documents (e.g. performance review forms)
 - k. Can search for particular documents
 - l. Can download a form, save it locally, and modify form as needed
4. Litmos

Public Relations Specialist

- a. Can reset forgotten username/password
- b. Can find and take courses from the Course Library
- c. Can view completed courses
- d. Can view/download achievement certificates
- e. Can view courses that are in progress, overdue, or not started
5. Basic computer use
 - a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can locate files/folders
 - e. Can save files using a standardized file format and using a logical filing system
 - f. Can diagnose basic computer problems
 - g. Can run and update software
 - h. Understands basic password security and password creation
 - i. Can move, rename and delete files
 - j. Can create a folder
 - k. Can identify properties of a file including size, date created, and date last modified
6. Library telephone system
 - a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail
 - h. Can change personal voicemail message
7. Event Calendar
 - a. Can log in and search for programs
 - b. Can view registrations/bookings for an event
 - c. Can create a new event
 - d. Can edit events
 - e. Can preview an event on the website
8. Miscellaneous web sites
 - a. Can submit a trouble ticket (for technology help)
9. Microsoft Office Basics (Word, Excel, PowerPoint, or Publisher)
 - a. Can create a new document
 - b. Can open and close a document

Public Relations Specialist

- c. Can save files in different formats (.docx, .xlsx, .pdf, etc.)
 - d. Can print preview and print only selected pages or selected text of a document
 - e. Can copy/cut and paste
 - f. Can format fonts (color, font used, size, bold, italicize, underline)
 - g. Can format paragraphs (line spacing, indents)
 - h. Can format document (margins, orientation, columns)
 - i. Can use spell check
 - j. Can use find and replace commands
 - k. Can use undo and redo
10. Microsoft Word
- a. Can create numbered and bulleted lists
 - b. Can insert an image or clip art
11. Microsoft Excel
- a. Can format cells (number format, alignment, border, fill)
 - b. Can adjust row height
 - c. Can adjust column width
 - d. Can sort fields
 - e. Can create multiple sheets in a workbook and toggle between them
 - f. Can edit information in a cell
12. Microsoft PowerPoint
- a. Can create, add, edit, copy, delete slides
 - b. Can view a slideshow
 - c. Can insert a video into a slide
13. Microsoft Publisher
- a. Can insert text boxes
 - b. Can insert an image or clip art
 - c. Create and edit designs with both art and copy
 - d. Make PDF of a Publisher document
14. Internet browsers
- a. Can use forward and back buttons
 - b. Can refresh the page
 - c. Can complete a search
 - d. Can open/close multiple tabs
 - e. Can navigate between tabs
 - f. Can print using embedded icons (e.g. Adobe PDF)
 - g. Can upload a file (e.g. resume to a job application site)
 - h. Can save or copy an image
15. Printing – basics

Public Relations Specialist

- a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
- b. Can use print preview (when available)
- c. Can choose between printers
- 16. Printing – copier/printer/scanner/fax
 - a. Knows where main power switch is located
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can copy in black/white or color
 - f. Can enlarge and reduce
 - g. Can use Preview feature
 - h. Can make single-sided or double-sided copies
 - i. Able to use any tray for copying and copy to all paper sizes
 - j. Can send a fax
 - k. Can scan and email documents in black/white or color
 - l. Can make an image lighter or darker
- 17. Printing – PR Specific Tasks
 - a. Be able to zip files
 - b. Be able to upload files to different servers
 - c. Be able to open, save and send files to/from Dropbox
 - d. Know how to make files print-ready
- 18. Wifi
 - a. Can connect devices to public wifi
 - b. Can connect devices to staff wifi
- 19. Equipment – Miscellaneous
 - a. Can operate shredder
 - b. Can take photos with digital camera or cell phone
 - c. Can operate AED
- 20. Library Website
 - a. Can upload files and media
 - b. Can link to uploaded files
 - c. Can create/edit blog post
 - d. Can create/edit webpage
- 21. General Design
 - a. Search for free fonts and be able to download and share with PR and Marketing colleagues
- 22. InDesign
 - a. Add and delete photos and copy from InDesign formats

Public Relations Specialist

- b. Create designs from a blank InDesign page (different sizes, single or multiple pages, etc.)
 - c. Create and use character and paragraph style sheets for consistency in large documents
 - d. Save files with naming structure to prevent using older files
 - e. Create PDFs
 - f. Be able to package files and find/fix elements that need to be linked or corrected
23. Photography
- a. Know how to use different photo services (such as Thinkstock, 123RF, Getty Images, etc.)
 - b. Understand how to use vector art
 - c. Be able to convert photos from RGB to CMYK process color
 - d. Be able to manipulate photos, such as to crop, lighten, change to transparent backgrounds, etc.
 - e. Know how to save photos in different formats (tiff, jpeg, png, psd) and know which formats are best for various uses
24. Digital marquee
- a. Can create a new message
 - b. Can open and edit existing messages
 - c. Can add a text box
 - d. Can change text font, size and color
 - e. Can change background
 - f. Can preview messages
 - g. Can create and save a message to a specific category
 - h. Can schedule and remove messages
 - i. Can update schedule
 - j. Can override all messages on a playlist
25. Animoto
- a. Can edit Animoto video (delete/add slides, add photos/videos, change slide duration)
 - b. Can download Animoto video with highest available resolution (1080p)
 - c. Can insert Animoto video into Circ Signage PowerPoint

Technical Services Assistant

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change password
 - e. Can set up automatic out-of-office reply
 - f. Can change email signature
 - g. Can manage email contacts
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms
 - d. Can locate Personnel Policies
 - e. Can locate branch staff list
 - f. Can locate emergency contact form
 - g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines
 - i. Can change password
 - j. Can open documents (e.g. performance review forms)
4. Litmos
 - a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started

Technical Services Assistant

5. Basic computer use
 - a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
6. Library telephone system
 - a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail
 - h. Can change personal voicemail message
7. Polaris – Cataloging
 - a. Create, access, edit and delete bibliographic records
 - b. Overwrite poor bibliographic record with better bibliographic record
 - c. Create, access, edit, and delete item records. Edit especially call number, collection, material type, loan period, fine code, renewal limit, and statistical code
 - d. Can place free text block on item record
 - e. Edit groups of bibliographic records and item records with record sets
8. Polaris – Circulation
 - a. Check in material to establish held or in-transit to fill hold
9. Microsoft Office Basics (Word, Excel)
 - a. Can create a new document
 - b. Can open and close a document
 - c. Can save a file to a specific location using "save as"

Technical Services Manager

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
 - i. Can approve or deny time off requests of employees
 - j. Can approve timesheets of employees
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change password
 - e. Can set up automatic out-of-office reply
 - f. Can change email signature
 - g. Can manage email contacts
 - h. Can log in to Barracuda website and manage quarantined messages (e.g. deliver, whitelist, block, delete, download, open)
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms
 - d. Can locate Personnel Policies
 - e. Can locate branch staff list
 - f. Can locate emergency contact form
 - g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines
 - i. Can change password
 - j. Can add new pages
 - k. Can add and edit content
 - l. Can upload and link to uploaded files or images

Technical Services Manager

- m. Can open documents (e.g. performance review forms)
- 4. Litmos
 - a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started
 - f. Can switch between Learner and Team Leader/Admin views
- 5. Basic computer use
 - a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can minimize, maximize or resize a window
- 6. Library telephone system
 - a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail
 - h. Can change personal voicemail message
 - i. Can access personal voicemail messages remotely
- 7. Polaris – Acquisitions
 - a. Create, access, edit, and delete Purchase Orders (PO) and Purchase Order Line Items (POLI)
 - b. Create, access, edit, and delete invoices and Invoice Line Items (ILI)
 - c. Create, access, edit and delete item records POLIs
 - d. Create, access, and edit PO in Polaris
 - e. Receive POLI. Create a new invoice and copy lines or copy lines to an existing invoice using the Polaris Can transfer Lines to Tool
 - f. Create, access, edit, and delete "on order" item record templates
 - g. Create, access, and edit invoice in Polaris
 - h. Distribute charges and credits and assign categories to charges and credits
 - i. Create, access, and edit an ILI
 - j. Create, access, and edit Fund records
 - k. Create, access, and edit Fiscal Years
 - l. Create, access, and edit Supplier records

Technical Services Manager

8. Polaris – Administration
 - a. Access and navigate Administration Explorer
 - b. Access and edit Parameters
 - c. Access and edit Profiles
 - d. Access and edit Permissions
 - e. Access and edit Policy Tables
 - f. Access and edit Database Tables
 - g. Create, access, and edit staff accounts
 - h. Assign and remove permissions to staff member's accounts
 - i. Implement new available settings as desired by the Management Team
 - j. Run fiscal year turnover at the end of the fiscal year
 - k. Run year end circulation turnover job at the end of the fiscal year
9. Polaris – Cataloging
 - a. Create, access, edit and delete bibliographic record templates
 - b. Create, access, edit and delete item record templates
 - c. Create, access, edit and delete bibliographic records, from scratch or using template
 - d. Overwrite poor bibliographic record with better bibliographic record
 - e. Create, access, edit, and delete item records. Edit especially call number, collection, material type, loan period, fine code, renewal limit, and statistical code
 - f. Can place free text block on item record
 - g. Create, access, edit, and delete item record templates
 - h. Create, edit, bulk change, and delete record sets
10. Polaris – Circulation
 - a. Check in material to establish held or in-transit to fill hold
11. Polaris – Find Tool
 - a. Create and edit SQL Queries
12. SimplyReports
 - a. Create and execute data queries on SimplyReports
13. Vendor webpages
 - a. Baker and Taylor: create and place orders
 - b. Baker and Taylor: access and search customer support
 - c. Baker and Taylor: create, edit and delete user accounts
 - d. Midwest Tape: create and place orders
 - e. Midwest Tape: search orders and access reports in Tools menu
 - f. Midwest Tape: access and edit users, accounts and other settings in Settings menu
 - g. Amazon.com: place and search orders

Technical Services Manager

14. Microsoft Office Basics (Word, Excel, PowerPoint, or Publisher)
 - a. Can create a new document
 - b. Can open and close a document
 - c. Can save files in different formats (.docx, .xlsx, .pdf, etc.)
 - d. Can print preview and print only selected pages or selected text of a document
 - e. Can copy/cut and paste
 - f. Can format fonts (color, font used, size, bold, italicize, underline)
 - g. Can format paragraphs (line spacing, indents)
 - h. Can format document (margins, orientation, columns)
 - i. Can use spell check
 - j. Can use find and replace commands
 - k. Can use undo and redo
15. Microsoft Word
 - a. Can create numbered and bulleted lists
 - b. Can insert an image or clip art
 - c. Can use Microsoft templates
16. Microsoft Excel
 - a. Can format cells (number format, alignment, border, fill)
 - b. Can adjust row height
 - c. Can adjust column width
 - d. Can sort fields
17. Microsoft PowerPoint
 - a. Can create, add, edit, copy, delete slides
 - b. Can view a slideshow in normal, slide sorter, reading, and slideshow view
18. Microsoft Publisher
 - a. Can insert text boxes
 - b. Can insert an image or clip art
19. Microsoft Access
 - a. Create and run queries
20. Internet browsers
 - a. Can use forward and back buttons
 - b. Can refresh the page
 - c. Can complete a search
 - d. Can open/close multiple tabs
 - e. Can navigate between tabs
 - f. Can print using embedded icons (e.g. Adobe PDF)
 - g. Can upload a file (e.g. resume to a job application site)
 - h. Can save or copy an image
21. Printing – basics

Technical Services Manager

- a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - b. Can use print preview (when available)
 - c. Can choose between printers
22. Printing – copier/printer/scanner/fax
- a. Knows where main power switch is located
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can copy in black/white or color
 - f. Can enlarge and reduce
 - g. Can make single-sided or double-sided copies
 - h. Able to use any tray for copying and copy to all paper sizes
 - i. Can scan and email documents in black/white or color
 - j. Can make an image lighter or darker
23. Polaris Servers
- a. Can access CCPLPOLARIS server using remote desktop
 - b. Can prepare files for going into offline mode
 - c. Can access CCPLPHONE server using remote desktop
 - d. Can access phone notification logs
24. MarcEdit
- a. Can edit and compile MARC files
25. WordPress
- a. Can sign in and navigate to Smart Forms entries
 - b. Can display, select and export entries for item request form
26. Equipment – Miscellaneous
- a. Can arm and disarm emergency door alarms
 - b. Can operate AED
27. Miscellaneous web sites
- a. Can create/edit reservations for meetings using online calendars

Technical Services Specialist

Created 15 Apr 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change password
 - e. Can set up automatic out-of-office reply
 - f. Can change email signature
 - g. Can manage email contacts
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms
 - d. Can locate Personnel Policies
 - e. Can locate branch staff list
 - f. Can locate emergency contact form
 - g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines
 - i. Can change password
 - j. Can open documents (e.g. performance review forms)
4. Litmos
 - a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started

Technical Services Specialist

- f. Can customize Litmos using CSS
- 5. Basic computer use
 - a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
- 6. Library telephone system
 - a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail
 - h. Can change personal voicemail message
- 7. Polaris – Cataloging
 - a. Create, access, edit and delete bibliographic records
 - b. Overwrite poor bibliographic record with better bibliographic record
 - c. Create, access, edit, and delete item records. Edit especially call number, collection, material type, loan period, fine code, renewal limit, and statistical code
 - d. Can place free text block on item record
 - e. Edit groups of bibliographic records and item records with record sets
- 8. Polaris – Circulation
 - a. Check in material to establish held or in-transit to fill hold
- 9. Polaris - Find Tool
 - a. Can create and edit SQL queries
 - b. Can run SQL queries
- 10. Polaris PAC
 - a. Can customize ASP and CSS files of PowerPAC and MobilePAC
 - b. Can compile PAC SCSS themes with Powershell
 - c. Can customize CSS overrides for library PAC computers
 - d. Can edit language strings with Web Admin
 - e. Can reload PAC with Web Admin
- 11. Polaris Database
 - a. Can access database using SSMS
 - b. Can access database programmatically
- 12. API
 - a. Can test API calls using Swagger and API documentation

Technical Services Specialist

- b. Can access API programmatically
- c. Can Manage API keys with Web Admin
- 13. MarcEdit
 - a. Can edit and compile MARC files
- 14. Wordpress
 - a. Can customize CSS and PHP plugins in Wordpress
- 15. Microsoft Office Basics (Word, Excel)
 - a. Can create a new document
 - b. Can open and close a document
 - c. Can save a file to a specific location using "save as"
- 16. Microsoft Excel
 - a. Can format cells (number format, alignment, border, fill)
 - b. Can adjust row height
 - c. Can adjust column width
 - d. Can sort fields
 - e. Can create and execute formulas
 - f. Can create and execute macros
- 17. Microsoft Publisher
 - a. Can insert text boxes
 - b. Can insert an image or clip art
 - c. Can edit and use templates

Weekend Courier

Created 23 Dec 2015
Revised 1 May 2019
Reviewed 1 May 2019

7. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
8. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change password
 - e. Can change email signature
9. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms
 - d. Can locate Personnel Policies
 - e. Can locate branch staff list
 - f. Can locate emergency contact form
 - g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines
 - i. Can change password
 - j. Can open documents (e.g. performance review forms)
10. Litmos
 - a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started
11. Cell phone (installed in courier van)
 - a. Can make a call

Weekend Courier

- b. Can receive a call
- c. Can retrieve voicemail

12. Library Express

- a. Can open all lockers
- b. Can assign lockers to patrons
- c. Can delete patrons from assigned lockers

Master List

Created 23 Dec 2015
Revised 1 May 2019
Reviewed 1 May 2019

1. Timesheet software
 - a. Can reset forgotten password for timesheet
 - b. Can enter regular hours and holiday hours
 - c. Can locate accumulated vacation, sick leave, or PTO
 - d. Can locate pending and approved time off requests
 - e. Can submit time off requests
 - f. Can approve individual timesheet
 - g. Can reset forgotten password for pay stubs
 - h. Can retrieve electronic pay stubs and W2s
 - i. Can approve or deny time off requests of employees
 - j. Can approve timesheets of employees
 - k. Can generate report of hours worked by part-time employees
2. Email
 - a. Can open, create, reply, forward, send, delete email
 - b. Can open other folders (e.g. sent, deleted)
 - c. Can attach a file to a message
 - d. Can change password
 - e. Can set up automatic out-of-office reply
 - f. Can create and add to a mailing list
 - g. Can create, edit, and time events in staff and personal calendar
 - h. Can change email signature
 - i. Can manage email contacts
 - j. Can archive email documents as necessary
 - k. Can subscribe and unsubscribe to email listservs
 - l. Can create new accounts
 - m. Can delete accounts
 - n. Can disable accounts
 - o. Can diagnose email issues like returned mail
 - p. Can log in to Barracuda website and manage quarantined messages (e.g. deliver, whitelist, block, delete, download, open)
3. Wiki
 - a. Can reset forgotten password
 - b. Can locate job description
 - c. Can locate performance review forms

Master List

- d. Can locate Personnel Policies
 - e. Can locate branch staff list
 - f. Can locate emergency contact form
 - g. Can locate core competency checklist
 - h. Can locate applicable training manuals and guidelines
 - i. Can change password
 - j. Can add new pages
 - k. Can add and edit content
 - l. Can upload and link to uploaded files or images
 - m. Can open documents (e.g. performance review forms)
 - n. Can create new users
 - o. Can block users
 - p. Can protect and place watch on specific pages
 - q. Can overwrite existing files
 - r. Can link to other pages and outside websites
 - s. Can create tables
 - t. Can search for particular documents
 - u. Can download a form, save it locally, and modify form as needed
4. Litmos
- a. Can reset forgotten username/password
 - b. Can find and take courses from the Course Library
 - c. Can view completed courses
 - d. Can view/download achievement certificates
 - e. Can view courses that are in progress, overdue, or not started
 - f. Can switch between Learner and Team Leader/Admin views
 - g. Can create, edit, and delete courses/learning paths
 - h. Can create, edit, and delete quizzes
 - i. Can create and upload a certificate
 - j. Can assign courses/learning paths to individuals/teams
 - k. Can run reports
 - l. Can add, edit, and delete teams and users
5. Basic computer use
- a. Can save files to local computer (documents folder), network drive (e.g. S: drive) and removable storage (e.g. flash drive)
 - b. Can reboot computer
 - c. Can login to staff computers
 - d. Can locate files/folders
 - e. Can minimize, maximize or resize a window
 - f. Can save files using a standardized file format and using a logical filing system

Master List

- g. Can diagnose basic computer problems
 - h. Can run and update software
 - i. Understands basic password security and password creation
 - j. Can restart public relations device at Patron Services desk
 - k. Can move, rename, and delete files
 - l. Can create a folder
 - m. Can identify properties of a file including size, date created, and date last modified
6. Polaris – Basics
- a. Can start, logon, logoff, and exit Polaris client
 - b. Can load entire search list when Polaris loads only partial results
7. Polaris – Acquisitions
- a. Create, access, edit, and delete purchase orders (PO) and purchase order line items (POLI)
 - b. Create, access, edit, and delete invoices and invoice line items (ILI)
 - c. Create, access, edit and delete item records POLIs
 - d. Create, access, and edit PO in Polaris
 - e. Receive POLI. Create a new invoice and copy lines or copy lines to an existing invoice using the Polaris Can transfer Lines to Tool
 - f. Create, access, edit, and delete "on order" item record templates
 - g. Create, access, and edit invoice in Polaris
 - h. Distribute charges and credits and assign categories to charges and credits
 - i. Create, access, and edit Fund records
 - j. Create, access, and edit Fiscal Years
 - k. Create, access, and edit Supplier records
8. Polaris – Administration
- a. Access and navigate Administration Explorer
 - b. Access and edit Parameters
 - c. Access and edit Profiles
 - d. Access and edit Permissions
 - e. Access and edit Policy Tables
 - f. Access and edit Database Tables
 - g. Create, access, and edit staff accounts
 - h. Assign and remove permissions to staff member's accounts
 - i. Implement new available settings as desired by the Management Team
 - j. Run fiscal year turnover at the end of the fiscal year
 - k. Run year end circulation turnover job at the end of the fiscal year
9. Polaris – Cataloging
- a. Create, access, edit and delete bibliographic record templates

Master List

- b. Create, access, edit and delete item record templates
 - c. Create, access, edit and delete bibliographic records, from scratch or using template
 - d. Overwrite poor bibliographic record with better bibliographic record
 - e. Create, access, edit, and delete item records. Edit especially call number, collection, material type, loan period, fine code, renewal limit, and statistical code
 - f. Can place free text block on item record
 - g. Edit groups of bibliographic records and item records with record sets
 - h. Access, edit, and delete on the fly (OTF) item record templates
 - i. Create, edit, bulk change, and delete record sets
10. Polaris – Searching
- a. Can search bibliographic records
 - b. Can search item records
 - c. Knows the difference between bibliographic and item records
 - d. Can search for items by common fields: title, author, keyword, series, barcode
 - e. Can find a patron registration by using patron name or barcode
 - f. Can sort search results by author, date and format
11. Polaris – Record sets
- a. Can create an item record set
 - b. Can add item records to a record set
 - c. Can find and access a record set
 - d. Can remove items from a record set
 - e. Can delete a record set
 - f. Can bulk change item record sets
 - g. Can properly bulk change weeding item record sets
 - h. Knows how to assign the correct ownership level to record sets
12. Polaris – Patron registration
- a. Can create a new patron registration
 - b. Knows how to determine correct statistical class
 - c. Can delete a patron registration
 - d. Can update a patron registration
 - e. Can reset PIN
 - f. Can add patron photo
 - g. Can turn on a patron's reading history – knows how long the reading history is kept, how many items can be in the list, and what happens when reading history is turned off
 - h. Can enable eReceipts
13. Polaris – Patron notes and blocks

Master List

- a. Can add a library-assigned or free text patron block
 - b. Can delete a patron block
 - c. Can add a blocking or non-blocking note
 - d. Can delete a blocking or non-blocking note
 - e. Knows what to enter in a patron note field after submitting an item request on behalf of patron
 - f. Knows what kind of patron note to enter and what text to enter after patron signs a laptop user agreement (Fort Thomas and Alexandria)
14. Polaris – Reports
- a. Can run and print the Request Manager report (pick list)
 - b. Can run and print the financial report for balancing cash drawer
 - c. Can run, post, and print fines Z-fold mailer
 - d. Can run, post, and print holds Z-fold mailer
 - e. Can run, post, and print billing Z-fold mailer
 - f. Can run, post, and print overdue Z-fold mailer
 - g. Knows how to re-print daily notices (e.g. in the event of printer error)
 - h. Can find, open, and complete branch statistical report
 - i. Can run patron register report
 - j. Can run in-house report
15. Polaris – Check out/renewal
- a. Can open check out screen
 - b. Can process check out blocks and messages
 - c. Can check out items to a patron
 - d. Can print check out receipt
 - e. Can view items checked out to a patron
 - f. Knows how to assign a special loan period and under what conditions
 - g. Can renew all items on a patron account
 - h. Can renew partial list of items on a patron account
 - i. Can determine how many times an item has been renewed
 - j. Can identify how many renewals are remaining
 - k. Knows when auto-renewal takes place and the reasons (3) why the renewal may be denied
 - l. Can print a list of all items out
 - m. Can reset due date
16. Polaris – Check in
- a. Can check in on normal mode
 - b. Can check in on bulk mode
 - c. Can check in on in-house mode
 - d. Can set free days on check in

Master List

- e. Knows difference between grace period and free days
- f. Can process check in messages and blocks
- g. Can print check in receipt
- 17. Polaris – Patron accounting
 - a. Can view a patron's charges
 - b. Can process cash or check payment in full
 - c. Can process cash or check partial payment
 - d. Can waive all charges
 - e. Can waive partial charges
 - f. Can process credit card payment in full
 - g. Can process credit card partial payment
 - h. Can process payment from credit
 - i. Can view a patron's notice history
 - j. Can create a charge on a patron's account
 - k. Can manually create a bill
 - l. Can manually create a credit on a patron's account
 - m. Can view a patron's financial transaction history
 - n. Can determine what form of payment a patron used to pay a charge (e.g. cash, credit card, etc.)
 - o. Knows the procedure for refunding a credit when the original charge was paid by cash/check
 - p. Knows the procedure for refunding a credit when the original charge was paid by credit card
 - q. Knows policy on allowing patrons to pay \$1 per computer use
- 18. Polaris – Claims and lost items
 - a. Can set an item to Claim Returned
 - b. Can set an item to Claim Never Had
 - c. Knows procedure for processing a Claim Returned item that is not returned
 - d. Knows procedure for processing a Claim Never Had item that is not returned
 - e. Can estimate fines for a patron on overdue items that have not been returned
 - f. Can declare an item lost
 - g. Can find the price of a lost item for a patron
 - h. Can resolve a lost and un-paid item
 - i. Can resolve a lost and paid item
 - j. Can resolve a withdrawn item that has been returned
 - k. Can resolve a deleted item that has been returned
- 19. Polaris – Holds
 - a. Can place a bibliographic-level hold on an item

Master List

- b. Can place an item-level hold on an item (and knows when it is appropriate to do so)
 - c. Can view a patron's hold list
 - d. Can cancel a hold
 - e. Can delete a hold
 - f. Knows what the following holds terms mean: active, cancelled, held, inactive, pending, not-supplied
 - g. Can view holds queue
 - h. Can shuffle holds queue
 - i. Can inactivate a hold request
 - j. Can reactivate a hold request
 - k. Can group and ungroup holds
 - l. Can change pickup location on a hold with a status of Active, Inactive, Pending, or Held
20. Polaris – Item records
- a. Can change an item circulation status to in-repair, missing, or withdrawn
 - b. Know when to check/uncheck boxes in item records (non-circulating, display in PAC, loanable outside system, holdable)
 - c. Can determine item availability
 - d. Can find item due date
 - e. Can find last check in date
 - f. Can find item check out date
 - g. Can view and interpret an item's circulation history
 - h. Can change the barcode number of an item
 - i. Can find the current borrower information on a checked out item
 - j. Can find last borrower information on an item
 - k. Can add a library assigned or free text block to an item
 - l. Knows when and how to change loan periods (e.g. 3 days to 7 days for DVDs)
21. Polaris – Serials
- a. Can check in newspapers and magazines
 - b. Can uncheck in newspapers and magazines
 - c. Can combine magazine issues
 - d. Can add/predict more magazine issues
 - e. Create, access, edit, and delete serials holdings records
 - f. Create, access, edit, and delete issue/part records
 - g. Create, access, edit, and delete check-in records
 - h. Create, access, and edit subscription records
22. Polaris – Off-line
- a. Can log onto Polaris off-line

Master List

- b. Can log off Polaris off-line
- 23. Polaris – Find Tool
 - a. Use the Find Tool in acquisitions, cataloging, patron services, and circulation subsystems to retrieve records and information
 - b. Run SQL queries
 - c. Create and edit SQL queries
- 24. Public Access Catalog
 - a. Can search for items
 - b. Can search for items by Accelerated Reader or Lexile information (e.g. Lexile score, AR interest level, book level, or point level)
 - c. Can narrow search by type of material and branch
 - d. Can help a patron log in to account
 - e. Can help a patron place a hold
 - f. Can help a patron make a payment
- 25. Unique Management System
 - a. Can log in to Unique’s website
 - b. Can search for and locate patron account
 - c. Can update patron information
 - d. Can view transaction history
 - e. Can determine status of an account
- 26. SimplyReports
 - a. Create and execute data queries
- 27. Vendor websites
 - a. Create, submit, and track orders
 - b. Where applicable, determine if site has stock of materials, or will need to wait for an order to be received before shipping
 - c. Baker and Taylor: create and place orders
 - d. Baker and Taylor: access and search customer support
 - e. Baker and Taylor: create, edit and delete user accounts
 - f. Midwest Tape: create and place orders
 - g. Midwest Tape: search orders and access reports in Tools menu
 - h. Midwest Tape: access and edit users, accounts and other settings in Settings menu
 - i. Amazon.com: place and search orders
- 28. Overdrive.com
 - a. Can identify format type displayed
 - b. Can read and understand displayed ownership information for titles
 - c. Can create and populate carts
- 29. Cloud storage (e.g. Google Drive, Dropbox)

Master List

- a. Understands cloud storage and can explain its use
- b. Can create, access, edit and delete docs in cloud storage
- 30. WordPress
 - a. Can upload files and media
 - b. Can link to uploaded files
 - c. Can create/edit blog post
 - d. Can create/edit webpage
 - e. Can perform basic navigation of administrative module
- 31. Library website
 - a. Can register a patron for a program
 - b. Can submit request for one-on-one technology training for patron
 - c. Can sign up a patron for the library newsletter
 - d. Knows where to direct a patron to sign up for a digital only library card
 - e. Knows where to direct a patron to apply to use a meeting/study room
 - f. Knows where to direct a patron to apply for a job or volunteer position
 - g. Knows where to direct a patron to sign up for book recommendations by email
- 32. Social media
 - a. Has basic understanding of library's social media presence(s) insomuch that can post appropriate material if needed
 - b. Can access password files
- 33. Cerkl
 - a. Can create content stories
 - b. Can edit/delete content stories
 - c. Can add subscribers
- 34. Animoto
 - a. Can edit Animoto video (delete/add slides, add photos/videos, change slide duration)
 - b. Can download Animoto video with highest available resolution (1080p)
 - c. Can insert Animoto video into Circ Signage PowerPoint
- 35. KeePass
 - a. Can access list of current online accounts and passwords
- 36. Library telephone system
 - a. Can answer incoming calls
 - b. Can transfer calls
 - c. Can place call on hold
 - d. Can make outside calls
 - e. Can make in-house calls
 - f. Can check voicemail
 - g. Can delete voicemail

Master List

- h. Can change personal voicemail message
- i. Can access personal voicemail messages remotely
- 37. PC Reservation (staff client on Information Services desk PCs)
 - a. Can create a guest pass
 - b. Can view PC status
 - c. Can determine name of patron logged on each computer
 - d. Can extend a session by adding time
 - e. Can end a session
 - f. Can send a message
 - g. Can create a reservation
 - h. Can cancel a reservation
 - i. Can unlock a computer that has been locked by a patron
 - j. Can mark a computer out of service
- 38. PC Reservation Station
 - a. Can assist patrons in making reservations
- 39. Event Calendar
 - a. Can log in and search for programs
 - b. Can view registrations/bookings for an event
 - c. Can create a new event
 - d. Can duplicate an event
 - e. Can insert an image
 - f. Can add a hyperlink
 - g. Can set event category, PR category, and reporting category
 - h. Can select appropriate booking and attendee form
 - i. Can publish event or save draft
 - j. Can edit events
 - k. Can delete an event
 - l. Can enter final attendance
 - m. Can preview an event on the website
 - n. Can enable registration for an event and set registration and wait list limits
 - o. Can set booking cut-off date
 - p. Can edit/delete bookings
 - q. Knows how to export bookings to generate participant list
 - r. Can send an email to registrants
 - s. Can access statistical data on program attendance
- 40. Kentucky Libraries Unbound (native interface)
 - a. Can navigate to website
 - b. Can find help and troubleshooting pages
 - c. Can sign in

Master List

- d. Can search for items
 - e. Can check out items
 - f. Can determine format of items (audio, ebook, Kindle, video) and understand the differences
 - g. Can determine number of copies and availability of an item
 - h. Can place a hold on an item
 - i. Can view items checked out
 - j. Can view holds
 - k. Knows about the Advantage collection and understands how it works in relation to the consortium collection
 - l. Can limit search results by format, maturity, and availability
 - m. Can change default lending periods
 - n. Can log in to KLU Marketplace and access and run reports
41. Kentucky Libraries Unbound (Public Access Catalog)
- a. Can search for items
 - b. Can check out items
 - c. Can determine format of items (audio, book, video)
 - d. Can place a hold on an item
42. Overdrive app
- a. Can download Overdrive app to compatible device
 - b. Can add KLU to "My Libraries"
 - c. Can sign in to KLU account
 - d. Can download items to device
 - e. Can return an item
 - f. Can download Kindle app to compatible device
 - g. Can add a KLU checkout to the Kindle app through Amazon
43. Libby app
- a. Can download Libby app to compatible device
 - b. Can add KLU to "Your Libraries"
 - c. Can add a card
 - d. Can link a second card
 - e. Can switch between two linked cards
 - f. Can search for and borrow an item
 - g. Can display book details (e.g. length of audiobook)
 - h. Can open and change reading settings of an ebook (font size, lighting, book design)
 - i. Can download items to Libby
 - j. Can change the loan period of an item
 - k. Can limit search by format (ebook, eaudiobook, etc.)

Master List

- l. Can limit search to available titles only
 - m. Can limit search to Kindle-compatible items only
 - n. Can send borrowed titles to Kindle app/device
 - o. Can place and suspend holds
 - p. Can adjust download behavior
 - q. Can return a title
 - r. Can find list of loans and holds
 - s. Can view place in line for a hold
44. Miscellaneous web sites
- a. Can submit a trouble ticket (for technology help)
 - b. Can submit an item request (for purchase or ILL)
 - c. Can create/edit reservations for meetings using online calendars
 - d. Can log a study room use (Fort Thomas only)
 - e. Can locate materials at other libraries using WorldCat
45. Microsoft Office Basics (Word, Excel, PowerPoint, or Publisher)
- a. Can create a new document
 - b. Can open and close a document
 - c. Can save files in different formats (.docx, .xlsx, .pdf, etc.)
 - d. Can print preview and print only selected pages or selected text of a document
 - e. Can copy/cut and paste
 - f. Can format fonts (color, font used, size, bold, italicize, underline)
 - g. Can format paragraphs (line spacing, indents)
 - h. Can format document (margins, orientation, columns)
 - i. Can use spell check
 - j. Can use find and replace commands
 - k. Can use undo and redo
46. Microsoft Word
- a. Can create numbered and bulleted lists
 - b. Can insert an image or clip art
 - c. Can use Microsoft templates
 - d. Can create and maintain a table of contents
47. Microsoft Excel
- a. Can format cells (number format, alignment, border, fill)
 - b. Can adjust row height
 - c. Can adjust column width
 - d. Can sort fields
 - e. Can create multiple sheets in a workbook and toggle between them
 - f. Can edit information in a cell
 - g. Can change the format (Microsoft "Category") of a cell

Master List

- h. Can create, edit, and delete formulas
- i. Can create a chart
- j. Can name a worksheet
- 48. Microsoft PowerPoint
 - a. Can create, add, edit, copy, delete slides
 - b. Can view a slideshow in normal, slide sorter, reading, and slideshow view
 - c. Can insert a video into a slide
- 49. Microsoft Publisher
 - a. Can insert text boxes
 - b. Can insert an image or clip art
- 50. Internet browsers
 - a. Can use forward and back buttons
 - b. Can refresh the page
 - c. Can complete a search
 - d. Can open/close multiple tabs
 - e. Can navigate between tabs
 - f. Can print using embedded icons (e.g. Adobe PDF)
 - g. Can upload a file (e.g. resume to a job application site)
 - h. Can save or copy an image
 - i. Can add a site to favorites and favorite bar
 - j. Can set the home page
 - k. Can play, pause, and change the volume of an embedded video
 - l. Can download a file and identify the download location
 - m. Can disable pop-up blocker in web browsers
- 51. Printing – basics
 - a. Can print single-sided and double-sided documents in black/white or color from email, wiki, Internet browser, Microsoft Office programs
 - b. Can use print preview (when available)
 - c. On a public Internet computer can send a black/white or color print job to the PC Reservation print release station
 - d. Can choose between printers
- 52. Printing – receipt printers
 - a. Can turn on/off
 - b. Can change paper
- 53. Printing – Dymo label printer
 - a. Can change paper
 - b. Can print spine label
- 54. Printing – copier/printer/scanner/fax
 - a. Knows where main power switch is located

Master List

- b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can copy in black/white or color
 - f. Can enlarge and reduce
 - g. Can use Preview feature
 - h. Can use Card Shot feature
 - i. Can make single-sided or double-sided copies
 - j. Able to use any tray for copying and copy to all paper sizes
 - k. Can send a fax
 - l. Can scan and email documents in black/white or color
 - m. Can make an image lighter or darker
 - n. Knows procedure for calling Millennium for service
 - o. Knows what bills/coins are accepted by the coin-op
 - p. Can use bypass key
 - q. Can scan documents to a USB drive (Alexandria only)
 - r. Can delete scanned documents (Alexandria only)
 - s. Can clear error messages from screen (Alexandria only)
 - t. Can view patron's print jobs by laptop name and number (Alexandria only)
 - u. Can release patron's print job (Alexandria only)
 - v. Can delete a print job (Alexandria only)
55. Printing – public printer
- a. Can turn the printer on/off
 - b. Can load paper
 - c. Can clear paper jams (knows all the places to look for paper jams)
 - d. Can change toner
 - e. Can clear error messages from printer screen
 - f. Knows procedure for calling Millennium for service
 - g. Knows what bills/coins are accepted by the coin-op
 - h. Can use bypass key
56. Public Laptops (Alexandria and Fort Thomas only)
- a. Can override filter
 - b. Can adjust volume
 - c. Can assist a patron with choosing black/white or color printer and submit print job
 - d. Knows the difference between closing client and logging in as super user and can do both
 - e. Can end session
 - f. Can lock a computer

Master List

- g. Can check condition of laptop and peripheral equipment
- h. Can connect laptop to charger
- 57. Printing – PC Reservation print release station
 - a. Can view patron's print jobs via patron barcode
 - b. Can view entire print queue for all print jobs
 - c. Can preview a print job
 - d. Can release single or multiple print jobs
 - e. Can delete single or multiple print jobs
 - f. Can override payment with staff password
 - g. Can override payment with bypass key
 - h. Can close PC Reservation program in order to shut down computer
- 58. PC Reservation Station
 - a. Can assist patrons in making reservations
- 59. BookScan Station
 - a. Can turn on/off scanner and computer
 - b. Can scan documents to the computer in color or black/white
 - c. Can rotate documents on-screen
 - d. Can delete a scanned image
 - e. Can scan to fax, USB, printer, email, Google Drive, phone/tablet
 - f. Can send a fax in color
 - g. Can set up email or print confirmation and knows the difference between them
 - h. Can create a cover page
 - i. Knows procedure for calling Millennium for service
 - j. Knows what bills/coins are accepted by the coin-op
 - k. Knows when fax/email jobs should be split into multiple jobs due to number of pages, page content, etc.
 - l. Can use bypass key
- 60. Public Internet computers
 - a. Can assist a patron with logging into the computer
 - b. Can override filter
 - c. Knows the difference between closing client and logging in as super user and can do both
 - d. Can end a session
 - e. Can lock a computer
 - f. Can adjust volume
 - g. Can assist a patron with choosing black/white or color printer and submit print job via Envisionware
 - h. Knows purpose of NTouch Videophone software and how to use it
- 61. AWE computers

Master List

- a. Can power on/shutdown AWE computers
- b. Can collect usage statistics
- 62. Digital marquee
 - a. Can create a new message
 - b. Can open and edit existing messages
 - c. Can add a text box
 - d. Can change text font, size and color
 - e. Can change background
 - f. Can preview messages
 - g. Can create and save a message to a specific category
 - h. Can schedule and remove messages
 - i. Can update schedule
 - j. Can override all messages on a playlist
 - k. Can import graphics/add an image
 - l. Can set default text/effects properties
 - m. Can set hold time for messages
- 63. Wifi
 - a. Can connect devices to public wifi
 - b. Can connect devices to staff wifi
- 64. Equipment – Projector
 - a. Can turn on/off
 - b. Can connect laptop to projector and mirror laptop screen
 - c. Can change size of the projected image
 - d. Can focus projected image (tabletop projectors only)
 - e. Can adjust height
- 65. Equipment – Televisions
 - a. Can turn on/off
 - b. Can connect DVD player and play DVD
 - c. Can connect laptop and mirror the screen
 - d. Can wirelessly connect devices such as a tablet, laptop, or smartphone to smart TV (Fort Thomas only)
 - e. Can mirror a device such as a tablet or smartphone to Apple TV
 - f. Can select various inputs (HDMI, AV, etc.)
 - g. Can display live programming on TVs with antenna (e.g. weather)
 - h. Can change channel
 - i. Can adjust volume
- 66. Equipment – Azuradisc
 - a. Can resurface discs
 - b. Can clean machine

Master List

67. Equipment – Security camera hardware/software
 - a. Can launch security camera software
 - b. Can view live feed on all cameras at home branch
 - c. Can view live feeds on all cameras at all locations
 - d. Can search previously recorded footage
 - e. Can print images to file with incident reports
 - f. Can save video footage to a flash drive
68. Equipment – Miscellaneous
 - a. Can operate shredder
 - b. Can take photos with digital camera or cell phone
 - c. Can operate ZappBug Oven
 - d. Can arm and disarm emergency door alarms
 - e. Can arm and disarm AED door alarm
 - f. Can operate AED
 - g. Can weigh package and print postage for USPS shipments
69. Thermostats (Fort Thomas, Cold Spring, Alexandria)
 - a. Can access thermostat website
 - b. Can adjust thermostats using the thermostat website
 - c. Can set a temporary or permanent temperature hold
 - d. Knows difference between set temperature and hold temp
70. BAS software (Newport)
 - a. Can access BAS software
 - b. Can log in
 - c. Can create and change schedules
 - d. Change HVAC units from Global to Operator to Local and know what each setting means
 - e. Change set point temperatures for individual heat pumps
 - f. Can adjust fans in ventilation portion
 - g. Can create accounts
71. Smartphone
 - a. Make/receive calls
 - b. Make/receive text messages
 - c. Access voicemail
 - d. Check and respond to emails
 - e. Manage online calendar
72. Library Express
 - a. Can open all lockers
 - b. Can assign lockers to patrons
 - c. Can delete patrons from assigned lockers

Master List

73. Mobile Hotspot
 - a. Can turn on and off
 - b. Knows the signal name
 - c. Knows the password
 - d. Can connect to hotspot with a mobile device
 - e. Can change signal name and password
74. RB Digital magazines
 - a. Can locate on CCPL website
 - b. Can create a new account and sign in
 - c. Can install RB Digital app to compatible device
 - d. Can checkout, download, and view title in RB Digital app
75. EBSCO databases (any research database such as MasterFILE Premier)
 - a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can search for a topic
 - d. Can tell the difference between full text entries and citations only
 - e. Can limit search results to full text
 - f. Can sort results by date
 - g. Can email an article/attachment
 - h. Can retrieve a list of all articles in a specific magazine/journal issue (e.g. Nov 2016 National Geographic)
 - i. Can find a full-text newspaper article that mentions a northern Kentucky city/town
76. NoveList
 - a. Can locate on the CCPL website
 - b. Can explain to patron how to access from home
 - c. Can identify read-a-likes based on a title or author
 - d. Can limit results based on age of audience
 - e. Can limit results based on grade level, lexile range, or accelerated reader book level number (e.g. 4.2)
 - f. Can find book discussion guides
 - g. Can find books by Appeal and create your own Appeal Mix
 - h. Can sign up for NoveList newsletters
77. Mango Languages
 - a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can create an account and log in
 - d. Can start a course
 - e. Can use the translate feature

Master List

- f. Can track user activity
- 78. Consumer Reports
 - a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can find product ratings
 - d. Can filter ratings by cost and score
 - e. Can sort results by price
 - f. Can compare three models of a product
 - g. Can find My Benefits and use the Car Recall Tracker
- 79. Gale Courses
 - a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can explain service (as if to a patron)
 - d. Can identify the New, Popular, and Featured courses
 - e. Can find courses on basic computer skills
- 80. Learning Express Library
 - a. Can locate on CCPL website
 - b. Can explain to patron how to access from home
 - c. Can sign in/register to view My Center
 - d. Can find the Citizenship practice test
 - e. Can find the Introduction to the GED test
 - f. Can find ACT practice tests
 - g. Can find the GRE practice tests
 - h. Can find Resume Builder
 - i. Can find career match quizzes
- 81. Miscellaneous tech
 - a. Can install and configure library app on a mobile device
 - b. Knows the difference between streaming and downloading
 - c. Can turn a mobile device on/off
 - d. Can increase or decrease the volume or mute a mobile device
 - e. Can close all apps on a mobile device
 - f. Can use thermal laminator