



Blended Services: Circulation

Session #18 – Expectations, Circulation, Reserve,
Self Check Out & Systems Troubleshooting

May 26, 2010

Outline

- Expectations

- Rubrics

- Mentors

- Shadowing

- Homework

- Assessment

- Circulation

- Reserve

- Self Check Out & Systems Troubleshooting

Rubrics

- Use the Rubrics as your guide. The goal is to reach proficiency in each of the 8 standards.
- Only assessed in areas that you have not shown proficiency in on the job and that you have not been previously trained on.

Mentors

- *Mills Blended Services Mentorship Programme Guidelines.* The guidelines will be available shortly & will be emailed to you.
- You are given one hour a week with your mentor. You should contact your mentor & make arrangements that suit you and your mentors needs.

Shadowing

- One hour a week from April 1/10 to April 30/10 was completed.
- Beginning the week of July 12/10 shadowing will resume for one hour a week.

Homework

- Not mandatory but to succeed, we advise you do your homework. We are not checking for homework completion.
- Staff are given up to two hours a week to work on homework and/or practice their skills.
- Staff are to use their own workstations for Horizon to complete homework.

Assessment: Circulation Fluency Skills

- The Assessment consists of two parts: circulation written test & circulation simulation
 1. Written Test (policy/procedures)– 30 minutes
 2. Simulated Circulation Transaction– 15 minutes; two questions
- Pass/Fail grade on each unit

Circulation

- Library Home page: Circulation Perspective
- Identifying Different ID Cards/Loan Times
- Checking out or Signing Out Books -step by step
- Checking in or Returning Books -step by step

Library Home page: Circulation Perspective

The screenshot shows the McMaster University Libraries website in a Windows Internet Explorer browser window. The address bar displays <http://library.mcmaster.ca/>. The browser interface includes standard menus (File, Edit, View, Favorites, Tools, Help) and a toolbar with navigation and utility icons.

The website header features the McMaster University logo and the tagline "Inspiring Innovation and Discovery". Navigation links include "McMaster Home", "Research", "Using the Libraries", "Collections", "Faculty Support", "About", and "Help". A "MUGSI" section offers a "Quick Links" dropdown menu and a search box with a "GO" button. Below this, there are radio buttons for "McMaster" and "Library website".

The main content area is divided into several sections:

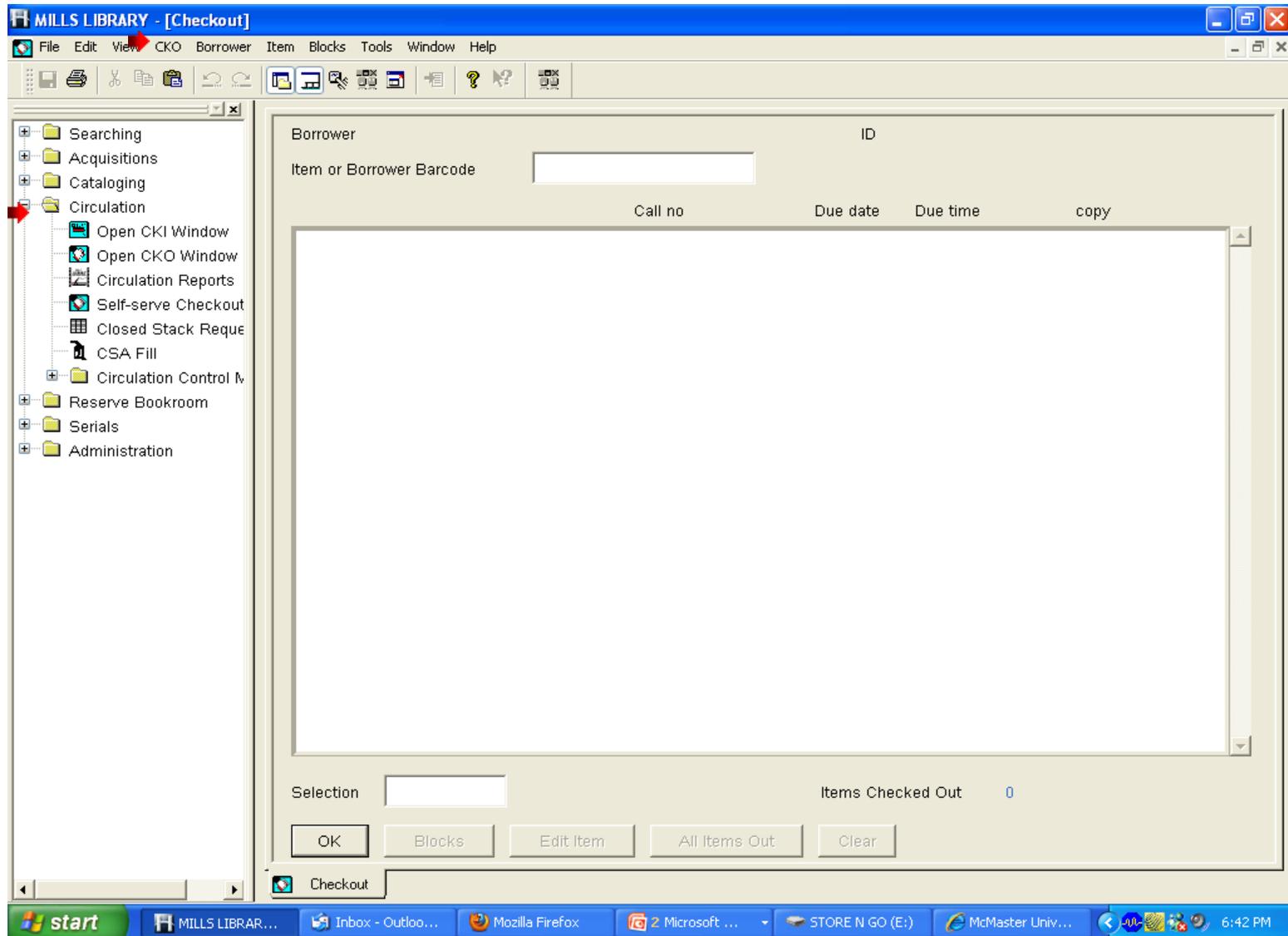
- Library Search:** A central search box with the text "Find books, journal titles, online resources and other materials in all four campus libraries and affiliates." Below the search box is a text input field containing "search for keywords, author, etc.", a dropdown menu set to "Anywhere", and a "GO" button. Below the search box are links: "Go to: [Classic MORRIS](#) | [Other Library Catalogues](#) | [Center for Research Libraries Catalogue](#)".
- Popular Links:** A list of links with red arrows pointing to the right:
 - Accessibility in the Libraries
 - Course Reserves
 - Book a Study Room
 - My Account/Book Renewal
 - RACER (Interlibrary Loan)
 - RefWorks
 - Request Forms
 - Login to LibAccess
- Library News:** Two news items:
 - Information Literacy Conference Comes to McMaster**
Posted on May 11, 2010 - 12:45.
This week McMaster welcomes over 150
 - Morris Norman: Our Great Donor of Canadiana**
Posted on May 5, 2010 - 08:42.
Many of us are collectors. We collect buttons,
- Spotlight:** A section titled "Counting Opinions" with the subtext "Your Opinion Counts ...". It features a graphic of a target and a poll question: "Is this library to your...". Below the poll is a "Browse" button.
- Hours for Tue. May 11:** A box indicating "Mills Library" hours from 9AM to 10PM.

The Windows taskbar at the bottom shows the Start button, several open applications (INNIS L..., Inbox..., McMast..., Pearce..., 2 Micr..., STORE..., 2 Pidgin, McMast...), and the system tray with the date and time (5:56 PM).

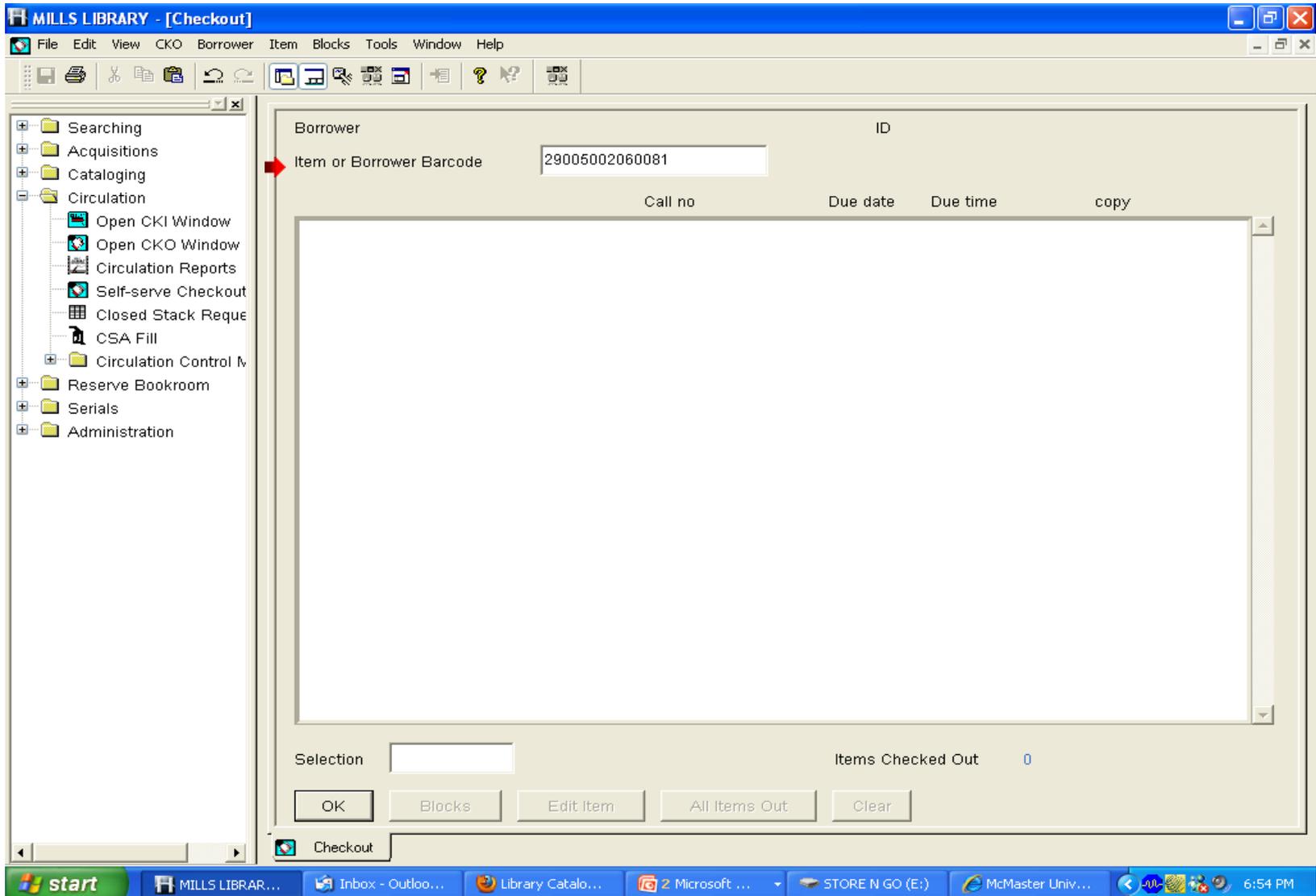
ID Cards & Loan Types

- Student Card
 - undergraduate has a red sticker – 2 week loan
 - graduate has a yellow sticker – 4 week loan
 - part time student has an orange/green sticker – 2 week loan
- Faculty/Staff have a “Working at McMaster” white photo ID card – 3 month loan
- Library issued cards
 - courtesy (temporary McMaster affiliated card) – loan period will vary
 - external (community) – 2 week loan
 - reciprocal (student/staff/faculty from another Canadian University) – 2 week loan

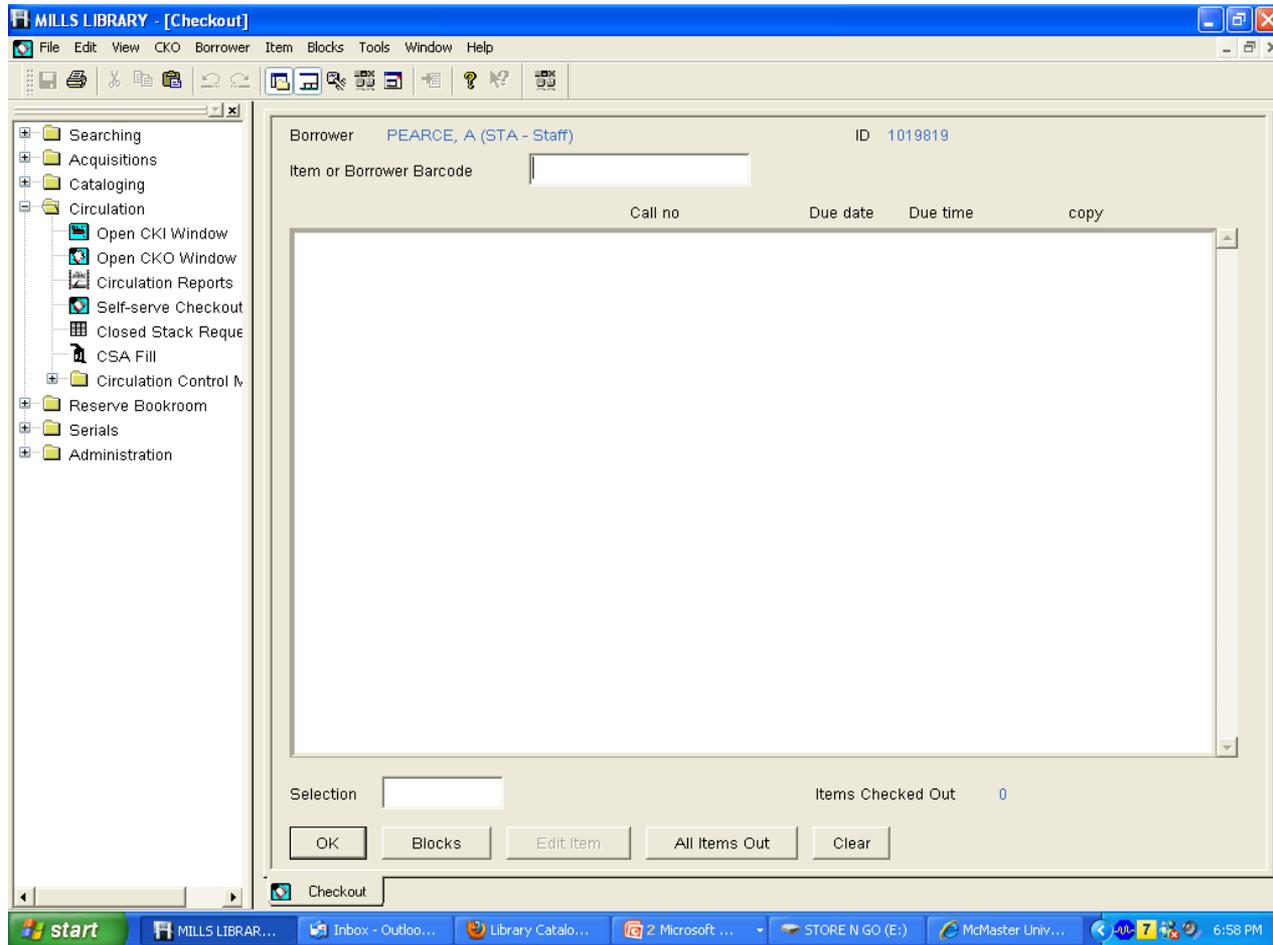
Checking Out/Signing Out Items



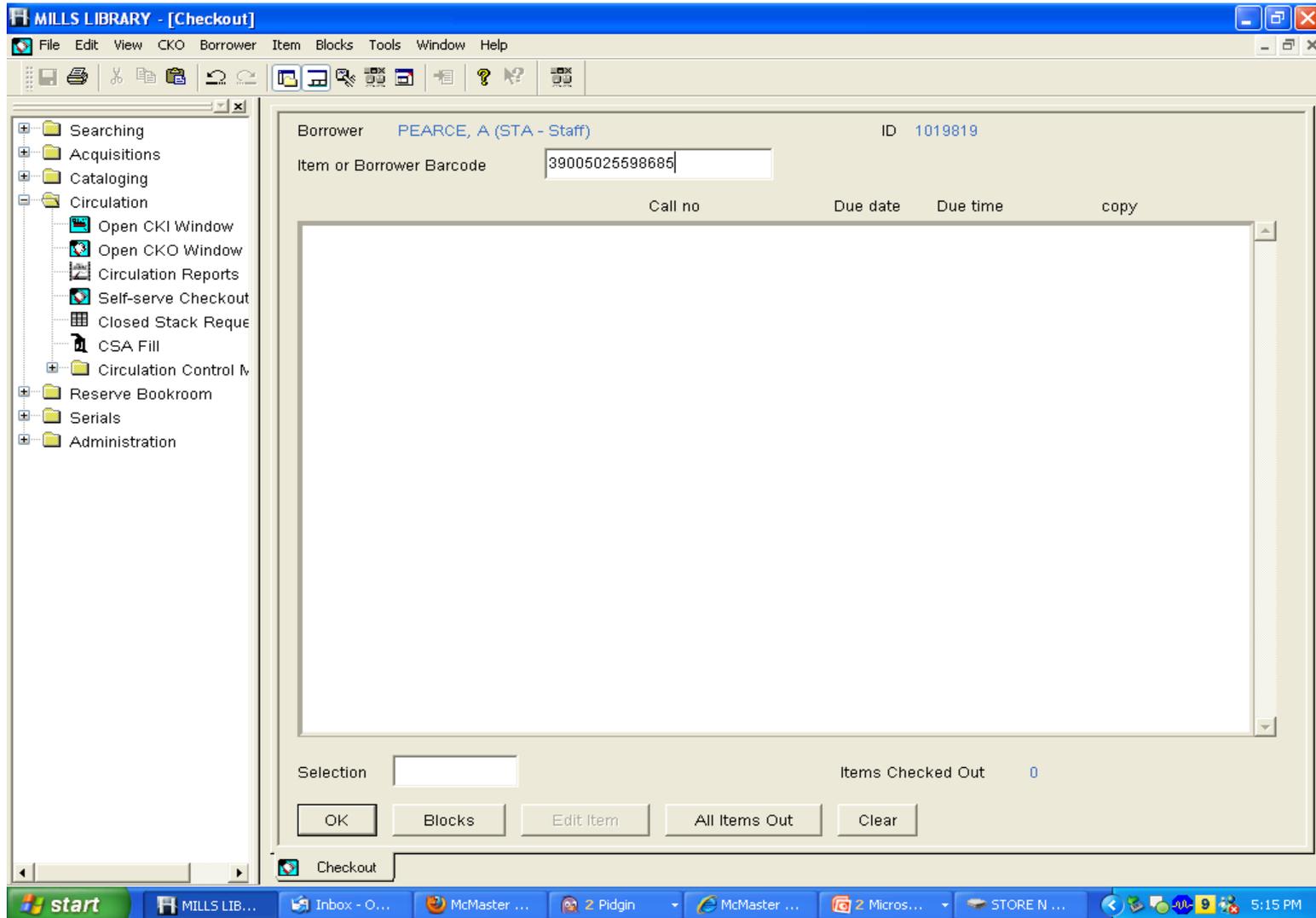
Step 1: Scan the patron's barcode



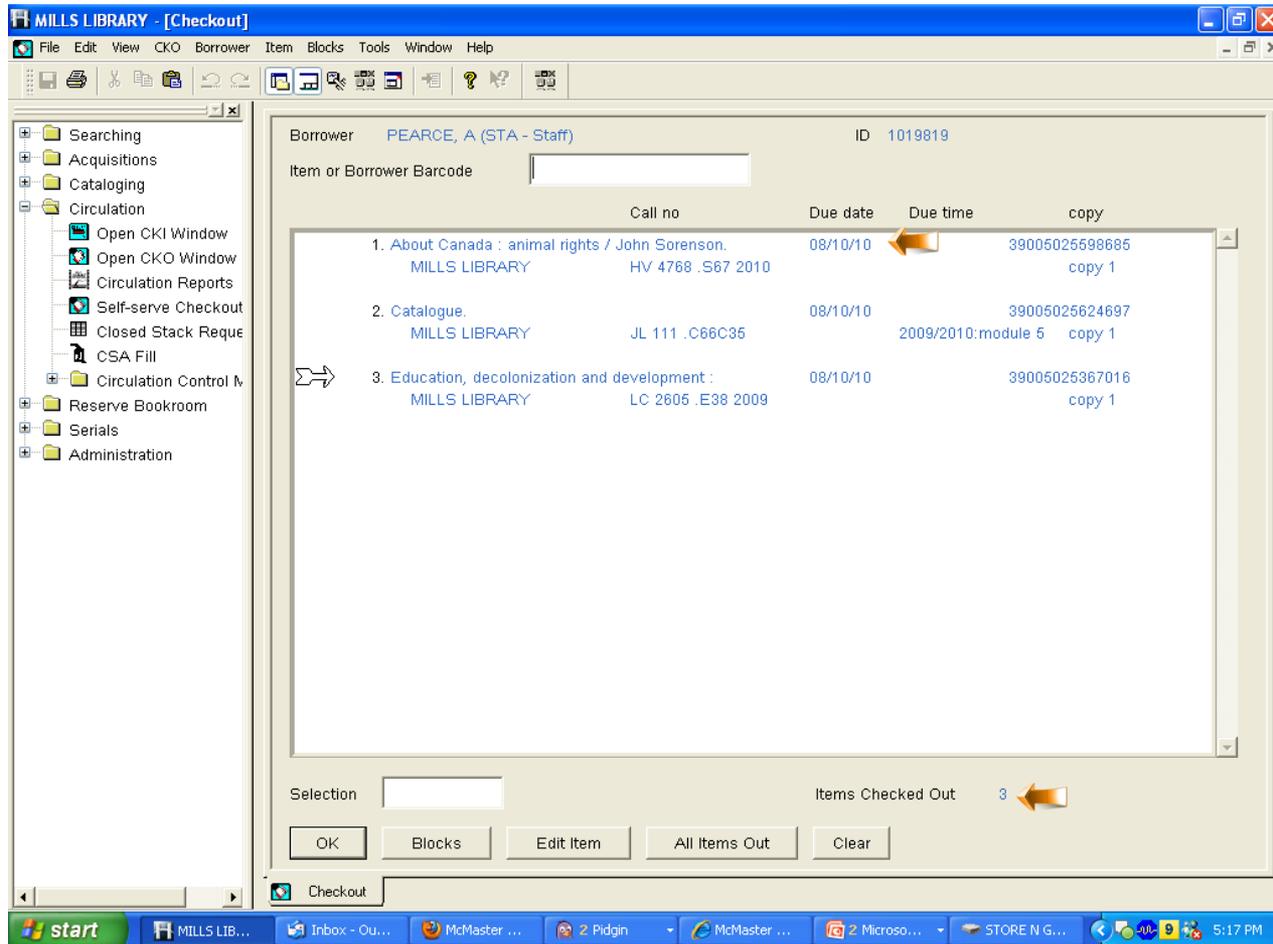
The patron name, borrower status & ID should appear.



Step 2: Scan the item



The item or book information should appear along with the due date. Note the number of “items checked out”. Selecting F11 will print a date due receipt for the patron.

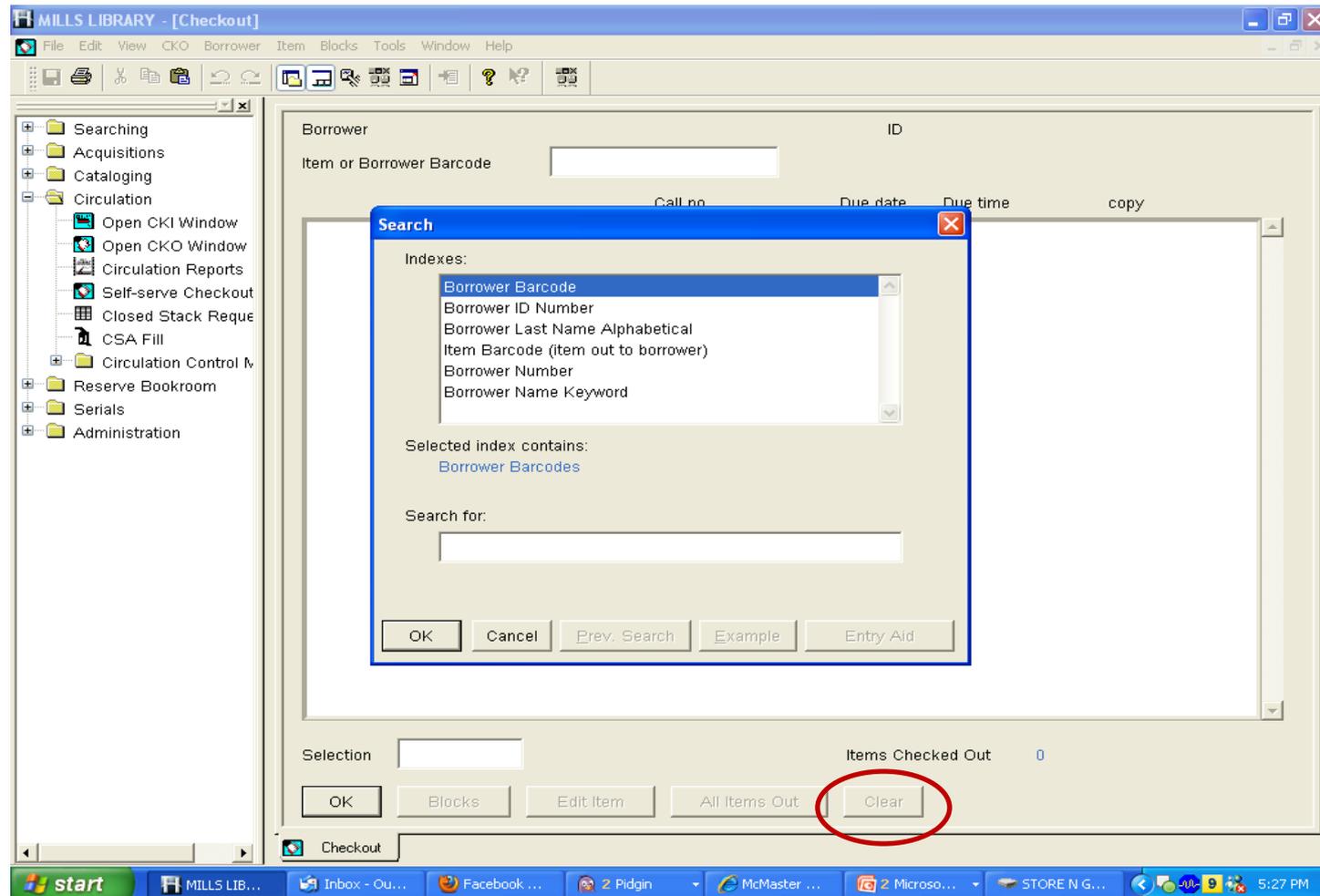


The “All Items Out” tab will show all the items currently signed out to the patron.

The screenshot displays the 'MILLS LIBRARY - [Checkout]' application window. The interface includes a menu bar (File, Edit, View, CKO, Borrower, Item, Blocks, Tools, Window, Help) and a toolbar. A left-hand navigation pane lists various library functions such as Searching, Acquisitions, Cataloging, Circulation, and Administration. The main area shows details for a borrower named 'PEARCE, A (STA - Staff)' with ID '1019819'. Below this, a table lists seven items currently signed out to the patron. At the bottom of the window, there are buttons for 'OK', 'Blocks', 'Edit Item', 'All Items Out', and 'Clear'. The 'All Items Out' button and the text 'All Items Out 11' are circled in red. The Windows taskbar at the bottom shows the system clock at 2:23 PM.

	Call no	Due date	Due time	copy
1.	The naming of the dead / Ian Rankin. MILLS LIBRARY RAN	06/30/10		39005025065099 copy 1
2.	Sanskrit / Michael Coulson ; revised by Richard MILLS LIBRARY PK 666 .C68 2003	06/30/10		39005023818838 copy 1
3.	The everything and the nothing / Meher Baba. -- MILLS LIBRARY BL 1146 .M37 E93	06/30/10		39005040544268 copy 1
4.	Pack up the moon / Anna McPartin. MILLS LIBRARY MCP	06/30/10		39005025081518 copy 1
5.	Life at its best / by Meher Baba ; edited by Ivy C. MILLS LIBRARY BL 1270 .M3787 1957	06/30/10		39005040557898 copy 1
6.	The mastery of consciousness : an introduction and MILLS LIBRARY BL 624 .M43 1977	06/30/10		39005040547006 copy 1
7.	Abbey Road : the story of the world's most famous MILLS LIBRARY ML 1055 .S65 2002	06/30/10		39005031110624 copy 1

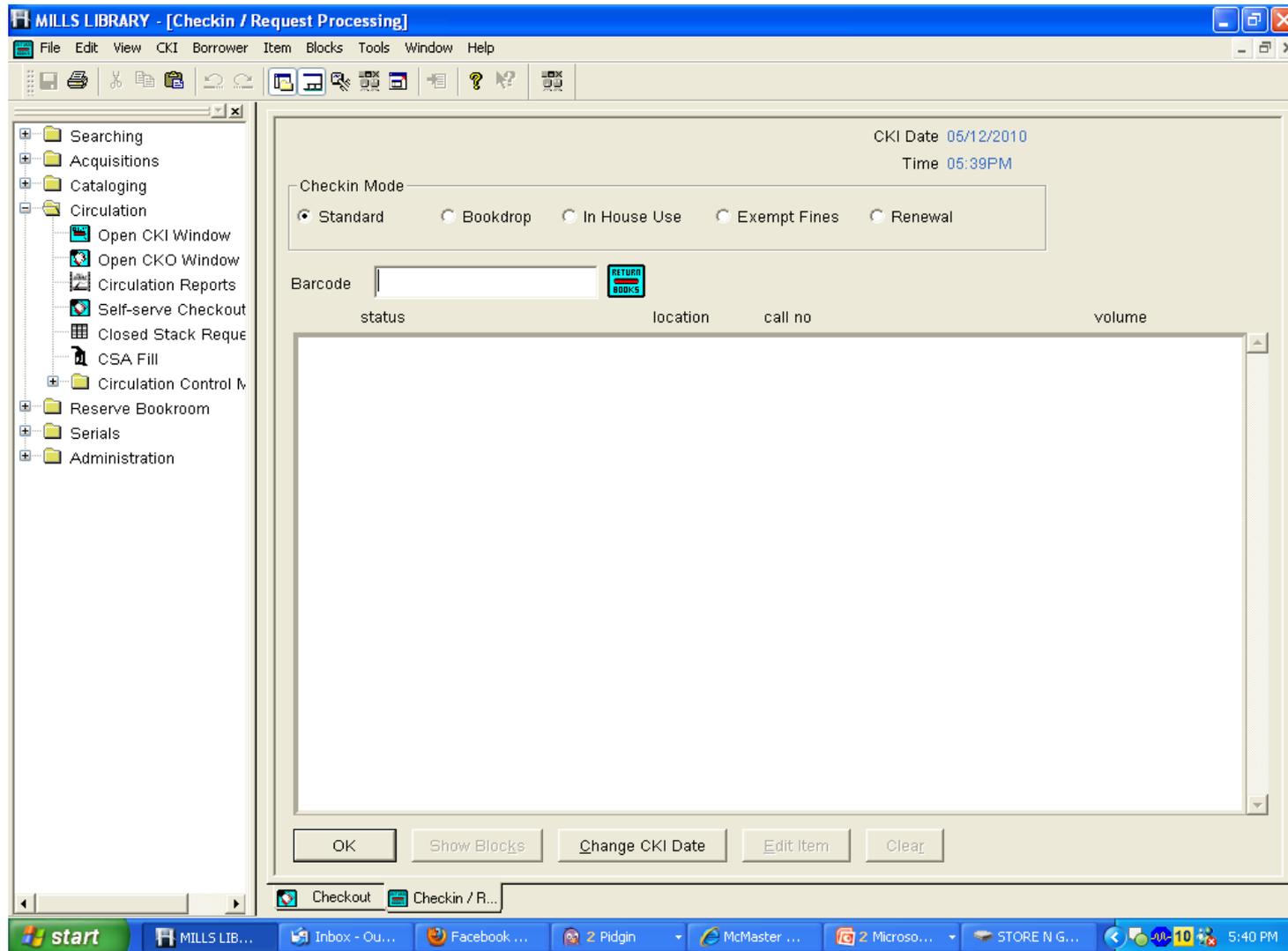
After you have finished a transaction always clear your screen for the next transaction. Select F4/or clear on your keyboard.



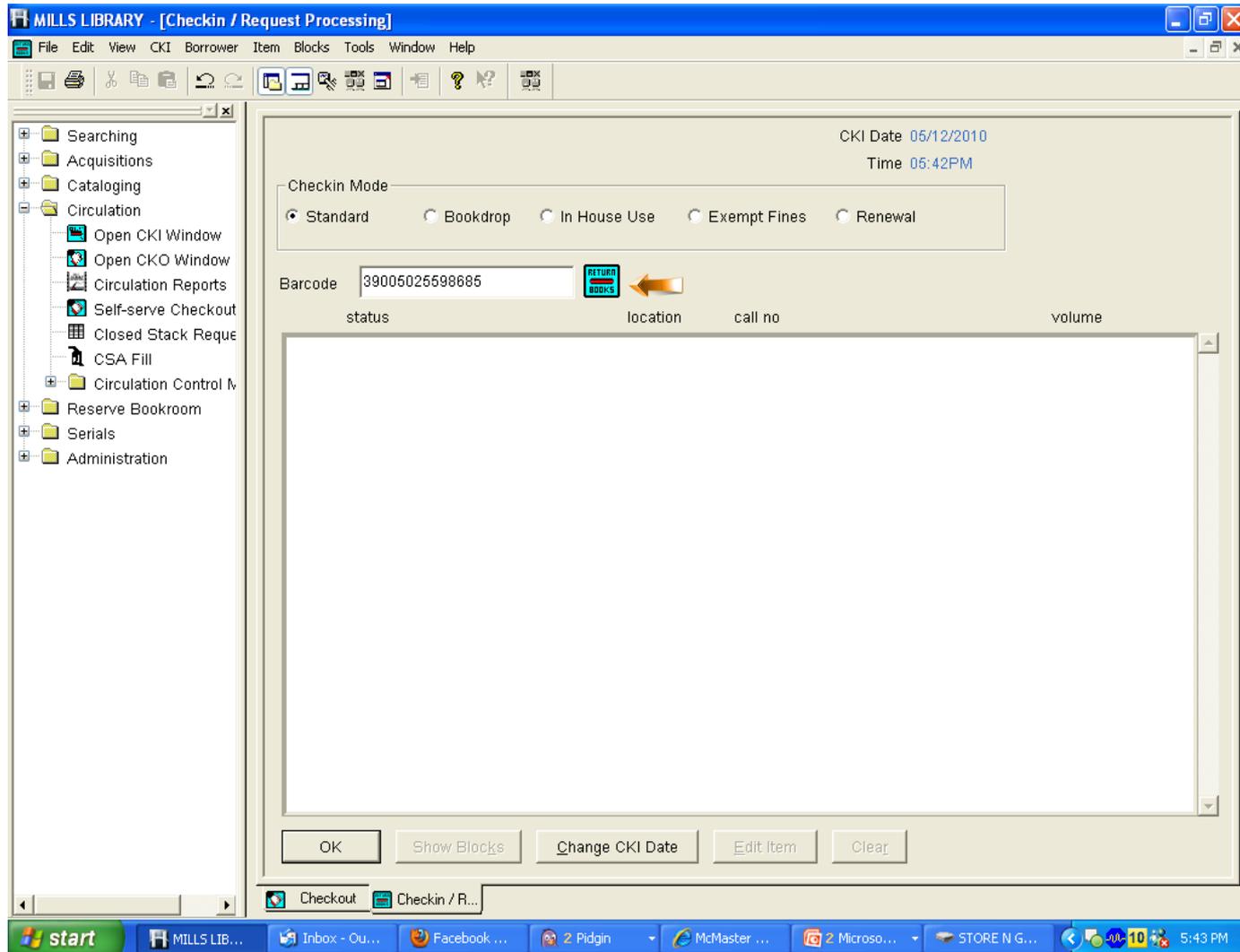
Useful Tips

- CKO = Check Out CKI = Check In
- F11 on your keyboard will print a date due receipt.
- F8 on your keyboard allows you to toggle between the Check Out & Check In screens.
- Always watch your screen when wandng the patron barcode or item barcode. Never trust the “beep”.

The Check in or Return Screen



Scan the item barcode



The item or book information should appear & should show the status of “checked in”.

MILLS LIBRARY - [Checkin / Request Processing]

File Edit View CKI Borrower Item Blocks Tools Window Help

CKI Date 05/12/2010
Time 05:47PM

Checkin Mode

Standard Bookdrop In House Use Exempt Fines Renewal

Barcode

status	location	call no	volume
Checked in	MILLS LIBRARY	LC 2605 .E38 2009 39005025367016	
Checked in	MILLS LIBRARY	JL 111 .C66C35 39005025624697	2009/20
Checked in	MILLS LIBRARY	HV 4768 .S67 2010 39005025598685	

OK Show Blocks Change CKI Date Edit Item Clear

Checkout Checkin / R...

start MILLS LIB... Inbox - Ou... Facebook ... 2 Pidgin McMaster ... 2 Microso... STORE N G... 5:48 PM

Circulation – In Class Exercise

1. Sign out 3 items to yourself and write down the date they are due.
2. Desensitize the books.
3. What function key do you use to print out a date due receipt?
4. Check in all material.

Reserve

- Reserve items are supplementary, required readings, & multimedia which have been placed on limited loan for specific courses. Professors have requested that these items be placed on Reserve.
- These items can be books, photocopied articles, VHS, DVDs, CDs, microfilm, eArticles, eBooks, music scores, government documents & custom courseware.
- A limit of 3 Reserve items can be signed out to only McMaster students, faculty & staff at a time.

Other Items on Reserve

Non course related Reserve items include Laptops, calculators, dry erase board markers/erasers, projectors, and videos/DVDs from the Lyons Media collection.

Reserve Loan Types

- Loan times for Course Reserves range from 2 Hour, 24 Hour & 1 week.
- Laptops/Projectors/Videos/DVDs can be signed out for 4 Hours.
- Calculators/Dry Erase Board items can be signed out for 4 Hours.

Looking up Course Reserves

- Patrons can search for “Course Name” or “Instructor Name” on the Library’s homepage.

Example: Labour Studies 1C3 – Professor Mills

Checking out Reserves

- Checking out Reserves to a patron is the same as checking out a book from stacks. The only difference is the due date & due time.
- At the check out screen, scan the patron's ID barcode & their information should appear on the screen.
- Scan the Reserve item barcode. The item information should appear on the screen.

Examples of a 2 Hour & 24 Hour Item

The screenshot shows the 'MILLS LIBRARY - [Checkout]' application window. The interface includes a menu bar (File, Edit, View, CKO, Borrower, Item, Blocks, Tools, Window, Help), a toolbar, and a left-hand navigation pane with categories like Searching, Acquisitions, Cataloging, Circulation, Reserve Bookroom, Serials, and Administration. The main area displays borrower information for 'PEARCE, A (STA - Staff)' with ID '1019819'. Below this is a table of items with columns for 'Call no', 'Due date', 'Due time', and 'copy'. Two items are listed, with their due dates and times circled: a red circle around '05/17/10 11:46AM' and a purple circle around '05/18/10 09:46AM'. At the bottom, there are buttons for 'OK', 'Blocks', 'Edit Item', 'All Items Out', and 'Clear', along with a 'Checkout' button. The Windows taskbar at the bottom shows the time as 9:46 AM.

	Call no	Due date	Due time	copy
1.	A Rabbi talks with Jesus : an intermillennial, interfaith MILLS RESERVE BM 620 .N48 1993	05/17/10	11:46AM	39005047604131 copy 1
2.	Franz Rosenzweig : his life and thought / presented by MILLS RESERVE BM 755 .R6 A5 1998	05/18/10	09:46AM	39005024323945 copy 1

Editing the Date and/or Time: Highlight the item you wish to edit & select “Edit Item”

Borrower **PEARCE, A (STA - Staff)** ID **1019819**

Item or Borrower Barcode

	Call no	Due date	Due time	copy
1.	A Rabbi talks with Jesus : an intermillennial, interfaith MILLS RESERVE BM 620 .N48 1993	05/17/10	11:46AM	39005047604131 copy 1
2.	Franz Rosenzweig : his life and thought / presented by MILLS RESERVE BM 755 .R6 A5 1998	05/18/10	09:46AM	39005024323945 copy 1

Selection Items Checked Out **2**

Checkout

Change the Due Date and/or Due Time. Remember to change the AM or PM (if applicable).

The screenshot shows the 'MILLS LIBRARY - [Edit: Checkout]' window. The interface includes a menu bar (File, Edit, View, Tools, Window, Help), a toolbar, and a left-hand navigation pane with categories like Searching, Acquisitions, Cataloging, Circulation, Reserve Bookroom, Serials, and Administration. The main area displays checkout information for the book 'A Rabbi talks with Jesus : an intermillennial, interfaith exchange /'. The 'Due Date' is set to 05/17/2010 and 'Due Time' is 11:46 AM. Other fields include Call No. (BM 620 .N48 1993), Status (Checked out), Barcode (39005047604131), and CKO Date (05/17/2010). A 'Prior Circ Info' section shows a previous checkout by TREBYCH, D on 05/14/10. At the bottom, there are buttons for 'Close', 'Save', 'Page Up', and 'Page Down', along with a 'Page 1 of 1' indicator.

title A Rabbi talks with Jesus : an intermillennial, interfaith exchange /

Call No. BM 620 .N48 1993 Copy No.

Status *o* Checked out

Due Date 05/17/2010 Due Time 11:46 AM PM

Checkin note Barcode 39005047604131 Item No.

Updated 05/17/2010

Internal Note

CKO Date 05/17/2010 CKO Time 09:46AM

CKO Loc mlr MILLS RESERVE

Location mlr MILLS RESERVE

Collection mlr2 Mills 2 hour Reserve

Itype 2hour 2 hour loan

Prior Circ Info TREBYCH, D: 05/14/10 1 of 1

Borrower TREBYCH, D

Barcode 29005001531124 2nd ID 1019157

CKI Date 05/14/2010 Time 09:57AM Location ml

CKO Date 05/14/2010 Time 09:47AM Location mlr

Renewals 0 by Phone 0 by OPAC 0 No. of Pieces 0

Used In-house No. In-house Uses 0

Page 1 of 1

Save & Close

The screenshot shows the 'MILLS LIBRARY - [Edit: Checkout]' application window. The interface includes a menu bar (File, Edit, View, Tools, Window, Help), a toolbar with various icons, and a left-hand navigation pane with folders like Searching, Acquisitions, Cataloging, and Circulation. The main area displays a checkout record for the book 'A Rabbi talks with Jesus : an intermillennial, interfaith exchange /'. The record includes fields for title, call number (BM 620 .N48 1993), status (Checked out), due date (05/18/2010), due time (10:00 AM), barcode (39005047604131), and item number. It also shows the checkout date (05/17/2010) and time (09:46 AM), location (MILLS RESERVE), and collection (Mills 2 hour Reserve). A 'Prior Circ Info' section shows a previous checkout by 'TREBYCH, D' on 05/14/10. At the bottom, there are buttons for 'Close', 'Save', 'Page Up', and 'Page Down', and a status bar indicating 'Page 1 of 1'.

MILLS LIBRARY - [Edit: Checkout]

File Edit View Tools Window Help

Searching
Acquisitions
Cataloging
Circulation
Open CKI Window
Open CKO Window
Circulation Reports
Self-serve Checkout
Closed Stack Reque
CSA Fill
Circulation Control M
Reserve Bookroom
Serials
Administration

title *A Rabbi talks with Jesus : an intermillennial, interfaith exchange /*
Call No. *BM 620 .N48 1993* Copy No.
Status *o Checked out*
Due Date *05/18/2010* Due Time *10:00* AM PM
Checkin note Barcode *39005047604131* Item No.
Updated *05/17/2010*
Internal Note
CKO Date *05/17/2010* CKO Time *09:46AM*
CKO Loc *mlr MILLS RESERVE*
Location *mlr MILLS RESERVE*
Collection *mlr2 Mills 2 hour Reserve*
Itype *2hour 2 hour loan*
Prior Circ Info *TREBYCH, D: 05/14/10* 1 of 1
Borrower *TREBYCH, D*
Barcode *29005001531124* 2nd ID *1019157*
CKI Date *05/14/2010* Time *09:57AM* Location *ml*
CKO Date *05/14/2010* Time *09:47AM* Location *mlr*
Renewals *0* by Phone *0* by OPAC *0* No. of Pieces *0*
Used In-house No. In-house Uses *0*
 Page 1 of 1
Checkout Edit: Checkout

start MILLS L... Inbox ... Mozilla ... Pearce... Kim 2 Micr... Kim [Co... 2 Micr... 10:16 AM

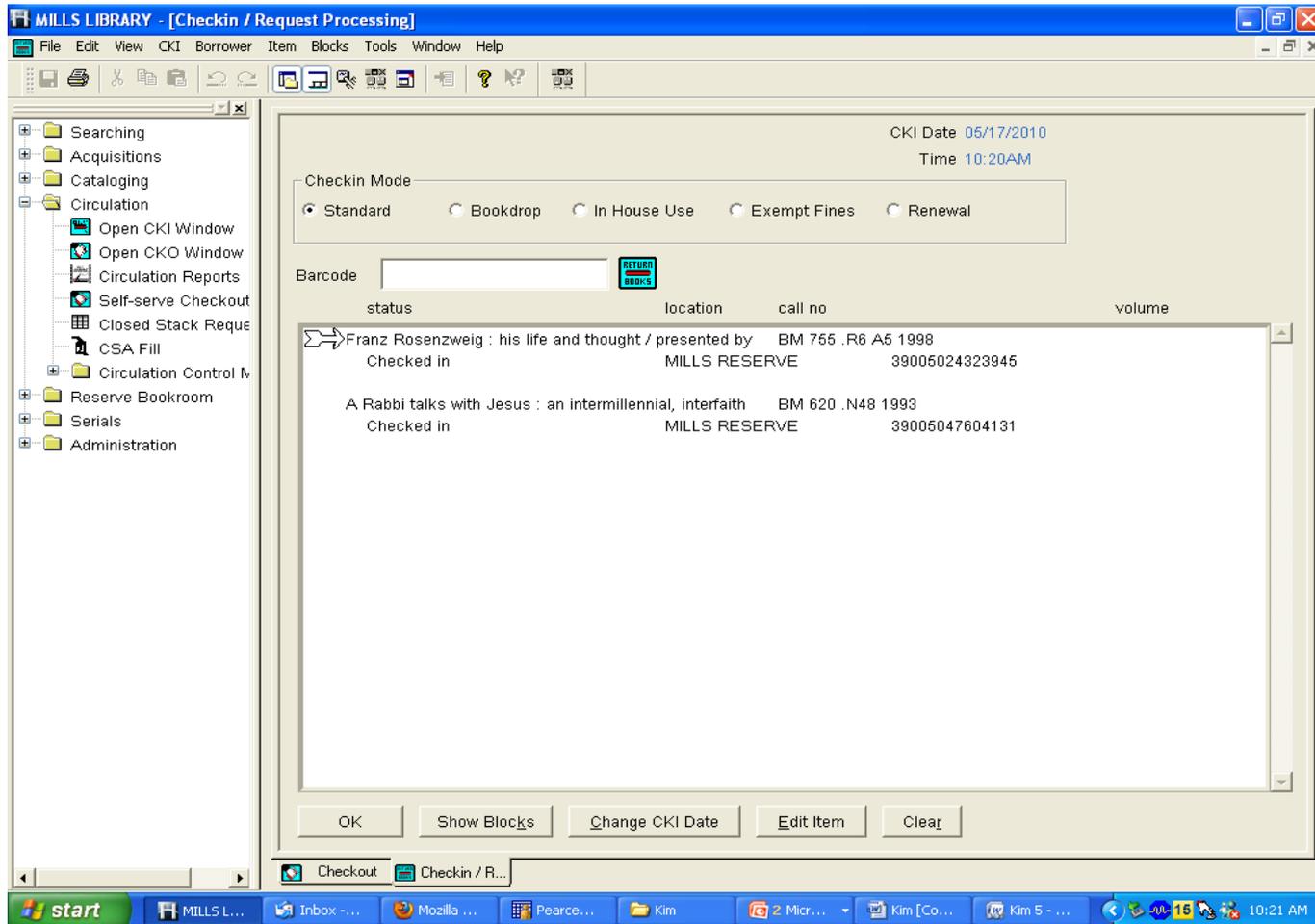
The saved changes should now appear on the check out screen

The screenshot shows the 'MILLS LIBRARY - [Checkout]' application window. The interface includes a menu bar (File, Edit, View, CKO, Borrower, Item, Blocks, Tools, Window, Help), a toolbar, and a left-hand navigation pane with categories like Searching, Acquisitions, Cataloging, Circulation, Reserve Bookroom, Serials, and Administration. The main area displays the borrower information: PEARCE, A (STA - Staff) with ID 1019819. Below this is a table of checked-out items:

	Call no	Due date	Due time	copy
1.	A Rabbi talks with Jesus : an intermillennial, interfaith MILLS RESERVE BM 620 .N48 1993	05/18/10	10:00AM	39005047604131 copy 1
2.	Franz Rosenzweig : his life and thought / presented by MILLS RESERVE BM 755 .R6 A5 1998	05/18/10	09:46AM	39005024323945 copy 1

At the bottom of the main area, there is a 'Selection' field, a counter for 'Items Checked Out' showing '2', and buttons for 'OK', 'Blocks', 'Edit Item', 'All Items Out', and 'Clear'. The Windows taskbar at the bottom shows the Start button and several open applications including 'MILLS L...', 'Inbox', 'Mozilla', 'Pearce...', 'Kim', '2 Micr...', 'Kim [Co...', and 'Kim 5 - ...'. The system clock indicates the time is 10:18 AM on 5/18/10.

Reserve Returns: Items are returned the same way as books from stacks.



Reserves in Heavy Demand

- Reserve items can be renewed as long as there is not another patron waiting to use it.
- If another patron is waiting and not currently at the desk we inform the patron who wants to renew it they must return the item and wait 15 minutes. If the item is still available after 15 minutes the initial borrower may sign it out again.
- An item which is in heavy demand (2 or more people waiting or a test/exam is that day) can be changed from a 2 Hour loan to a 1 Hour loan at the discretion of the staff member. Once an item has been changed to 1 Hour, the 15 minute wait for renewals applies here. This allows everyone an opportunity to sign out the item.

What Happens to Reserve Lists submitted Online or at the Desk?

- Lists must be checked by the Reserve Supervisor (Kim) who then records the Course name, professor, date of submission & whether a list is:

New – a previous year's list does not exist

Update – a previous year's list is available in our catalogue and either all materials are retained or removed or new items are added.

Remove – lists submitted may also be requests to have the entire list from last year completely removed from the catalogue.

- Reserve lists are done on a first come first serve basis.

Reserve - In Class Exercise

1. Sign out 3 Reserve items and write down the date and time they are due.
2. Edit the due time on the MPB to 9:45pm.
3. Check in all material.
4. Check your card to see if they have been returned.

Self Check Out Machines

- Video - “How to Use the Self Check Out Machine”
- Troubleshooting the Self Check Out:
 - If there is a problem with the computer an auto email is sent to Roger Periard & the Library Services Supervisors.
- Roger can reboot the computer remotely.

Troubleshooting System Problems

- On occasion the system can go down. When this happens there is a contact list & procedures on LibStaff:

<http://libstaff.mcmaster.ca/technology-new-media/llt/reporting-problems>

- Once the problem has been reported all Circulation transactions will have to be done manually.

Manual Circulation Transactions

- If the circulation system goes down, a manual procedure can be used to record Circulation/Reserve checkouts.
- You'll record the important information such as patron ID/barcode and item barcode on paper sheets.

General Circulation Transactions

1. Print all information clearly on coding sheets. Be sure to use barcode from front of book.
2. Renewals are not done when the system is down. Ask the borrower to come back.
3. Returns should not be processed until the system is back up and all the borrow transactions are processed.

Reserve Circulation Transactions

1. Use manual loan slips to process reserve checkouts. Put the yellow copy with the item and file the white copy in the box. When items are returned, match slips and discard yellow copies.
2. When the system comes back up; any materials which were signed out before the system went down must be returned under “Exempt Fines” so that billing notices are not generated.

I.D. Badges

1. Borrowers must still present an ID badge with a current validation sticker in order to borrow.
2. Reciprocal borrowing cards can be issued when the system is down.
3. External and courtesy borrowing cards can be issued when the system is down.
4. Cards cannot be renewed when the system is down.

After the System is Back Up

1. Process all the checkout transactions from the sheets first. Pass any sheets with problems to Debbie to investigate.
2. After the checkouts have been completed, process the returns.

Systems – In Class Exercise

1. Manually sign out 3 items on your card.
2. What transactions are available when the system is down?
3. When the system is back up, what steps are taken to process the books?

Questions?

- Expectations/Rubrics/Mentors/Shadowing/Homework/Assessment
- Circulation
- Reserve
- Self Check Out
- Troubleshooting System

