

# Norma Marion Alloway Library Policy and Procedure Manual For Student Assistants



## *Counter Assistant Version*

Available online at

[http://www.twu.ca/library/circ/Counter\\_Assistant\\_POLICY\\_AND\\_PROCEDURE\\_MANUAL.pdf](http://www.twu.ca/library/circ/Counter_Assistant_POLICY_AND_PROCEDURE_MANUAL.pdf)

Some material listed here may not be included in the manual for floor assistants.

<b>OUR WORK &amp; WORKPLACE .....</b>	<b>5</b>
<b>JOB DESCRIPTIONS .....</b>	<b>5</b>
Student Circulation Counter Assistant.....	5
Student Floor Assistant; Circulation department .....	7
<b>SPECIAL BENEFITS FOR STUDENT ASSISTANTS .....</b>	<b>9</b>
<b>STUDENT ASSISTANT DRESS GUIDELINES .....</b>	<b>9</b>
<b>LIBRARY MISSION STATEMENT.....</b>	<b>10</b>
Values Statement .....	10
Goals of Circulation Services .....	10
<b>ON SERVICE.....</b>	<b>12</b>
Customer service can be PERFECT: .....	12
Privacy and confidentiality .....	12
Communication .....	13
Conduct .....	14
<b>LIBRARY FLOORPLANS .....</b>	<b>14</b>
<b>A SAFE WORKPLACE.....</b>	<b>16</b>
<b>EMERGENCY / SECURITY .....</b>	<b>17</b>
Door Alarms .....	17
In case of emergency .....	18
Safe and Secure .....	18
<b>CLOSING THE LIBRARY .....</b>	<b>18</b>
Clean up.....	18
Counter services: .....	18
Lights.....	18
Security check .....	19
Closing Security Walk.....	19
Counter assistant .....	20
<b>HOURS OF OPERATION.....</b>	<b>20</b>
A word about snow days.....	21
<b>BREAK SCHEDULES .....</b>	<b>21</b>
<b>THE HORIZON INTEGRATED LIBRARY SYSTEM .....</b>	<b>22</b>
<b>NAVIGATING HORIZON .....</b>	<b>22</b>
<b>HORIZON OPENING PROCEDURES .....</b>	<b>22</b>
To start Horizon.....	22
<b>SYSTEM DOWN .....</b>	<b>23</b>
When the Horizon System goes down.....	24
When the system is restored .....	24
<b>CIRCULATION SERVICES, POLICIES &amp; PROCEDURES.....</b>	<b>25</b>
<b>GENERAL PUBLIC SERVICES.....</b>	<b>25</b>
Access for physically challenged persons.....	25
Cash box .....	25
Copying, printing and scanning.....	25
Laptop computers and word processors.....	26
Notices and bulletin boards .....	26
Supplies .....	26
Telephones and paging.....	26
<b>BORROWERS.....</b>	<b>27</b>

ID Cards.....	27
Borrowers' responsibility.....	27
Limits .....	27
Borrower Records in Horizon .....	27
<b>CIRCULATING MATERIALS .....</b>	<b>33</b>
Circulation Periods .....	33
<b>CIRCULATION TO FACULTY .....</b>	<b>34</b>
Checking out material in Horizon .....	34
<b>DESENSITIZING MATERIAL .....</b>	<b>36</b>
<b>RENEWALS .....</b>	<b>36</b>
To Renew Material when the borrower and items are present.....	36
To Renew Material when the borrower or items are not present .....	37
Requests and Renewals .....	37
<b>STUDY ROOMS.....</b>	<b>38</b>
Policy Notes.....	38
Booking sheets .....	38
<b>INTERLIBRARY LOAN PROCEDURES .....</b>	<b>38</b>
Checking out an ILL item .....	38
Checking-in an ILL item .....	39
Booked Videos Procedures .....	40
<b>POLICIES FOR OVERDUES, FINES AND LOST ITEMS .....</b>	<b>40</b>
Advance, Overdue and Lost Notices.....	40
Fines.....	40
Lost Materials .....	41
Claimed Returned .....	41
<b>BLOCKS IN HORIZON .....</b>	<b>42</b>
Responding to blocks .....	43
Accepting fine payment.....	44
Refunds .....	45
Placing Blocks.....	45
Adding a comment to a block .....	45
Deleting a block.....	46
<b>CIRCULATION SUMMARY.....</b>	<b>46</b>
<b>USING THE CATALOGUE.....</b>	<b>47</b>
Searching the catalogue.....	47
<b>REQUESTS (HOLDS).....</b>	<b>48</b>
Placing Requests in Horizon.....	49
Viewing and Deleting Requests.....	49
In-Library Requests.....	50
Recalls .....	50
<b>CHECK-IN.....</b>	<b>51</b>
To Check-in materials .....	51
Checking-in group items.....	52
Damaged Materials .....	52
Pre-sorting after check-in .....	53
<b>“NOT-OURS” BOOKS .....</b>	<b>54</b>
Numbers to note.....	54
<b>THE RESERVE BOOK ROOM.....</b>	<b>55</b>
Finding material.....	55
To find reserve items in the catalogue .....	55

Checking-out and Checking-in Reserve material .....	55
“In transit” items .....	56
Requests/Holds/Pick-up notes for Reserve material .....	56
<b>COLLECTION MANAGEMENT &amp; SERVICES.....</b>	<b>58</b>
<b>SORTING.....</b>	<b>58</b>
Books and media .....	58
Curriculum Resource Units .....	58
Statistics Canada Collection .....	58
Periodicals .....	58
Telephone Directories .....	59
Microfilm .....	59
Microfiche.....	59
<b>SHELVING AND FILING .....</b>	<b>60</b>
Policy Notes.....	61
<b>SHELVING QUALITY CONTROL PROJECT .....</b>	<b>61</b>
How it works .....	61
<b>SHELF READING .....</b>	<b>62</b>
Policy Notes.....	62
<b>SEARCH REQUEST/HOLD .....</b>	<b>63</b>
Search Request Tips .....	63
<b>CONCLUSION.....</b>	<b>65</b>
You should be able to: .....	65
<b>GLOSSARY.....</b>	<b>66</b>

# OUR WORK & WORKPLACE

## Job Descriptions

### Student Circulation Counter Assistant

#### *About this position*

Counter 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 borrowers. Counter Assistants are expected to know the library's circulation policies and will be required to apply them to ensure fair access to resources. The library is an essential service on campus; consequently a high level of commitment is required of student assistants to be present and prepared to work during assigned shifts.

This is a part-time position for the academic term. Typically, 6 hours per week are broken into 2 or 3 shifts on an assigned shift schedule and may include work at any time during the library's operating hours which include late evenings, Saturdays and Sundays as well as during the final exam period and some statutory holidays. Shift schedules are created to avoid conflicts with assistant's class schedules and other regularly scheduled commitments.

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.

#### *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. Counter Assistants work at the circulation counter as well as in the shelves and other collection areas of the library. Counter Assistants are expected to respond to circulation-related inquiries. Reference and research related queries should be directed to the library's professional staff.

#### *Duties and Responsibilities*

Read and implement applicable sections of the Policy and Procedure Manual

Accurately check-in and check-out 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 appropriately respond to security system alarms according to established policies and procedures.

Assist with closing procedures, when applicable, to ensure the security of the building.

Verify the accuracy of co-workers' shelving according to established policies and procedures.

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. The library's busiest times coincide with the busiest times in a student's year, therefore excellent time management skills are essential, as is the ability to work with stressed patrons. Attention to detail in sorting alpha-numeric 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 at counters. 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, either in oral or written form.

## Student Floor Assistant; Circulation department

### *About this position*

Floor Assistants play an important role in the operation of Alloway Library working throughout the building to shelve and maintain order in the library's resource collections. Floor Assistants are expected to know the procedures for handling, sorting and shelving a wide range of material. They must also be prepared to assist library patrons in locating material on the shelves and answer general questions about the library's resources and facilities. During closing shifts, Floor Assistants play a key role in securing the building and preparing it for the next day. The library is an essential service on campus; consequently a high level of commitment is required of student assistants to be present and prepared to work during assigned shifts.

This is a part-time position for the academic term. Typically, 6 hours per week are broken into 3 shifts on an assigned shift schedule and may include work at any time during the library's operating hours which include late evenings, Saturdays and Sundays as well as during the final exam period and some statutory holidays. Floor assistants are usually scheduled to work at least one closing shift each week. Shift schedules are created to avoid conflicts with assistant's class schedules and other regularly scheduled commitments.

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 pertinent Alloway Library procedures, customer satisfaction, established quality standards and productivity expectations.

### *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. Much of your time will involve shelving library resources. Floor Assistants work independently throughout the library and are expected to respond to patrons' general inquiries. Reference and research related queries should be directed to the library's professional staff.

### *Duties and Responsibilities*

Read and implement applicable sections of the Policy and Procedure Manual

Accurately sort material for shelving.

Accurately shelve material.

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

Verify the accuracy of co-workers' shelving according to established policies and procedures.

Assist patrons with inquiries about the location of library collections and facilities.

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

Assist with closing procedures, when applicable, to ensure the security of the building and prepare it for the next working day.

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

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*

Personal skills: Attention to detail in sorting alpha-numeric material is essential. Able to work without direct supervision and maintain a high level of productivity. High level of personal initiative, dependability and commitment. The library's busiest times coincide with the busiest times in a student's year, therefore excellent time management skills are essential. Self motivated individuals appreciate the challenges of working in an environment that can be very busy or very quiet.

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

Computer skills: General knowledge of menu-driven software.

Physical skills: Floor Assistants do most of their work on their feet. In the course of a shift, Floor Assistant can expect 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, either 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 will be given at the start of the academic year.

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 which 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.

This means that 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: jogging shorts, sweat pants, torn or excessively worn blue jeans, dirty or unkempt clothing.

Examples of appropriate attire would include: slacks, shirts with collars, skirts, dresses. Shorts, blue jeans, tee 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, as a gateway to the global information environment, is to support and further the University's goal of developing godly Christian leaders by providing excellent services and resources which will enable users to achieve their research goal, equip them to navigate effectively and wisely in the information age, and foster a life-long dedication to learning.

### Values Statement

In order to pursue this mission, staff members of the Norma Marion Alloway Library are committed to the following core values:

*Excellence* Library staff members are committed to the highest realistically achievable standards in their roles as educators, facilitators, collection builders, service-providers and information brokers. They are also committed to teaching, promoting and encouraging the goal of excellence in their users.

*Integrity* Library staff members are committed to the practice of ethical behaviour and ethical attitudes in all of their dealings - with vendors, with other university departments, with users and with each other. They embrace the practice of high standards in their professional conduct, their public service and their personal interaction.

*Service* Based on their recognition of the intrinsic value of people, Library staff members are committed to public service, rather than the pursuit of organizational self interest. In all of the functions of the library's technical and public services, staff members are intent on providing personal help and innovative programs that will provide answers for the information queries of users. Staff members also aspire to enhance and improve the abilities of all users in personal research skills.

### Goals of Circulation Services

#### *Goal #1*

To perform circulation tasks accurately and competently

#### **Objectives**

- To ensure that accuracy is maintained in all transactions
- To check-in materials promptly and accurately
- To shelve material quickly and correctly
- To maintain a systematic program of shelf-reading of the collection
- To maintain an efficient Reserve Book Room (RBR)

#### **Measurements**

- Comprehensive training in the Horizon system
- Continuing to monitor shelving accuracy
- Evaluating and revising standards for shelving
- Maintaining regular shelf-reading cycle
- Maintaining and improving communication links with faculty re RBR

- Producing prompt (three days maximum) and accurate catalogue records for the RBR
- Surveying user satisfaction level

### *Goal #2*

To serve users knowledgeably, promptly and personably

#### **Objectives:**

- To ensure that staff members (including student workers) are fully knowledgeable of service parameters
- To ensure that staff members respond promptly to user needs
- To ensure that staff members serve in a friendly and courteous manner
- To achieve a high level of staff involvement and staff satisfaction on the job
- To provide staff with basic information service skills training
- To ensure that communication to users is clear, correct and informative

#### **Measurements:**

- Mandatory staff training workshop or video on customer service
- Refresher training on Horizon circulation module each semester
- Continuous training, communication and reminders to staff re changes, innovations, developments, equipment and technologies.
- Advance scheduling to ensure adequate staffing at the circulation counter
- On-going reminders and education of the staff on the principles of customer service
- Development of standards for customer waiting time, response-time to phone inquiries, etc.
- Suggestion boxes with posted responses (with staff standards for responses), and also an electronic suggestion box on the library website
- Development of user surveys to assess service quality
- Improvement of the orientation of new staff.
- Periodic review of staff working conditions
- Recognition and reward of staff achievements
- Encouraging staff suggestions for innovations, and implementing those that benefit the service mandated of the department
- Regular review of signage, notices, etc.

### *Goal #3*

To serve users in an ethical way

#### **Objectives:**

- To perform circulation tasks with honesty and integrity
- To administer public facilities and materials fairly and impartially
- To exercise discretion and confidentiality

#### **Measurements:**

- Delineate clearly to staff all areas of confidentiality concerning user records and information
- Give clear direction to staff and student workers concerning legitimate access to petty cash and debit cards

- Establish clear guidelines for fair and impartial fine payment
- Maintain or create policies that are fair and equitable (due dates & times, grace periods, fine rates, end of semester collections, etc.)

### *Goal #6*

Enhance skills of student library workers

#### **Objectives**

- Improve student workers' understanding of general library operations
- Improve library research skills
- Improve communication and customer service skills
- Enhance workers awareness of copyright issues
- Foster an improved sense of solidarity and community in the library

#### **Outcomes**

- Student workers that are better qualified and more competent.
- A higher level of interest among student workers in their assigned tasks
- More efficient use of student work time
- Use of student workers as knowledgeable information dispensers

From Library Strategic Plan 08/2000)

## 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 competently respond to questions pertinent to circulation. We can handle questions about loan periods, requests, fines, photocopiers and "where are" 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 which require that organizations:

- 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 borrowers.
- Although we have access to personal information and borrowing records of our users, this information is private and is never discussed with other borrowers
- When transactions are completed we clear the screen so that borrower 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 discrete 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 which 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.

## Conduct

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

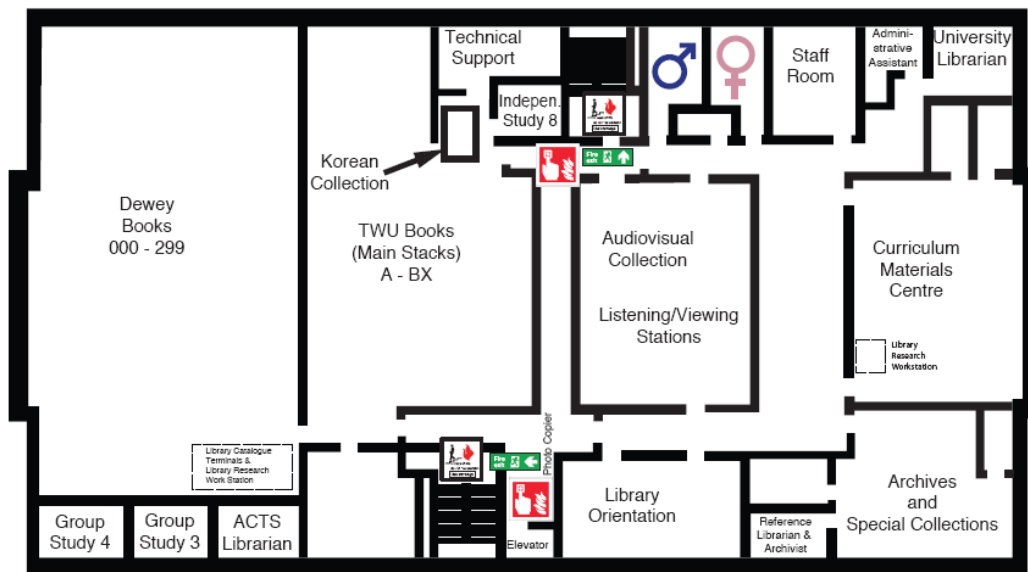
Circulation counter computers are not to be used for non work-related purposes such as surfing the web, online games, chat or messages. Accessing webmail for any reason other than arranging a library-related shift-change is not permitted. Personal communication devices, mobile phones and MP3 players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

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

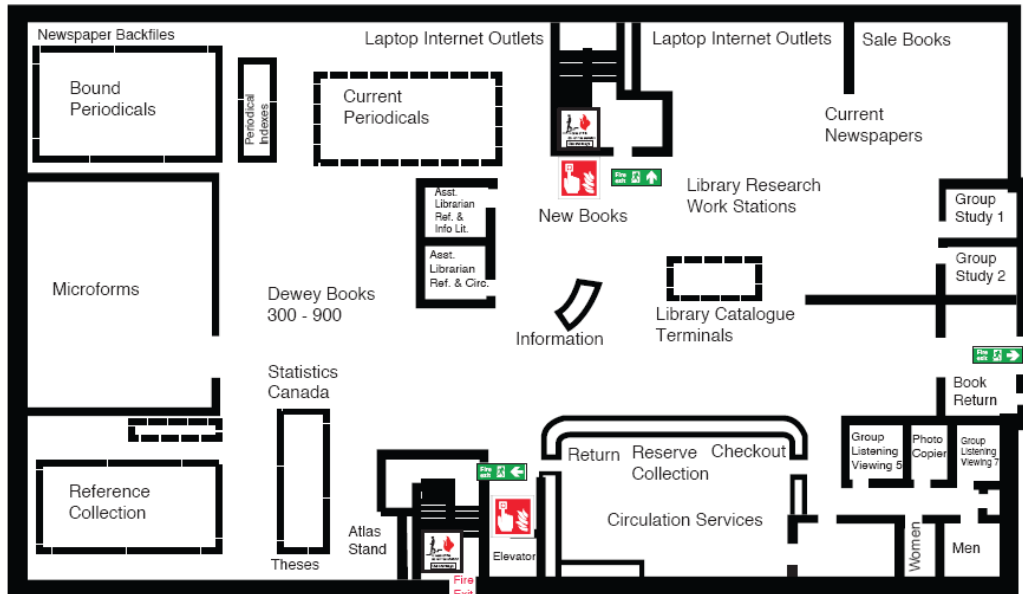
Student assistants should not expect to do homework while on duty and should take care to clearly distinguish between the times when they are working for the library as a student assistant and working for themselves as a student.

## Library Floorplans

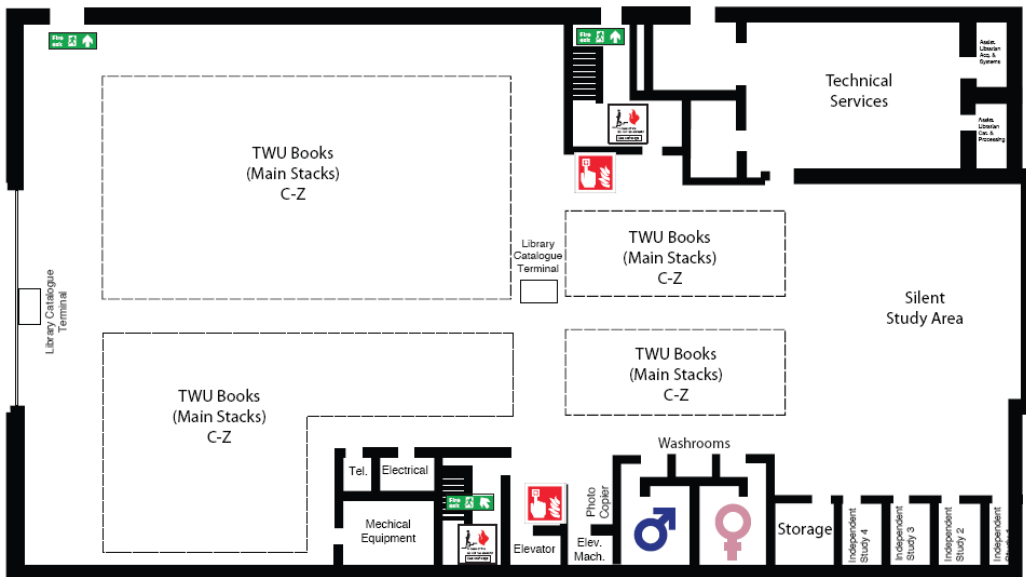
### Upper Level



## 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 the two way radio 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 (2099) is posted on all library phones. 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 systematically walk through the building or area you are assigned to check and report back 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. Push in the chairs. Leave the building tidy for the next day. If patrons have left personal belongings, put these behind the circulation counter. They can be transferred to the Lost and Found the next day.

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 minimal 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 check-out 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 prior warning of closing, all the building lights are flashed off and on 30 minutes before closing and just prior to the security check.

## 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 the other student assistant then begin the following security procedures.

## Closing Security Walk

During the security check if any patrons are found on the UL or LL the staff person will ask them to leave, and wait until the patron has left that level.

<b>Staff person:</b>	<b>Student assistant:</b>
lock elevator and take south stairs (circulation counter side of building) to upper level of library	take north stairs to upper level of library
turn off UL photocopier	men's washroom (check stalls)
Orientation room(go inside)	custodian's room
Archives(go inside)	Audio-visual room
Curriculum room and storerooms	women's washroom (check stalls)
display cases in hall	staff room and office
	proceed to main stacks
Dewey room, turn off lamps	study room and Office
	Circle around the perimeter of the area from the A-B stacks to the interior window wall and the north wall carrels
Study Rooms	north perimeter
	Carrels along window
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	take the north stairs to lower level. Check the stairwell fire exit & under the stairs
turn off LL photocopier	walk around the perimeter of the lower level along the north/west/south walls, looking in the carrels and along the aisles
men's washroom(check stalls)	
custodian's room	
women's washroom.(check stalls)	pump & electric room doors
Independent study rooms #1-5	
Study area.	
Check Technical services door	
	Re- establish contact with partner

exit through north doors and proceed to the main level

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

exit through south doors and proceed to the main level

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

Group study rooms #1 & 2

unlock elevator

Study Room 5, photocopy room (turn off copier), Study Room 7, custodian's room, men's and women's washrooms

### 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 turn off the ML photocopier and 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.

## 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

If you work 4 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
6 hours	30 minutes without pay and 15 minutes, or two 15 minutes
7 hours	60 minutes without pay and 15 minutes, or 30 minutes without pay and 15 minutes, or two 15 minutes
8 hours	60 minutes without pay and two 15 minutes, or 30 minutes without pay and two 15 minutes

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 taken concurrently, nor used to leave early (or arrive late!)

Arrange your breaks with your supervisor.

# THE HORIZON INTEGRATED LIBRARY SYSTEM

The Horizon system is an integrated library system (ILS). It assumes users will work back and forth between circulation, the catalogue (sometimes referred to as iPac) and Technical Services. Checking out a book in circulation will immediately change the item's status in the catalogue. Some transactions, such as requests, will require you to move from the catalogue to circulation.

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 to ask staff to override the block or advise the patron to take steps before you can check-out material.

## Navigating Horizon

The first rule of working with any computerized program is *Read the screen*.

Listening to the computer is a good rule too, as the Horizon program uses beeps and tones to communicate with you, the operator.

The Horizon system 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. When an operation button has a dotted box around it, hit **Enter** or spacebar to select that box. An underlined letter means you can select that letter with the keyboard, or Alt + letter to execute the indicated operation. Other shortcut keys include:

- F2 takes you to the catalogue
- F4 to find borrower
- F5 to create a borrower
- F6 to edit a borrower.
- F8 switches between the checkout and check-in windows
- Ctl +F6 switches between the catalogue and circulation windows
- Esc will cancel some screens or dialogue boxes.

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.

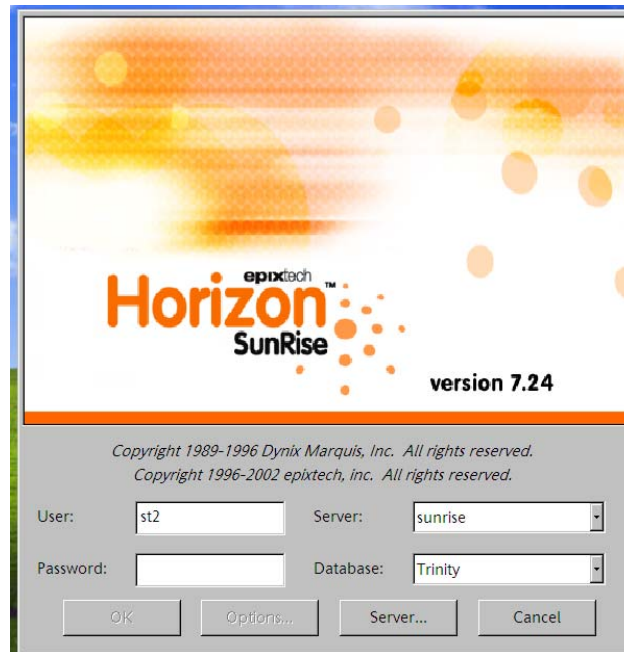
## Horizon Opening Procedures

Usually the system will be running when you begin your shift. If it is not, you may need to open up Horizon.

### To start Horizon

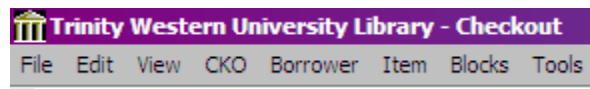
1. Click on the Horizon icon. A screen will open up for Horizon. Make sure the appropriate Horizon User, usually ST2 is entered. Type in the password for that user name. (Make sure Caps lock is off!)

2. Enter or OK. The system automatically opens up the catalogue and circulation modules

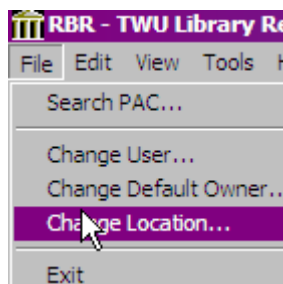


3. Wait for the hourglass icon to disappear before using the mouse or keyboard. Horizon is now ready for action.

Horizon should open to either the Trinity Western University Library or RBR-TWU Reserve Bookroom depending on the location of the computer terminal.



If the location is incorrect, change the location using the file menu.



## System down

It is still possible to provide essential circulation services in the event of a system failure. During such occurrences, library workers will collect data for entering into the system once it is up and running again. Essential data include: the borrower's name and bar-code number; the item's title and bar code. Staff may hold items under the counter for patrons willing to wait until Horizon is operating again.

When the Horizon System goes down

Note the time of the system failure and any on screen error message. Also note if there were any unusual circumstances prior to the system failure.

Post “system down” signs. These are kept in the drawer or cupboard beside the terminal

During a power failure use system down sheets to record checkouts. If power is available use the “system down.txt” file on the computer to scan in barcodes.

<b>Borrower Bar-code</b>	<b>Borrower Name</b>	<b>Item Bar-code</b>	<b>Item Title/copy #</b>	<b>OK</b>
333930000051633	Gene Eugene	2339300000615963	Your long year	

During system failure we may limit the number of items checked-out to a maximum of 5.

Encourage patrons to hold items if possible until the system is restored. Materials will be held under the counter 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 system is restored

Remove “system down” signs. Return them to the cupboard or drawer beside the terminal

Close and restart Horizon where needed.

FIRST check-out material using data gathered from system down sheets.

THEN, once checkout is completed, check-in items making sure that the check-in time is changed to reflect time of system failure. (Use the Book drop setting) Restore to correct time when all items have been checked-in.

Return completed data sheets to the cupboard or drawer beside the terminal.

# 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. The library prefers not to accept large denomination bills ( \$50 or \$100) and may not have enough cash on hand to make change for these notes.

### Copying, printing and scanning

*Photocopiers* are located on all three levels of the library. The copier/printer/scanner on the main level also functions as a printer for the public workstations and catalogues. All copiers have scan-to-email functions.

Copiers for both print and microform formats are provided for the convenience of patrons. Two photocopiers/scanners are equipped only with a print card reader; the other with both print card reader and coin unit.

Microform printers are equipped with print card readers only.

It is the responsibility of staff to attend to minor equipment problems such as paper jams and to replenish paper and toner supplies.

The library undertakes to provide copies of readable quality; not necessarily presentation quality copies such as may be required for resumes or overheads. Accordingly, refunds for less-than-perfect quality copies will only be given where the machine 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 promptly 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 key operator, the library Administrative Assistant.

### *Print Card Sales*

Print cards 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 are no refunds for unused money on cards.

Lost or misplaced cards that are turned in to the circulation counter will be held for a maximum of thirty days only. 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 by owner after 30 days will be forwarded to the finder. Library staff and student workers are exempt from any claims.

The library Secretary has been designated as the key operator for the print card system. This person is responsible to replenish the supply of cards and attend to equipment malfunctions.

### Laptop computers and word processors

The library is primarily a place for independent study, a place for quiet and thoughtful reflection. It is the responsibility of the laptop user to demonstrate a sensitive concern for others by using headphones and muting sound schemes.

Internet connections for laptops are located on the main level. Electrical outlets are available throughout the building. Wireless access is available to eligible users throughout the building.

### 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.

### 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 note paper 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. Patrons will be directed to use the public telephone located at the front entrance or those located elsewhere on campus.

Many people pass through the library on a daily basis. 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.

Cellular telephone may be used only in the front lobby and stairwells.

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 4 digits of the phone number. Dial 9 to call off-campus numbers.

Regular staff have codes to use for making long distance calls.

## Borrowers

### ID Cards

Material must not be checked-out unless the patron presents his or her own library card or picture ID. Expired cards may be accepted in the library only if the patron is current in the library database. Expiry stickers for students are issued by the Office of the Registrar. Lost ID cards are turned in to the Housing Office (lost and found.) The Housing Office issues cards to all TWU students and employees

*Former students and employees may use their student ID as Alumni borrowers; in that case the expiry sticker is not updated. The patron must have a TWU Alumni sticker, issued by the Alumni office and i pay \$15 per year for library privileges. Refer to the patron's Horizon record to determine expiry date.*

### Borrowers' responsibility

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

- immediate notification of a change of address or phone number;
- returning all materials when due; and
- adherence to all Library policies as stated in the policy and procedure manual and in Library Information Guides 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 borrowers and TWU staff may check-out up to 30 items; Graduate students: 40 items and Faculty: 60. For Undergrads, Graduate students, TWU staff and Faculty this limit includes a maximum of 6 media items.

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

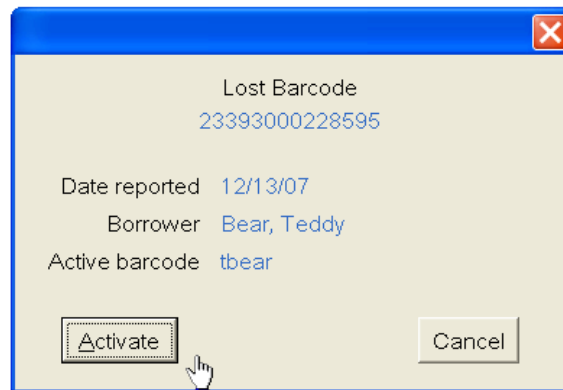
### Borrower Records in Horizon

*You can practice any of the following procedures with Sergeant Pepper's borrower record or ask staff for assistance. Guides located by the keyboards at the circulation counter will help you select the correct codes as well as what to enter in the Campus address field*

Identifying the borrower is the first step in most circulation transactions. In most cases, the barcode on the borrower's ID card is scanned to identify the borrower.

If Horizon indicates the borrower is using a Lost Bar-code be sure to confirm the identity of the cardholder. Update the borrower's record if necessary to indicate that the card is no longer "lost."

*How to find a borrower if the card is not available:*



1. Press **F4** or, from the Circulation menu bar select **Borrower> Find Borrower**
2. Select a search index
3. Enter the data, such as the name of the person you are searching for. Horizon will find the borrower or a close match to the data you entered.

*To edit a borrower's record*

Generally, you will edit a borrower record if the borrower has an address change, a new phone number or replaces a lost card or damaged barcode. Horizon automatically asks for address update information on a regular basis.

1. Find the borrower, or scan the borrower's barcode
2. From the circulation menu bar select **Borrower>Edit Borrower** or **F6**. Carefully change any data as required. Be aware that it is possible to have different sets of data for a borrower, such as 2 telephone numbers listed as 1 of 2 and 2 of 2.
3. Save and close the edit borrower window

### *Borrower barcodes*

A borrower should have only one active barcode. Here are the steps to editing barcodes;

1. What happened to the old barcode? Is it lost or stolen?  
 Fill in the **date lost** then click **New**. Scan in the new barcode
2. Has the card been confiscated? (A defective card replaced by housing or some campus department)  
 Click on **Delete**. Scan in the new barcode. (Note that the cursor jumps to the date lost field, even if the barcode isn't lost)
3. Does the patron still have the old card and a new card? Is the old barcode damaged or worn out?  
**Delete** the old barcode in Horizon. Peel it off or stick a new barcode onto the old one; If there are two cards, tell the patron that the old card is no good. ("Put it in your scrapbook", "Cut it up") Scan in the new bar code
4. Save and close (**Enter, Enter**)

### *Btypes and Bstats*

Btype and Bstat are code words for "borrower type" and "borrower statistical class." Btype determines all the privileges a patron receives (fines, number of items, limits on types of items, loan periods etc.) Bstat helps us determine how to collect money for unpaid fees and tells us which institution, if any; the borrower is connected to (TWU, ESLI, Summit Pacific College or other organization.)

**Edit: borrower**

Borrower No. 5064    Creation date 09/06/1997    Regist. Date 06/04/2001  
 No. of CKOs 719    Last Updated 07/18/2001    Last CKO Date 08/16/2001  
 Name Bear, Teddy.    ID tbear

Barcodes   tbear 1 of 1  
 Barcode tbear    Date Lost

Bstat   TWU - Btypes UG, G, FAC or STF 1 of 1  
 Stat Class tw    TWU - Btypes UG, G, FAC or STF    Codes  
 Btype UG    Undergraduate Student    Codes

   Page 1 of 4

Make sure the bstat class description matches the Btype

### Borrower Information Fields

The library routinely sends all notices by email. Occasionally we phone patrons. When those options are not available we use campus mail. Therefore, we need at least **two** ways to contact the borrower. Our preferences, in order, are:

1. Email address (the address they read)
2. Phone number (the number they answer)
3. Campus address such as mail box number, or office location
4. Mailing address

Once we have two reliable ways to contact the borrower, there is no need to add extra information.

**Edit: borrower**

Addresses   perm.: : dom: Box 60: 1040 S W St 1 of 1

Addr. Type  Perm     temp.    Begin    End

Campus address Box 60

Street

City, province

Postal Code    Current Phone #

Mail Sort type dom    Domestic    Codes

Notice By  Std     E-Mail    email addr. biornstad@agape.twu.ca

Note

   Page 2 of 3

If the patron is from an affiliate school or is an external borrower, put the patron's B-type or home institution name in the campus address field (i.e. Alumni, or Regent College etc)

### Creating borrowers

If a borrower has a valid card but is not in the database you will need to “create” a borrower.

1. Open the CKO window
2. Press **F5** or, from the menu bar select **Borrower >New borrower**


Carefully enter data as required. Last name first. e.g., Jones, Martha.


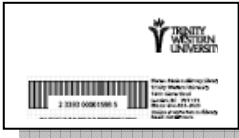


The codes button reveals acceptable codes for Btype and Bstat.

The **page down** key, **arrow** keys and **tab** key will move you through the screens quickly without switching from keyboard to mouse.

3. Be aware that it is possible to have different sets of data for a borrower, such as 2 telephone numbers listed as 1 of 2 and 2 of 2.
4. Save and close

### Borrower information Summary


CARD	BSTA T Org.	BTYPE Privileges	NOTE
Trinity Western University			
	UNDERGRAD	tw	UG
	TWU Extension	TWX	TWX
	TWU Extension Bellingham	B	UG
	ESLI	es	UG/STF/FAC
	ACTS (GRADUATE)	ac	G or STF/FAC
	GRADUATE	tw	G

	STAFF	tw / ac	STF	
	FACULTY	tw / ac	FAC	
	Retired faculty	tw	RFAC	
	CanIL (Canada Inst. Of Linguistics)	ci	UG/G/STF/FA C	
Summit Pacific Bible College				
	UNDERGRADUATE/ STAFF/FACULTY	AFsp	SP	Must have a white TWU expiry date sticker to borrow material.
Trinity Western University... Borrower Library Card				
	ALUMNI \$15/year			
	Can obtain alumni ID from the Housing Office or Alumni Office	al	EXT	
	COMMUNITY \$60/year	comm	EXT	
	COMPLIMENTARY/ Spouse/child of TWU employee (pays fines)	comp	EXT	Indicate why the card is issued e.g. "spouse of faculty"
	COMPLIMENTARY/ President's Circle (no fines)	vip	SPEC	
Other Affiliate/Reciprocal				
	COLUMBIA BIBLE COLLEGE	CBC	AFcb	
	COPPUL (GREY)	CPG	AFac	Include University name in address
	COPPUL (YELLOW)	CPU	AFac	Include University name in ad-

---

dress

---

	REGENT	RGT	AFac
VST	VANCOUVER SCHOOL OF THEO- LOGY	V	AFAC

---

## Circulating materials

### Circulation Periods

When checking out items, be sure to read the Horizon screen to clearly communicate to the patron the due date of borrowed material.

*21 days* the date stamp is changed every morning at the beginning of the workday. Fines are charged beginning on the date due.

Types of material: TWU Books, Dewey books, Curriculum collection material with LT call number

*7 days* The date stamp is changed at the beginning of each workday. Materials are due on the date stamped on the "one week loan" date due slip. Fines are charged beginning on the date due.

Types of material: Audio-visual materials (videorecordings, audio cassettes, CDs, DVDs)

*2 and 3 day* Materials are due by closing time on the second or third day. E.g. a 3-day item checked-out on Monday is due by closing time on Thursday. Fines are assessed at \$5 per day. Renewals are not permitted.

Types of material: Reserve collection material

*8 hour* Materials are due 8 hours after checkout or, if the library closes before the 8 hours elapse, then they are due one hour after the library opens the next day. Hourly fines are assessed at 50¢ per hour or portion of an hour. Renewals are not permitted.

Types of material: Reserve collection material, Audio recorders

*2 hour* In-library use only. Material is due 2 hours after check-out, or by closing time if there are less than 2 hours until the library closes. Fines are assessed at \$1 per hour or portion of an hour. Renewals are permitted if the item is not in high demand, or has not been requested.

Types of material: Reserve collection, Headphones, Study room keys, Calculators

### *Non-circulating*

- Reference collection
  - Periodicals (including indexes and abstracts)
  - Newspapers
  - Telephone directories
-

- Microforms
- Statistics Canada publications
- Theses collection

Certain materials in this category may be circulated, where, in the judgment of the librarian, circumstances warrant the exception.

## Circulation To Faculty

The faculty of the University and affiliated colleges have been granted extended borrowing privileges for some library material. The rationale for extended loan periods is to facilitate class preparation and research.

*Note* Refer to the previous section for the basic discussion of circulation periods for library patrons. Discussed below are only the exceptions for various material formats that have been granted to faculty. For those material 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.

Though most materials are circulated to faculty for extended loan periods, items 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. The faculty member will be advised accordingly.

*Reserve collection materials* (including 2 hour materials) may be checked-out only for those courses where the requesting faculty member has placed the material on reserve for her/his class; for other courses they must secure the permission of that professor. Permission to borrow Reserve collection items normally shelved in the Reference collection must be obtained from the librarian in charge.

Reserve material should be checked-out on-line even if it is the instructor's own material; the library needs to keep track of who has the material in case questions arise later.

*Reference collection material*, Stats Canada items, Student theses and periodical materials do not normally circulate. Exceptions may be given by regular staff (not student assistants) to faculty for special uses, such as classroom instruction. The loan period is negotiated, clearly defined, and is the shortest possible time. Horizon 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* should be checked-out using a document envelope; edit the due date in Horizon and identify the contents on the front of the envelope. (E.G. "Newsweek July 12, 2001)

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

### Checking out material in Horizon

Checking out materials begins by opening the checkout window-- **CKO** on the menu bar, or click the Checkout icon, or click on the gray checkout window bar or press **F8** to switch from the check-in window to the checkout window.

1. Identify the borrower by scanning the ID card bar code.
  - If there are current blocks on the borrower you must deal with them. ([See next section](#))
2. Identify the item by scanning its bar-code.
  - For some items you will need to make sure all the pieces are together, for example a book with a map in the back, or a set of CD's in a single case.
3. Read the screen to ensure the item has been entered. Place the item face down and proceed to the next item.
4. Read the screen to advise patron of due dates. The patron may select a date due reminder.
5. Desensitize material.

### *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 Horizon record, and by a label on the cover of the item.

When one component is missing, it diminishes or even ruins the value of the whole set. We can protect our resources by carefully ensuring that the label/or check-in note in Horizon are accurate, both at check-out and at check-in. We must be able to account for all the pieces so we can be sure that the borrower is getting a complete set, and won't be charged for pieces that were not present at the time of check-out. We also want to be confident that when we do contact borrowers who return incomplete items, that we are justified in doing so.

A complete check may take extra time at the circulation counter, but will save us the time and confusion involved in tracking down pieces from a borrower. It will protect us and library users 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 check-out, use the **edit item** button to add a comment in the check-in note.

5. Advise the borrower that the material is accounted for “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 often kept in the back of the book, although some may be in the front. 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 doesn’t get 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 check-out 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 borrower to return the disc with the book. Advise the borrower 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.

## **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, borrowers may renew material if it is not requested by another patron. The renewal period for books and audio tapes is always the same as the initial loan period – 120 days, 21 days 7 days, etc. Most valid borrowers can renew material twice online and ask for two additional renewals by phone, in person, or by email. More than 4 renewals may be permitted at the discretion of staff if the material is present at the time of renewal. 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.

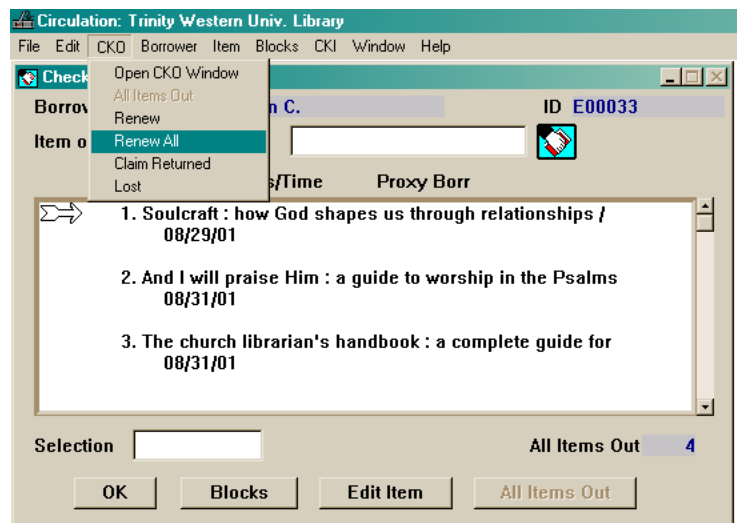
If the item has been declared lost, it must be present to be renewed.

To Renew Material when the borrower and items are present

1. Identify the borrower
  - If there are current blocks on the borrower you must deal with them. (See next section on [Blocks](#).)
2. Identify the item
3. The system will ask you to confirm the renewal and confirm that the item is present.
4. Read the screen to ensure the item has been renewed. Place the item face down and proceed to the next item.
5. Read the screen to advise patron of new due date. The patron may select a date due reminder.

### To Renew Material when the borrower or items are not present

1. Identify or find (F4) the borrower
  - If there are current blocks on the borrower you must deal with them.
2. Use the **all items out** button and then use the mouse to select the items to be renewed.
3. In the **CKO** menu click the **renew** or the **renew all** option . Be sure to scroll up and down the list to see all the items in the borrower's record.



4. The system will ask you to confirm the renewal and ask if the item is present.
5. Read the screen to ensure the item has been renewed.
6. Read the screen to advise patron of new due date.

### Requests and Renewals

When a borrower asks to renew an item requested by another patron you must advise the current borrower 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 borrower decides to return the item, check it in and place the item on the hold shelf.

## Study Rooms

### Policy Notes

Study rooms are intended for the use of students.

Group study rooms are for groups of 2 to 6 persons involved in legitimate, interactive group study. Group study rooms may be signed out to a single student if all other rooms are occupied but, only for a limited period of time; the individual may be displaced by a group at the end of the time period.

The use of study rooms is subject to the guidelines posted in each room.

- Group Rooms 1, 2, 3 4 and 5 are for 2-6 occupants
- Group room 4 has a DVD and VCR. It is for 2-6 occupants (but can hold up to 10 for special cases) . It is available to any group regardless of whether or not they are using it to view media; however we prefer to use it for larger groups and groups that need to watch or listen to media together.
- Study Rooms 7 and 8 are for 1-4 occupants.
- All the rooms have electrical outlets and all the rooms, except for independent rooms, have whiteboards.

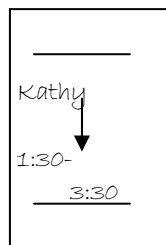
The maximum length of time in one stretch for which rooms may be booked is generally 2 hours because the loan period is 2 hours. To avoid fines, borrowers must renew their booking before the end of the 2-hour loan period.

### 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.

Patrons 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

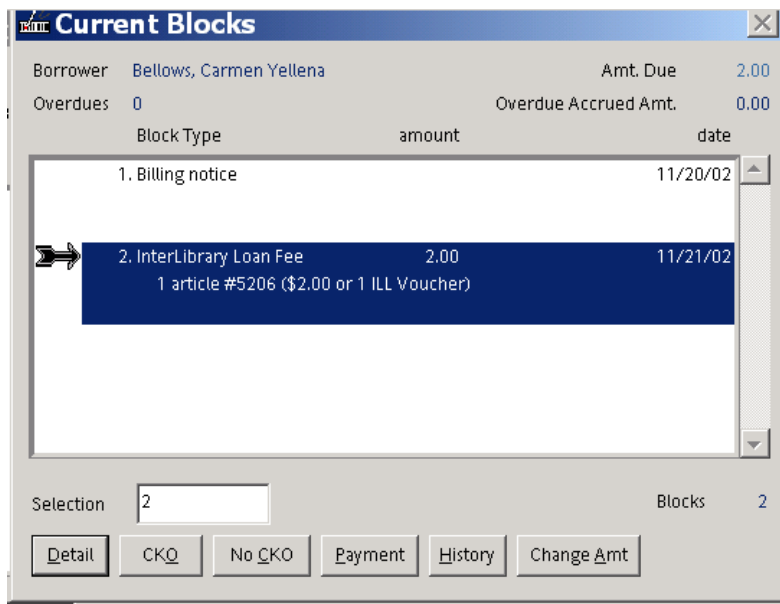
1. Print patron's name at beginning of the block being reserved, neatly and legibly.
2. Write the time span being reserved beneath the name. e.g.: 1:30 - 3:00
3. Draw in vertical lines to indicate the length of reservation and horizontal lines to mark blocks of time.
4. Check-out the room key and advise the patron of the due time.



## Interlibrary Loan Procedures

### Checking out an ILL item

1. 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 Horizon account. (Staff and Faculty are not charged for ILL items)
2. The item is placed on the ILL shelf behind the circulation counter
3. The patron asks for the item at the circulation counter
4. The item is found by looking for the patron's name on the yellow slip attached to the item
5. Scan the patron's card to see what charges are due. (Staff and Faculty are not charged for ILL items)
6. If there are charges due the patron may pay cash, cheque or voucher (if indicated), or defer payment. (The library prefers payment rather than to send charges to students' accounts. Charges under \$10 must be paid in the library.)



If the patron pays cash for the item, select **Payment**. Put the money in the cashbox

If the patron pays by voucher, fill in the voucher with the article number and patron's name.

Select **Payment**.

Put the voucher in the cash box.

Colour-coded vouchers are non-transferable and good only for the academic year for which they are issued.

Vouchers can be used to pay either a \$2 fee (for an article) or \$5 for (for a book.)

7. The patron signs the yellow slip. For books, advise the patron of the due date indicated on the slip attached to the item.
8. In the case of photocopied material, there is no yellow slip; 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.
9. Desensitize the item and keep the yellow slip.
10. The yellow slip is filed by due date in the ILL file on the circulation counter

### Checking-in an ILL item

1. The patron returns the item, usually it is handed to counter staff, but it may be returned to the drop box
2. Check the item's due date and find the yellow slip in the ILL file. Match the title of the item (or ID number for foreign language items) with the card

3. 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 through the Media Exchange Cooperative (MEC) 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

MEC videos are signed for; the signed slip is returned to the circulation coordinator's desk

Returned MEC videos are placed on the circulation coordinator's desk.

## Policies for overdues, fines and lost items

### Advance, Overdue and Lost Notices

Notices are sent as a courtesy to 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 borrower's responsibility to report a change of address. The library sends notices in good faith that they will be delivered. The date due reminders at the time of check-out 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 declared, "lost." The borrower 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 paid-for item is returned to the library. These costs are usually more than the maximum fine that will be assessed so it is in the patron's financial interest to return lost items.

### Fines

Fines are assessed to provide an incentive for library users to return materials by the due date. Overdue fines will be waived 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 in 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. Fines and fees under \$10 will not be sent to accounting.

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

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 accumulate to the maximum amount of \$15.00 for each item overdue. Fines are assessed starting with the due date and are levied every day the library is open. For most of the material there is some degree of grace in the assessing of fines, to allow for cases of unforeseen circumstance which may prevent the prompt return of library material.

Fines for overdue material begin to be calculated on the due date. So, there are 4 or 5 days of "grace" depending on whether you start counting on or after the due date.

**EXAMPLE**

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

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

*General Circulation (all materials except Reserve & media materials)*

20¢ per day per item to a maximum of \$15.00

*7-Day Circulation* Fines are \$1.00 per day per item to a maximum of \$15.00 per item.

*Reserve Fines* accumulate only during hours the library is open. There is a 15- minute grace period before fines begin to accrue. The maximum fine is \$25 per item.

**Fine Rates for Reserve Materials, Study Room Keys and Headphones**

Item type	Rate
(RON) eight hour/overnight reserve	.50/hour
(R2D/R3D) 2-3 day reserve	\$5/day.
(R2H) 2 hour reserve	\$1/hour.
Study room keys	\$1/hour.
Headphones	\$1/hour.
Video tapes	\$1/day

*Recalled material* 50¢ per item for each day

Lost Materials

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

Two or more current lost items will block a patron from borrowing material until the lost items are returned or paid for.

Claimed Returned

If the borrower claims to have returned an item, but the library does not have evidence of this, the item can be changed to Claimed Return status. The item remains on the borrower's record and if the item is not found at the end of 90 days, the borrower will be charged replacement costs for the item. The library will systematically search for claimed returned items on a regu-

lar basis during the 90 days. Borrowers with claimed returned items should be encouraged to check again for the item -- under the car seat, with friends and room-mates, etc.

Claimed returned items will be listed in the patron's current blocks.

Two or more current 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. Borrower 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. A CR notice is generated and sent by Horizon
4. Staff search monthly for three months for CR material. A comment is added to the block detail after every search.
5. If the item is found, it is checked-in. Staff may assess fines depending on the circumstances of the item's recovery.
6. 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.

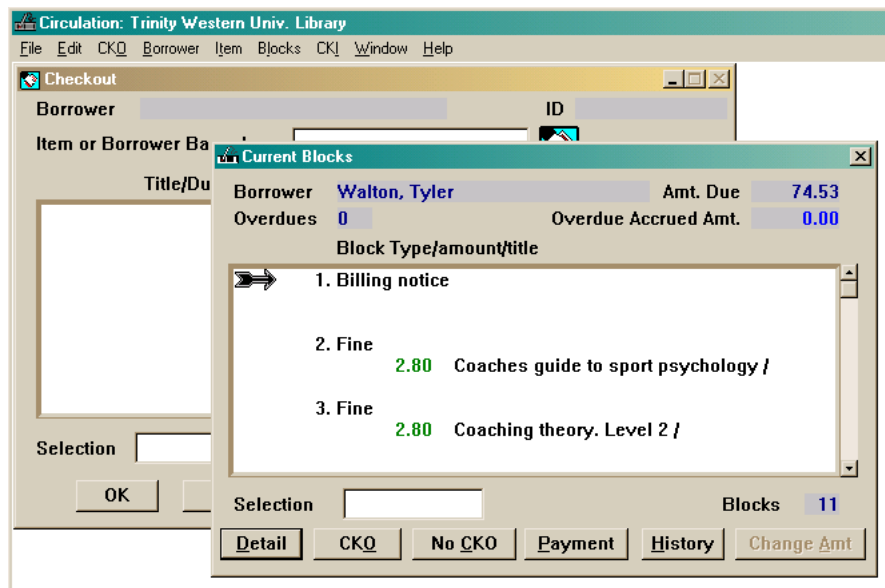
## Blocks in Horizon

Blocks are placed by the system to give the library or the patron messages. Some are placed automatically by the system and some can be placed by library staff. There are really two kinds of blocks. Some blocks stop the borrower from checking out material until the borrower takes action, by paying a fine, for example. Other blocks interrupt the normal check-out transaction to ask for or provide information.

Blocks are used to enable the library to communicate to borrowers about situations that require prompt attention. Blocks should not be overridden until the borrower is advised of the situation. Student workers may

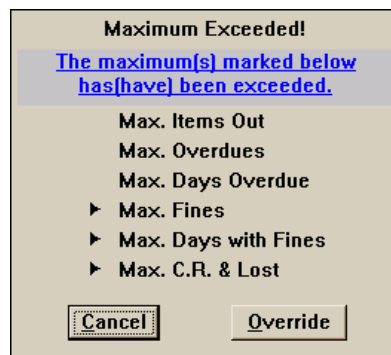
override blocks if they have a valid reason to do so. If you are unsure about overriding a block, ask a regular staff member for an override or, cancel the transaction.

A transaction maybe canceled if the borrower is unable to resolve the block.



## Responding to blocks.

This is where "Read the screen" becomes important! When you identify a borrower you may receive a block message. Tell the patron what the block is--it may be for fines, an item on Hold, or another message such as address correction or "Pick-up your umbrella at the circulation desk." Some messages may be old news to the borrower; he may know about the fines outstanding already. The message will stay until the situation is resolved either by an action on the borrower's part (payment, returning items), by the passing of time, or by deleting the message when appropriate.



The Current blocks screen will allow you to:

- get Details about a selected block,
- go to CKO,
- cancel the transaction (No CKO)
- take a payment
- see what the borrower owes in current fines and what her accrued fines are (fines as of today)
- see past blocks that have been resolved in History.

If the patron has exceeded any limits set by the library, the Maximum Exceeded block will appear.

The type of excess will be indicated by an arrow on a list of possibilities.

Maximums are:

Type of Maximum	To remove block:	Override to allow check-out?*
Number of items out. Limits vary according to item type and borrower type.	Return items so that the total # of items out is less than the maximum	Do not override except for some reserve counter items for example, headphones, book, and CD
Over \$20.00 payment due	Make a payment to bring amount owing to under \$20	Do not override until payment is made
Fines unpaid for over 14 days	Pay fines	Do not override until payment is made
2 or more items lost or claimed returned,	Find items	May be overridden at the discretion of regular staff
6 or more items overdue	Return or renew items so that less than 6 are overdue	Do not override unless borrower is renewing overdue material

Type of Maximum	To remove block:	Override to allow check-out?*
Items overdue for over 14 days	Return or renew items	Advise borrower that unless the material is returned a charge of \$10 per item plus the cost of the material will be made.  May not be overridden unless borrower is renewing overdue material
Recalled items 3 days (or more) overdue	Return items	Do not override until material is returned

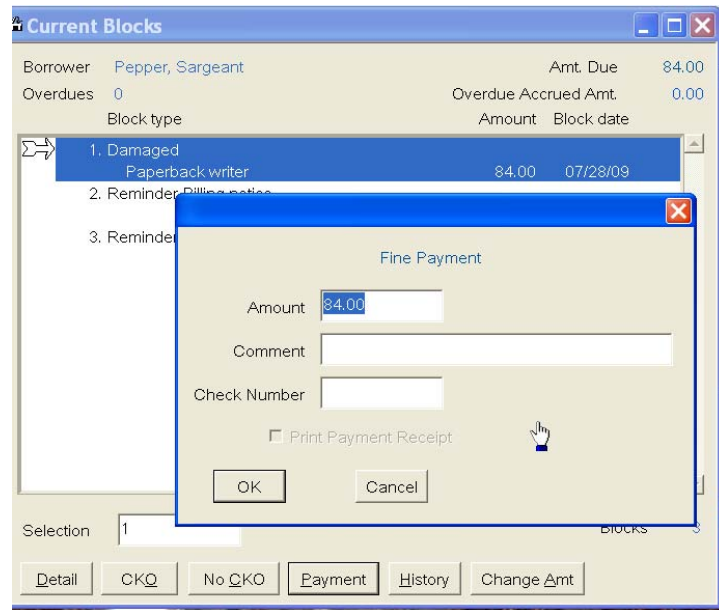
**\*You may override to allow the patron to use reserve counter items in the library.**

### Accepting fine payment

The patron can pay any amount up to the total amount due. You can not take payment for amounts in the accrued amount. Accrued amounts become due when material is renewed or checked-in.

Limited funds are kept in the cash drawer. Staff may need to contact the library secretary for more cash in order to make change for a \$50 or \$100 note. (Large bills are not accepted on weekends)

1. Identify borrower.  
Current blocks, if any, will appear
2. Select **Payment**
3. Confirm the amount due and the amount given.  
"Your fine is \$2.60. This is \$10, thank you." Enter the amount given in the dialogue box. Do not use "\$"
4. The payment will be recorded in History. The amount of change due will appear on the screen
5. Put the fine money in the cash drawer.
6. 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 you receive a dialogue box about Offsetting Fines choose **NO**

## Placing Blocks

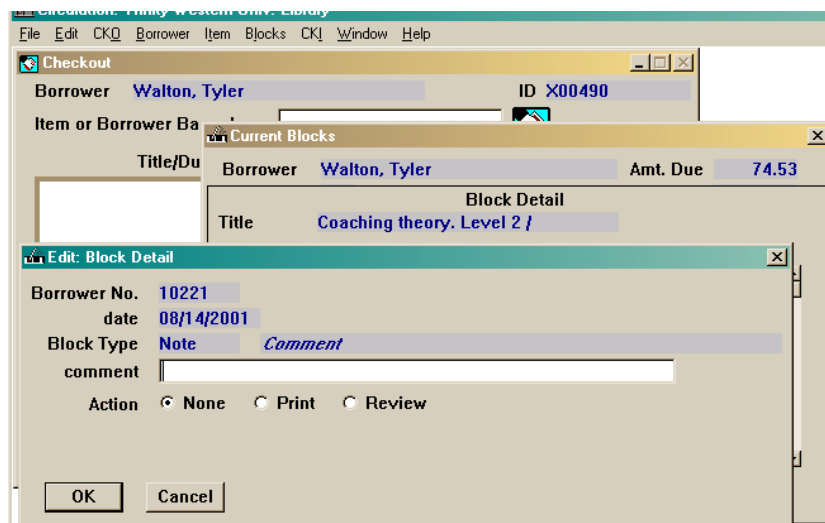
Although it is not expected to be a common occurrence, student workers may place blocks on a patron's record. Usually these will be messages to the borrower.

1. Identify Borrower
  - If there are current blocks on the borrower you must deal with them.
2. From the menu bar select **Blocks > Add note**
3. Using the **Codes** button, select type of note.
4. Enter a concise comment. Use correct capitalization because the message may be emailed and sent to the patron.
5. Select an action button. (Usually none or print.)
6. OK or enter

## Adding a comment to a block

Comments may be added to specific blocks to remind library staff of any action taken in regard to the block. For example, if a borrower tells you that he returned an overdue book that appears on his blocks and you check the stacks but don't find the item, you can note this in a comment about that block.

1. Identify Borrower
2. In the borrower's current blocks window, select the block to which you wish to attach a comment.
3. Detail
4. Comment
5. Enter a concise comment. Use correct capitalization because the message may be sent to the patron. The current date will be attached automatically to the comment.
6. Select an action. (Usually none.)
7. OK



## Deleting a block

Most blocks will be deleted by day-end processes or when the patron acts to resolve the block, such as make a payment or return an item. Once you have advised a patron of a message block, the block may be deleted at your discretion. For example a manual address correction block should be deleted after you have updated the patron's address.

1. Select the block to be deleted.
2. **D** for **D**etail
3. **D** for **D**elete

OR to delete several blocks at once:

4. Select the blocks to be deleted
5. In the menu bar choose **blocks**
6. In the drop-down menu choose **delete**

## Circulation Summary

Item type	Fine Rate	Limits	Requests?	Renewals?
Books 21-day Loan 120 days for Faculty	20¢/day	Undergrads 30 Graduates 40, Faculty 60	On-line	2 online renew- als + 2 renewals by contacting staff
Videorecordings, audio tapes, CDs, DVDs. 7-day loan	\$1/day	6 (Not available to external bor- rowers)	On-line (May also be booked for a showdate)	2 online renew- als + 2 renewals by contacting staff
Curriculum items with LT call num- bers 21-day Loan	20¢/day	30	On-line	1 renewal to undergrads only
Study room keys (In-library use only)	\$1/hour	1	Booked up to 2 weeks in advance	Yes (If not re- quested)
Headphones (In- library use only)	\$1/hour	1	Ask at counter	Yes (If not re- quested)
Other audio-visual equipment	Up to \$5/day depending on loan period	1	Ask at counter	Yes (If not re- quested)

Item type	Fine Rate	Limits	Requests?	Renewals?
Eight hour/overnight reserve (RON)	50¢/hour	2	Ask at counter	Not renewable
2 day reserve (R2D)	\$5/day	2	Ask at counter	Not renewable
3 day reserve (R3D)	\$5/day	2	Ask at counter	Not renewable
2 hour reserve (R2H) (In-library use only)	\$1/hour	2	Ask at counter	Yes (If not requested)

## Using the catalogue

Circulation staff are not expected to handle reference questions. Nevertheless, staff will need to use the catalogue to verify call numbers, location and status of items. Staff also use the catalogue to view the borrowing history of an item such as current and prior borrower, number of check-outs, last date of use and original cost.

### Searching the catalogue

The fastest way to get to the catalogue from the circulation module is to use the F2 key; or use the menu **Item>find item**. The default search index is "Title alphabetical" but other indexes may be more useful.

### *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. Just one or two are sufficient to gain useful results. 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 and a theological study. Six of the results are for the book itself. Each of those results are a unique record for each different edition of the book. Five of those editions have similar call numbers starting with PR 6023 .E926 L5 followed by a different date, another has a call number starting with LT because it is shelved in the curriculum collection. If you select one or more of the titles in the results list and then click "show detail" you gain more information about that edition, such as the publisher, the size, a summary of the plot.

By clicking on **Show copies** in the biographical detail window you can see the barcode number, current status, price and number of check-outs of a particular copy of this edition of the work. From the copies window you can click on **detail status** to view details about the current or prior borrower including the date it was checked-out, checked-in or if the item was renewed.

The library has 9 copies of the book, so if you wanted to find out who the last borrower of a specific copy, a better way to search would be to use a barcode search.

### *Search indexes*

### Commonly used indexes and their results

Search Index		results
Title alphabetical	searches titles for exactly what you type in e.g. "The lion the witch and the wardrobe"	Open-ended list of titles
Title keyword	searches titles for all the words you type in e.g. "lion wardrobe"	Closed list of titles
Author alphabetical	Lastname firstname format	Open ended list of authors
Author keyword	Name in any order or just first or last name	Closed list
Combined keyword	Searches the entire the catalogue including format (use the correct terms) and chapter titles for any of the words "abortion videorecording" "Lewis, lion" "Beethoven piano sound recording"	Everything with these keywords in the record.
Barcode number	Scan in the barcode number of the item	The exact item. Go to "Show copies"
LC or Dewey call number	Type in the call number; no spaces	Open ended list of items
Course name or Professor name	ENGL 341 or Campbell	Used to find Reserve items

### Requests (holds)

Items which are unavailable because they are checked-out, in repair, in cataloguing or on the hold shelf can all be requested and the requestor will be notified when the item becomes available. Items with an in-library status can also be requested. Requestable items include TWU books, Dewey Books, Curriculum items, videos and CDs.

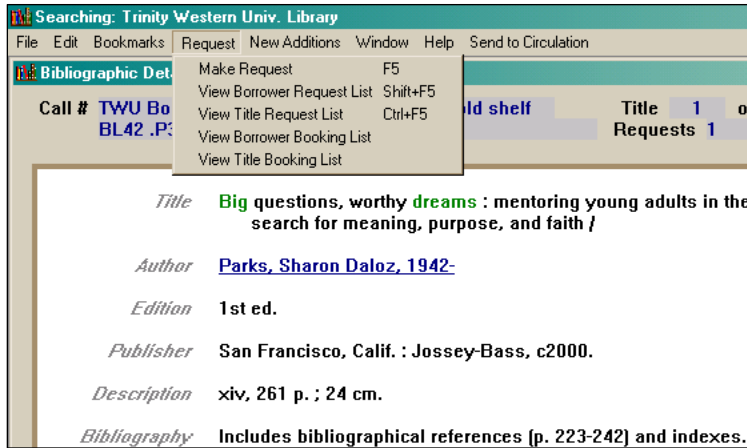
Patrons are encouraged to place their own requests using the request link in the online catalogue. Users can log into *My Account* at [www.twu.ca/library](http://www.twu.ca/library) for current information on the status of their request.

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

A request does not change a due date. It puts the requestor on a list for the first available copy and blocks the current borrower from renewing the item. A request also blocks others not on the Request Queue from checking the item out.

## Placing Requests in Horizon

1. Identify borrower in the CKO window.
  - If there are current blocks on the borrower you must deal with them.
2. Go to the catalogue (F2) Locate the item at the copies level to verify status.
3. Select a requestable copy or copies.
4. From the menu bar **Request >Make Request** or F5 You will get a reserve request screen to complete.
5. Enter comment if necessary. "Needs ASAP" is not a valid comment as all requests are processed as soon as possible.
6. Edit the request expiration date if necessary. Requests normally expire after 30 days.
7. Save



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

If, after 30 days, an item is not checked-in, the request expires and the requestor is notified of the cancellation.

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 Requests

Borrowers may ask to know what items they have requested and may delete requests for material no longer needed. They can do this for themselves online in "[My Account](#)" or staff can check their record in Horizon

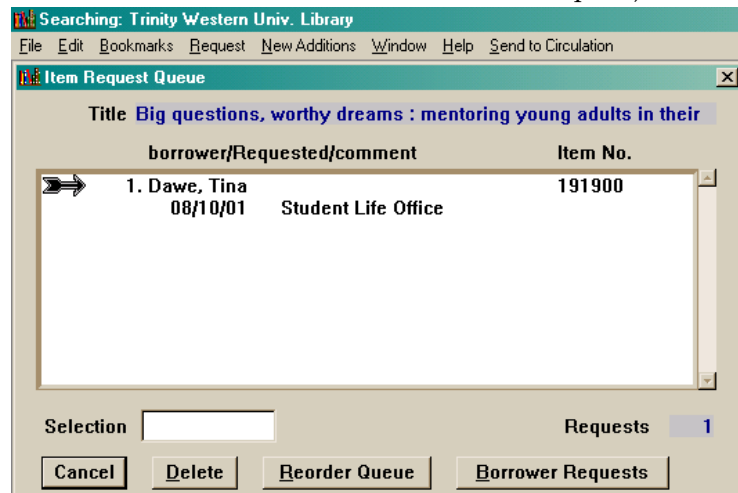
1. Identify the borrower in the CKO window
  - If there are current blocks on the borrower you must deal with them.
2. From the menu bar select **Borrower >Request**
3. The screen will show the borrower's current requests. From this screen, the library can also advise a requestor if there are others waiting for the same item by selecting **Item Queue**.
  - Library staff must not reveal the names of others on an Item Request Queue.
4. Select the item to be deleted

5. **Delete** (Remember that Cancel means cancel this screen not cancel this request!)

If the item is already on the hold shelf, and the patron wishes to cancel the hold, it must be checked-in in order to cancel the hold.

Staff can also view re-requests for an item using the request menu in the catalogue.

1. Find the item
2. Click on the Request menu
3. Select "View title requests"



### In-Library Requests

In order to maintain excellent service to our users, Alloway Library allows patrons to request items with an "in-library" status. As a courtesy to our users, Library staff will pull requests up to twice a day.

If an item is checked out by another library user before being retrieved by library staff, the request 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.

### **Daily Procedure**

Print "Request pull list" (Circulation Reports>Requests>request pull list. Sort by: Collection and Call number)

Pull items from shelves and check-in to trigger holds.

Place on hold shelf

### Recalls

Recalls are different from requests. A 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. Items are recalled if an instructor wants checked-out material to go on Reserve. Items are also recalled if it is requested and the 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. Staff should also telephone to advise of the recall

The recaller 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 borrower will receive overdue notices which can be frustrating for the borrower and inefficient and embarrassing for the library.

Check-in is also the ideal time to identify damaged material being returned 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 CKI window by clicking on the icon or by selecting CKI- Open CKI Window from the menu bar or, F8.
  - Use the CKI menu to turn off "show borrower".
  - For the first check-in session of the day turn on Book Drop. (Book drop moves the check-in time back to closing time of the previous day.)
2. Check the CKI date and time.
3. 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"
4. Scan the item bar code.
5. Examine the item for damage; remove date due reminders or bookmarks.
  - 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. If not previously noted, show the item to library staff.

6. Read the screen to confirm check-in or to note any blocks or special instructions. For example, it is especially important to note what course a recalled item is for .
7. 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 borrower can be identified and issue a refund for monies paid.
  - 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.
  - Place magnetic material such as tapes or floppy disks to one side so they are not inadvertently erased by the sensitizing machine
8. Place checked-in items on the return cart, spine out
9. When the labeled shelves of the check-in cart are full, resensitize the material. Place resensitized items spine up on the cart.
10. Unload the cart in the sorting area.

### 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.

### 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 account 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 borrower 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 borrower be charged)
- Stains (determine if the last borrower be charged)
- Loose pockets
- Loose dust jackets
- Illegible spine labels

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

Refer to the yellow **Damage Noted** cards by the check-in station.

- 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 examine the book to see if there are book-marks, 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 on the bottom right corner of the inside back cover and shelve the book
- Damage due to normal wear and tear
  - Send to repair

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. As you check-in, read the screen to see the call number:

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 borrower is responsible for returning material to the lending library.

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. (check-in > edit item>prior circulation info)
  - 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)
2. Contact the borrower to say that we found an item that may belong to him or her and we will hold it for 30 days
3. 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.
  - 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.
  - Personal items left after 30 days are given to the director for evaluation for addition to the collection
  - 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 – often 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

### 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

## The Reserve Book Room

The Reserve Book Room 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.) It's important to know where to look. 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

1. Start a new search F2
2. Select Course Name Alphabetical or Instructor Name Alphabetical as a search index
3. Note that a course name is "ENGL 103" not "Introduction to Poetry"
4. When you get the desired name select Show titles.
5. A list of titles appears. Show detail will give the call number, the reserve type (2 hour 1 day etc.) and the status of the item.

### 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 borrower'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 borrowers name on the screen, looking at the picture and saying the patron's name.
2. You must tell the borrower the due time for every item checked-out. Date due reminders should be given for overnight, 2 or 3-day items if the borrower intends to take the 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 borrowers, the circulation period for reserve items is indicated by a sticker above the bar code.

### "In transit" items

Our Horizon system is set up to operate for two different libraries. One is called the TWU Library; the other is the Reserve Book Room. Although both of these libraries are in the same building and are largely indistinguishable from one another the distinction is necessary because the two locations have unique loan periods, fine structures and places where the resources are shelved.

At the circulation counter, Workstation 02 is set as the Reserve Book Room (RBR) location while the other terminals are set as TWU location. When an item from one location is checked-in at the other location, the item has an "in transit" status until it is returned to its own location. (just as if it had to be transported from a branch on the other side of campus to the main library.)

In order to avoid the in transit status, which sometimes confuses patrons and may not activate any requests on an item, we prefer to use the Reserve terminal to check-in RBR items. Reserve items can be checked-out at any terminal. Similarly, material from the main collections should be checked-in at any station except the Reserve counter terminal and can be checked-out at any terminal.

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

#### *For 2 hour items*

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

*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*

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 but take care to avoid conflicting requests.

#### *For 8-hour or 2-3 day items*

For 8-hour, 2 day or 3 day items we can place a pick-up note for ONE borrower per item.

If an 8-hour, 2 or 3 day item is out and a patron wishes to reserve it:

1. Find the item in the catalogue, then look at detail status and note the name of the current borrower
2. In circ, find current borrower and **edit item**. Add check-in note "PICK-UP date, time, requestor's name." Be sure to include specific time of day but remind the requestor that the material is due by closing time, so it may not be available until late in the day.
3. Fill in a white pick-up slip with the requestor's name and preferred time of pick-up. Leave the Pick-up slip on the Reserves shelf

When the item is returned:

1. Read cki note
2. Find the Pick-up slip on the Reserves shelf and attach it to the item. Do not use tape
3. Resensitize and shelve on RBR shelves

When another borrower checks out the item before the designated pick-up time.

1. Read cki note. Keep slip.
2. Edit due date and time so the item is due before the designated pick-up time
3. Give borrower due date reminder

When the requestor cko's the item, delete cki note and discard the slip

If the pick-up time/date has passed delete cki note

Only 1 pick-up note per item

PICK-UP note is specific to a copy

# 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 necessary to always 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.,

1990 issues are not moved back to bound periodicals until the first issue for 1991 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 as are 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.
  - If necessary sort individual titles chronologically.
4. 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.

#### Telephone Directories

Directories are shelved in alphabetical order; no sorting required.

#### 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

Three collections: ERIC, periodicals, and miscellaneous.

ERIC fiche are arranged numerically by ERIC number, e.g., ED 360 257. The eye-readable headers indicate the number of fiche in a set, e.g., 1 of 8, 2 of 8, etc.

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 ERIC, periodical, and miscellaneous fiche.
2. Sort ERIC fiche by ERIC number and file.
3. Sort periodicals first by a, b, c, if sufficient quantity.
4. 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.
5. 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 as a result 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 of time 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.

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	

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 unbound 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

## 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, i.e., i) remove all issues from the previous month; ii) check each issue to be sure that all sections are present in proper order and straighten them out; and iii) shelve them with other backfiles on the upper level; existing

backfiles will have to be shelf read so that the oldest ones can be discarded to make room for the most recent issues

Retain the most recent six months of daily newspapers; for those published weekly or less frequently, retain as many as the space allows.

## 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 not uncommon 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 check-outs. A recently updated item with 0 check-outs 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	BV 4827
BS 2575.2	BS 2575.2 (a misshelved book at the end of the shelf above created confusion)
D 810	DA 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

Check-out items to a patron

Tell a borrower about blocks on her account

Change a borrower's address

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

Find a reserve item in the online catalogue

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

Check-in an item

Renew an item

Explain system down procedures.

Explain closing procedures

## Glossary

---

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 borrower
External borrowers	Non TWU borrowers including borrowers 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
Horizon	The integrated library system we use
ILL	Interlibrary loan.
iPac	Internet Public Access Catalogue
OPAC	Online Public Access Catalogue
PAC	Public Access Catalogue, online catalogue
Range	One side of a free-standing (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
Request	Not the same as "Reserve" although patrons may say "I want to reserve a book" An item may be requested if it is not currently available (checked-out, or in technical services)
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

---