Blended Services: Circulation

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

May 26, 2010
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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
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.
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 wanding 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”.

![Library software interface with checked in book information]

- **Barcode**: Blank
- **Status**: Blank
- **Location**: Blank
- **Call No**: Blank
- **Volume**: Blank

Information about the checked in book:
- **Title**: Education, decolonization and development
- **Library**: MILLS LIBRARY
- **Call No**: LC 2805.E39 2009
- **Catalogue**: MILLS LIBRARY
- **Call No**: JL 111.C66C35
- **Volume**: 2009/20

Other books in the system:
- **Title**: About Canada: animal rights / John Sorenson
  - **Library**: MILLS LIBRARY
  - **Call No**: HV 4768.S67 2010
  - **Catalogue**: MILLS LIBRARY
  - **Call No**: 39009025653880
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

<table>
<thead>
<tr>
<th>Call no</th>
<th>Due date</th>
<th>Due time</th>
<th>copy</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. A Rabbi talks with Jesus: an intermillennial interfaith (MILLS RESERVE) SM 620 .N48 1993</td>
<td>05/17/10</td>
<td>11:48AM</td>
<td>39063047604131 copy 1</td>
</tr>
<tr>
<td>2. Franz Rosenzweig: his life and thought (Presented by MILLS RESERVE) SM 755 .R6 A6 1998</td>
<td>05/18/10</td>
<td>09:46AM</td>
<td>39060234323845 copy 1</td>
</tr>
</tbody>
</table>
Editing the Date and/or Time: Highlight the item you wish to edit & select “Edit Item”
Change the Due Date and/or Due Time. Remember to change the AM or PM (if applicable).
The saved changes should now appear on the check out screen.
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](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