

# Norma Marion Alloway Library

## Policy and Procedure Manual

### For Student Assistants



## Counter Assistant Version

Available online at [www.twu.ca/library/circ/POLICY\\_AND\\_PROCEDURE\\_MANUAL.pdf](http://www.twu.ca/library/circ/POLICY_AND_PROCEDURE_MANUAL.pdf)

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# OUR WORK & WORKPLACE

## **Job Descriptions**

*In this manual, student assistants are part of the library's staff. The terms "Regular staff" or "staff person" here refers to any non-student TWU employee; "professional staff" generally refers to professional librarians.*

### **Library Circulation Assistant – (student position)**

#### **Position Summary**

In this service-oriented position, you will be working under the supervision of the Circulation Coordinator and reporting to regular library staff in carrying out the day-to-day activities of the circulation services department of Alloway Library. Circulation Assistants work at the circulation counter as well as in the shelves and other collection areas of the library. Circulation Assistants are expected to respond to circulation-related inquiries. Reference and research related queries should be directed to the library's professional staff.

#### **About this position**

Circulation Assistants play an important role in the operation of Alloway Library working in a highly visible position where they interact with a broad range of people including fellow students, faculty, staff and community users. Assistants are expected to know the library's circulation policies and will be required to apply them to ensure fair access to resources. Assistants are expected to know the procedures for handling, sorting and shelving a wide range of material. During closing shifts, Assistants play a key role in securing the building and preparing it for the next day. The library is an important service on campus; consequently, a high level of commitment is required of student assistants to be present and prepared to work during assigned shifts.

Hours for this position may vary and include work at any time during the library's operating hours, which include evenings and weekends.

An extensive on-the-job training period is supplemented by personal study of the [Policy and Procedure manual](#). Performance standards are based on knowledge and application of Alloway Library's policies, customer satisfaction and established quality standards and productivity expectations.

#### **Duties and Responsibilities**

Read and implement applicable sections of the [Policy and Procedure Manual](#)

Accurately check-in and checkout library materials according to established policies and procedures.

Assist patrons with inquiries about their library account, general library policies, and the location of library collections and facilities.

Collect fine payments and process other cash transactions according to established policies and procedures.

Accurately sort material for shelving.

Accurately shelve material.

Shelf-read and carry out related housekeeping tasks to maintain order within the collections.

Monitor and respond to security system alarms according to established policies and procedures.

Assist with closing procedures to ensure the security of the building.

Assist circulation staff in carrying out assigned tasks pertinent to the operation of the library.

In the event of a library disaster recovery operation, student assistants may be designated as Work Unit Members on Recovery or Salvage teams as outlined in the library's Disaster Preparedness Manual.

### **Skills required**

**Public service skills:** Ability to meet the public in a friendly and courteous manner, excellent oral communication skills and an interest in serving all library users with enthusiasm and integrity.

**Computer skills:** General knowledge of menu-driven software. Accurate keyboarding and spelling are essential.

**Personal skills:** High level of personal initiative, dependability and commitment. Excellent time management skills are essential, as is the ability to work with stressed patrons. Attention to detail in sorting alphanumeric material is essential. Self-motivated individuals appreciate the challenges of working in an environment that can be very busy or very quiet.

**Physical skills:** Circulation assistants do most of their work standing. In the course of a shift, circulation assistant may also be required to:

- Reach up to shelves over 6' above the floor,
- Bend down to shelves less than 2" above the floor.
- Push wheeled book carts weighing up to several hundred pounds when loaded.
- Handle library material –a single book may weigh in excess of 5 pounds.

### **Other requirements**

The library is open in the evening and weekends when public transit may not be available; therefore, access to transportation is an asset for employees living off-campus.

This job is open to eligible TWU/ACTS students only. Eligibility for application to this job is established by the Student Life office.

### **Note**

Duties and responsibilities may be added, deleted or changed at any time at the discretion of the supervising staff person, in oral or written form.

## ***Special Benefits for Student Assistants***

Every student assistant is entitled to one free Interlibrary Loan per year. An ILL voucher is available on request from the library's administrative assistant.

Student assistants are welcome to sit in on library orientation sessions. These are offered at the start of the term for various classes and focus on using the library's databases. Times and locations will be posted.

The library rewards the loyalty of student assistants who "stick with us" during their academic career. Student workers who stay with the library until their graduation receive a TWU Bookstore gift card as a token of appreciation. (\$25 for two years of service; \$35 for three years of service; \$50 for four or more years of service.) Student must be employed by the library at the time of graduation to be eligible.

## ***Student Assistant Dress Guidelines***

Alloway Library enjoys an excellent reputation among its users for many different reasons including the professional image that staff present to the public. When Student Assistants present a professional image, they foster confidence in their abilities.

Since Student Assistants deal directly with a broad range of library users on a daily basis, they are expected to dress in a manner that reflects well on the university and the library. Simply stated, Student Assistants should dress appropriately and safely to carry out their assigned duties of public service and working in the stacks.

Clothes worn on the job should be clean, well maintained and in good taste. The overall appearance of a Student Assistant should be well groomed and approachable, and avoid that which reasonable patrons would find indecent, distracting, intimidating or contrary to the standards of the TWU community. Closed-toed shoes are required. Student Assistants are also required to wear a name badge

Examples of inappropriate attire may include fitness gear, sweat pants, torn, dirty or unkempt clothing.

Examples of appropriate attire would include slacks, shirts with collars, skirts, dresses. Shorts, blue jeans, t-shirts, etc. are acceptable if clean, in good repair, and appropriate to an office setting. A cap, if worn, must sit far enough back on the head so that it is easy to make eye contact.

The Supervisor on duty may use his or her discretion to discern and discuss inappropriate dress and grooming with individual Student Assistants.

## ***Library Mission Statement***

The mission of the library is to support and extend Trinity Western University's goal of developing godly Christian leaders. As the university's key gateway to the global information and research environment, the library fulfills its mission by providing services and resources that enable users to achieve their research goals, to navigate knowledge sources effectively and wisely, and to pursue a life-long dedication to learning.

In pursuit of this mission, Alloway Library staff are committed to three core values:

**Excellence:** The library is committed to the highest standards in each of its roles as educator, research facilitator, collection builder and manager, service-provider, and information broker. The library is also committed to promoting and encouraging the quality of excellence in its users.

**Integrity:** The library is committed to practicing ethical behaviours and attitudes in all of its personal interactions, the professional conduct of its business, and in its public service.

**Service:** The library is committed to public service, rather than the pursuit of organizational self-interest. In all of its technical and public services functions, staff members aim to provide personal help and innovative programs to meet the information needs of users.

## ***On Service***

### **Customer service can be PERFECT:**

Polite, Efficient, Respectful, Friendly, Enthusiastic, Cheerful, Tactful.

Providing good customer service is the responsibility of all library workers. Exceptional customer service will take into account the needs of the individual library patron, as well as the needs of the library and its staff in carrying out the library's mission to the community.

Patrons expect fairness, prompt attention, courtesy and respect. They need accurate information about library practices. Staff should be able to provide this in every transaction. In order to provide exceptional customer service staff need to know the extent of their authority and how the systems and procedures that they use work.

As members of the circulation department, we should be able to respond competently to questions pertinent to circulation. We can handle questions about loan periods, requests, fines, photocopiers and "where" questions. Questions regarding research, finding information and appropriate resources should be directed to the professional librarians where the patron can receive personalized and thorough service. The on-duty hours of the librarians are posted at the circulation counter.

### **Privacy and confidentiality**

Alloway library is committed to protecting the privacy and confidentiality of patron information. The library complies with the principles of the Canadian Standard's Association Privacy Code that requires organizations to:

- collect no more information than they need,
- use it only for carrying out their business,
- make sure it is secure
- not sell the information
- keep data only as long as it is needed
- securely dispose of it when it is no longer needed

The library takes several steps to ensure that we respect personal privacy:

- We collect the bare minimum of personal information to transact our business with users.
- Although we have access to personal information and borrowing records of our users, this information is private and is never discussed with other users
- When transactions are completed, we clear the screen so that user information is no longer displayed. Screen savers come on after 60 seconds of inactivity. Screens

normally face away from the public side of the counter, but we can turn them to accommodate patrons who wish to see what is in their record.

- We strive to be discreet and confidential in our conversations with users by speaking quietly. Respect the fact that users may not want their questions, borrowing transaction or fines publicized. All transactions are treated with the highest level of trust and privacy that we can offer within the context of a public workplace.
- Printed documents that contain personal information are placed in a locked bin for shredding.

### **Communication**

Clear communication is a vital part of successful service and a foundation of the library's operating principles. We need to be good communicators with library users, who may not be familiar with our policies, the way an academic library works or even some of the terms we use routinely to describe aspects of our job. Good communicators will avoid jargon or technical terms whenever possible and seek to ensure understanding with our communication partners, whether they are co-workers or library users. A good communicator will keep informed about the events, and resources that affect the workplace. Because so much of our work is collaborative, library staff need to communicate clearly with coworkers about the work they are doing.

[Alloway Library News](#) is our blog. Subscription, via RSS or Feedblitz, is a good way to stay up-to-date with news and activities at Norma Marion Alloway Library.

Student assistants are subscribed to a Library\_SA an email list-serv used by circulation staff to communicate with student assistants about aspects of our work. Student assistants can also use the list to arrange a shift swap with a co-worker or to communicate items of interest to other list members.

To post to the list, send to [library\\_sa@patience.twu.ca](mailto:library_sa@patience.twu.ca) (You must send from the address that is subscribed to the list.)

You can change some aspects of your subscription or view past messages at [http://patience.twu.ca/read/login/?go=http://patience.twu.ca/read/about/?forum%3Dlibrary\\_sa](http://patience.twu.ca/read/login/?go=http://patience.twu.ca/read/about/?forum%3Dlibrary_sa)

The Memo Binder includes printouts of Library SA posts as well as other items of information for all Student Assistants. Checking the binder for new items regularly is a part of your job duties.

Be sure to "Like" [Norma Marion Alloway Library](#) on Facebook!

### **Conduct**

Employees are hired to serve the needs of the library and its users. Personal activities that may distract from this purpose should be set aside while working.

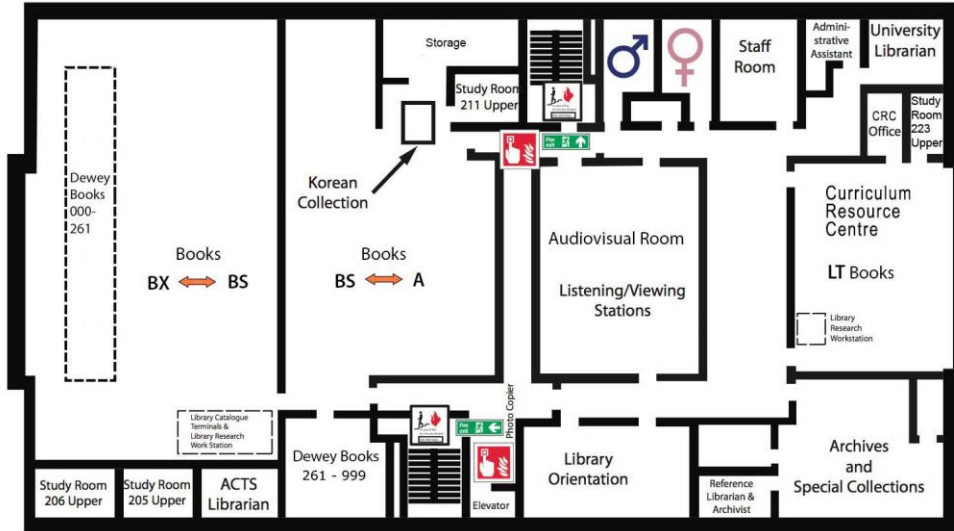
Circulation counter computers are not to be used for non work-related purposes such as surfing the web, online games, chat or messages. Accessing webmail for any reason other than arranging a library-related shift-change is not permitted. Personal communication devices, mobile phones and MP3 players should be turned off while on shift.

Conducting research online or in the stacks for class assignments is inappropriate while working.

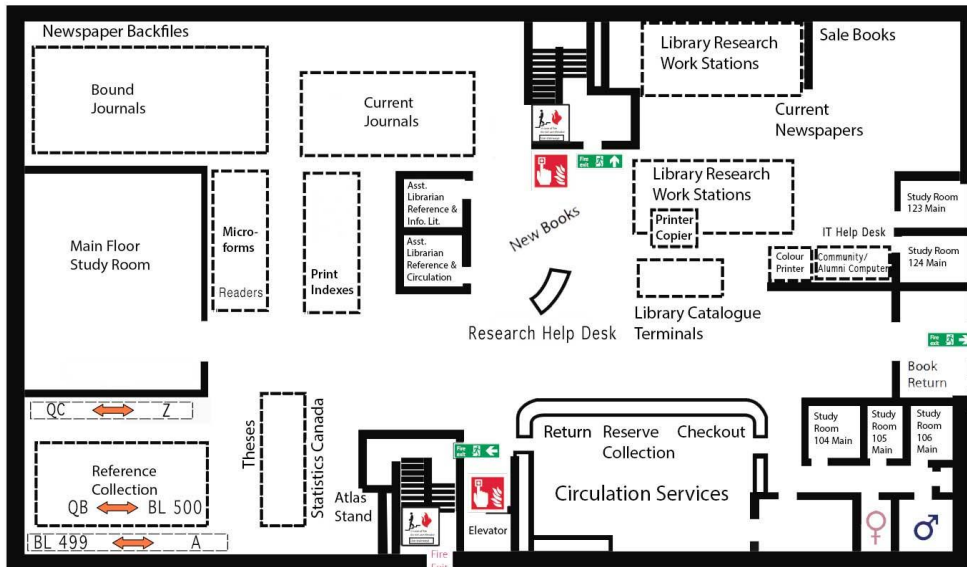


Student assistants should not expect to do homework while on duty and should take care to distinguish clearly between the times when they are working for the library as a student assistant and working for themselves as a student.

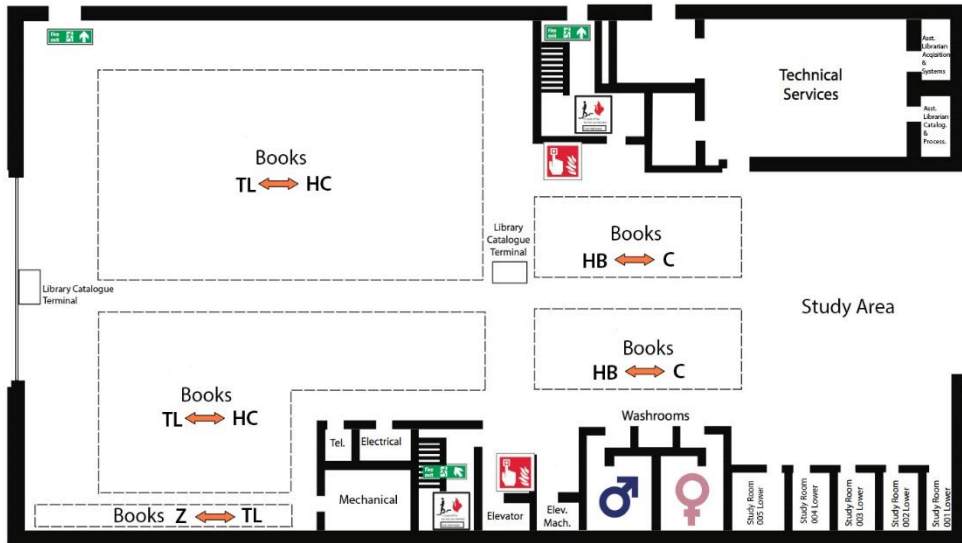
## Library Floorplans



### Upper Level



### Main Level



## Lower Level

### ***A safe workplace***

As an employer, TWU has many responsibilities to its workers, including student assistants. A key responsibility is to provide a safe workplace for us all. Some of the ways TWU does this include:

- Ongoing monitoring of workplace conditions.
- Correcting unsafe conditions.
- Providing necessary protective equipment and tools
- Consulting with TWU's health and safety committee and representatives.  
Responding to their recommendations
- Providing first aid if a worker is injured on the job
- Investigating reports of unsafe or unhealthy work conditions
- Informing, training and supervising workers about workplace hazards and the correct procedures to preserve a safe workplace

As an employee, you have rights. These rights include:

- A safe workplace
- Information and training on workplace health and safety and workplace hazards
- Equipment and tools required to do your job safely, including personal protective devices
- Representation and participation in health and safety committees
- Right to refuse unsafe work without fear of reprisal or discrimination

With rights, come responsibilities. As an employee, you have the responsibility to work with your employer to maintain a safe workplace:

- Follow safe work procedures and safety rules
- Use protective clothing, equipment and tools properly
- Report unsafe conditions to your supervisor
- Refuse tasks that you believe pose undue risk of injury or harm

- Cooperate with the health and safety committee to improve health and safety on the job
- Refrain from unsafe work practices, including horseplay on the job
- Report injuries incurred on the job immediately to your supervisor

How do we assess risk? Here are some specifics about our safety policies, procedures and practices in the library.

- Ask yourself “Does it look dangerous?”
- If so, respond, report, and react! Talk to your supervisor, regular library staff or call security. Take responsibility for our workplace and your safety
- Use equipment provided to protect you: stepstools, hand sanitizer, hand tools, book carts, etc
- Be aware that book carts may be prone to tipping if the upper shelves are full on one side and empty on the other. Avoid pushing or pulling unbalanced carts on their broad end.
- Maintain a clean and tidy workplace– avoid tripping hazards!
- Use good posture, take breaks or change activities to avoid overuse or repetitive stress injuries
- Use a mobile phones to keep in touch when staff are away from the counter
- Wear closed toe shoes
- Familiarize yourself with the location of tools as well as flashlights, first aid equipment, fire alarms, emergency exits, phone lists and phones to contact first aid attendant
- If you require first aid, call extension 2099

Familiarize yourself with the location emergency exits,

- The main entry
- At the bottom of the North stairwell exiting into the receiving area.
- Between the main and lower level in the south stairwell exiting into the campanile garden.
- The back corner on the lower level exiting onto the grass overlooking the pond

Familiarize yourself with the location of First aid equipment

- At the circulation counter
- In the staff room
- With the emergency preparedness supplies in the Tech services ante room

In the event of an emergency, work with staff to protect lives. Evacuate the building using the same procedures as outlined in the [closing walk procedures](#).

## **Emergency | Security**

If an emergency or incident happens during your shift, you may be a first responder! Current emergency numbers and procedures are posted on the bulletin board in the circulation office and in the memo binder. Take time to be familiar with these documents.

### **Door Alarms**

All exits are alarmed. For doors used routinely by staff and patrons, the alarm is turned off.

When a fire exit door is opened, the first priority is to find out who opened the door:

1. Alarm sounds. The person at the door will hear a bell. At the circulation counter panel, "ice cream truck" music will play for about 10 seconds. (You may also hear the bell if one of the doors in the stairwell has been opened.)
2. A light on the panel will indicate which door has been opened.
3. When you know which door has been opened, immediately go to that door and bring the person who opened the door back into the library. Explain that the main level doors are the only exit to be used.
4. Flick the switch above the indicator off and on again to reset the alarm.

### **In case of emergency**

The campus security number is 2099. To call off-campus emergency services you must dial 9-911. If making a 911 call, you should also call campus security so they can direct Emergency Services personnel to your location.

### **If the fire alarm sounds**

You may be asked to assist staff in clearing the building. Use the [closing procedures](#) listed below to walk systematically through the building or area you are assigned to check and report to your supervisor.

### **Safe and Secure**

Take responsibility for your own personal safety on the job. Report any dangerous or suspicious activity to your supervisor.

## **Closing the library**

Closing the building is a procedure that takes longer than opening, and which requires close attention to detail. Each of the following tasks must be performed to ensure an orderly and thorough closing that leaves the building secure and ready for opening the next day.

### **Clean up**

Part of the closing procedure involves cleaning library materials off tables and carrels. These items should be brought to the sorting area or, if time is short, left on the nearest book cart for check-in the next day. As the semester gets busier, this task should be started earlier in the shift to avoid a rush at closing. On weekends, or when custodial staff will not be in to clean up, extra time should be taken to clean up trash that has been left in study areas, on counter tops, on the floor, at photocopiers, etc. Leave the building tidy for the next day. If patrons have left personal belongings, put them in the Lost and Found box.

During the clean-up round, it is worth taking the time to check inside and secure all empty study rooms. Doing so makes the final security round simpler and more rapid.

### **Counter services:**

At 15 minutes before closing, remove the cash box and print cards from their respective drawers and lock them in the safe. Put the "Closed" signs on the counter. From this point on only essential service is provided as time and staffing permit. The essential services are checking-in Reserve materials and equipment for users as they leave. Other services are provided at the discretion of the counter assistants. Bear in mind the desirability of closing the

building promptly and the patron's urgent needs. Library staff may hold items under the counter for checkout the next day.

**Lights**

Patrons are entitled to be in the library until the stated closing time, but at that time, all users must leave the building. In order to give users warning of closing, all the building lights are flashed off and on 30 minutes before closing and just prior to the security check. Public workstations are programmed to give a five-minute warning before shutting down at closing time.

**Security check**

The final check of the building does not take place until the elevator doors are locked. One staff person or student assistant is assigned to watch the circulation counter. The staff person in charge and a second student assistant then begin the following security procedures.

**Closing Security Walk**

During the security walk, any patrons found on the UL or LL will be asked to leave. Staff must wait until the patron has left that level.

**Staff person:**

lock elevator and take south stairs (circulation counter side of building) to upper level of library

Orientation room(go inside)

Archives door

Curriculum room and storerooms

display cases in hall

Dewey room, turn off lamps

Study Rooms

Proceed to the south stairs and go to the lower level. Check fire exit in main level stairwell& under the stairs on the lower level

Check custodian's alcove

men's washroom(check stalls)

custodian's room

**Student assistant:**

take north stairs to upper level of library

men's washroom (check stalls)

custodian's room

Audio-visual room

women's washroom (check stalls)

staff room and office

proceed to main stacks

study room and storage room

Circle around the perimeter of the area from the A-B stacks to the interior window wall and the north wall carrels

north perimeter

Carrels along window

Take the north stairs to lower level. Check the stairwell fire exit & under the stairs

walk around the perimeter of the lower level along the north/west/south walls, looking in the carrels and along the aisles

women's washroom.(check stalls)

pump & electric room doors

Study rooms 001-005

Study area.

Check Technical services door

Re- establish contact with partner

exit through north doors and proceed to the main level

exit through south doors and proceed to the main level

walk around perimeter of building to the north and east sides (catalogues, sale books)

walk the perimeter of building to the south through Reference, Collaborative Study Room and periodicals

Study rooms 123 & 124

unlock elevator

Study Rooms 104-106, custodian's room , men's and women's washrooms

Confer with co-workers to ensure that all areas have been checked and all visitors have left the building

### ***Counter assistant***

While the staff person and student assistant are making the security round the student assistant at the circulation desk will perform the following tasks:

1. Tidy the circulation desk for the next shift.
2. Ensure that no one enters the stairwells.
3. Advise anyone entering the building that the library is closing.
4. If possible, check the study rooms and washrooms and check the perimeter of the building as outlined above taking care to watch and listen for people entering the building or stairwells.
5. Minimal circulation services are provided at the discretion of the assistant at the desk.
6. Confer with co-workers to ensure that all areas have been checked and all visitors have left the building

### ***Hours of Operation***

During the fall and spring semesters (beginning the first full week of classes in September through the beginning of examinations in April), the core operating hours will be as follows:

Monday - Thursday	7:45 am - 11:00 pm
Friday	7:45 am - 6:00 pm
Saturday	10:00 am - 6:00 pm
Sunday	1:30 pm - 5:00 pm
Statutory Holidays	to be announced



From May through August, the library is generally open:

Monday - Friday	8:00 am - 4:30 pm
Saturday & Sunday	CLOSED
Statutory Holidays	CLOSED

Adjustments to accommodate longer opening hours during examination periods and summer courses will be made.

The operations schedule will be posted on the bulletin board in the front lobby and on the [library's webpage](#).

Copies of the operations schedule will be distributed to all library staff and key departments and individuals on campus.

***A word about snow days*** The library is considered an important service, and as such, every attempt is made to keep it open and running even when the rest of the campus is closed due to snow. Please call the library if you are unable to make it in due to the snow or call if you are able to pick-up some extra hours for stranded commuters. Do not assume the library is closed unless you hear it from the library or the academic dean.

## ***Break schedules***

*According to BC Labour Law, an employee must not work more than five hours in a row without a 30-minute unpaid meal break. An employee who is required to work or be available for work during a meal break must be paid for the meal break...Employers are not required to provide coffee breaks.*

*In keeping with the law, TWU's HR policy states that, employees scheduled to work a full regular shift [of 7.5 hours] shall observe an unpaid eating period. Eating Periods shall commence at a time that is no longer than five (5) hours after the shift starting time. The exact time of the eating period shall be established by the employee's immediate supervisor in light of operational requirements. Employees are not allowed to forego their eating period and are not allowed to leave early if they forego their eating period.*

*Employees who work a full regular shift [of 7.5 hours] are granted one 15 minute paid rest 'coffee' period each half shift. If supervisor approved, employees ...may add their morning and /or afternoon paid rest period to a 1/2 hour unpaid lunch for a maximum 1 hour break ...Employees are not allowed to leave early if they forego their rest period.*

For Circulation Assistants the following policy is observed:

15-minute breaks are paid breaks; longer breaks are unpaid. Be sure to clock out if you are taking a longer than 15 minute break.

Breaks should not be used to leave early (or arrive late!)

Arrange your breaks with your supervisor.

Circulation Assistants who desire a longer break and wish to maximize their paid hours may arrange with their supervisor to come earlier or stay later to achieve this goal.



If your shift is four or more hours at one time, you are entitled to breaks as follows:

4 hours	15 minutes
5 hours	30 minutes without pay, or 15 minutes
5-6 hours	30 minutes without pay or 15 minutes
	60 minutes without pay and 15 minutes, or
6 - 7.49 hours	30 minutes without pay and 15 minutes, or two 15 minutes
7.5 - 8 hours	<u>60 minutes</u> without pay and two 15 minutes, or <u>30 minutes</u> without pay and two 15 minutes or
<u>Mandatory break</u>	<u>30 minutes</u> without pay <u>combined with</u> 30 minute paid break.

# CIRCULATION SERVICES, POLICIES & PROCEDURES

## **General Public Services**

### **Access for physically challenged persons**

Upon request, library staff will provide assistance in the use of the library.

### **Cash box**

Fine and fee payments as well as used book sales cash are collected in the cash box. Change for patrons paying fines or using photocopiers is available from the cash box. The largest bill that we will make change for is \$5.00 unless the patron is making a payment. Do not take \$50 or \$100 bills unless it is for a payment that is more than half the value of the bill. Do not deplete the supply of smaller bills in the cash box.

### **Copying, printing and scanning**

**Photocopiers** are located on two levels of the library. The copier/printer/scanner on the main level also functions as an alternative printer for public workstations. All copiers have scan-to-email functions.

Staff will attend to minor equipment problems such as paper jams and to replenish paper and toner supplies.

The library copiers provide copies of readable quality; not necessarily presentation quality copies such as may be required for résumés. Accordingly, refunds for less-than-perfect quality copies will only be given when the copier has clearly malfunctioned, e.g., machine has jammed and no copy delivered. The library will not be responsible to refund patrons in cases where they have failed to read and comprehend the instructions on the equipment before pressing the copy start key.

In most cases, patrons will be refunded a maximum of 10¢. The responsibility for reporting equipment problems rests with the patron.

“Wild cards,” encoded with small values, will be available on an honour system basis to visitors to the library who may not wish to purchase a print card for small amounts of copying. Visitors must report the total number of copies (including those spoiled) made; they will be charged 10¢ per copy. Wild cards are not intended for use by regular library users including TWU students and staff. Wild cards will be issued at the discretion of regular staff.

All inquiries for technical servicing are to be directed to the library Administrative Assistant.

Paper for the copiers is stored at the circulation counter and should not be used in the library printers. Paper for the public printers and the photocopiers are funded by different accounts.

### ***Copier Card Sales***

Copier cards for use in the library copier/printer/scanner machines and microform printer are sold by authorized personnel only. Authorization is done following training by the library Administrative Assistant.

Cards for students and external patrons are available in three denominations: green \$1.00, red \$5.00 and blue \$10.00. The value of the copies plus sales tax has been calculated so that cards can be sold at even dollar values. The price per copy is 10¢ for \$1 and \$5 cards and 9.5¢ for \$10 cards.

A \$1.00 deposit (not taxable) is added to every card sold; it is refunded when the card is returned in useable condition. No deposit will be refunded for warped, cracked or broken cards.

There is no refund for unused money on a card.

Lost or misplaced cards that are turned in to the circulation counter will be held for a maximum of thirty days. Cards may be claimed if the owner can adequately identify the card using the information collected on the Lost Card Report. The Lost Print Card Report will include date found, time, value on card, location, returned by and staff initial. Cards unclaimed after 30 days will be forwarded to the finder. Library staff and student workers are exempt from any claims.

The library Administrative Assistant is responsible to replenish the supply of cards and attend to equipment malfunctions.

### **Laptops & Wi-Fi**

Electrical outlets are available throughout the building. Wireless access for eligible users is available throughout the building. TWU users should contact TWU IT department to configure wireless access. Free Wi-Fi access is available to visitors on the TWUGuest network – login instructions are posted in the Memo Binder at the circulation counter.

### **Lost and Found Items**

The Library maintains a Lost and Found box for items found in the library.

Please note the date found and the finder's contact information. Items unclaimed after 30 days can be disposed of/ given to the finder (who must claim the item within a week after the 30 days.)

Don't keep smelly items!

### **Notices and bulletin boards**

Notices to be posted in the library are to be cleared with the librarian staffing the Information counter. Notices will be posted only on boards at the front entrance, i.e., not on front doors or glass. "For sale" and other commercial notices will not be posted.

### **PaperCuts Print Account**

TWU students have a printing account known as PaperCut that enables them to print documents from library workstations to library print stations. Students can add money to their PaperCut account by purchasing a \$5 or \$10 "TopUp" card from authorized library personnel. Authorization is done following training by the library Administrative Assistant.

## **Quiet**

The library is primarily a place for independent study, a place for quiet and thoughtful reflection. It is the responsibility of both library users and staff to demonstrate a sensitive concern for others by working quietly at all times.

## **Supplies**

Pens, pencils, scissors, glue sticks, etc are available as a courtesy for patron use at the circulation counter.

Paper cutters, hole punches, scissors, staplers and pencil sharpeners are kept near each copier/printer/scanner. Scrap notepaper and recycled sheets of paper are also available around throughout the library.

## **Telephones and paging**

Library telephones are for the exclusive use of library employees. A public telephone is located at the library's front entrance.

Library staff have many responsibilities that demand their time. It is not their responsibility to call people from any of our three levels to the phone. Therefore, no persons will be paged to the telephone, except in the case of emergency.

Cell phone conversations should be conducted in the front lobby and stairwells where they will not disturb other library users.

The library's main phone number is 604-513-2023. Although all library phones have voicemail to handle unanswered calls, the phone on the circulation supervisor's desk should be answered whenever possible, as it is the main line into the library.

Calls to phones on-campus can be made dialing the last four digits of the phone number.

Dial 9 to call off-campus numbers.

Regular staff have codes for making long distance calls.

## **Library Users**

### **ID Cards**

To borrow material the patron must present his or her own library card or picture ID. Expired cards are accepted only if the patron is current in the library database. The Office of the Registrar and the Student Life Office issue expiry stickers for TWU ID

Lost ID cards are turned in to the Student Life office, which issues cards to all TWU students, employees and alumni

Former students and employees may use their TWU ID as Alumni users; in that case the expiry sticker is not updated. Free Alumni cards are issued upon request, by the Alumni office. Alumni pay \$15 per year for library privileges.

### **Users' responsibility**

The library will hold the user whose name appears on the library ID card responsible for all use made of the card. Responsibilities include:

- Immediate notification of a change of email address or phone number.

- Returning all materials when due.
- adherence to all Library policies as stated in the [Policy and Procedure Manual and online](#)

Library privileges may be revoked and/or fines assessed for any of the following reasons:

- Attempted or actual book theft
- Failure to pay for lost books
- Failure to respond to overdue notices promptly
- Defacement of library materials in any manner, i.e., underlining, marginal notations, removing pages, etc.
- Damage to library furniture or fixtures
- Rude or abusive treatment of library staff

### **Limits**

Undergrads, external users and TWU staff may checkout up to 30 items. Graduate students and Faculty: 60.

Due to lending restrictions placed on the library by video distributors, Affiliate users, Community/Complimentary/ Alumni Users may not borrow videorecordings.

### **Study Rooms.**

Study Room 001 Lower	1-2 occupants	Lower Level below circ
Study Room 002 Lower	1-2	Lower Level below circ
Study Room 003 Lower	1-2	Lower Level below circ
Study Room 004 Lower	1-2	Lower Level below circ
Study Room 005 Lower with monitor	1-4	Lower Level below circ.
Study Room 104 Main with monitor	1-4	Down the hall from circ
Study Room 105 Main	1-2	Down the hall from circ
Study Room 106 Main	1-2	Down the hall from circ
Study Room 211 Upper with monitor	1-4	Upper, by north stairs
Study Room 124 Main	2-4	Around the corner from entry
Study Room 123 Main with monitor	2-4	Around the corner from entry
Study Room 205 Upper	2-6	Upper, south west
Study Room 206 Upper with monitor	2-6	Upper, south west corner
Study Room 223 Upper with monitor	2-6	Curriculum room

A single student may use a multi-occupant room if all other rooms are occupied but only for a limited period; the individual may be displaced by a group at the end of the time.

All the rooms have electrical outlets and whiteboards. Several rooms have monitors and cables for connection to laptops. Rooms are not soundproof.

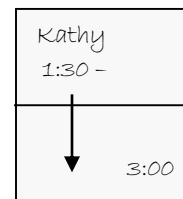
The maximum length of time in one stretch for which rooms may be booked is generally 2 hours because the loan period is 2 hours. To avoid fines, users must renew their booking before the end of the 2-hour loan period.

### **Booking sheets**

Booking sheets are used to monitor the use of study rooms and allow staff to see at a glance the availability of rooms. Reservation sheets are to be filled in by staff not by patrons.

Students will be allowed to reserve in advance up to 6 hours per week. This prevents a few people from monopolizing the rooms. Should a patron who has reached this limit arrive at the circulation counter asking for further use, the request will be granted, particularly where there are openings during non-peak times

1. Neatly and legibly print patron's name at beginning of the block being reserved,.
2. Write the time span being reserved beneath the name. e.g.: 1:30 - 3:00.  
Round up to the nearest quarter hour
3. Draw in vertical lines to indicate the length of reservation and horizontal lines to mark blocks of time.
4. Checkout the room key and advise the patron of the due time.



- Keep the user's TWU ID card, placing it in alphabetical order in the Reserve Desk card-holder box

## **Policy notes for Overdues, Fines and Lost items**

### **Advance, Overdue and Lost Notices**

Notices are sent by email as a courtesy to all patrons. Failure by the library to send the notice or non-receipt of the notice does not absolve the patron of responsibility to return or renew material on time. It is the user's responsibility to report a change of address. The library sends notices in good faith that they will be delivered. The date due reminders available on the counter at the time of checkout are regarded as the patron's first notification.

A pre-overdue notice is usually sent 3 days before the due date for most items.

Overdue notices are sent after the item is 7 days overdue. If an item is not returned after 2 overdue notices have been sent, the material is assumed lost. The user will be sent a bill for the cost of the item plus a \$10 processing fee. The cost of the item and the processing fee will be refunded if the item is returned to the library. Since these costs are usually more than the maximum fine that will be assessed, it is in the patron's financial interest to return lost items.

### **Fines**

The library's fine policy for regular circulation books can be summed up as: fines are \$.20 per day per book but we do not collect fines under \$1 per book.

Fines are assessed to provide an incentive for library users to return materials by the due date. Overdue fines will be forgiven only at the discretion of circulation staff or the librarian in charge where extenuating circumstances warrant. Illness does not normally warrant forgiveness of a fine. Patrons who wish to dispute a fine should fill out a Fines Appeal Form.

The library prefers payment in cash. The library may send charges over \$10 to the Accounting department if charges remain unpaid for more than 14 days. After charges have been sent to

Accounting, the library will no longer accept payment at the circulation counter; payment must be made to the cashier, Mattson Centre. Bills under \$10 will not be sent to Accounting.

The library may apply a “hold” on the TWU account of a student with unpaid bills; this will affect the student’s ability to register for classes, receive transcripts or even graduate.

Fines accumulate to the maximum amount of \$20.00 for each item overdue. Fines are assessed starting on the day after the due date and are levied every day the library is open. For most items, there is some degree of grace in the assessing of fines, to allow for cases of unforeseen circumstance that may prevent the prompt return of library material.

**EXAMPLE**

SUN	MON	TUES	WED	THUR	FRI
DUE DATE	.20 waived	.40 (waived)	.60 (waived)	.80 (waived)	\$1 payable

Overdue penalties apply to students and external users. Employees of the University will not normally be charged. However, they will be charged for lost or damaged materials

**Reserve Fines** are 50¢ per hour or portion of an hour and accumulate only during hours the library is open. There is a 15- minute grace period before fines begin to accrue. The maximum fine is \$20 per item.

**Recalled material** 50¢ per item for each day overdue past the recall due date.

**Lost Materials**

An item can be declared lost by the user in consultation with library staff. Once an item is declared lost, the user is responsible to pay replacement costs for the item.

Having two or more lost items will block a patron from borrowing material until the lost items are returned or paid for. Lost items may be returned at any time for a refund.

Overdue notices are sent after the item is 7 and 14 days overdue. If an item is not returned after two overdue notices have been sent, the material is “assumed lost.” The user will be sent a bill for the cost of the item plus a \$10 processing fee. The cost of the item and the processing fee will be refunded if the item is returned to the library. Since these costs are usually more than the maximum fine that will be assessed, it is in the patron’s financial interest to return lost items.

**Claimed Returned**

If the user claims to have returned an item, but the library does not have it, the item can be changed to Claimed Return (CR) status. The item remains on the user’s record and if the item is not found at the end of 90 days, the user may be charged replacement costs for the item. The library will systematically search for claimed returned items on a regular basis during the 90 days. Users with claimed returned items should be encouraged to check again for the item -- under the car seat, with friends and roommates, etc.

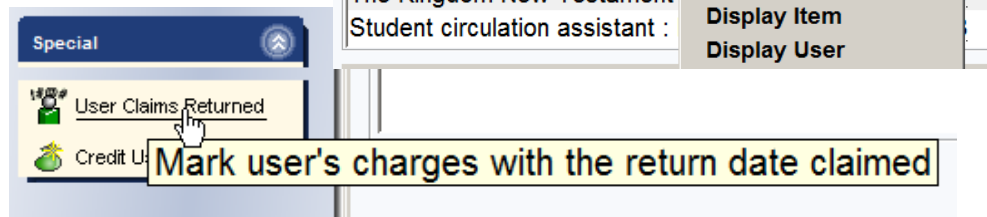
Claimed returned items will be listed in the patron’s alerts.

Having two or more claimed returned items will block a patron from borrowing material until the items are returned or paid for.

**Circulation Procedures for Claimed Return items:**

1. User advises staff of claim to return material.

2. A search should be done before the item is actually declared CR or before day end.
3. In the Checkout Wizard, right click on the item and select "claim return" or use the User Claims Returned wizard to mark the item "Claimed Returned"



4. A CR report is generated and sent by WorkFlows
5. Staff search monthly, for three months, for CR material.
6. If the item is found, it is checked-in. Staff may assess fines depending on the circumstances of the item's recovery.
7. If the item is not found after the final search, staff change the item's status from CR to lost and add a processing fee. A billing notice will be produced.



# THE SIRSIDYNIX SYMPHONY WORKFLOWS INTEGRATED LIBRARY SYSTEM

## **A new system**

Symphony Workflows was introduced to Alloway Library in the summer of 2011. Workflows is *task-driven*, it starts with "What task needs to be done?" Once that question is answered, find the appropriate "wizard" to continue with our service to the user.

*SirsiDynix* is a corporation; *Symphony* is a software suite that combines various aspects of library operations; *WorkFlows* is the software suite designed specifically for library staff operations.

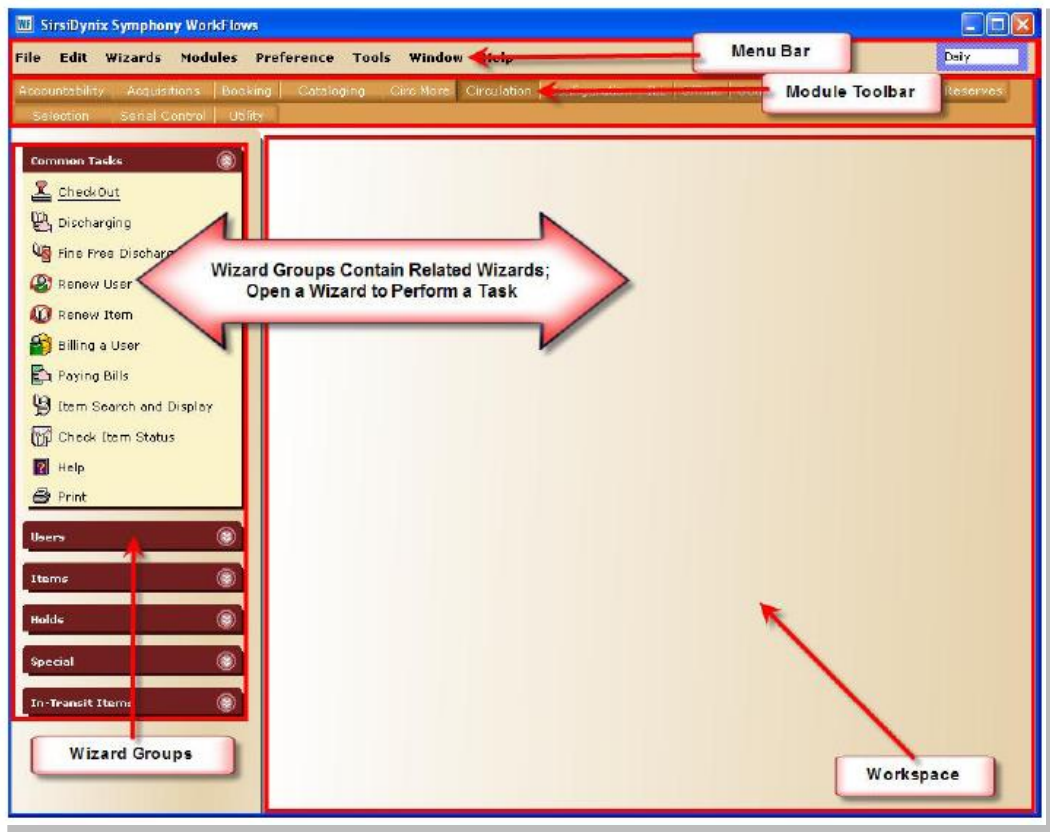
Symphony WorkFlows is an integrated library system (ILS). Library staff use a suite of tools designed to carry out tasks in various modules. For example checking out a book in the circulation module will immediately change the item's status in the online catalogue.

The system also blocks you from carrying out some transactions. When blocked, read the screen to find out what your options are. In some cases you will be able to proceed once you are satisfied that it is within library policy to do so. In other cases, you will need enter an override, or ask staff to override the block, or advise the patron to take steps before you can checkout material.

## **Navigating Symphony WorkFlows**

The keys to success with WorkFlows are:

1. Read the screen.
2. Learn Symphony Workflows terminology: WorkFlows has specific terms to describe its components:



**Menu Bar.** Standard Windows-type context-sensitive tools to perform tasks.

**Module Toolbar.** Circulation counter workstations are configured to give access to the Circulation Module and the Offline Module. Move between modules by clicking on the module toolbar.

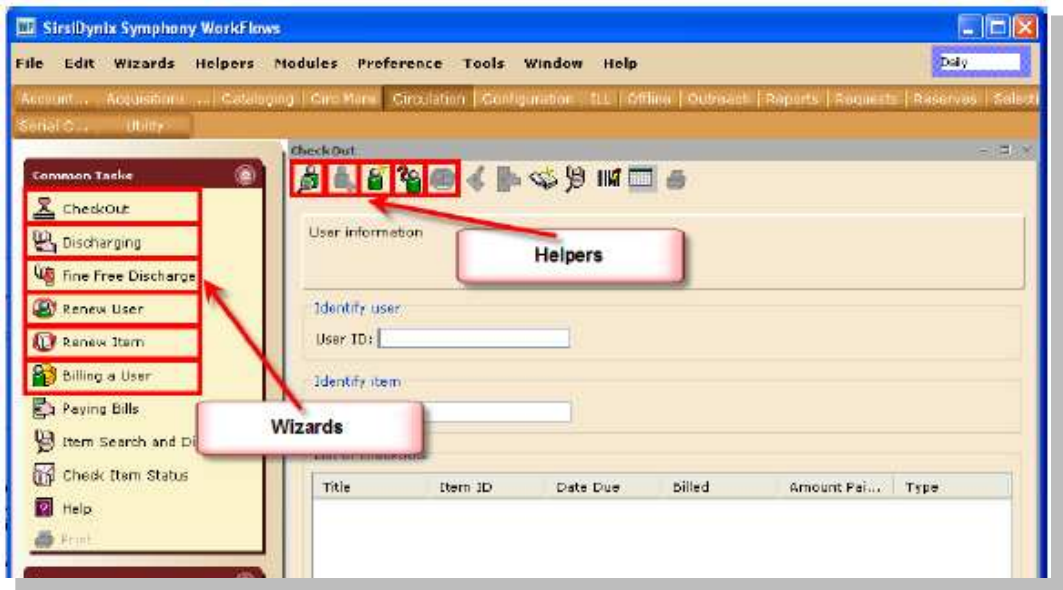
**Wizard Groups.** Organizes wizards into grouped sets that perform related workflows. The arrow in the upper right-hand corner opens or closes the group. Double click on a wizard to open it on the workspace.

**Workspace.** Displays the wizards that have been opened. Windows open one on the top of another so you can have many wizards open at once, moving freely between them.

### **Wizards, Helpers and Windows**

Wizards and Helpers are tools used to conduct tasks within SirsiDynix WorkFlows. Each wizard has a unique icon that represents what the tool does. A Helper works with a Wizard, and displays a balloon tooltip when you hover over its icon. *(For the mythologically minded: Helpers can sometimes be Wizards.)*

Right click on a Wizard to change properties for the way the Wizard works on a workstation.



WorkFlows lets users do some things in several different ways. Although you can use the mouse to point and click for many operations, it is possible to use the keyboard for some frequently done operations.

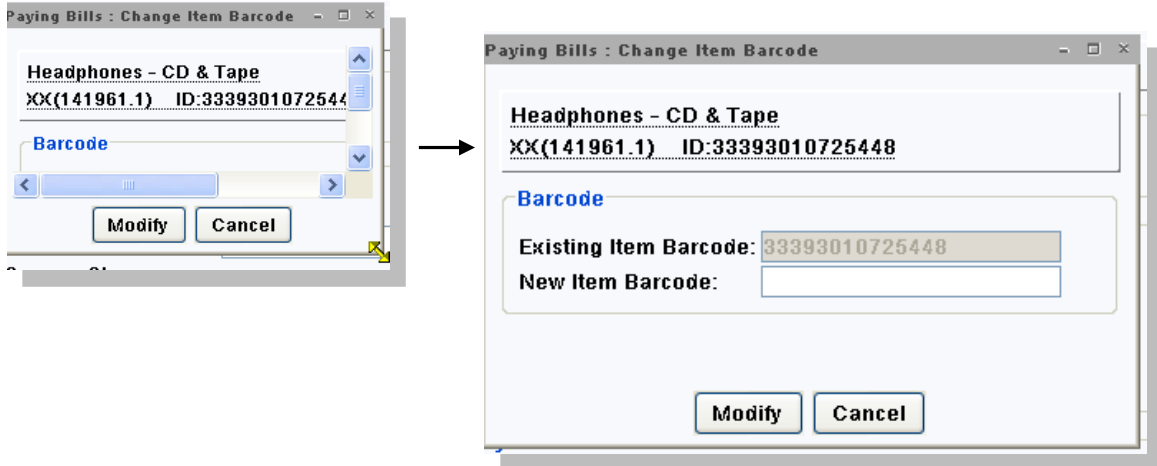
### **Function Keys**

The Circulation counter workstations have assigned shortcut keys for WorkFlows. These shortcuts lessen the dependency on clicking the mouse.

Key	Wizard or Helper
F1	Help
F2	Renew all items for) user
F3	Pay bills
F4	Check in
F5	Check out
F7	Renew item
F9	Modify user
F11	New user registration
F12	Item search and display

Be sure the flashing cursor is in the box where you want to enter information. Information can be entered from the keyboard or by using the scanner.

Always expand windows to see the full information. Once expanded, windows will retain their dimensions the next time they are accessed.



When an item has a dotted underline, you can click on it to access a glossary that will provide more information.

You can also right-click on some elements to access a menu.

Workflows can be customized at several levels including login specific customization and workstation specific customization; this may lead to different system behaviours, tools and appearance among different workstations.

WorkFlows tends to use many windows; get in the habit of clicking one of the buttons at the bottom to close the window.

## WorkFlows Opening Procedures

### To start WorkFlows

Usually the system will be running when you begin your shift if it is not, you may need to start WorkFlows.



1. Click on the WorkFlows icon on the desktop.
2. Click OK to accept the configuration. (Click the Offline Mode option only if directed to do so)



3. Enter the user ID "ST1" and the password (supplied by staff) to log in.
4. Workflows will open.



## **System down:**

Essential circulation services are still provided even in the event of an electrical power outage or when connection to the WorkFlows server is down. Each scenario has its own set of procedures and tools. Library workers will collect the following essential data for entering into the system once it is up and running again:

- The user's name and bar-code number.
- The item's title and bar-code number.

Staff may hold items under the counter for patrons willing to wait until WorkFlows is operating again.

### **When the power is out**

During a complete power failure, use System Down sheets to manually record checkouts.

User Bar-code	User Name	Item Bar-code	Item Title/copy #	OK
333930000051633	Gene Eugene	2339300000615963	Your long year	

- During a complete power failure, we may limit the number of items checked-out to a maximum of five.
- Inform patrons that the library can hold items under the counter until the system is restored. Materials will be held for 4 days.
- For reserve material used in the library, simply keep the patron's card; no need to record item barcodes for in-library use.

### **When the server is down**

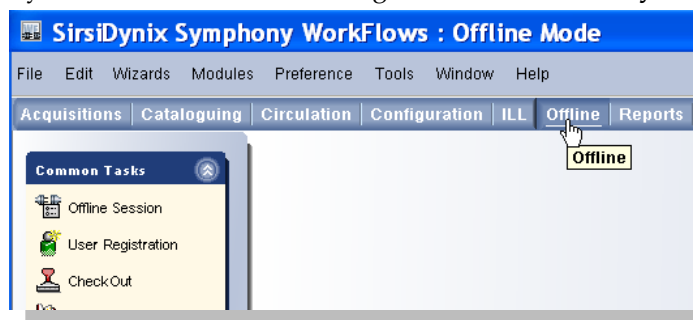
If there's electrical power but the WorkFlows server is unavailable, we can use Workflows' Offline mode to circulate material. Staff need to restart WorkFlows as outlined above but select the Offline Mode option and select the Offline module wizards.

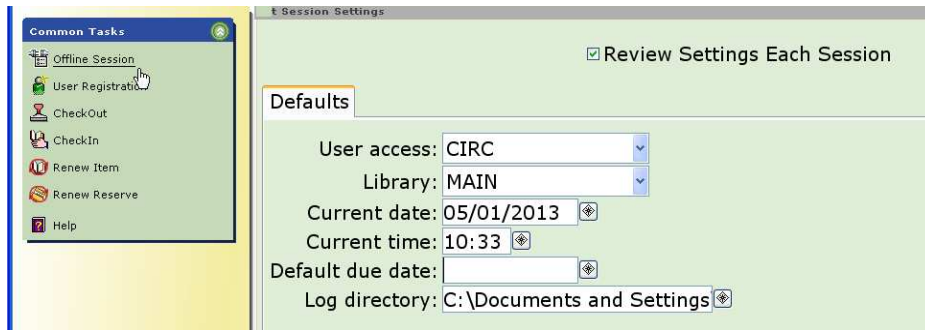


In the Offline Mode, WorkFlows simply collects data to be loaded into the server when it becomes available. Workflows cannot search

or display information from the Symphony database about the status of a user's or an item's record.

For simplicity, circulation activity should be conducted on a single workstation and **only checkouts** should be conducted during Offline sessions.





It may be necessary to review Offline settings. Leave the Default Due Date field blank, but make a note of the due date for 21 and 120 day loans so you can tell users the correct due date.

### **When the system is restored**

After the system comes back up, do NOT start checking in any items until notified by the system administrator that the Load Offline Transactions report has been run.

### **After the server being down -**

1. Close WorkFlows
2. Restart WorkFlows but uncheck the Offline Mode option

Check the workstation's C:\ directory to make sure the transaction log was automatically transferred to the server. Just a quick look at the C:\ drive to make sure there are no transactions log file there should do it. E.g. C:\Users\std1\Sirsi\Workflows\Log\Main\

The system administrator will need to run reports to load the data collected offline onto the server.

### **After a complete power failure**

1. Checkout material using data gathered from system down sheets.
2. Only when checkout is completed, use the Book drop wizard to check-in items making sure that the check-in time is changed to reflect time of system failure.
3. When all items have been checked-in, close the Book drop Wizard.
4. Return completed data sheets to the cupboard or drawer beside the terminal.

# SEARCHING BASICS



At the circulation counter library staff search for two kinds of things – user records (people) or item records (things.) Workflows provides helpers for both kinds of searches.



Searching for records within the SirsiDynix WorkFlows client is straightforward. In each case, you are searching the database for records – once you find the desired record you put it to use in the current workflow.

## To search for a user record:

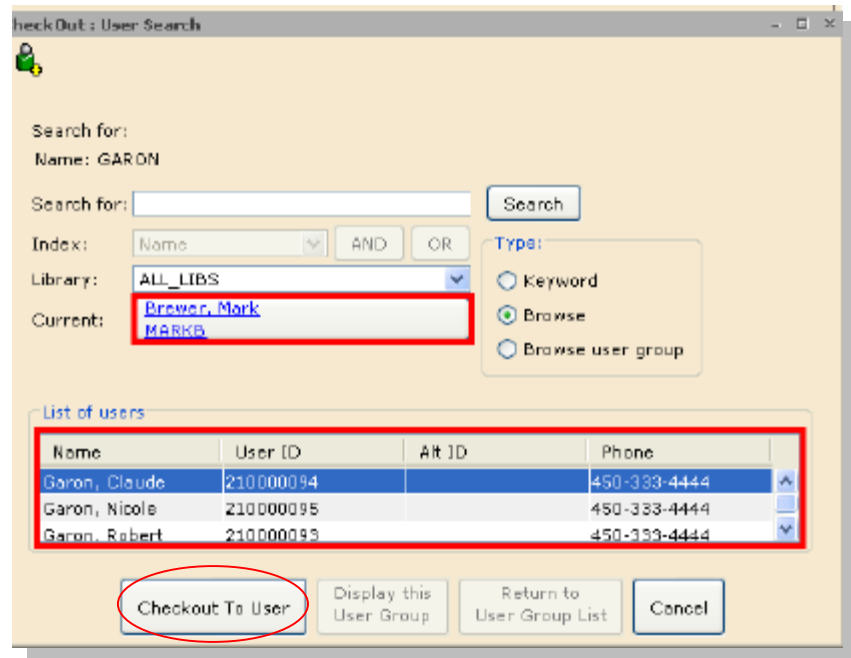
1. Wizards that deal with users have a User Search helper. When you know the task you want to perform, open that wizard.
2. Click on the User Search helper at the top of the window. A user search pop-up like this one displays:

A screenshot of a dialog box titled 'CheckOut : User Search'. It contains a search interface with the following elements:

- A 'Search for:' text input field.
- A 'Search' button.
- An 'Index:' dropdown menu set to 'Name', with 'AND' and 'OR' buttons next to it.
- A 'Library:' dropdown menu set to 'ALL\_LIBS'.
- A 'Current:' field displaying 'Bear, Teddy' and 'TBEAR'.
- A 'Type:' section with radio buttons for 'Keyword' (selected), 'Browse', and 'Browse user group'.
- A 'List of users' section with a table header: Name, Secondary ID, Borrower Barcode, Phone.

3. Type or scan the name, ID number or barcode of the user you want to find. Note that the most recent (current) borrower displays in the “Current” field. You can click on that field if you want to work with that user.
4. Make sure the Index field matches your search term (For example, if you type in an ID number, select the “Secondary ID” index). You can use the AND or OR buttons for more complex searching but this is usually not necessary for most routine circulation business. The Type option can be keyword-, which will look for the exact search term you enter; Browse will produce a results list with the search term, or a close match of the term.
5. Click search

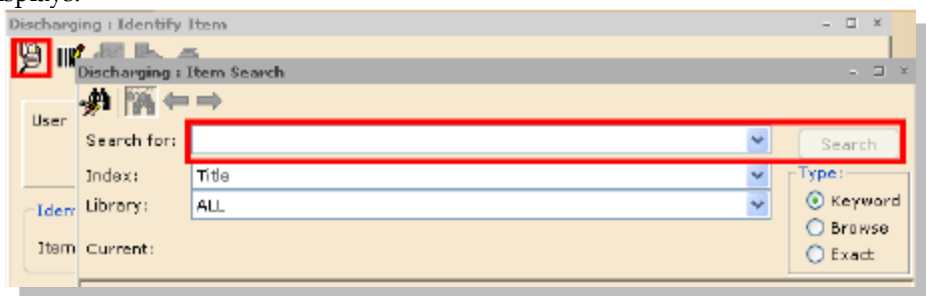
- When there are multiple matches to your search, they display as a list in the lower part of the window:
- Select the desired user and click the task button at the bottom of the window to continue to work with the record.



**To search for an item record:**

The Item Search and Display Wizard will provide most of the information you need but there are other task-oriented item search wizards and helpers.

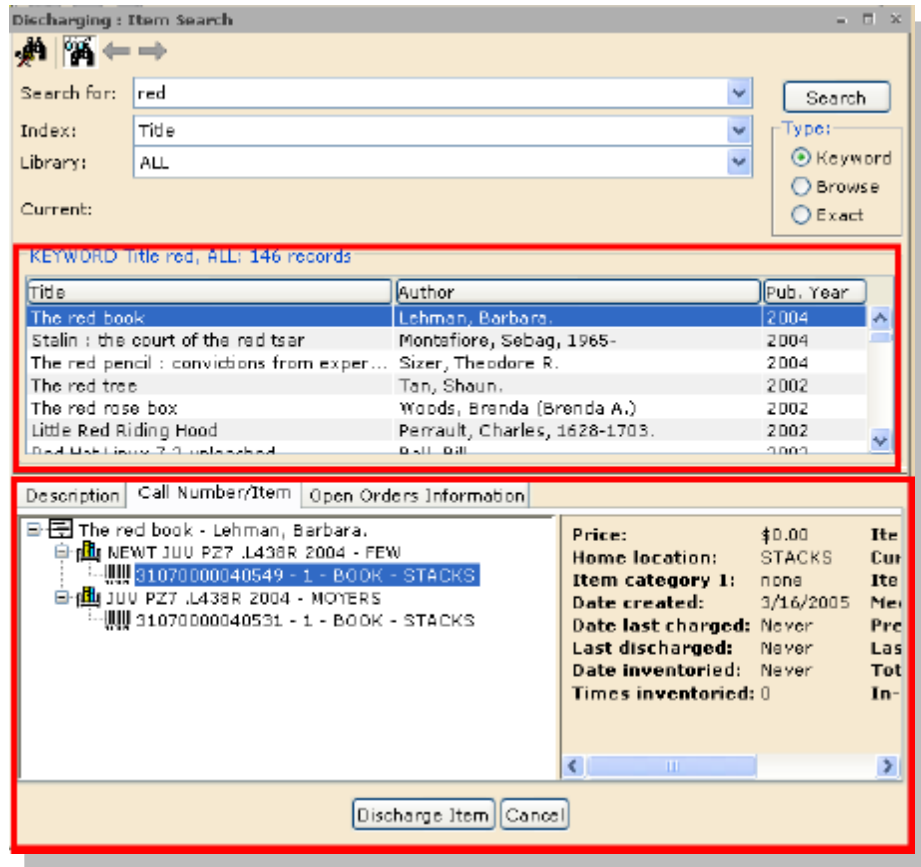
- Open the Wizard that pertains to the task you want to perform
- Click on the Item Search helper. An Item Search window displays:



- Make sure the Index field matches your search term (For example, if you type in call number, select the "Call number" index). Note that you can use the AND or OR buttons for more complex searching but this is usually not necessary for most routine circulation business. The Type option can be keyword-, which will look for the exact search term you enter; Browse will produce a results list with the search term, or a close match of the term.
- Click search



- The Item Search and Display window has three parts. The top section displays the search parameters. The middle section shows a list of matches to the search and the bottom section will display detailed information about the highlighted selection



- Click the appropriate task button at the bottom of the window to continue or conclude your activity

## **The Library Catalogue**

There are two versions of the catalogue: the eLibrary version online at [library.twu.ca](http://library.twu.ca) and the WorkFlows version. eLibrary is primarily intended for use by the public and provides information useful to researchers who want *subject-oriented* information. The Workflows version supplies *item-oriented* information essential to library staff

Circulation staff use the WorkFlows catalogue to verify call numbers, location and status of items. Staff also use the catalogue to view item information such as current and prior user, number of checkouts, last date of use and original cost.

WorkFlows provides two different views for staff to find out about items. The Check Item Status Wizard gives a very brief summary about the status of an item For example: is it checked out and who has it? Item Search and Display gives a very detailed view of an item.

### **Understanding Search Results**

There are many ways to find the call number for CS Lewis' The Lion, the witch and the wardrobe. The fastest way is a title keyword search. What keywords might you use? *Lion,*

*witch* and *wardrobe* are all good. Usually one or two well-chosen keywords will produce useful results. For example, a search for the title Keywords *lion wardrobe* yields 10 results

- four are not for the Lewis book itself but are:
  - lesson plans,
  - a sound recording version
  - a theological study.
- Six of the results are for the book itself.
  - Five of those editions have similar call numbers starting with PR 6023 .E926 L5 followed by various years indicating different editions,
  - Another has a call number starting with LT because it is included in the curriculum collection.

Selecting one of the titles in the results list will produce more information about that edition in the tabs below.

KEYWORD Title lion wardrobe, MAIN: 10 records

Title	Author	Pub. Year
The lion, the witch, and the wardrobe	Lewis, C. S. (Clive Staples), 1898-1963.	2000
The lion, the witch, and the wardrobe	Lewis, C. S. (Clive Staples), 1898-1963.	1995
The lion, the witch, and the wardrobe	Lewis, C. S. (Clive Staples), 1898-1963.	1994
The Lion, the witch and the wardrobe	Lewis, C. S. (Clive Staples), 1898-1963.	1994
The lion, the witch and the wardrobe : a story for children	Lewis, C. S. (Clive Staples), 1898-1963.	1970

Description	Call Number/Item	Price:	Home location:	Item type:	Current location:	Ongoing che
The lion, the witch, and the wardrobe - Lewis, C. S. (Clive S...		\$16.00	BOOK-TWU	BOOK	BOOK-TWU	Ongoing ren
PR6023.E926 L5 1994 - MAIN		Item category 1:	none	Item category 2:	none	Checkouts to
33393010142149 - 1 - BOOK - BOOK-TWU		Date created:	2/12/1997	Media desk:	none	Renewals to
33393010171197 - 2 - BOOK - BOOK-TWU		Date last checked out:	12/14/2010	Previous secondary ID:		Date last cl
		Last checked in:	Never	Last activity:	2/1/2011	
		Date inventoried:	Never	Total checkouts:	21	
		Times inventoried:	0	In-house uses:	0	

The library has nine copies of the book, so if you wanted to find out who the last user of a specific copy, a better way to search would be to use a barcode search.

Item Search and Display \*  
 Item Search and Display

Search for: 33393000021220

Index: Item Barcode

Library: MAIN

## USER RECORDS

Information about users and the material they borrow is subject to Alloway Library's Privacy policy outlined above in this manual.

### **User Records in WorkFlows**

Identifying the user is an essential step in most circulation transactions. Once you have decided on the task that needs to be done for the user, scan the barcode on the ID card to identify the user. TWU students' information is imported from the Registrar's office into our system. Similarly, other users who have used the library in the past have a record in WorkFlows.

Circulation workers register new users who are not in our system. Staff may also update user's records to add a barcode number to a new user, or change address information. When a user has changes, those changes need to be updated in their library record. For example, an undergraduate student may become a graduate student and then a staff member or alumni user. Each change in a library user's status also corresponds to a change in his or her library profile, library privilege and demographic data – there could also be changes in name, address information, and user barcode. A TWU user's ID number (student ID number) remains the same over the life of the individual

The information we use can be summarized as BDA, which corresponds to three tabs in WorkFlows' Modify User or Register User Wizards

B- Basic information: Name, ID number, Barcode number, Library profile

D- Demographic information: describes what school they attend

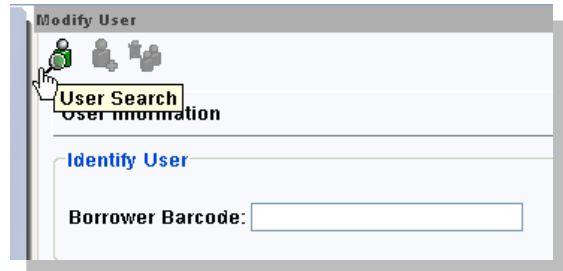
A- Address information: telephone, email, and if necessary a more specific school identity.

The screenshot displays the 'Modify User' interface. At the top, there are icons for Alerts and Notes. Below that, the user's Borrower Barcode is 'PBEAR', the name is 'Bear, Paddi', and the Profile name is 'UNDERGRAD...'. The 'Identify User' section has a text box containing 'PBEAR'. The 'Addresses' tab is active, showing the following fields: Title (empty), First name: 'Paddington', Preferred name (empty), Middle name (empty), Last name: 'Bear', Suffix (empty), Secondary ID: 'TPBEAR', Borrower Barcode: 'PBEAR', Group ID (empty), Library: 'MAIN', Profile name: 'UNDERGRAD', and Charge history rule: 'CIRCULE'.

### **To modify a user's record**

Modify a user record when the user has an address change, replaces a lost card or a damaged barcode.

1. Click the Modify User Wizard in the Users Wizard group
2. Scan the user's barcode or use the User search helper to find the user
3. In most cases you will need to change the info in at least one of three tabs: Borrower, Demographic or Address - BDA
4. When you are done, save and close the modify user window



### **Changing User barcodes**

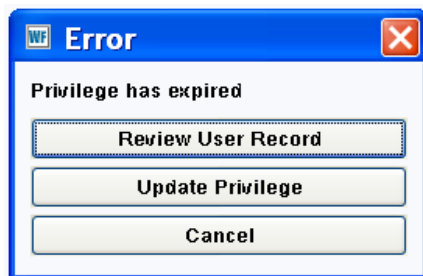
Modify the user to delete the old barcode and then scan in the new barcode.

### **Renewing a user's privilege**

User privileges expire annually or on a term-by-term basis, depending on the user's profile. An expired or soon-to-expire user's card produces an Alert when scanned in WorkFlows. Note that library privileges are linked to the expiry date on the ID card but may not be identical. For example, TWU students may have a May or August expiry date on their ID card but their library privileges expire on September 21 in order to provide full privileges for students taking summer courses.

Users must have proof that they are entitled to continue using the library in order to renew privileges. In most cases, the ID card should display an expiry date sticker for a future date. Alumni and Community borrowers will need to pay a fee to renew their library privilege

### **If the user's privilege has expired**



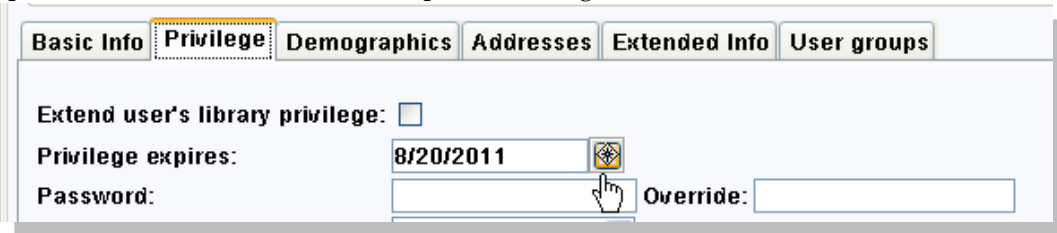
1. Examine the ID card to verify that privileges can be renewed
2. Update Privilege
3. Use the Modify User Wizard to make any necessary changes to the BDA tabs
4. Save and close

### ***If the user's privilege will soon expire***

WorkFlows will shorten the due date to match the user's expiry date. If the User's ID indicates that you can renew the privileges, use the Renew Privilege helper to update privileges.



Alternatively, use the Modify Borrower wizard to make further changes. If the user's ID indicates that you can renew the privilege, you can modify the user's expiry date in the privilege tab either by typing in an appropriate date or by clicking on the calendar gadget beside the text box. You will need to enter the usual password in the Override box to complete the change.



### ***Registering users***

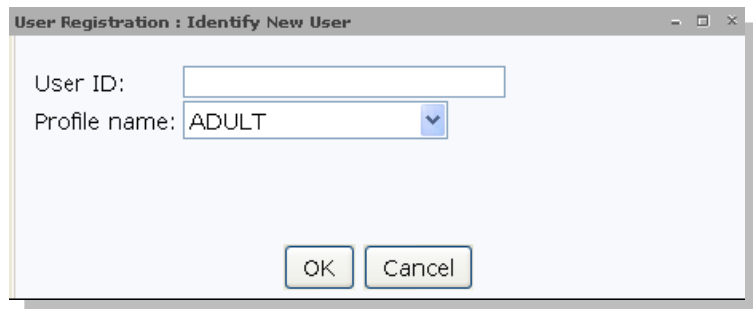
Library staff and student assistants must register users who are not in the Symphony database. Don't assume you need to register a user just because scanning the user's barcode doesn't find the user. It is possible for a user to be in the database, but not have a barcode in the system,



### **To create a user record Register a new user**

1. Use the User Registration Wizard to create a new user record.

2. Type in the new user's ID number (Student or Employee number as it appears on their ID card) and type in or select the appropriate profile name using the drop down menu. Profile type is indicated on the ID card. The



Profile type determines a user's privileges such as loan period and fine rate. (See the [Library Card Summary](#) ahead for more information about cards and profile types.)

3. Complete the BDA information (Basic info, Demographics, Address.) There are just four key Basic Info fields to fill in:

- First name
- Last name

- Borrower barcode (scan in)
- Confirm that the profile name is appropriate ([more on this below](#))

4. On the Demographics tab choose the new user's school, as indicated on the ID card

5. Complete the Address tab. We need two points of contact: the new user's phone number and email are all we need.

- Email address (the address they normally use, not necessarily their TWU account.)
- Phone number (the number they answer)
- Users from an affiliate school are registered with the name of their home institution in the TYPE field (i.e. UBC, or Regent College etc)

6. Save and close

## **Profile types and User categories**

Profile type determines user privileges such as the number of items the user may borrow, the loan period, fine rate and privilege expiry date. The demographic information in User Cat1 is used when the library needs to collect unpaid bills by accessing the user's student account.

### **User information Summary**

<b>If the card says:</b>	<b>Use this Profile type (Privileges)</b>	<b>Use this Demographic (School)</b>	<b>NOTE / EXPIRY</b>
<b>Trinity Western University</b>			
Academic Visitor or other special borrower	SPECIAL	TWU	End of term
ACTS (GRADUATE)	GRADSTDNT/ OR STAFF/FACULTY	ACTS	Sep 21
CanIL (Canada Inst. Of Linguistics)	UNDERGRAD/ GRAD/STAFF/FACULTY	CANIL	Sep 21
ESLI	UNDERGRAD/ STAFF/FACULTY	ESLI	Sep 21
FACULTY	FACULTY	TWU or ACTS	Sep 21
GRADUATE	GRADSTDNT	TWU	Sep 21
RETIRED FACULTY/ STAFF	RETIREE	TWU or ACTS	Sep 21
STAFF	STAFF	TWU or ACTS	Sep 21
TWU Extension	TWX	TWX	End of term e
TWU Extension Bellingham	UNDERGRAD	BELLINGHAM	Sep 21
UNDERGRAD	UNDERGRAD	TWU	Sep 21
<b>Other Trinity Western University</b>			
Ask circulation staff for assistance 365 days expiry			
ALUMNI	ALUMNI	ALUMNI	Obtain alumni ID from the Housing Office or Alumni Office \$15/year
COMMUNITY	COMMUNITY	COMMUNITY	\$60/year
COMPLIMENTARY Spouse/child of TWU employee (pays fines)	COMPLIMTRY	COMPLIMTRY	Indicate in the Address TYPE why the card is issued e.g. "spouse of faculty"
IMMERSE (Northwest Baptist Seminary continuing education)	IMMERSE	NBS	Card authorized by NBS. Fees and privileges same as Alumni. Use paper complimentary cards.
<b>NON TWU; Other Affiliate/Reciprocal</b>			
Ask circulation staff for assistance. End of term expiry Include School name in Address			
SUMMIT PACIFIC COLLEGE	AFFILIATE	SPC	Must have a TWU expiry date sticker to borrow.
COLUMBIA BIBLE COLLEGE	AFFILIATE	CBC	
COPPUL (GREY)	AFFILIATE	COPPUL-GRD	
COPPUL (YELLOW)	AFFILIATE	COPPUL-UG	
REGENT	AFFILIATE	REGENT	

VANCOUVER SCHOOL OF THEOLOGY	AFFILIATE	VST
OTHER BC Post Secondary with whom we have reciprocal agreements.	AFFILIATE	UNKNOWN

## **User Status**

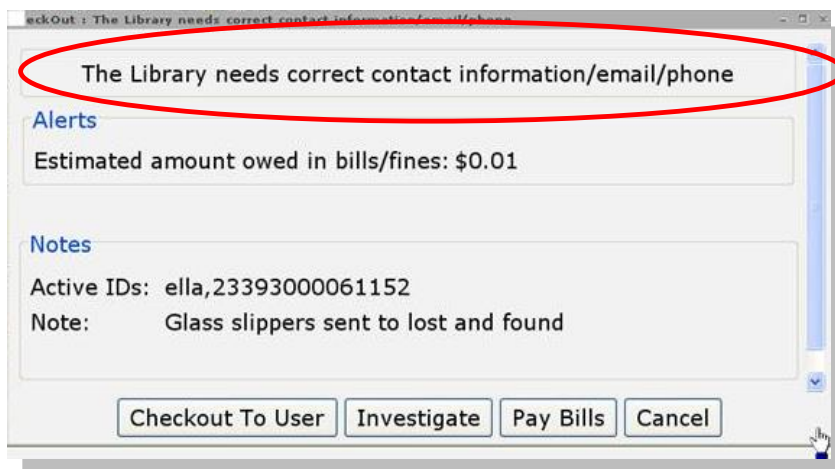
A user's status may affect borrowing privileges. WorkFlows uses four status levels:

- OK - no fines
- Chk\_Address - the library needs complete address information. (Procedure below)
- Delinquent - has fines or overdues, but hasn't exceeded the maximum
- Blocked - has fines or overdues and needs to deal with them before borrowing material
- Barred - has fines, overdues, or other issue to deal with before borrowing material. Also used for students who withdraw from the university. Status must be changed by regular staff member before borrowing material

[See below for procedures to deal with payment of fees and other status-related issues.](#)

### **CHK ADRESS status**

When a user's address is not correct, we can manually change their status to CHK\_ADDRESS. Then, when they check out material, we will get this message



*(Well, in this case Cinder Ella has several issues going on...)*

When the Check Address alert appears:

1. Proceed to Check Out and then to the Modify User wizard.
2. In the Modify User wizard, change information in two tabs:



3. First the Privilege tab – change the status to Delinquent (yes, delinquent –it will correct itself.)

- (If you discover that we have a bad address for a user – bounced email, wrong telephone number etc --, then you would change the status to CHK\_ADDRESS)

4. Next, enter your override code (large aquatic fowl) in the lower override box
5. Now, correct the users' Address information

6. Save and close and continue the transaction.

NOTE: If you find that the process lacks some efficiency it may be a properties setting for this wizard. A system administrator can change the properties for this Wizard so that when you hit **enter** one of the following will occur:



# CIRCULATING MATERIALS

## ***Circulation Periods***

Read the WorkFlows screen carefully to clearly communicate to the patron the due date of borrowed material. Fines are assessed starting on the day or hour after the due date. When the library is closed, the due date automatically becomes the next open day. Consequently, borrowers get an extended loan over the Christmas break or a holiday long weekend. Here is a summary of loan periods:

**21 days** Types of material:

- TWU Books,
- Dewey books,
- Curriculum collection material with LT call number ,
- Audio-visual materials (videorecordings, audio cassettes, CDs, DVDs)

**Hour based loans: 2 hour, 24 Hour, 48 Hour and 72 Hours.** Materials are due the designated time period after check out. If the library is scheduled to be closed during the “normal” time period, then the loan is automatically extended and the materials due one hour after the opens. For example: an item is checked out for 24 hours at 10PM on a Thursday; since the library is not normally open Friday nights, the material would be due one hour after the library opens on Saturday. Types of material: Reserve collection, Headphones, Study room keys, Calculators

**3 days** used for devices such as tablets. Material is due by closing time on the due date.

## ***Non-circulating***

- Reference collection
- Periodicals (including indexes and abstracts)
- Newspapers
- Microform
- Statistics Canada publications
- Theses collection

The librarian in charge may make an exception to allow non-circulating items to be borrowed. External borrowers are not permitted to borrow videorecordings due to licencing restrictions imposed by the suppliers.

## ***Circulation to Faculty***

The faculty of the TWU and designated affiliated colleges have been granted extended borrowing privileges for some library material. Extended loan period is to facilitate class preparation and research.

**Note** The following are the exceptions for various material formats that have been granted to faculty. For formats not discussed below, faculty are subject to the same policy as all other patrons.

**TWU and Dewey books** may be checked-out for 120 days. They may be renewed for one 120-day period. Additional renewals will be given at the discretion of staff.

Materials that are circulated to faculty for extended loan periods may be recalled by the library for other library users. At the point of recall, the due date will be revised to conform to the current due date for 21 day materials and the faculty member will be advised accordingly.

**Media items and curriculum material** circulate for 21 days, and may be renewed up to 4 times.

**Reserve collection materials** Reserve collection material needs to be checked out through WorkFlows even if the instructor owns the material so that the library has a record of the material's whereabouts.

**Reference collection material**, Stats Canada items, Student theses and periodical materials do not circulate. Regular staff (not student assistants) may make an exception for faculty who wish to use material for a special use, such as classroom instruction. The loan period is negotiated, clearly defined, and is the shortest possible time. WorkFlows permits a one-day loan of Reference material to faculty at the discretion of regular staff. Material may be allowed out for a longer--though short and clearly defined-- period of time.

**Periodicals or non-bar-coded items** do not circulate. Regular staff (not student assistants) may make an exception for faculty who wish to use material for a special use, such as classroom instruction. The loan period is negotiated, clearly defined, and is the shortest possible time.

### **To check out non-bar-coded material**

For full details on check out see the next section

1. Use a document envelope to check out the material
2. Identify the contents of the envelope on the envelope(E.G. "Newsweek July 12, 2001)
3. Scan the barcode on the envelope and add a check in note to the item to describe the contents.
4. Desensitize the material.
5. Inform the user to return the material with the envelope directly to a regular staff member

Use a document envelope to check out the item, identify the contents on the front of the envelope and with a check in note in WorkFlows

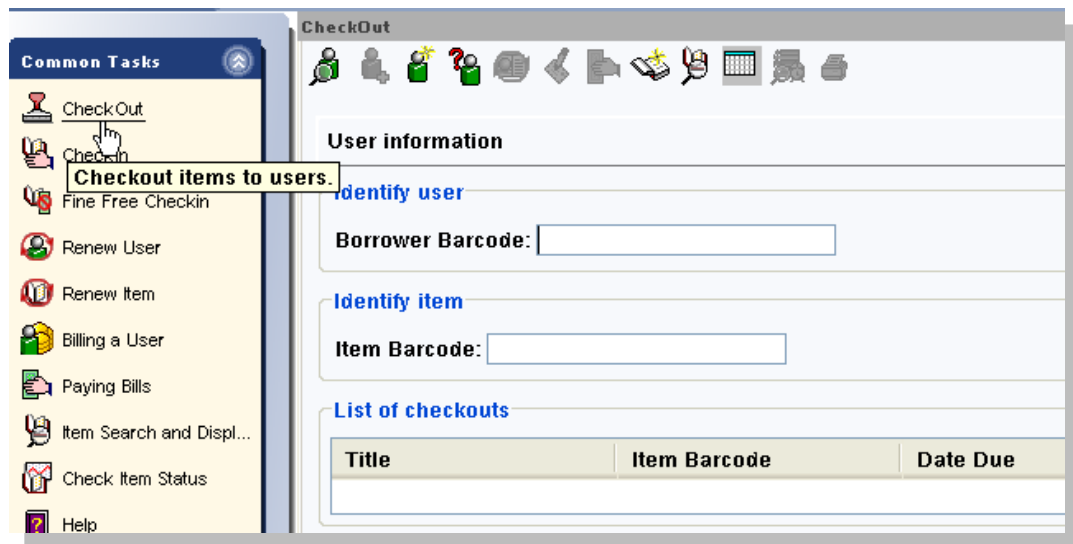
Ask the user to return the material and the envelope directly to staff to ensure that it is checked-in and resensitized.

## Checking out material in WorkFlows

Valid ID is required for borrowing library material. The user needs to present his or her university ID, Library card. In lieu of a Library card, the patron may present photo ID; staff will need to use the Search User Helper and then double check to ensure the right record has been called up by asking the user to confirm student ID number or another piece of information in the library's record.

### To check out material

1. Open the Checkout Wizard



2. Scan the user's ID card to identify the user.
  - If the user has an Alert, you can investigate and take actions to resolve the problem. (See [next section](#)) You can then continue with the checkout process.
3. Scan the item's barcode to identify the item.
4. Make sure all the pieces of the item are together, for example a book with a map in the back, or a set of CD's in a single case.
5. Read the screen to ensure the item has been entered.
6. Place the item face down
7. Proceed to the next item.
8. Read the screen to advise patron of due dates.
9. Click the Check out to a new user button
10. Desensitize material.
11. The patron may select a date due reminder.



### **Group Items (Items with Bits and Pieces)**

Library material such as a boxed set of CDs or, a multi-media teacher's guide in a binder containing discs, overhead transparencies, booklets, and charts are sometimes counted as one item even though they are made up of several individual components. These supplementary materials are usually indicated both in the WorkFlows record, and by a label on the cover of the item.

Diligence in ensuring all components of a set are present and accounted for is crucial. All pieces must be accounted for so we can be sure that the user is getting a complete set, and won't be charged for pieces that were not present at the time of checkout. When staff contact users who return incomplete items they need to know that they are justified in doing so.

A complete check may take extra time at the circulation counter, but will save time and confusion involved in tracking down pieces from a user, as well as protect the library from loss of resources.

Whenever you deal with items with pieces, please include the following steps:

#### **For most multi-piece items**

This procedure applies to CDs videorecordings and books

1. Scan the barcode
2. Read the label on the item/case/container; there may also be a check-in note on the screen
3. Look for the individual items and account for each item.
4. Confirm that the contents match the container (compare the label on the individual parts to the label of the case)
  - Count the individual components It's helpful to say something like "Mozart disc one, Mozart disc two, Mozart booklet" or "...H4 1986 c.1 disc, ...H4 1986 c.1 booklet" or "Interactions guide one, Interactions booklet two... Interactions transparency 17"
  - If an item is missing at checkout, right click the item due date and use the edit item option to add a comment in the check-in note.
5. Inform the user of the number of components in the set: "There are 2 discs and a booklet" or "There's 17 items in this set"
6. Advise the patron of the due date
7. Desensitize the material on the correct desensitizer

#### **Books with floppy discs**

Floppy discs are not particularly floppy, and they are usually square, not disc shaped! They are magnetically encoded and can be erased by our book sensitizers. The discs are attached to the inside of the back or front cover of the book These items are all labeled can be checked-out as above except that 'floppy' disc(s) must be removed before the item is desensitized or resensitized..

1. If dealing with several books, put the "disc book" to one side and process it last, so that it isn't mixed up and desensitized with the others.
2. Identify the item by scanning its bar code

3. Remove and count the discs-(as instructed by the check-in note that appears below the title in the checkout window.)
4. Be sure the label on the discs matches the label on the book!
5. Desensitize the book and put the disc back in the pocket.
6. Remind the user to return the disc with the book. Advise the user that the material is accounted for "there are 2 discs in this set"
7. Read the screen to advise the patron of the due date.

### **Circulating Tablets and other devices.**

When checking out a Tablet to a borrower be sure to review Quick Guide lending policies included with tablet so the borrower understands the conditions of the loan. Currently this includes:

- 3-day loan period.
- Return directly to Alloway Library staff at the Reserve counter before the library closes on the date due.
- A \$25 fee if this item is returned to the drop box or after hours return slot.
- Overdue fines are \$50/per day for each day or portion of day that the item is overdue.
- Maximum fine is \$500.
- The fee for loss or damage to this item is \$500.
- All data or downloads will be cleared from the device after it is returned to Alloway Library.
- The item may be renewed up to 4 times before it must be checked in.
- Users may require an accessory bag with power cord, and other supplies.

When the device is returned counter staff should ensure that:

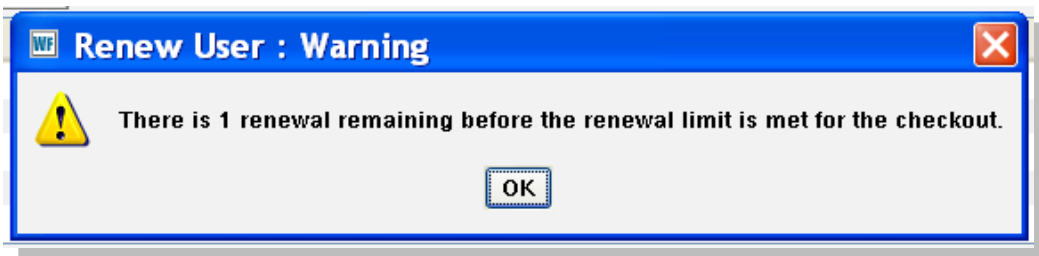
- It was returned correctly and in good condition. Notify staff if there is a concern.
- There is at least 30% charge remaining on the battery. Re-charge the battery if necessary.
- The device is returned to "Factory setting"
  1. Touch the bottom right corner of the screen then touch the settings icon in the bottom right corner.
  2. Touch Settings menu
  3. Touch Privacy >Factory Data Reset > Reset Tablet >Erase everything.
  4. The device will take about 2 minutes to clear its internal memory and restart itself
  5. Use the power button to shut down the device.

## Desensitizing material

Library material is protected with anti-theft devices. This device must be desensitized to allow it to leave the building without triggering the security system. Care must be taken to desensitize all checked-out material using the appropriate device. One type of desensitizer is used for books, CDs and DVDs; another is used only for VHS tapes. Tapes and other magnetically encoded material can be damaged if placed in the wrong device.

## Renewals

Generally, users may renew material if it is not requested by another patron. The renewal period is always the same as the initial loan period – 120 days, 21 days 2 hours, etc. Most valid users can renew material a total of four times online, by phone, in person, or by email. More than four renewals may be permitted at the discretion of staff or the item may be checked-in and then checked-out again to the user.



Because of the small collection size and high demand for use by Faculty of Education students Curriculum Collection material may be renewed only one time and only by undergrad students.

WorkFlows distinguishes between “Seen” and “Unseen” renewals based on whether or not the item is present at the time of renewal. Our policies don’t make a distinction between the two kinds of renewals.

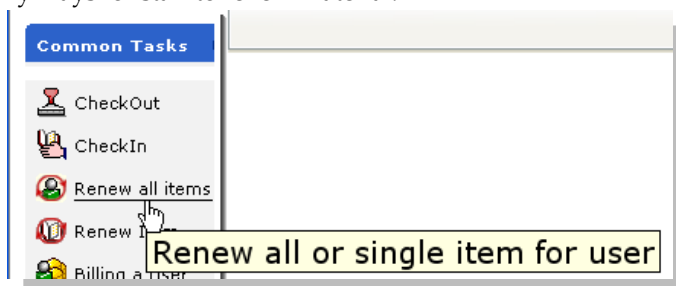
Items declared lost, it must be present to be renewed.

*If the user has a BLOCKED status, you can determine the reason for the status and take actions to resolve the user’s Blocked status. You can then continue with the renewal process.*

Users can renew their material online using the interface in eLibrary’s [My Account](#).

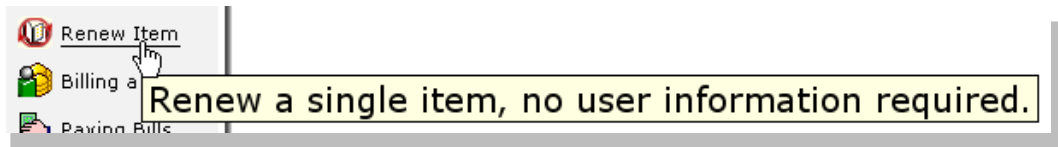
Workflows provides many ways for staff to renew material.

1. The Renew all items Wizard can be used for renewals by phone, or if the user does not have the material present;

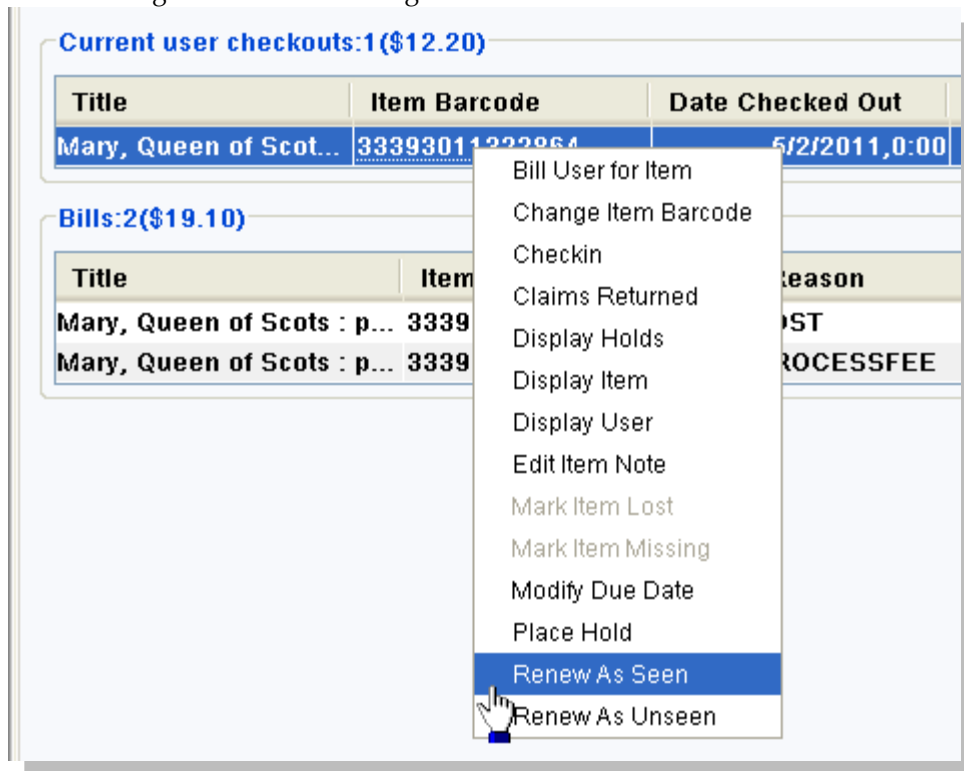




2. The Renew Item wizard lets you renew material just by scanning it's barcode; no need to scan the user's ID



3. In the Check Out wizard, scanning an item that is already checked out will renew it.
4. You can also right click on an item to get a renew menu.



### **Renewing multiple items at one time**

Example: the patron has 60 items out and wants to renew 25 of them.

1. Open check out wizard
2. Identify borrower
3. Click to sort checkouts by due date
4. Select items; use the shift or Ctrl key to select multiple items
5. Right click to access "renew as seen/unseen" menus

### **Holds and Renewals**

When a user asks to renew an item which has been requested by another patron advise the current user that the item cannot be renewed; the name of the requestor is confidential.

Encourage the patron to return the item. If it is still needed, explain that another person needs it too. The patron may keep the item until the due date. The usual fines will apply if it is overdue.

If the current user decides to return the item, check it in and place the item on the hold shelf.

## ***Interlibrary Loan Procedures***

The library secretary notifies the patron that an ILL item is ready for pick-up and, if applicable, advises of charges due and adds an ILL charge to the requestor's WorkFlows account. (Staff and Faculty are not charged for ILL items.) The item is placed on the ILL shelf behind the circulation counter.

### ***Checking out an ILL item***

ILL items are circulated offline, using manual procedures. Therefore, information about a user's ILL requests and transactions will not appear in WorkFlows – only the fees associated with the ILL request will be in the system.

1. The patron asks for the item at the circulation counter
2. The item is found by looking for the patron's name on the yellow slip attached to the item
3. Use the Pay Bills Wizard and scan the patron's card to see what fees are due. (You can use other circulation wizards to see this information as well.
  - Staff and Faculty are not charged for ILL item. If there are fees due, the patron may pay or defer payment at the time of check out.
  - The library prefers payment rather than to send fees to students' accounts. Fees under \$10 must be paid in the library. ([More on paying fees below](#))
4. The patron signs the yellow slip. For books, advise the patron of the due date indicated on the slip attached to the item.
  - There is no yellow slip for photocopied material because the patron keeps the material.
  - If the patron no longer wants the item, note the reason on the yellow slip and return the item to the library secretary as outlined below.
5. Desensitize the item and keep the yellow slip.
6. The yellow slip is filed by due date in the ILL file on the circulation counter

### ***Checking-in an ILL item***

When the patron returns the item:

1. Check the item's due date and find the yellow slip in the ILL file. Match the title or ID number of the item with the slip
2. See that the item is given to the library secretary or place it on the circulation coordinator's desk.

Don't confuse ILL items with items from other libraries that have been returned to us by mistake.

## **Booked Videos Procedures**

Faculty may reserve TWU videos, or order videos from other libraries for use on a specific date. These videos are shelved on the “Booked Video” shelf and are handled like an interlibrary loan with the following exceptions.

TWU videos are checked-out to the faculty member as normal

ILL videos are signed for; the signed slip is returned to the circulation coordinator’s desk

Returned ILL videos are placed on the circulation coordinator’s desk.

## **User Status, Alerts and Notes**

A user’s status may affect borrowing privileges. WorkFlows uses four status levels:

- OK - the user is in good standing
- Delinquent- the user has some overdue items or bills to pay, but can continue as if she was in good standing.
- Check Address - the library needs correct contact information. Modify the users record to update and, when updated, change the status to “delinquent”
- Blocked - the user has overdue, lost or claimed return items or has bills to pay and must take action before borrowing or requesting material.
- Barred - the user has an issue to resolve with staff. An override is required to change the status.

## **Delinquent, Blocked or Barred Users**

WorkFlows will alert you that a borrower is Delinquent, Blocked or Barred. You will need to take action before checking out material or else cancel the transaction.

A Delinquent user has bills/fines or overdues, but hasn’t exceeded

the maximum. If there is a bill, ask the user if he would like to make a payment. If there are overdues, offer to renew the material. You can also investigate to see more information. Alternatively, you can simply proceed to check out.

Checkout : User is DELINQUENT

User is DELINQUENT

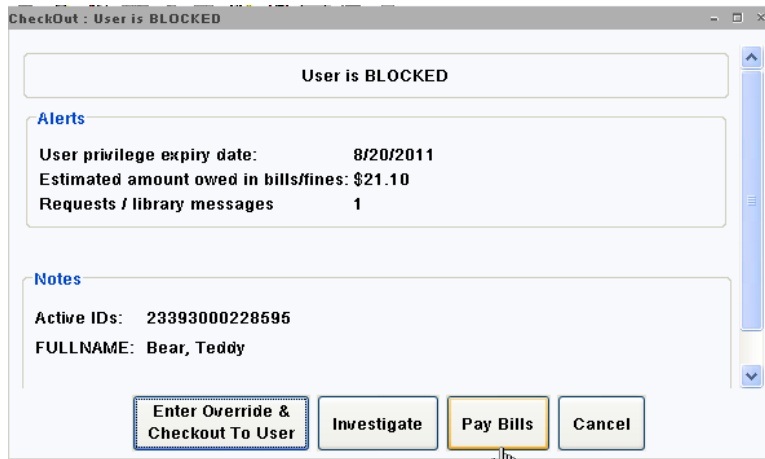
**Alerts**

Estimated amount owed in bills/fines: \$9.40  
Overdues: 1

**Notes**

Active IDs: ella,23393000061152  
FULLNAME: Ella, Cinder

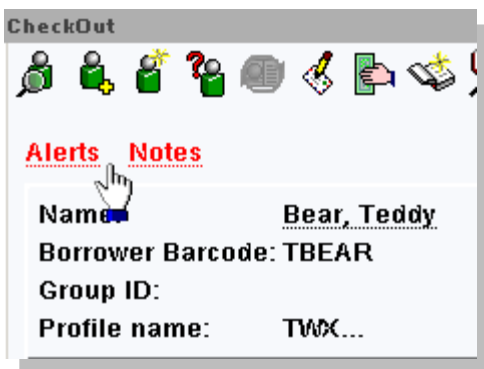
Checkout To User Investigate Pay Bills Cancel



A Blocked user has bills or overdues and must deal with them before borrowing material. You may need to enter an override in order to proceed with the transaction and resolve the user's problem, or call for staff assistance or cancel the transaction.

A Barred user has bills, overdues or other issues to deal with before borrowing material. This status is also given to an individual who has withdrawn from the university. The Barred status must be changed by regular staff member before the user can borrow material.

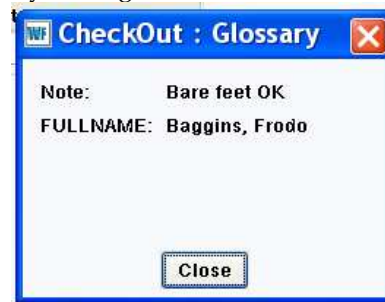
### **Alerts and Notes**



A user's blocks and notes can be seen by clicking on the Alerts or Notes links. Alerts are created automatically by the system and include a summary of fines and fees, overdues, available holds and library messages.

Notes are created by library staff and provide staff with

information about some aspect of the user. Notes are created by modifying the user and adding text to the extended info notes field



### **Responding to Alerts and Notes.**



This is where "Read the screen" becomes important! When you identify a user, you may receive an alert. Tell the patron what the alert is--it may be for fines, an item on Hold, or another message. The message will stay until the situation is resolved either by an action on the user's part (payment, returning items), by the passing of time, or by deleting the message when appropriate.

If the patron has exceeded any limits set by the library, the user is blocked.

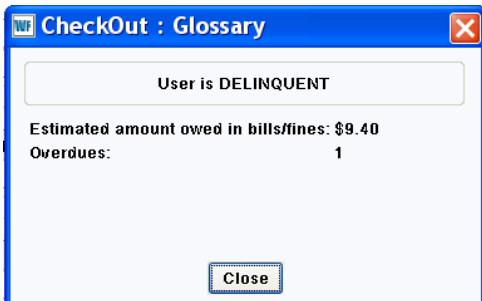
## Maximums

Type of Maximum	To remove block:	Allow checkout?
30 items (most users) 60 items (Faculty and Grads)	Return items so that the total # of items out is less than the maximum	No, except for some reserve counter items
Over \$20.00 payment due	Make a payment to bring amount owing to under \$20	When payment is made
Fines unpaid for over 30 days	Pay fines	When payment is made
2 or more items lost or claimed returned,	Find items	At the discretion of regular staff
Items overdue	Return or renew items so that less than 6 are overdue	When overdues are cleared/returned
Items overdue for over 14 days	Return or renew items	When overdues are cleared/returned
Recalled items 3 days (or more) overdue	Return items	When overdues are cleared/returned

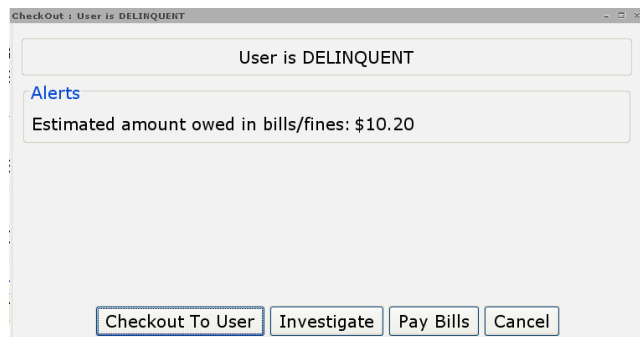
## Accepting bill payments

The patron can pay any amount up to the total amount due however; you cannot take payment for amounts that do not appear as a bill.

Compare these two Alerts:



The Alert (Checkout Glossary) shows an estimated amount due for items that are currently overdue, but have not been renewed. Note that the only option offered is to Close the Alert.



The second Alert shows several options to choose before proceeding.

Let's look at a possible scenario: A patron wants to check out material. An Alert (Check out: Glossary) tells us that she owes money.

Closing the alert, we can see that she has an overdue item that has accrued \$1.40 in fines as of today; (the fines will continue to increase until the item is checked in or renewed.) She cannot pay the \$1.40 until the amount appears as a Bill. She can pay the \$8.00 ILL fee because it is listed as a Bill (in this case it appears she has already paid part of the total \$25.00 ILL Fee.)

Current user checkouts:1(\$1.40)					
Title	Item Barcode	Date Checked Out	Date Due	Recall Date Due	Status
The essential plays	33393010864536	8/25/2011,14:08	8/18/2011,23:59		Overdue

Bills:1(\$8.00)					
Title	Item Barcode	Reason	Owes	Billed	
		ILL-COPY		\$8.00	\$25.00

If we renew the overdue item, the screen information changes:

Current user checkouts:1(\$0.00)					
Title	Item Barcode	Date Checked Out	Date Due	Recall Date Due	Status
The essential plays	33393010864536	8/25/2011,14:08	9/20/2011,23:59		

Bills:2(\$9.40)					
Title	Item Barcode	Reason	Owes	Billed	
		ILL-COPY		\$8.00	\$25.00
The essential plays	33393010864536	OVERDUE	\$1.40	\$1.40	



Use the Pay Bills helper to take a payment:

The user can pay all the fees, some of the fees or just pay for a specific fee. Use the Total Bills and Payments area to pay all or, the Individual Bills area to pay just for specific item. To take a

payment, enter the amount tendered, (don't use the \$ dollar sign but do include the decimal and cents) select the payment type (CASH or CHEQUE) and Enter.

**Total bills and payments**

Total bills: 2      Payment:

Total owed: \$9.40      Payment type: CASH

Still owes: \$9.40      Change:

Credit balance: none

**Individual Bills and Payments**

Title	Item Barcode	Reason	Owes	Payment Type	Payment	Change
		ILL-COPY	\$8.00	CASH		
The essential plays	33393010864...	OVERDUE	\$1.40	CASH		

Workflows calculates the change due.

Reason	Owes	Payment Type	Payment	Change
ILL-COPY	\$0.00	CASH	10.00	\$2.00
OVERDUE	\$1.40	CASH		

It is possible to pay bills using funds from Credit account. Staff should refer to the “Credit balance” information to see if there are funds available and select “CreditAcct” as the payment type

Still owes:	\$10.00	Change:	
Credit balance:	\$10.03		
Individual Bills and Payments			
Title	Item Barcode	Reason	Owes
The pesharim and ...	33393010748556	PROCESSFEE	\$10.00
Current user checkouts:7(\$0.00)			
Title	Item Barcode	Date Checked Out	
Student circulation a...	33393011344298	1/16/2014, 12:49	
The 10 conversation...	33393011215076	4/25/2014, 8:33	

**Notes:**

Verbally confirm the amount due and the amount given. “Your fine is \$2.60. This is \$10; thank you.” Count out the change.

Put the fine money in the cash drawer.

A receipt is not generated. If the user requests a receipt, use the manual receipt book in the cash drawer to write one.

Limited funds are kept in the cash drawer. Do not take \$50 or \$100 bills unless it is for a payment that is more than half the value of the bill.

The payment will be viewable in the Display User Wizard Bills tab, which shows Paid, Unpaid or All bills.

Count out the change if necessary.

**Refunds**

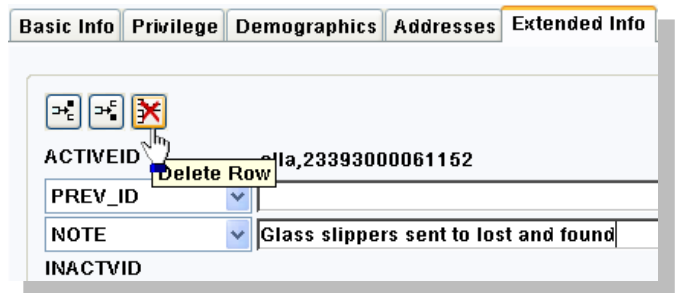
Any money owing to a patron is generally sent to a student’s account rather than cash from the library. A cash refund may be issued under special circumstances by library staff.

If a lost and paid for item is returned, Alloway Library will refund to the user any lost charges (cost of item and processing fees.) The cost of the item is refunded automatically by the system. The processing fee is refunded manually by authorized staff. When applicable, an overdue fine may be assessed to a maximum of \$25 per item. The fine will be paid for using the refunded money. Any balance owing to the user will be transferred to the user’s student account. When there is no student account, the library will issue a cash or cheque refund. Refunds will be issued on a regular basis (e.g. during the last week of each month/term...) The library will also issue refunds, when appropriate, for fees, following the same principles.

**Adding and deleting user notes**

Although it is not expected to be a common occurrence, student workers may place notes on a patron’s record if necessary. Usually these will be messages to other library staff.

1. Use the Modify User Wizard
2. Select the Extended Info tab
3. Enter a concise comment on the Extended Info tab
4. Use the Delete Row tool to get rid of unnecessary comments



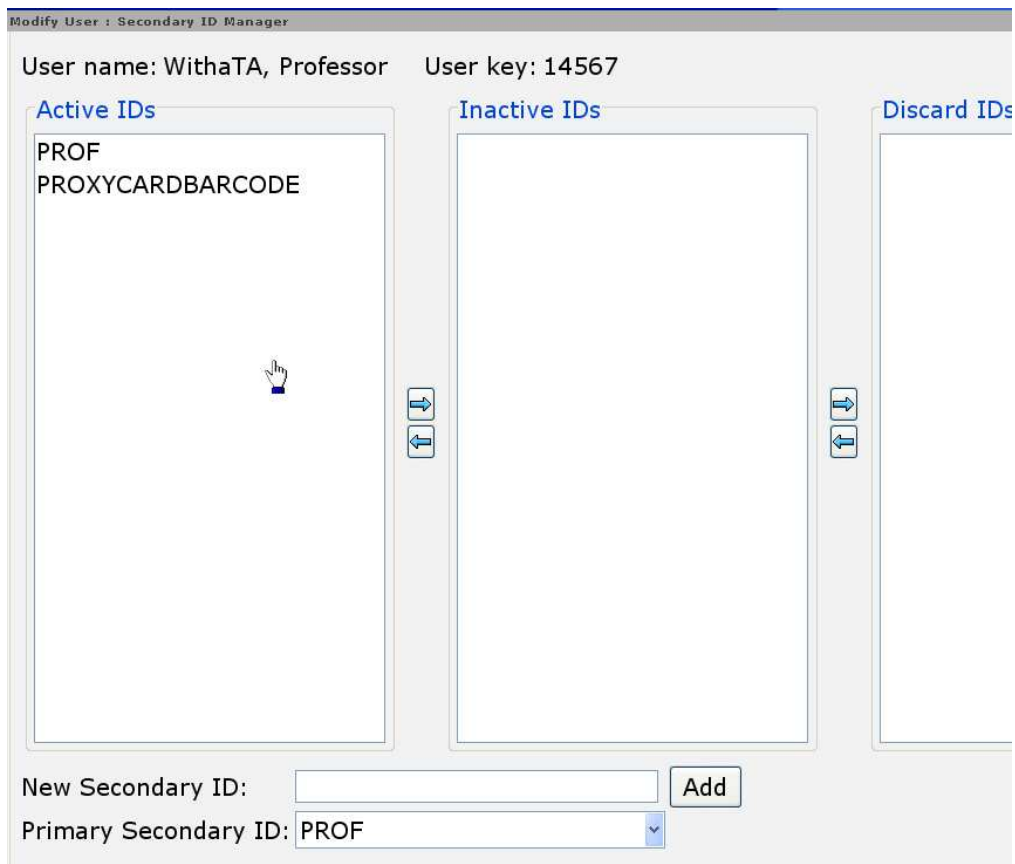
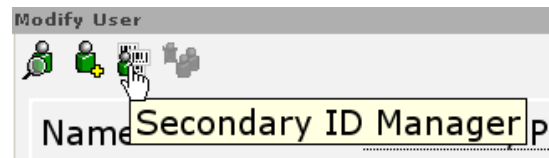
## Proxy Cards

Proxy cards are the way we allow one user to borrow on behalf of another user. Typically, a TA borrows on behalf of an instructor. When a proxy borrows on behalf of an instructor, the item is checked out to the sponsor, who is responsible for the item.

### Proxy Card Basics

When an instructor wants a TA to borrow on his/her behalf regular library staff will complete the following steps:

1. The library asks the Student Life office to create a proxy borrower card on behalf of the instructor.
2. When the card is ready, Modify the instructor's record and use the Secondary ID Manager\* to add the proxy barcode number
3. Save and close

A screenshot of a software window titled "Modify User : Secondary ID Manager". The window displays user information: "User name: WithaTA, Professor" and "User key: 14567". Below this, there are three columns: "Active IDs", "Inactive IDs", and "Discard IDs". The "Active IDs" column contains the text "PROF" and "PROXYCARDBARCODE". Below the columns are three sets of arrows (right and left) for moving items between columns. At the bottom, there is a "New Secondary ID:" field with an "Add" button, and a "Primary Secondary ID:" dropdown menu currently showing "PROF".

\*To access Secondary ID Manager which may not be currently available on some workstations:








1. Right click the Modify Borrower Wizard to access Properties.
2. Helpers> select Secondary ID manager
3. Restart WF

### **Policy Notes**

- Instructors can have multiple cards and therefore multiple Active IDs
- The instructor is personally responsible for anything checked out on the proxy card including any interlibrary loan requests made using the barcode on the card.
- Instructors are advised to notify the library at once if the card is lost or stolen.
- Items checked out on the proxy card have the same loan period as faculty normally receive. (120 days for books, 21 days for media and curriculum collection items, and reserve items as indicated.)
- The proxy card will expire at the same time as the instructor's library privileges
- The card is permanent and can be used again for other individuals authorized by the instructor
- It is sponsor's responsibility to know who is using their card; the library DOES NOT track the names of individuals using the proxy card.

## Circulation Summary

CIRCULATION SUMMARY	ITEM TYPE AND LOAN PERIOD	FINE RATE	LIMITS	REQUESTS / HOLDS	RENEWALS ? <i>If not requested</i>
	<b>BOOKS</b> 21-DAY LOAN 120 DAYS FOR FACULTY	\$.20/day	30 items <i>Faculty &amp; Graduates</i> 60 items	Place Online	4 renewals 1 renewal for faculty
	<b>CURRICULUM MATERIAL</b> 21 DAY LOAN	\$.20/day	30 items	Place Online	1 renewal
	<b>MEDIA (CDS, VIDEOS)</b> 21-DAY LOAN	\$.20/day	30 items <i>TWU borrowers only</i>	Place Online	4 renewals
<b>2 hour loan</b>	<b>2 HOUR RESERVE</b> <i>IN-LIBRARY USE ONLY</i>	\$.50/hour or portion of hour	2	Ask staff	Yes
	<b>OTHER RESERVE ITEMS</b> 24/48/72 HOUR LOAN	50¢/hour or portion of hour	2	Ask staff	No
<b>24/48/72 hour loan</b>					
	REFERENCE, MICROFORM, PERIODICALS, STATS CANADA COLLECTIONS	Non-circulating	0	No	No
	<b>STUDY ROOM KEYS &amp; HEADPHONES</b> 2 HOURS <i>IN-LIBRARY USE ONLY</i>	50¢/hour or portion of hour	1	Ask staff	<b>Yes</b>
	<b>OTHER EQUIPMENT:</b> USB STICKS, CALCULATORS, DIGITAL RECORDERS...	50¢/hour or portion of hour	1	Ask staff	Yes
<b>3 DAY loan</b>	<b>DEVICES TABLETS AND ACCESSORIES</b>	\$50/day			Yes

## Holds

Items that are unavailable because they are checked-out, in repair, in cataloguing or on the hold shelf can all have a hold placed on them. The requestor will be notified when the item becomes available. Items with an in-library status can also have holds. Holdable items include TWU books, Dewey Books, Curriculum items, videos and CDs.

### Item Details

Add to List

[Place Hold](#)

[Nearby items on shelf](#)

Users are encouraged to place their own holds using the Place Hold link in the online catalogue. Users can log into *My Account* at [library.twu.ca](http://library.twu.ca) for current information on the status of their Hold.

Users may have up to 12 active requests at one time.

An item with a Hold cannot be renewed by the current user and other users may be blocked from borrowing the item. The current user of the item will receive notification that the item is wanted by another user and, if the current user has had the item for more than 21 days, the item will be recalled and due within 7 days of the hold being placed. Overdue recalled items are subject to higher fine rates.

Note that in WorkFlows the terms *Holds* and *Requests* are very different. Holds are placed on items and can be active, available or unavailable. "Request" refers to a communication feature currently turned off in our system

### Placing Holds in Workflows

1. Use the Place Hold Wizard and identify the user
  - If there are alerts for the user, you must deal with them.
2. Find the item with the Item search helper
3. When you have found the correct

The screenshot displays the 'Place Hold' wizard interface. At the top, there is a toolbar with icons for Alerts, Notes, and Item Search. Below the toolbar, the 'Item Search' button is highlighted. The main area shows the item details for 'Sleep : a comprehensive handbook - Lee-Chiong, Teofilo L., 1960-'. The call number 'QP425 .L44 2006 - MAIN' and the barcode '33393011108495 - 1 - BOOK - BOOK-TWU' are visible. At the bottom of the wizard, there are 'Place Hold' and 'Cancel' buttons.

item, click on the Place Hold button.

Then, in the Place Hold Wizard, complete any additional necessary Hold Info. For example, you can change the hold expiry date – if the user does not need the item after a specific date, change the expiry date. (The default expiry time for a hold is 30 days. If, after 30 days, an item is not checked-in, the request expires and the requestor is notified of the cancellation.)

**Hold Info**

Pickup at:  Expires:

Comments:

Date suspended:  Date unsuspended:

**Level/Range**

Level:  Copy  Title

Range:  Library  Group  System

**Recall status**

Allow Recall  No Recall  Recall now (RUSH)

Make hold first in queue

Get User Information Get Item Information (i) Place Hold Place Hold for Another User (g) Close

4. Indicate if you need a specific copy or volume, otherwise the first available copy will fill the request.
5. Note that items are not usually recalled, nor should the Make first in queue button be used.

The requestor will be notified by email when the item becomes available.

Requested items are held for 7 days.

Reserve material is requested manually, off-line, using [procedures described below](#).

Items with a long term due date, held by faculty, will be recalled by staff and become due within 21 days of the recall being placed.

### **Viewing and Deleting Holds**

Users may ask to know what items they have held and may delete holds for material no longer needed. They can do this for themselves online in "[My Account](#)" or staff can check their holds in WorkFlows using the Display User Wizard (or the Modify Holds or Remove Holds Wizards)

1. Identify the user in the Display User Wizard
  - If there are current blocks on the user, you must deal with them.
2. View holds in the Hold tab. Note that you can select what types of holds to display. Three key terms to note are:
  - Active- currently waiting to be filled
  - Available – on the hold shelf

- Inactive - expired

Total holds:1

Title	Item Barco...	Level	Status	Placed	Pickup at	Pickup by	Expires
Cows, pigs, ...	3339300049...	TITLE	(unavailable)	8/29/2011	MAIN		9/1/2011

Display options

Pickup library
  Placed at library
  Owning library

Library: All libraries
 Type of hold: Active

Active  
 All  
 Available  
 Inactive  
 Recalled  
 Reserve

3. Right click on an item to modify or delete the hold

Total holds:1

Title	Item Barco...	Level	Status	Placed
Cows, pigs, ...	3339300049...	TITLE	(unavailable)	8/29/2011

Display Item  
 Edit Item Note  
 Modify Hold  
 Place Hold  
 Remove Hold

- If the item is already on the hold shelf, and the patron wishes to cancel the hold, use the Remove Holds Wizard.

**On-Shelf**

**Holds**

Alloway Library allows patrons to place a hold on

items with an “in-library” status. As a courtesy to our users, Library staff will pull requests up to twice a day.

If a requested item is picked off the shelf by another library user before being retrieved by library staff, that patron may check out the item. The hold will be filled as soon as a copy becomes available.

If the item cannot be found, library staff will continue to search for the item using a Search Request form. Requests will be filled as soon as a copy becomes available.

## **Recalls**

Recalls are different from requests.

A rush recall changes the due date of an item so that it must be returned sooner than the original due date assigned when the item was checked-out. Recalls are used in two situations:

- When an instructor wants checked-out material to go on Reserve.
- When an item's due date is more than 21 days from the day it is requested

Recalled items going on Reserve become due 4 days after being recalled. Long-term loan items are due within 21 days of being recalled. Overdue recalled items are subject to fines of 50¢ per day.

The current user of the item will receive a notice advising of the new due date.

The Requestor will receive a notice when the item is in.

Student workers will not place recalls unless specifically authorized to do so by library staff.

## ***Check-in***

Just as we strive for accuracy in our shelving and communication, we also strive for error free check-ins. It is crucial to providing good customer service that library materials are checked-in promptly and accurately. When returned material is not checked-in, it reflects poorly on Alloway Library's staff and reputation.

Every effort must be taken to keep the check-in process orderly and organized to avoid errors. Material is either in the bin or on the check-in cart. It is not stacked on the counter. Handle material once; the more an item is handled, the less efficient the process.

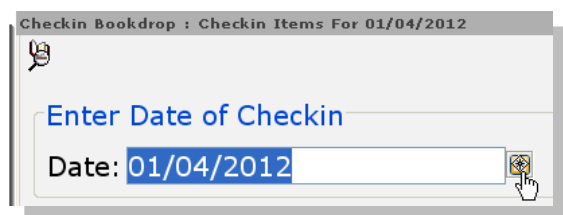
Check-in automatically calculates fines, and changes the item's status in the catalogue from checked-out to checked-in or shelving cart. At check-in, "lost" and "missing" items are "found" enabling staff to issue credits for paid-for material and waive processing fees when appropriate. Requested items are placed on the hold shelf. Items returned by patrons but not checked-in by staff will accrue fines and the user will receive overdue notices, which can be frustrating for the user, inefficient, and embarrassing for the library.

During Check-in, we also identify damaged material and assess charges or notices to patrons who return damaged material.

Although Check-in can be done on any terminal, it is expected that CKI will usually be done at the terminal by the book drop bins.

## **To Check-in materials**

1. Open the Check- in Wizard.
  - For the first check-in session of the day, use the Check In Book Drop Wizard and the calendar gadget to select the last day that the library was open.
2. Remove the item from the book drop bin.
  - Do not stack the books up on the counter or in the bin. Efficiency is lost when books are handled multiple times. Errors may occur when



material is placed in undefined spaces. Returned material is either “in the bin/not checked-in” or “on the cart/checked-in”

3. Scan the item bar code and read the screen to confirm check in and any special instructions.
4. Examine the item for damage; remove date due reminders or bookmarks.

### **Resensitizing material**

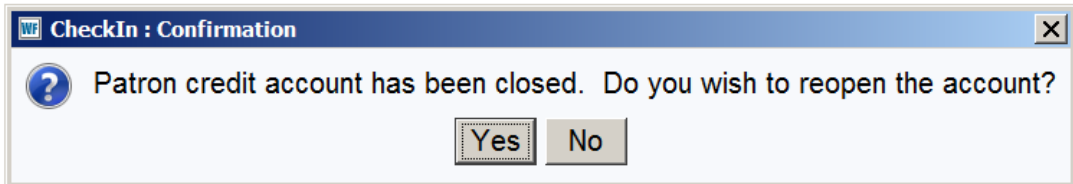
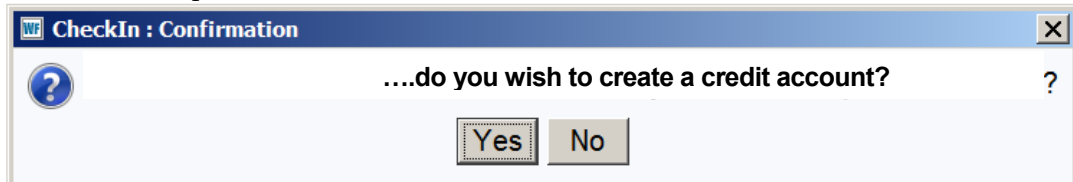
Library material is protected with anti-theft devices. Care must be taken to resensitize all checked-in material using the appropriate device. One type of resensitizer is used for books, CD's and DVDs; another is used only for VHS tapes. Tapes and other magnetically encoded material can be damaged if placed in the wrong device.

- If you notice obvious water or soil damage, marked pages, folded down pages, numerous bookmarks etc., check to see if the damage was previously noted on the inside back cover of the item. If not previously noted, resensitize it and follow the instructions outlined on a yellow “Damaged Noted” card.

- Resensitize any damaged item and place it on the “damaged” shelf.
- Resensitize any requested item and place it on the “hold” shelf in alphabetical order by its title as it

appears on the screen. There is no need to label the item with the name of the requestor.

- Resensitize any item that needs to go to Technical Services and place it on the “to be catalogued shelf”
- Alert staff if you check-in any item with a missing status. Staff will check item detail status in the catalogue to see if the last user can be identified and issue a refund for monies paid.
  - When a lost & paid for item is returned staff will see one or two of three possible notes on the cki screen.



- CKI staff insert a blue “A Refund has been applied...” card into the item, resensitize it and place it on the “Lost now Found” Shelf
  - WF will automatically refund the cost of the item to the user’s Credit Account when a lost& paid for item is checked in and pay any overdue fines on the item.
  - Staff will refund the processing fee manually
- Alert staff if you check-in any item with a lost status. Staff will waive any processing fee attached to the item.
  - Alert staff if you check-in any item with a claimed return status and note any special circumstances. Staff will assess fines unless there is reason to believe the item was found in the library.
  - Alert staff if a tablet has been returned to the bookdrop.
  - Place magnetic material such as tapes or floppy disks to one side so they are not inadvertently erased by the sensitizing machine
5. Place checked-in items on the return cart, spine out
  6. When the labeled shelves of the check-in cart are full, resensitize the material. Place resensitized items spine up on the cart.
  7. Unload the cart in the sorting area.

### **Checking-in group items**

1. Read the label on the front cover or the check-in note on the screen
2. Open the item and check for each item.
3. Check that the individual contents match the item.
4. Desensitize the material as required
  - If there are many items to count check it in and set the item aside for checking later. Every effort should be made to check items on the day they are returned.
  - If there are missing items, notify staff so the user can be contacted.
5. Place the item on the book cart spine out.

### **Damaged Materials**

Do not attempt any kind of repair in circulation. We will not routinely erase pencil marks. Erasing can cause damage to the paper, binding and text. An instruction sheet on erasing is kept in the memo binder.

Books with the following defects should be sent to Technical Services for repair.

- Loose hinges
- Broken, worn or loose spines
- Book is split
- Loose or torn pages
- Ripped cover
- Corners missing on cover
- Loose spine label or barcode label



- Water damage (determine if the last user be charged)
- Stains (determine if the last user be charged)
- Loose pockets
- Loose dust jackets
- Illegible spine labels

***Checklist for checking-in damaged items***

For items that are repairable or otherwise salvageable, charges may be assessed to cover the library’s costs of repair. Irreparably damaged materials will be charged at cost plus \$10 processing fee. Patrons who return books with marked or folded pages, stains or other signs of misuse may be assessed for damage and charged \$5 per book.

***Pre-sorting after check-in***

To speed up unloading the check-in cart it’s possible to rough sort material as it is checked-in. The basic goal is to group material on the check-in cart by call number in the same way that the sorting area is arranged. After the item is checked in and assessed, read the call number on the item and

Place A-BX and Dewey items on the top shelves

C-Z call numbers on the second shelf closest to you

Do not put VHS tapes on the cart; place them on appropriate shelf by the sensitizer.

If a shelf gets full, group items together on other shelves

Once the three shelves are full, unload the cart. Don’t waste time filling the hard- to-reach shelves of the cart.

***“Not-ours” books***

Books from other libraries left in the library, but which are not ILL need to be returned to their owners. Because of the time and costs involved in mailing “not ours” items, effort should be made to see that the user is responsible for returning material to the lending library.

**DAMAGE NOTED**

Folded pages, moisture damage, stained, chewed or otherwise misused. **Give to staff.**

**Marked with pencil, pen, highlighter etc:**  
Markings in NEW books. **Give to staff.**

If it is NOT a new book ...

Are there bookmarks, post its, folded pages where the marked pages are? If YES, **Give to staff.**

If NO go to the next step:

Do other returned books on this topic or from this borrower have similar markings?

If YES, **Give to staff.**

If NO, note the damage and shelve the book

Is this damage due normal wear and tear?

**Send to repair**

Place this card where you noted one example of damage. (One card per item)

Staff will assess the damage and may apply fees.

Refer to the "Not ours" cards kept by the check-in area for a summary of these steps for dealing with such items:

1. Look for a name in the book or try to see if other items on a similar topic are in the box and note the name and telephone number of the person who borrowed those items. (Right click on the item and look at "Charge History")
2. If it is from another library, contact that library's circulation department and ask them to notify the person who borrowed the item (Have the item barcode number handy)
3. Contact the user to say that we found an item that may belong to him or her and we will hold it for 30 days
4. Note the day you called or left a message. Place the item on the "not ours" shelf. Material is arranged chronologically - the most recently received item is on the right-hand side.
5. If you can't tell who returned it, note the date on a slip of paper and put it in the item, put on the "not ours" shelf.
6. Personal items left after 30 days are given to the director for evaluation for addition to the collection
7. Material from another library unclaimed after 30 days will be sent to the lending library either by mail or to the local public library.

Check for:

- Donations - sometimes marked inside the cover "donation"
- Books from the new book shelf with dustcovers attached
- Items from the sale shelf - often with a highlighter mark on the top of the text block near the spine
- Items from the CanIL library - send them to CanIL building via campus mail

### **NOT OUR MATERIAL**

*Is it an ILL without paperwork?*

Check the ILL box for the title.

**OR**

*Are there other books on this topic in the drop box?*

Find out who returned those books.

Put a note in the item with the date, possible owner's name & contact info.

Contact the person asking them to claim the item within 30 days.

Note the action taken.

Put the item and note on the "not ours" shelf - arranged by date received.

After 30 days the item will be considered a donation to the library

**OR**

*Is it from another library?*

Contact that library's circulation desk and ask them to notify their borrower. Put a note in the item with the date and action taken and put it on the "not ours" shelf. Unclaimed items will be returned to the owning library after 30 days.

## **Numbers to note**

---

Columbia Bible College Library	(604) 853-3358
Fraser Valley Regional Library	604) 514-2850
Regent College	604-221-3340
Simon Fraser University	604-291-4345
	604-291-3915
Summit Pacific (was Western Pentecostal)	(604) 851-7230
	(604) 851-7231
	(604) 851-7225
Surrey Public Library	(604) 588-5015 ext 300
University of British Columbia	(604) 822-2406
Vancouver Public Library	604-331-3670

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## ***The Reserve Desk***

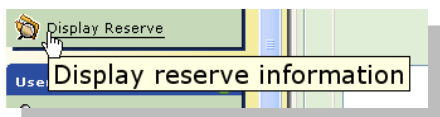
The Reserve Desk is like a separate branch of our library. The reserve collection consists of materials put aside by instructors because the material will be used heavily by their students or because they wish to provide special items such as personal copies of books or tapes that are not part of the regular library collection. Because of the high use of materials, loan periods are very short--from 2 hours to 3 days.

Keys for study rooms, headphones and other audiovisual equipment are checked-out as reserve items using the bar code on the equipment, just as any other library material.

### **Finding material**

About half of the reserve collection is filed by call number while the other half is filed under the instructor (or, in a few cases the course name.) Usually the patron will provide a call number, but you may need to ask the name of the instructor to find the material. A search of the on-line catalogue will help to locate reserve items.

### **To find reserve items in the catalogue**



Use the Reserve Search helper and type in a course name, code or instructor name and choose the appropriate index.



## **Checking-out and Checking-in Reserve material**

Checking out and checking-in reserve items is done in the same manner as regular items with two key differences:

1. When checking out a 2-hour item, retain the user's University ID card until the item is returned. This is done to ensure prompt return of the item. Never retrain non-university ID such as a driver's licence, which a patron may show when his university ID is not available. When an item is returned, take care to return the card to the rightful owner by reading the users name on the screen, looking at the picture and saying the patron's name.
2. You must tell the user the due time for every item checked-out. Date due reminders should be given whenever the user intends to take longer-term loan material out of the building.

When checking-in material, be sure to place items with reserve stickers into the reserve collection not the shelving cart.

For the benefit of staff and users, the circulation period for reserve items is indicated by a sticker above the bar code.

## **Requests/Holds/Pick-up notes for Reserve material**

We use two kinds of forms. The short orange form is for short (2-hour) loans The longer form is for items with a longer loan - 24, 48 and 72-hour loan periods

### **For 2 hour items**

**Pick-up note for 2 hour item**

Title West Coast Diaries

Call # GV 299 .P3 1994

Requestor's name Mike Roe

Today's date Sept 23

Date wanted September 24

Time wanted from 8:30 - 10 am

*(Reservations may be cancelled if not picked up within 15 minutes of indicated time)*

*scb*

Requests on reserve material are done off-line using paper and pencil. For 2-hour items, fill in a short Pick Up note form and clip it to the front of the item, if it is available, or file the slip with the current user's card. When the item is checked-in the slip should be clipped (never taped) to the front of the item.

It's important to include the time range for these short loan items - and AM or PM

Your initials

A 2-hour item can have multiple requests- take care to avoid conflicting

requests.

The short form is a "Paper only" form, there's

no need to add a circ note in WorkFlows

### **For 24/48/72 hour items**

For longer loans, we use a longer form because there is more information to keep track of. The long form is either taped to the reserve shelf when the item is out, or attached to the item (without using tape) when it is in. It requires an extra step in adding a Circ note so that when it is in checked out or in we will see that there is a request to use it at some point. An item can have only one pick-up request at a time. Once the pick-up date has passed, the item needs to be checked in and have its note deleted manually using Edit Item Note

Remember to protect the confidentiality of users; don't disclose to other users the name of the user who has the item or who has requested the item.

If you need to practice, feel free to do so, or ask staff for additional assistance.

#### **This Item is Reserved for Pick-Up Pick-Up Note for 24hr/48hr/72hr Items**

Title: \_\_\_\_\_

Call #: \_\_\_\_\_

Pick Up Date: \_\_\_\_\_

Preferred pick up time: \_\_\_\_\_ AM / PM  
*Requests may be cancelled if not picked up within 15 minutes of indicated time.*

Requested by: \_\_\_\_\_

Library initials & date \_\_\_\_\_

#### **If the item is OUT**

1. Find the desired item. **F12-Item Search and Display**
2. **Detailed Display > Call Number/Item** click on the desired copy
3. Note any CIRCNOTES in the **Item Info** tab;  
*If there is already a valid pickup note do not proceed. One Pick-up note per item*
4. Click on **Checkouts** to view current borrower
5. Use the **Display User** wizard to view **Checkouts** of current borrower.
6. **Right Click** the desired item > **Edit Item Note.**
7. In the CIRCNOTE type, "Pick-Up - [date & time] - by [name]"

#### **8. Save**

9. Tape this note to the Reserve shelf

#### **If the item is IN**

1. Check it in
2. Do steps 6-8 above
3. Attach this note to the item with an elastic band or paper clip



# COLLECTION MANAGEMENT & SERVICES

## **Sorting**

### **Books and media**

1. Checked-in books are placed on (or underneath) the sorting counter shelves using labels as a guide. If it is necessary to stack books, the piles should be neat and stable; maximize use of space by piling against the wall, as high as possible. Stack material so the call number is visible.
2. Begin to sort where the shelves are fullest. It's not always necessary to start at the beginning of the alphabet. Think about the shelving process too; it's more efficient to shelve several books that are grouped together rather than a single book here and another book two aisles away. Do not put items going to the lower level of the library on the same cart as items shelved on the upper level
3. Items are sorted in alphanumeric order by their call number label.
  - E.g. BT comes before BX
  - BT 333.497 comes before BT 333.7
  - Nothing comes before something (BT 333.7 comes before BT 333.7 c.1)
4. Fine sort by taking books one-by-one from the shelf or pile and placing them on the sorting counter with spine labels facing up. Use bookends to help keep the books upright.
  - If there are many books to sort under the counter, you may have to do a rough sort to make the pile manageable
  - Don't let the row of sorted books get too long. When a row is over 5 feet long, it becomes difficult to squeeze books in and can cause strain to your shoulders, arms and fingers
5. Watch for damaged items, or bookmarks and other papers that should be removed before shelving.
6. Use the shelving slip to label the completed book cart with the date, the range of call numbers and your initials, and then choose 10 complete call numbers for the accuracy check.

### **Curriculum Resource Units**

Curriculum unit files; sort numerically by grades K, 1-12.

Background materials; sort alphabetically by subject.

### **Statistics Canada Collection**

Sort numerically by Statistics Canada catalogue number.

### **Periodicals**

This collection consists of several A-Z collections: current periodicals, bound periodicals and periodical indexes, as well as current and back issues of newspapers

Current periodicals are located on display shelves; the current issue is displayed with the cover facing out and back issues for the current year are stored on the shelf behind the lift-up

display shelf. The most recent year for which the library has holdings will be displayed, i.e., 2012 issues are not moved back to bound periodicals until the first issue for 2013 arrives (which might not be until April, as in the case of some quarterly publications). Arrangement is alphabetical by title; backfile issues for the current year behind the lift-up shelf are in random order.

Each title has a shelf label on the current issues stacks. If there is no shelf label for the periodical you are trying to put away, double check to see that a) it has a library stamp on it, b) you are using the correct title--check the title page. If the shelf label is missing, advise the circulation supervisor.

Bound periodicals are located in stacks behind current periodicals collection. This collection contains all paper holdings prior to (i.e., older than) current periodicals. These paper issues have a colored sticker on the top left corner of the cover or are stamped "Serials-Stacks" in red ink so they may be readily distinguished from current periodicals. Arrangement is alphabetical by title; sub arrangement is numerically by volume and issue numbers/chronologically by year and month.

Periodical indexes are arranged the same way as the current and bound collections.

### ***To sort periodicals:***

1. Rough sort alphabetically by title
2. Separate current issues from back issues
3. Fine sort each pile alphabetically by title.
4. If necessary sort individual titles chronologically.
5. Shelve.

Newspapers are considered part of the periodical collection but are shelved together on the main level in a more accessible location.

Sort newspaper backfiles for each title by month.

### **Microfilm**

This consists of a collection arranged alphabetically by title; sub arrangement is numerically by volume and issue numbers/chronologically by year and month.

Arrangement within drawers is front to back, left to right:

### **Microfiche**

Two collections: periodicals, and miscellaneous.

Periodical fiche are arranged alphabetically by title; sub arrangement is numerically by volume and issue numbers/chronologically by year and month; sub-sub arrangement is by number of fiche in a set, e.g., 1 of 8, 2 of 8, etc.

Miscellaneous fiche are variously arranged; see circulation supervisor for instructions.

### ***To sort microfiche:***

1. Separate periodical and miscellaneous fiche.
2. Sort periodicals first by a, b, c, if sufficient quantity.



3. Fine sort by title; if individual fiche are being returned to envelopes with several fiche, check to make sure that all fiche within the envelope are in order.
4. File.

## ***Shelving and Filing***

Shelving books presupposes a knowledge of how the classification systems work (Library of Congress or Dewey Decimal)

Shelvers, take note of the following principles, some of which apply to other formats as well:

Never place a book on the shelf without checking the call numbers of books positioned before and after. For instance, never place a book in the first or last position of a shelf or section without checking the call number of the previous or next book, whether that be the next/previous shelf, section, across the aisle or "around the bend." Lack of care here could lead to the development of a separate alphabet.

Never retrieve a book from a shelf by pulling the top of the spine; always push in the books on either side so that the book can be firmly gripped and pulled out.

Never shelve a hardcover book too tall to stand on the shelf with its spine label facing up; spine should rest on the shelf.

Where many books have been removed, push bookends up snug; face books off if necessary so they line up neatly along the outer edge of the shelf

Reshelve books lying on shelves if there is time. Place on the book cart items that belong in a distant part of the collection and return them to the sorting area.

Look for books that have been pushed through from the opposite side; lay them on top of books where they belong; the next shelver will put them away.

Return items for repair to the repair shelf behind circulation counter; the circulation supervisor will give instructions on processing.

Occasionally, shelvers experience light-headedness because of bending down to the lowest shelf and then reaching up to the highest. This is caused by poor posture and can be avoided. Use your knees to squat down, keep your back straight! Other tips to help you avoid occupational overuse syndrome: Don't over extend your hands and wrists--use both hands to lift heavy items. Don't over-extend your shoulders by pushing long lines of books at awkward angles. Use a stool to stand on. Break up the task into manageable units. Take micro-pauses, stretching sessions and vary your tasks to avoid long periods doing the same repetitive motions. Wearing comfortable footwear will help too.

### **Policy Notes**

Shelving books involves more than just putting books back on the shelf; often a certain amount of shelf maintenance is accomplished at the same time. Early in the semester, when circulation volumes are low, there will be time to top and tidy the shelves. However, later in the semester the goal will be to get materials on the shelf as quickly (and accurately) as possible; accordingly, less attention can be given to shelf maintenance. The circulation supervisor will decide what the priorities are at any given time during the semester.

Performance standard for shelving: average of one book cart per hour with 98% accuracy.

Shelvers are part of the service team and are expected to be able to provide appropriate assistance to patrons in the stacks. Because personal stereo headphones may discourage patron inquiries, the use of headphones is not permitted.

If you are unable to empty a book cart during your shift, do not leave the truck in the stacks; return it to the circulation area. Be sure to indicate on the shelving accuracy slip the range of items that you shelved.

### **Shelving quality control project**

Ensuring that library materials can be found in the right spot is a key part of the service provided by the circulation department. Frequent shelf reading of the collection is helpful but is really just a corrective procedure. Accurate shelving by library staff is the ideal way to ensure that material can be found exactly in its place.

This project is primarily intended to monitor the shelving accuracy of library assistants who work in the stacks. By checking the shelving accuracy of a sample from each cart, we can estimate an overall shelving accuracy. A circulation department accuracy rate of over 98% is a reasonable target.

#### **How it works**

1. Sort material and load it on a cart
2. Fill in a shelving slip with the range (e.g. BJ - DS,) your initials, and the date.
3. Note the call numbers of any ten items on the cart. The call numbers should be easy to read, printed on the spine not the front cover of the book. This will make checking easier.
4. Tear off the bottom part of the shelving slip and leave it at the circulation counter. Tape the top part of the slip to the cart.
5. After the cart is shelved, the shelver adds the date and his/her initials. The slip is reattached to the bottom part kept at circ.
6. The shelving is checked. Errors or unfound items are noted. The checker adds his/her initials and the date.
7. The results are recorded under the shelver's name.
8. Any errors are reviewed with the shelver.

Shelving accuracy for individuals and the department is calculated regularly

Range	
_____	
Carted by	
_____	
Date _____	Shelved
by/Date _____	
_____	
Range	
_____	
Carted by	
_____	
_____	Date
_____	
Shelved by/Date	
_____	
Check these call #'s	
Found, correct	√
Found, incorrect, (record where found on back)	x
Not found-Check HORIZON	
_____	
_____	
_____	
_____	
_____	
_____	
_____	
_____	
Correctly shelved	/10
Checked by/Date	

## ***Shelf Reading***

Essential to providing good service to library patrons is the maintenance of orderly shelves. An important part of the shelf reading procedure is the cleanup of shelves.

This procedure statement is intended to cover the steps followed in working with all formats.

Read the call number label, title, etc. of each item to ensure it sits in its proper location on the shelf. Never place an item in the first or last position of a shelf or section without checking the call number, title, etc. of the previous or next item, whether that be the next/previous shelf, section, across the aisle or "around the bend." Lack of care here could lead to the development of a separate alphabet. Check the stack-end signs to ensure that they are accurate

Shift to ensure an even distribution of items on each shelf, always taking into account how many items may be checked-out. Ideally, there should be at least a hand width of empty space on each shelf.

Line up the books with the edge of the shelf

Reshelve items left laying flat on shelves; if they belong to a distant part of the collection return them to the book return truck or sorting area; do not reshelve.

Items that have been pushed through from the opposite side need only be laid down on top of the section from which they came; the next shelver or shelf reader will reshelve.

Never shelve a hardcover item too tall to stand on the shelf with its spine label facing up; spine should rest on the shelf.

Return items for repair to the repair shelf at the circulation counter.

Dust the empty spaces on the shelves and all empty shelves, including the top shelves.

Check the stack end signs to ensure that they are correct.

### **Policy Notes**

Bin boxes for weekly periodicals are labeled by year; shelf reading by year (i.e., not by week or issue number) is sufficient.

Newspapers will be shelf read at the end of each month.

## ***Search Request/Hold***

This procedure provides a way for the library to locate items the patron cannot find and hold them for up to 7 days.

Ask patrons to fill in the first part of the form as completely as possible.

Search for the item; staff will do this for the item three times in the locations listed leaving sufficient time to allow items to move through the system so they can be found.

It is important to verify the call number given by the patron; it is common to find an error here.

If the item has not been found, pass the form onto Technical Services staff so the catalogue record can show that this item is missing. If the item is found, contact the patron and place the item on the hold shelf, for 7 days.

## **Search Request Tips**

Looking for a "Search Request" requires some detective skills. One study shows that in 8 out of 10 cases, a careful and expanded search can lead to success.

Before heading out to the shelves

- check the catalogue record to see that the call number on the search form is correct,
- that the item is actually in the library,
- The format/ collection location of the item (E.g. Reference book.)
- Note the size and age of the item. A skinny book may require a little extra care to be found. An old book may stand out from others around it.
- Note too the last time the item was updated and the number of checkouts. A recently updated item with zero checkouts may be on the "New Books" shelves.
- You should also see if there are other copies or editions that could be requested for the patron.

Once you have a good idea of what you are looking for it's time to start the search. A good place to start is the location where the item should be. If it's not, there you need to start thinking about how one could misshelve the item. Here's a sample of some real life errors:

Looking for	Found at
BX 4827	<u>BV</u> 4827
BS 2575.2	BS 2575.2 (a misshelved book at the end of the shelf above created confusion)
D 810	<u>DA</u> 810

Other common misshelving errors are:

- confusing 0 and O;
- ignoring decimals,
- switching numbers (e.g. 2535 vs. 2353)
- Stopping too soon – a misshelved book may lead you to believe you have reached the end of a sequence; continue to check the shelves above and below.

Act on your hunches – sometimes a call number in the catalogue is wrong! Does it make sense, for example to look for a book on cloning with a call number that leads to commentaries on the Gospel of John?

Don't forget to look behind the row of books on the shelf. Some items get pushed through and out of sight.

## CONCLUSION

### ***You should be able to:***

Explain key library policies including loan periods and fine rates

Checkout items to a user

Tell a user about blocks on her account

Change a user's address.

Find an item in the catalogue and tell about its status including current and prior users

Find a reserve item in the online catalogue

Place a request for a patron in WorkFlows and for a Reserve Book Room item

Check-in an item

Renew an item

Explain system down procedures.

Explain closing procedures

## Glossary

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Bay	A vertical unit of shelves. At Alloway Library there are usually 7 shelves in a bay
Circ	Circulation
CKI	Check-in, to return material
CKO	Check-out, to loan material to a user
External users	Non TWU users including users from other schools, the community and alumni of TWU
Grace	Overlooking fines
Hold	An item on hold has been requested by a patron and is on the hold shelf for the patron to check it out. Patrons sometimes say "I have a book on hold" meaning a book on the hold shelf, or a book set aside under the counter, or a Reserve item for which a Pick-up note was made, or even an interlibrary Loan item
ILL	Interlibrary loan.
iPac	Internet Public Access Catalogue now known as eLibrary
OPAC	Online Public Access Catalogue
PAC	Public Access Catalogue, online catalogue
Range	One side of a freestanding (or wall-mounted) unit of shelves. There may be several bays in a range
RBR	Reserve Book Room, the Reserve Collection. Items set aside by instructors for use by students in a class.
Ref	The Reference collection
Reserve	"Reserve" refers to the Reserve collection not to the idea of 'reserving' an item for use when it comes available.(see request) It is often necessary to clarify what a patron means by "I have a book on reserve" They may mean, a book on hold or a book from the Reserve Collection.
Stacks	bookshelves
Symphony	The integrated library system we use. Prior to Aug 2011 the system was called Horizon

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