

Montana Tech Library Public Services Policies and Procedures Manual

Montana Tech Library Public Services

- **Policies and Procedures Manual**
- **Information Desk Procedures for Student Workers**
- **Information Desk Procedures for Staff**

PUBLIC SERVICES MANUAL

11/19/2009

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PART AA - EMERGENCY, SAFETY and CONFIDENTIALITY**1) TELEPHONE NUMBERS**

CAMPUS SECURITY	4357 (HELP)	
Fire Department	911	
Physical Plant	496-4168	
Boiler Room	496-4199	
Director of Physical Plant	496-4399	
Marilyn Cameron	496-4463	Home Ph 494-5050
Campus Environmental Health & safety		

2) FLOOR PLAN

A floor plan showing the location of emergency exits, fire alarms and fire extinguishers is located on the brick wall behind the circ desk, at the first floor reference area, and at the stairway landing on the second floor.

3) EMERGENCY EXITS

There are 3 emergency exits in the building:

- 1 upstairs leading directly outside
- 2 on both floors leading to the emergency staircase

4) ALARMS

All doors have a local alarm which goes off when the door opens, and turns off when the doors are closed again.

The alarm to the upstairs outside exit (North) can be disabled temporarily if this door is needed for handicapped access or on other rare occasions. The box to turn off this alarm is on the top left of the door. The labeled key is in the locked key box in the circ office. There is a control button to see if the alarm is working. When you push the button and it buzzes, the alarm is off. If the button doesn't buzz when pushed, the alarm is on.

5) EMERGENCY LIGHTS

The fluorescent lights in the emergency staircase have a switch to the left of the doors. These lights are to be on at all times.

There is also an emergency light system (spotlights) which comes on during power failure. Always verify that these lights come on during power failures.

6) EMERGENCY PROCEDURES**MONTANA TECH LIBRARY EMERGENCY RESPONSE PROCEDURE**

1st responder does a sweep of 2nd floor (provided stairwell is safe to use), exiting from 2nd floor emergency exit.

2nd responder will sweep the 1st floor to notify patrons of the emergency and exit through the nearest door.

3rd responder will sweep the auditorium and exit the building through the front doors.

4th responder will exit the building through the nearest door.

- 1st notifies 2nd and so on. If 1st Responder is absent, the 2nd will take her place and so on.
- All staff and student employees will meet on the south side of Park Street and then proceed to the HPER parking lot to await further instructions.
- On EVENINGS/WEEKENDS when only one staff person and one student are working, the staff person will ALWAYS be the person to sweep the 2nd floor.

1st Responder – Director

2nd Responder – Computer Support Specialist

3rd Responder – Public Services staff or Reference

4th Responder – Tech Services staff

DO NOT REENTER BUILDING UNTIL INSTRUCTED TO DO SO BY PERSONNEL FROM FIRE DEPT OR PHYSICAL PLANT

-Montana Tech Emergency Plan Instructions

What You Need to Know NOW

from
Montana Tech Student Handbook & Calendar
2009-2010

Bomb Threat

1. Call 911 but do not pull fire alarm.
2. Follow evacuation procedures and sign in at assembly area.

Earthquake

1. Take cover under heavy desk or table and stay put until shaking stops.
2. If nothing to hide under, inner walls or door frames are next choice.
3. Stay away from glass, hanging objects, bookcases.
4. Shield head & face.
5. If outdoors, move away from buildings & utility wires.

Fire

1. Pull fire alarm & follow evacuation procedures; sign in at assembly area.
 2. Call 911 from safe location.
 3. Call Environmental Health & Safety 4463 and Security 4357 (HELP).
- **Use fire extinguisher if you are trained and fire is "garbage can size."

Gunman/Terrorist Event/Violence

1. If you are outside, go to closest safe building and closest room.
2. If you are already inside, stay in room.
3. Close and lock door if possible.
4. Close windows, drapes, & turn off lights.
5. Lie down on floor away from windows and out of sight if possible.
6. Remain silent & calm.
7. Communicate with authorities if possible.
8. Stay in place until all-clear is given by authorities.

Hazardous Materials Incident

1. If in lab and spill is small & manageable, wear personal protective equipment & clean up appropriately.
Notify EH&S 4463.
2. If in lab and spill is large, toxic or flammable, evacuate lab. Notify EH&S 4463 & Security 4357 immediately.
3. If incident is large from railcars or trucks, follow instructions to shelter-in-place or evacuate.

Hostage Situation

1. If you are not the hostage, call 911, EH&S 4463, Paul Beatty 4198, Security 4357.
2. Remove uninvolved individuals to a safe location.
3. Provide any information you have to authorities.

Medical Emergency or Physical Injury

1. Call 911 if you have an unconscious person or if someone requires immediate medical assistance.
2. Also call EH&S 4463 and Security 4357.
3. Send someone to meet emergency responders.
4. Administer first aid, CPR or AED (automated external defibrillator) if necessary and if trained.

Evacuation Procedures – follow anytime the alarm sounds Or you are instructed to evacuate

1. Follow evacuation route for that room/building.
2. Close but do not lock doors unless necessary.
3. Turn off equipment if safe to do so.
4. Use stairs, not the elevator.
5. Go to assigned assembly area and sign in so you are accounted for.
6. Do not go back into a building until given the all clear.

Lockdown Procedures – follow for any event when you need to be protected from someone or something on the outside

1. If you are outside, go to closest safe building and closest room.
2. If you are already inside, stay in room.
3. Close and lock door if possible.
4. Close windows, drapes, & turn off lights.
5. Lie down on floor away from windows and out of sight if possible.
6. Remain silent & calm.
7. Communicate with authorities if possible.
8. Stay in place until all-clear is given by authorities.

Shelter-in-Place Procedures – follow anytime there has been a large hazmat spill, radiation event, or other similar emergency

1. Move all people inside a building immediately.
2. Close all doors to the outside close and lock all windows, close drapes & blinds.
3. Close as many internal doors as possible.
4. Turn off all ventilation, heating & air conditioning systems. (Note: on campus, this has to be done by Physical Facilities.)
5. Extinguish all ignition sources.
6. Take shelter in upstairs, interior room without windows if possible.
7. If possible, seal gaps around windows, door, ventilation ducts or air conditioning units with duct tape, plastic sheeting, aluminum foil, towels, clothing, whatever you have available.
8. Tune into local radio or TV for information.
9. Stay in place until all-clear is given by authorities.

Subscribe to Montana Tech’s Emergency Text Messaging Notification System

It takes less than 2 minutes and can give you peace of mind that you will know when something is happening on campus. This service will only be used for emergency messages and testing of the system.

Scenario:

1. There is a person on campus with a gun and has started shooting. Would you want to know?
2. There has been a chemical spill in a building on campus. Would you want to know?
3. There has been a bomb threat on campus. Would you want to know?
4. The campus is in lockdown and you are on your way up the hill. Would you want to know?
5. The campus has been closed down because of a major winter storm or a pandemic. Would you want to know?

Instructions for opting into the Emergency Text Messaging System for Montana Tech

1. On your cell phone, go to the area where you send text messages.
2. For the phone number, type **368674**. (that is not a typo)
3. For the text, type **utextme mtech** and send
4. Within seconds, you will receive a text message that asks you to respond with the number 1. Hit reply and type 1 and send.
5. You will receive another text message that asks you to respond with the word yes. Hit reply and type yes and send.
6. You will receive a confirmation text message that says “You have been subscribed.” (will also tell you how to unsubscribe – don’t follow these instructions unless you want to unsubscribe).
7. Finally, you will receive a message that says “This is a test of Montana Tech’s Emergency Notification System. Reply S to Stop. If you reply S to this email, it will unsubscribe you, and you will have to start over. **DO NOT reply to the last message.**

If your cell phone subscription includes text messaging, each of these messages will count as a text message.

If you do not pay for a text messaging service, each text will cost whatever your carrier charges for a text message.

Parents are welcome to subscribe to the service.

Contact Marilyn Cameron, 4463, at any time with questions or concerns.

7) REQUESTS FOR RELEASE OF STUDENT INFORMATION

Registrar 11/21/01

Since the President's signing of the PATRIOT act on 10/26/2001, a subpoena or court order should accompany all law enforcement requests for nonconsensual releases of non-directory information. Nonconsensual release of private student information, unless pursuant to a subpoena or court order or otherwise authorized under a separate provision of law, could expose institutions to significant legal consequences. Release of directory information for students who have not requested confidentiality is allowed as in the past.

All law enforcement requests for any student information should be directed to the Registrar's Office to ensure consistency in our future dealings with official data requests. Requests from the Immigration and Naturalization Service about students on foreign student visas should be directed to Paul Beatty or Margie Pascoe, Designated School Officials (DSO's) on our campus. INS is legally entitled to access certain non-directory information on foreign students.

Please note that some requests may pertain to topics beyond student records, and may be made of such campus units as security, human resources, laboratories, computer centers, international student offices, or academic departments. Applicable privacy laws governing releases of the different categories of information are varied. Various college departments should consult with the appropriate administrative office regarding specific data requests.

Library procedure 5/17/04

If law enforcement personnel produce a search warrant or subpoena for patron library records, library staff will not provide requested information immediately.

Staff will direct law enforcement personnel to the Library Director, in her absence, following the chain of command, Doug Abbott, the VCAA, in her absence Dr. Frank Gilmore, the Chancellor, in his absence, UM Attorney David Aronofsky 406-243-4742

Staff will notify supervisor of any law enforcement requests for patron information even if the request is directed to the Registrar's Office.

9) CONFIDENTIALITY LAW

CFR 22-1-1103 NON-DISCLOSURE OF LIBRARY RECORDS

- (1) No person may release or disclose a library record or portion of a library record to any person except in response to:
 - (a) A written request of the person identified in that record, according to procedures and forms giving written consent as determined by the library; or
 - (b) An order issued by a court of contempt jurisdiction, upon a finding that the disclosure of such record is necessary because the merits of public disclosure clearly exceed the demand for individual privacy.
- (2) A library is not prevented from publishing or making available to the public reasonable statistical reports regarding library registration and book circulation if those reports are presented so that no individual is identified therein.
- (3) Library records may be disclosed to the extent necessary to return overdue or stolen materials or collect fines.

**PART A – PUBLIC SERVICES POLICIES/SERVICES
11/19/2009**

1) LIBRARY CODE OF CONDUCT

Welcome to the Montana Tech Library. Members of the campus community and visitors are invited to use the Library's information resources and services.

The Library strives to provide access to complete and well-maintained collections, information resources and equipment. The Library seeks to provide a safe and secure environment, and facilities suitable for reading, studying, and other activities associated with scholarly teaching and research.

All library users are expected to conduct themselves in a manner which facilitates these rights for themselves and others. Users and their guests who do not comply with these guidelines may be asked to leave the building. For off-campus users, the access to library resources and workstations may be limited to reasonable usage.

ALL LIBRARY USERS ARE ENTITLED TO:

- Courteous assistance from library staff
- Access to library resources and equipment
- a quiet research and study environment
- a clean physical environment

ALL LIBRARY USERS HAVE THE OBLIGATION TO:

- interact courteously with other users and library staff
- maintain a reasonably quiet environment in research and study areas
- use library resources in a responsible manner
- keep beverages away from electronic equipment
- Present identification upon request.

LIBRARY SERVICES END 15 MINUTES BEFORE CLOSING INCLUDING

- Check out
- Use of computers
- Use of photocopier

FAILURE TO ABIDE BY ANY OF THESE POLICIES AND PROCEDURES CAN LEAD TO SUSPENSION OF LIBRARY PRIVILEGES

2) LIBRARY CIRCULATION POLICY

All patrons must have a bar-coded ID card in order to check materials out of the library. There is no limit to the number of items a patron may check out. The owner of the card is responsible for any materials checked out of the library, even if used by another person.

a) LIBRARY/ID CARDS

- i) All campus patrons use their regular DiggerCard card.
- ii) All University of Montana (U of M, UM-Western, MT Tech, Missoula COT, Helena COT and Butte COT) faculty members and students use their own institution ID card or barcode.
- iii) Alumni, members of other units of the Montana University system and some off-campus users over 18 may obtain a Montana Tech Library card. Off-campus users do not have remote access to library databases. There is no charge.
- iv) Faculty emeritus and visiting scholars may obtain a library card with that special status.
- v) Individuals using the library resources for business purposes may obtain a library card (Business user). Please consult staff about particular services.
- vi) Distance education students may not have been issued a DiggerCard. They can contact staff at the Circulation Dept at 406 496-4281. Staff will use an off-campus card for the distance education student and
 - (1) Add the barcode to the student's record
 - (2) Write the student's name and "Distance Ed" on the card.
 - (3) Mail the card to the students.

3) POLICY FOR OFF-CAMPUS LIBRARY USERS

Policy for granting off-campus cards

Off-campus borrowing privileges will be extended to alumni and patrons of legal age who need to use the special resources of the Tech library. Patrons will be encouraged to use the Public Library for general resources and interlibrary loans. If patron is alumni, check Voyager to see if they have a record—if so, it can be edited to “off-campus” status. Off campus cards expire and must be updated after one year.

The patron needs to provide **TWO PROOFS OF CURRENT ADDRESS** such as:

- **Montana** Driver's License
- Rental or Lease Receipt of Payment
 - Landlord's name and phone number should be on receipt
- Utility Bill Receipt of Payment
- Telephone Book Listing/Cell phone bill
- Conservation License
- Bank Statement

If possible, have the patron provide:

Business address, phone & email—add to notes field in patron record

Social Security Number (we DO NOT use as ID#)

Always use **BMMDDYY** as the institution ID #.

OUT OF STATE Driver's License will be accepted with **TWO OTHER PROOFS OF CURRENT ADDRESS**

- a) LOAN PERIOD AND OVERDUES (no fines for faculty/staff)
 - i) Long-term – students, off-campus and business: 28 days, 2 phone renewals
 - (a) Overdue fine: \$ 0.15/day, one-week grace period
 - (b) After one month, patron will be billed for replacement cost plus \$ 10.00 processing fee for each overdue item.
 - (c) Borrowing privileges suspended in case of 5 overdues or \$ 50 fines/fees.
 - ii) Long-term - Graduate students: end of current semester, no phone renewals
 - (a) Overdue fine: \$ 0.15/day, one-week grace period
 - (b) After one month, patron will be billed for replacement cost plus \$ 10.00 processing fee per item.
 - (c) Borrowing privileges suspended in case of 5 overdues or \$ 50 fines/fees.
 - iii) Distance Education students: 2 months, 1 renewal
 - iv) Long-term - Faculty/staff: 1 year, no phone renewals
 - v) Long-term – Faculty Emeritus: 3 months, 2 phone renewals
 - vi) Long-term - other libraries: 42 days
- b) LOAN TERMS
 - i) LONG-TERM: according to patron type, all formats
 - (1) Books
 - (2) Documents
 - (3) Annual Reports
 - (4) Journals more than 6 months old
 - (5) Maps
 - (6) Technical Reports
 - (7) Montana Tech Theses
 - ii) NON-CIRCULATING: may be used in library without checkout
 - (1) Serials less than 6 months old
 - (2) Reference collection
 - (3) Bibliographies
- c) RECALLS
 - (1) All items may be recalled after one week's use. There are no exceptions. The original patron may request to have the material returned after one week.
 - (2) No items or patrons are exempt from recalls.

- d) RENEWALS (if no holds)
 - i) Undergraduate students, off-campus and business and business users: three renewals. No phone renewals for overdue books.
 - ii) Faculty and graduate students: items checked out by these patrons must be physically produced and verified at the end of checkout period. Staff will checkout/renew.
- e) PAST OVERDUE ITEMS (NOT FACULTY)

Students and off-campus and business patrons receive three overdue notices, one week apart. After one month the item is no longer overdue, but considered to be lost. The patron is billed the replacement cost of the item plus a processing fee of \$ 10. A block is put on the student's record in the administrative database. All blocks must be cleared before the student can register or pre-register, or receive a transcript. Arrangements for similar restrictions are in place with other U of M libraries.
- f) SUSPENDING LIBRARY PRIVILEGES
 - i) In the event a patron develops a history of not responding to repeated attempts at recalling materials or billing for overdue materials, his/her library privileges may be suspended at the discretion of the Public Services Staff or the Library Director. The same rule may apply to a patron who continues to have a history of losing or not returning books on time, with repeated fines, which are not paid.
 - ii) When any patron has had a consistent problem with overdues, books not returned, no response to recalls, and the patron is due to leave campus permanently in the near future, the library reserves the right to suspend or restrict the patron's library privileges.
 - iii) Library privileges may be suspended to an off-campus patron if the patron does not obey Circulation Policies and Procedures.
 - (1) Limit computer use time to one hour per day
 - (2) Paying for printing fees at .10 per page
 - (3) Giving students priority computer use
 - (a) If the computer lab is needed by students an off-campus patron will be asked to leave

4) SPECIAL COLLECTIONS POLICY and PROCEDURES updated May 6, 2003

The Special Collection of the Montana Tech Library includes rare and historic resources relating to mining, minerals, geology, industry and culture, with an emphasis placed on subjects related to Montana. New publications are selected to enhance the collection. Careful handling of the items in this collection is necessary to preserve the content. Direct access to the Special Collections room is prohibited. For large research projects, an appointment may be required, depending on staff availability. Archival gloves must be worn while handling the retrieved item because oils, acids, salts and enzymes on fingertips damage paper and cause deterioration over time. If you need photocopies from a Special Collection item, provide a library staff member with a call number and list of pages from the item you wish to have photocopied. The circulation staff will photocopy items at 15 cents/page for durable items. Turnaround time will depend on the staff workload. The user must follow copyright guidelines for copyrighted materials. Payment to the circulation staff is due when copies are made.

5) INTERLIBRARY LOANS FOR MONTANA TECH PATRONS

NOTICE: WARNING CONCERNING COPYRIGHT RESTRICTIONS

The copyright law of the United States (Title 17, United States Code) governs the making of photocopies or other reproductions of copyrighted materials. Under certain conditions specified in the law, libraries and archives are authorized to furnish a photocopy or other reproduction. One of these specified conditions is that the photocopy or other reproduction is not be "used for any purpose other than private study, scholarship, or research." If a user makes a request for purposes in excess of "fair use", that user may be liable for copyright infringement. This institution reserves the right to refuse to accept a copying order if, in its judgment, fulfillment of the order would involve violation of copyright law.

Information or items needed by a patron, but not owned by the library, can be obtained through the Interlibrary Loan System. It is the responsibility of the borrower to exhaust all in-house resources. Patrons requesting ILL service should be directed to a Reference Librarian. Off-campus users are encouraged to use their public library. Requests can only be placed through the online interlibrary loan module ILLIAD. A patron may request an item only once per semester.

a) Charges:

- i) Undergraduate students: The library will not pay cost for undergraduate students for Interlibrary Loans unless all other sources which do not charge have been exhausted.
- ii) Faculty/staff: library will absorb cost if it has been determined there is not another alternative for getting the required information needed
- iii) Graduate students: IDCR (Indirect Cost Recovery program) will absorb cost.
- iv) Off-campus and business users, including alumni: \$15.00/transaction plus other charges.
- v) Business patrons will be charged \$ 15 per transaction plus any other charges from the lender.

- b) **Copyright Fees:**
Copyright fees will be charged to the faculty/staff member's department, or passed on to the off-campus and business user. A student's need for the item will be assessed before ordering material where a copyright fee will be charged.
 - c) **RUSH:**
There will be a charge of \$ 5.00 for RUSH requests (receipt of item within one week.) Patron will also assume RUSH charges from the lending library, as well as extra delivery charges, such as Federal Express.
- 5) **INTERLIBRARY LOANS TO OTHER LIBRARIES, BUSINESSES, OR DOCUMENT SUPPLIERS**
- a) The Library follows the State of Montana, National and International ILL protocols, as well as copyright guidelines.
 - b) The Library maintains reciprocal agreements with a number of libraries and belongs to the OCLC International Lending group.
 - c) The Library does not charge for providing loans or photocopies to other libraries.
 - d) The Library charges businesses and document suppliers for loans and photocopies: \$ 15.00 per transaction. Special requests and oversize items upon agreement.
- 6) **DOCUMENT DELIVERY SERVICES**
Users do not need to come to the Library to use in-house resources or Interlibrary Loan services.
1. Library users who may use this service
 - a. Distance education students (students who are enrolled in online courses at Montana Tech. They do not come to campus to attend classes, and therefore are not expected to come to the library to use its resources.)
 - b. Graduate students working out of area
 - c. Faculty and staff of Montana Tech and the Bureau of Mines working at out of town or out of state locations
 2. Materials we own
 - a. The library mails books and other library materials to the user's home address.
 - b. The user returns the library materials to us by mail.
 - c. The library scans copies of articles in library-owned journals and posts them on the web for the user's desk-top access.
 3. Materials we don't own
 - a. The Library obtains books and other library materials through Interlibrary Loan and mails them to the user's home address.
 - b. The user returns the library materials to us by mail.
 - c. The Library obtains copies of articles from other libraries and posts them on the web for the user's desktop access.
 4. Procedure to request these materials
 - a. Register as an Illiad (Interlibrary Loan software) user on the library home page at <http://www.mtech.edu/library>
 - b. Use Montana Tech email address for contact.
 - c. Identify yourself as "Distance Ed".
- 7) **ACCESS TO LIBRARY DATABASES from off-campus**
All Montana Tech students have off-campus access to the databases listed on the library homepage. In order to be verified as a Montana Tech student, the user needs to provide his or her Montana Tech ID# (9 digit number) which is imprinted on the DiggerCard, (Montana Tech ID card).
1. ID#s for students, staff and faculty are added by the system through Banner loads. Old numbers/barcodes etc must be deleted (or expired) by Circ staff.
 2. Distance education students may not have been issued a DiggerCard. They can contact staff at the Circulation Dept at 406 496-4281. Staff will use an off-campus card for the distance education student and
 - a. Add the barcode to the student's record
 - b. Write the student's name and "Online" on the card.
 - c. Mail the card to the students.
- 8) **MISCELLANEOUS SERVICES**
- a) **TYPEWRITER** (first floor, south wall)
One typewriter for student use is available in the library: IBM Wheel writer 2 with printwheel. It can be checked out from the Information Desk (2 hr In-Library Use).

- b) **PCs FOR STUDENTS' USE**
There is a computer lab area along the west wall of the library and in the center row of the 1st floor. The Information Commons area PCs are primarily for research purposes. There is a PC with a scanning station located next to the student printers. This PC also has the microfiche reader with it.
 - c) **Photocopiers for public use**
One photocopier is available for use in the student work area. Copies are ten cents each. The machines take coins, or one and five dollar bills.
 - d) **Staff copier**
Staff may use the staff copier. Staff must use their own account number (set up by us) to access the copier. If they do not have one (see list of acct #s in blue copier folder at Info Desk), Circ staff can set one up for them. Off campus business users can also request an account to be set up if they have large quantities to copy. Circ staff will bill monthly for these charges.
 - e) **Hiring of students for copying on their own time**
Will be at the director's discretion.
 - f) **Over size copies (large maps etc.)**
The Montana Bureau of Mines or Central Duplicating.
 - g) **Color copies**
Copying will be done as personal are available. Charges are \$0.50 per page.
 - h) **Color printing**
Is available on the scanner computer with assistance from a staff member for log-on access to the color printer in the staff copy room.
 - i) **Scanning**
Self-service on reader/printer workstation next to Reference desk.
 - j) **Converting microform to electronic format (pdf)**
Self-service on reader/printer workstation next to Reference desk
 - k) **Office equipment worktable**
Scissors, hole punch, staplers, tape dispenser, pencil sharpener on table near Reference Desk
 - l) **Photocopying Service Charges for one-time projects (copies for Business users, copying theses for other libraries etc.)**
 - i) Can be done at Circ staff discretion (or check w/ Library Director).
 - ii) Copying done by student employees: \$.15/pages plus \$ 5.00 shipping and handling.
 - iii) Invoice at time of service.
 - iv) Charge for scanning/sending electronic copying: check w/ Director.
- 9) **LIBRARY STUDY ROOMS (on 2nd floor)**
Study rooms are available upstairs. Rooms can be reserved 24 hours in advance for students on a first come first serve basis.
- 10) **PETS IN BUILDING**
According to Campus Policy, no animals are allowed in the building except for service animals such as seeing-eye dogs.

PART B COLLECTIONS IN THE LIBRARY AND DEFINITION OF CIRCULATION TERMS

Montana Tech Library shares the online catalog with the University of Montana Libraries and others: Mansfield, WMC, Butte, Helena, Missoula COT, Salish Kootenai College, and St. Patrick Hospital.

NOT ALL OF TECH'S HOLDINGS OR COLLECTIONS ARE IN THE ON-LINE CATALOG. FOR MORE INFORMATION, CONSULT THE REFERENCE LIBRARIAN.

Visit the Library's homepage at www.mtech.edu/library

1) CIRCULATION TERMS

NON-CIRCULATING (REFERENCE and BIBS): May be used in the library without checkout at desk. May be checked out and leave the building with special permission by Library Director or either Reference Librarian

NON-CIRCULATING (CLOSED STACKS): Will be retrieved by staff and checked out at desk to be used in the library.

REGULAR: 28 days to students and off-campus
 Until end of current semester for graduate students
 1 year for faculty and staff

RESERVES: LIBRARY USE ONLY (2 hr use in library)
 RESTRICTED USE (2 hr use in library may be taken out shortly before closing,
 due at opening next morning)
 ONE DAY USE (check out at any time, due back next day at any time) or as designated by faculty

2) BIBLIOGRAPHIC RECORD IN ONLINE CATALOG

In catalog:	yes
Some in catalog:	some
Not in catalog:	no

3) CLASSIFICATION SYSTEM (shelf order)

Library of Congress:	LC
Superintendent of Documents:	SuDocs
Alphabetical:	A

4) COLLECTIONS

a) MONOGRAPHS (BOOKS) (second floor)

<i>REGULAR</i>	<i>LC</i>	<i>yes</i>
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Books are cataloged and classified according to the Library of Congress (LC) Classification call number system using subject groups. This is an alphanumeric system ranging from A – Z. All cataloged books are stored on the second floor.

Special items (see below):

FOLIO: over-sized books which do not fit on the regular book shelves are stored at the beginning of the regular books.

CD, DVD, and VHS cases are in the circular file display behind student printers (first floor)

LEISURE READING AREA (first floor) Selected items for recreational reading

NEW BOOK SHELF (first floor)

b) GOVERNMENT DOCUMENTS (second floor)

REGULAR

A document is any information published by a government agency: state, federal, or foreign. The library has an archival collection of US Geological Survey, US Bureau of Mines, and Montana Bureau of Mines publications.

Special sections:

Folio - over-sized items which do not fit on the regular shelves are stored at the beginning of the documents

CD, DVD, and VHS cases are in the circular file display behind student printers (first floor)

- j) VERTICAL FILE (first floor)
- k) MICROFORMS, MICROFILM (first floor)
NON-CIRCULATING
- 2) SPE preprints (with BIB indexes on top of cabinet) under review
 - 3) Cataloged microfiche, incl. city directory under review
 - 4) Serials on microfiche under review
 - 5) BCL British and American History under review
 - 6) Washoe Sampler: IN BROWN BOX ON TABLE ADJACENT TO STAFF COPIER. This is a microfilmed collection of the assay records of ore samples analyzed at the Washoe, an office located west of Butte. These ore samples come from all over Montana. Caution should be taken in researching duplicate mine names located in different areas. The original collection consists of 17 volumes covering periods from February 1905 to February 1964. Information in each entry includes the mine or property name and the amounts of various substances assayed. The original collection is stored at the Montana Historical Society.
 - 7) US patents on microfilm (first floor) under review
 - 8) SUPERFUND microfilm (second floor, to the left of folded GPO maps)
 - 9) Miscellaneous USGS maps on microfilm (second floor)
 - 10) Miscellaneous foreign and state docs (second floor)
- l) MISCELLANEOUS
- m) SUPERFUND (second floor)
NON-CIRCULATING LC Some
The EPA office provides the publications in the SUPERFUND collection, which is located in front of the State Documents section on the 2nd floor. This collection and its in-house directory (in notebook) are updated periodically by the EPA office. Items may be checked out short-term with written approval of REF librarian.
- n) ADMINISTRATIVE FILE (second floor)
NON-CIRCULATING A NO
These records concerning the Montana Pole Plant are also provided and maintained by the (state) EPA office.
- o) MINE WASTE PUBLICATIONS (second floor)
REGULAR A YES
The publications by the Mine Waste Pilot Program are stored between the SUPERFUND and the TECHNICAL REPORTS.
- p) TECHNICAL REPORTS (second floor)
REGULAR A SOME
Technical reports are usually written for a government agency for research done on a specific subject, through government funding.
Technical reports are published both on paper and on microfiche. The paper collection is located upstairs behind the map cases, next to the Superfund collection. Some Technical Reports have been incorporated into the general SuDocs collection. The copies on microfiche are stored in cabinets along the North wall according to the Technical Report Number.
- q) MAPS (second floor)
REGULAR SOME
Maps are stored according to various systems: by location, by title, or by SuDocs call number on the second floor in the large storage cabinets, also in 4-drawer file cabinets. The filing system is outlined in a Map Index folder.
- r) FEMA AND FIRM maps (second floor)
- s) US PATENT AND TRADEMARK OFFICE PUBLICATIONS
THERE ARE NO CHARGES FOR THE USE OF THE PATENT CENTER
Patents available on Internet - consult staff - various sources are available
The Patent materials are located near the Patent workstation at the left end of the North wall, as well as in SERIALS under "P". Patents can be searched on paper and on CD-ROM. We assist the patron in her/his search, but the actual PATENT search has to be done by patron.
Reference will do free TRADEMARK searches after the patron provides a written request containing the name to be searched.
OFFICIAL GAZETTES are stored in the Serials section.

Holdings of PTO materials are found in the Directory of Patent Libraries.
 Patents on microfilm are stored in drawer cabinets near the MF reader/printers.
 Patents on CD are stored in drawer cabinets to the left of the staff copier.

Patent and patent-related holdings in our library:

Patents on microfilm:	1981 (4242757) - to present	(full text with drawings and abstract)
Patents on CD:	1994 (5274846) - to present	"
Official Gazette:	1871 (v.1) - to present	(short version with drawings and claims)
Plant patents	starting with # 1, on mf and paper	

u) CLASS RESERVES (behind circ desk)

CIRCULATE AS DESIGNATED

Reserve items are stored on the shelves directly behind the circulation desk, arranged alphabetically by instructor's last name

Reserve items are held for students in a particular class to use for a controlled short period of time through the instruction of the instructor.

NON-CLASS USE RESERVES (behind circ desk)

CIRCULATE AS DESIGNATED

On this shelf to the left of the circulation office door are the following items:

Non-class use reserves such as campus policies and course catalogs.

v) CLOSED STACKS (Special Collections, upstairs archival storage)

Some items in our collection meet particular criteria, which require them to be stored in closed stacks.

a) THESES Tech theses may only be removed if additional copy exists.

i) Montana Tech masters' theses c. 1 (upstairs archives) IN-HOUSE

ii) Tech bachelors' theses in Technical Services

(1) Copy 1 IN-HOUSE

(2) Copy 2 REGULAR may only be removed if additional copy exists

2) SPECIAL COLLECTIONS

IN-HOUSE USE

Careful handling of the items in this collection is necessary to preserve the content. Direct access to the Special Collections room is prohibited.

For large research projects, an appointment may be required, depending on staff availability.

To identify items in Special Collections, search the library catalog. If you wish to view an item from the Special Collection, fill out a "call slip" at the circulation desk, and give it to a circulation staff member. Depending on the workload of the circulation department, the item may be retrieved immediately, or you may be asked to come back to view the material at a later time. One call slip per item is required.

Archival gloves must be worn while handling the retrieved item because oils, acids, salts and enzymes on fingertips damage paper and cause deterioration over time.

If you need photocopies from a Special Collection item, provide a library staff member with a call number and list of pages from the item you wish to have photocopied. The circulation staff will photocopy items at 15 cents/page for durable items. Turnaround time will depend on the staff workload. The user must follow copyright guidelines for copyrighted materials. Payment to the circulation staff is due when copies are made.

ARCHIVAL MATERIALS

IN-HOUSE USE

Yearbooks, US Geological Survey, US Bureau of Mines, Montana Bureau of Mines and Geology may only be retrieved by staff, and may only be removed if additional copy exists.

w) HOLD SHELVES (outside circ office)

b) HOLD SHELF is for holding items until the user can check them out.

i) All items should have a name and a date on them. Items not picked up after 2 weeks will be reshelfed

c) FACULTY HOLD is for new books which had been recommended for purchase by faculty, bought and processed.

A hold has been placed on these books in the requesting person's name. The faculty member who requested the purchase has first priority for check-out. . Items not picked up after 2 weeks will be reshelfed.

PART D GUIDELINES FOR PUBLIC SERVICES STAFF

1) GENERAL INFORMATION

- 2) There are 3 emergency exits in the building: 1 upstairs leading directly outside, 2 on both floors leading to the emergency staircase
- 3) All emergency doors have a local alarm, which goes off when the door opens, and turns off when the doors are closed again. The upstairs door leading outside (North) has a mechanism which disables this alarm temporarily: for example to move furniture or to use this door for handicapped access. This alarm can be turned off with the library master key using the box on the top left of that door. There is a control button in this box to see if the alarm is working. When you push the button and it buzzes, the alarm is off. If the button doesn't buzz when pushed, the alarm is on.
- 4) The fluorescent lights in the emergency staircase have a switch to the left of the doors. These lights are to be on at all times (unless they draw too much attention and too many people attempt to open those doors. Please keep an eye on this.)
- 5) There is also an emergency light system (spotlights), which comes on during power failure. When we have a power failure please check and see if these lights have come on.

2) WORKPLACE SAFETY

- a) Safety and sound ergonomics is a first concern for all staff.
- b) Safety procedures will be followed according the guidelines on the Board of Regents website.
- c) Following safety procedures is part of the MAP yearly evaluation under: Leadership: ...and attention to safety principals
- d) See appendix

3) CONFIDENTIALITY LAW

- a) Library staff and student workers NEVER give out personal information about patrons or items that have been checked out. Anyone insisting on this information should be referred to the Head of Public Services or Library Director. Anyone requesting information about a MT Tech student or staff member will be referred to the Human Resources or the Registrar's office.
- b) If a person wants a book that is already checked out, Library Staff will contact the patron using it, without disclosing who is requesting the item or who has it checked out. When contacting a patron about an item to be picked up at the library, name titles only to the person who has item checked out or who has requested the item.
- c) OBEY CONFIDENTIALITY LAW!

4) LIBRARY COMPUTER POLICY

a) LIBRARY STAFF/STUDENT COMPUTER –

All library staff/student workstations have access to Voyager and/or Banner – all machines lead to student information and are therefore vulnerable.

b) VIRUS SCANNER UPDATES:

Library Staff IT (Marcia) with the help of Student IT will update staff Virus Scanners to search for potentially unwanted programs.

c) LOADING SOFTWARE:

Staff may load, re-load, and run updates on software that has been PURCHASED for the Library without double-checking with Marcia.

d) LOADING FREWARE PROGRAMS FROM THE INTERNET:

i) Staff - Before downloading software from the Internet do the following:

- (1) Email Library IT (Marcia) with URL for the software
- (2) In detail, explain why this software is needed for your processes
What Why When How: Answer all of the above in your email
- (3) Marcia will check with Campus Network Manager (Bill Schmidt), Comp. Ctr. Equip. Tech. (Eric Luther), and other sources to learn if any problems have been reported with the software.
- (4) If the freeware software checks out then the software will be approved for installation.
- (5) If the freeware software is not approved and there is compelling evidence indicating that the functions of the software are important to the job, then a search will be done to find a software package that may be purchased for the purpose.

ii) Students - Students should never load software on the staff/student machines.

5) SUPERVISION OF STUDENTS

- a) The main assigned circulation supervisor on schedule should check student work and the procedures they are using. If another staff person needs help from an assigned circulation desk student, the supervisor responsible for the desk should be asked if s/he needs the assigned student. Immediate desk supervisor has the first choice of these students. If a circ student is away from the desk, it is the supervisor's responsibility to watch the desk. Generally the assigned supervisor will stay at the desk to answer questions and have the student find materials, etc.
- b) In dealing with students from other library departments, always go through that student's supervisor. For example, if a student receives a phone call, transfer the call to the student's supervisor.
- c) Note students' failure to work shift on master calendar.

6) FAX

- a) The FAX transmits and receives anytime; it is never turned off.
- b) Faxes received for the top administrators are immediately sent to the administration fax machine and the original copy is delivered in an envelope to one of the Administration or Human Resources' Departments' secretaries.
- c) Faxes received for faculty: fax to departmental fax machine, or call recipient and put fax on hold shelf.
- d) Follow operating procedures in fax machine manual.

7) DUPLICATING SERVICES INFORMATION see PROCEDURES for specific charges

- a) Copiers – desk staff and students maintain supplies
 - i) Student copiers
One copy machine is available for student use. It is supported by Student Activities (Duplicating). We keep track of maintenance problems and call for service under the service contracts. Service Log is kept at circ desk. When replacing a toner cartridge, the date and machine number must be written down on pink slip attached.
 - ii) Staff copier
 - (1) The staff copier operates on a cost/copy basis. This includes the toner/copy cartridges. They are not interchangeable with the student cartridges, even though they may be identical.
 - (2) Electronic auditron numbers for different library and campus accounts are programmed into the copier by PS staff. All library users may use the staff copier and pay in cash or charge to an account.
- b) Microform Reader/Printer
For both film and fiche: desk staff and students maintain supplies. No charges.

8) MASTER CALENDAR

Trays for memos and the master calendar are kept on the shelves above the ILL shelves. These memos should be checked at the beginning of a shift for new information. The Master Calendar shows schedules, staff activities and events. A note **MUST** be placed on this calendar when student schedules are rearranged. You should note hours exchanged for both students involved and the exchange should be completed within a week's time. Any changes or absences in the working schedule should be cleared with circ staff **BEFORE** the working hours. Staff will use this calendar to track of hours worked and time taken off.

9) BREAK ROOM POLICY

- a) The break room is provided for all staff and students employed by the Montana Tech Library for their relaxation and convenience. Because it is an area of relaxation, library work or studying should be undertaken in other areas of the building. Any person may forfeit the privilege to use this room if the rules are not followed.
- b) Food items on table (or clearly indicated) are for any hungry person. Those items, which are in the refrigerator, are private and should be left for the proper owner.
- c) Clean up all dishes used.
- d) Clean up all areas used (includes counter, stove, oven, microwave, refrigerator, and table tops.)

10) AUDITORIUM ACCESS

Library Staff are not in charge of auditorium or giving access to auditorium. Refer users to the Student Activities Office. Do not admit user before time agreed on with Student Activities Office. Emergency access may be granted by Library Staff.

11) CD-PRODUCTS and PC SUPPORT

- a) The manuals and documentation for all computer related equipment and software are managed by Marcia.
- b) All check-in of records will be maintained by Technical Services.
- c) Marcia is the first resource for computer-related problems and questions (library and public access).

- 12) DIRECTOR'S OFFICE As per Ann:
- a) The lock to the director's office has been changed.
 - b) In the director's absence her mail is to be placed in Betsy's office, any ILL received for her on the faculty hold shelf.
- 13) WORKORDERS
- a) Physical Plant
 - i) Work orders for Physical plant problems may go to either Frances Holmes or Carol Reed or to Marcia Lubick in their absence.
 - ii) Send work orders to mdurkin@mtech.edu with subject line: work order. Put who/what/when/where in the body of the message.
 - b) Computer Center
 - i) Work orders for computer problems will go to Marcia or Circulation in her absence, or Ann St. Clair. Copies to Marcia are required.
 - ii) Send work orders to bschmidt@mtech.edu with subject line: work order. Put who/what/when/where in the body of the message.
- 14) OFFICE SUPPLIES
- a) Replacement items for this drawer are found in the supply room.
 - b) Circulation supplies are kept in the bottom drawer at the west end of the circ desk.
 - c) Supplies taken from the supply room are to be checked off on the inventory lists kept on the clipboards.
 - d) Supplies needing to be replaced should be reported to Carol Reed for reordering.
- 15) STAFF GUIDES
- a) PUBLIC SERVICES DEPARTMENT FUNCTIONS:
 - i) Answer and direct questions by patrons
 - ii) Circulation
 - iii) Overdues
 - iv) Faculty and graduate student renewals
 - v) ILL
 - vi) Reserves
 - vii) Book shelving and stack maintenance
 - viii) Searching for MISSING, LOST items
 - ix) Study rooms reservation
 - x) General upkeep of public areas (non-janitorial) during evenings
 - xi) Quick maintenance of non-computer equipment
 - xii) Quick reference during off hours
 - xiii) Operating fax machine
 - xiv) Operating color copier
 - xv) Supervision of work-study and hourly students
 - b) UNION:

Classified staff at Montana Tech is covered by a union contract. In case of problems, talk to supervisor. If necessary, refer to Union Blue Book. If you are still not satisfied, talk to Library Director.
 - c) EVALUATION;

The Library uses the MAP series.
 - d) PROBATION:

Probationary period for new staff is 6 months. No reason needs to be given for dismissal during probationary period.
 - e) FERPA:

All staff members (and students) must attend FERPA (patron record confidentiality) training
 - f) SCHEDULE:

Working hours are as scheduled, not to exceed 40 hrs/week. If you are asked to work outside your regular schedule, for example to cover staff who are ill or on vacation, you are entitled to time and a half after 40 hours, or after 8 hours in one day, even if the 40 hours do not seem contiguous, for example:
You have worked Monday-Friday, and also work Sunday:
Sunday will be considered overtime. If within the 2 week change-of-schedule notice period, employee may not be asked to take off the following Friday in order to save overtime

Your regular schedule is Tuesday-Saturday. You work Sunday, but take vacation any day during the previous week (could even be Saturday):

Sunday will be considered overtime.

- g) **TRADE SHIFTS:**
You may trade shifts with another staff at both your convenience. Comp time is not permitted. Possible overtime must first be approved by Director.
- h) **SAFETY:**
All staff must follow established safety procedures. Refer to Montana Tech Employee handbook and Board of Regents policies (see below)
- i) **OVERTIME :**
A separate orange timecard must be used for the overtime hours, besides the regular timecard for regular hours. Timecards are turned in every 2 weeks. Business Office must be notified ahead of submitting timecard.
- j) **TEMPORARY STAFF**
(< 90 days) may be hired without search. Position must be pre-approved by Business Office. Suitable candidate may be suggested by us, or Personnel will go to a Temp Agency. The temp worker will receive the appropriate pay grade (entry level) for the position.
- k) **TRADE POSITIONS**
- l) A memo to the Business Office is required when currently employed staff members trade positions.
- m) **HIRING NEW STAFF:**
All applications are returned to Personnel. All applicants receive letter from Personnel after decision has been made. Head of FS may call applicants who have been interviewed to thank them and let them know that at this time another person has been chosen.
- n) **MISCELLANEOUS**
 - i) The regular working day consists of 8 hours. For rest periods (coffee breaks) for staff and students see Policy Memo.
 - ii) All functions of PS are covered in a Procedures Manual. It covers Library Policy, student and staff duties, PS policies, and detailed procedures for all jobs. The manual is open for discussion and improvements. It is updated periodically.
 - iii) All equipment is for job-related purposes only. All long-distance phone calls must be recorded in a log, and are checked against the state phone bill each month.
 - iv) The break room is for all staff and student use.
 - v) Refer all problem patrons to supervisor or Library Director.
 - vi) State Holidays must be taken during the same pay period, but not necessarily on the calendar day.
- o) **STUDENT WORKERS:**
 - i) Students at the circ desk are supervised in a professional manner. If problems can't be handled between staff and student, contact supervisor.
 - ii) Each new student is to receive a packet of the following items:
 - (i) Training schedule
 - (ii) Work-study requirements (to be signed)
 - (iii) General guidelines memo
 - (iv) Fax guidelines
 - iii) Students may work: 8 hours on days without classes, 20 hrs/week if taking summer classes
 - iv) Work-study students eligible to work during winter break: only codes preceded by "6" on timecard. All students are eligible to work during spring break. Only half of the award may be earned during the first semester.
 - v) Starting pay for all library students is minimum wage, as of 7/1/09 is \$ 7.25/hr, with 25 cents increment raises in subsequent years if budget allows. Summer wages are higher depending on experience and availability.
 - vi) Procedure to be used in case of student absenteeism:
 - (1) Email and/or verbal warning
 - (2) Dismissal
- p) **Timecard Policy**
(as per Lea Stillwagon and Maggie Peterson 9/19/05)

In response to an audit issue, the following guidelines will be implemented to insure that timecards are not modified after a supervisor's approval:

- i) Staff timecards
- ii) Timecards must be completed in ink.
- iii) Timecards must be submitted to the supervisor for approval/signature before they can be processed for payment.
- iv) Timecards must be submitted to the payroll department by the supervisor. Timecards are not to be returned to employees for submission.
- v) Any obvious or adjustments (sic) on the timecards will be investigated prior to payment.
- vi) Student timecards:
- vii) Student timecards must be completed in ink.
- viii) Student timecards must be submitted to the supervisor for approval/signature.
- ix) Student timecards must be submitted to the Career Services by the supervisor or departmental secretary.
- x) Financial Aid will accept timecards submitted by the student employee only with verification from the supervisor.

MONTANA BOARD OF REGENTS OF HIGHER EDUCATION
Policy and Procedures Manual

SUBJECT: PERSONNEL

Policy 713.1 - Workers' Compensation; Workplace Safety
Effective March 20, 2003; Issued May 2, 2003

Board Policy:

It is the policy of the Montana University System (MUS) to provide and promote a safe and healthy work environment for all employees to foster a positive atmosphere for learning and the educational process. The Montana University System (MUS) Board of Regents believes our employees are our most important assets.

Each MUS unit will designate at least one individual identified by job description and evaluation criteria who shall have authority and responsibility for occupational safety, health, and loss control activities campus wide. To enhance consistency and lead to an efficient loss control program an individual may be assigned authority and responsibility for more than one campus.

During the initial orientation period, each employee will be informed of the individual institution's emphasis on safety and the individual employee's responsibility for safety. This will include information regarding workers' compensation coverage, accident reporting, accident investigation procedures and injury monitoring and mitigation efforts. Supervisors shall have the responsibility of requiring safe work practices for their employees.

History:

Item 118-104-R0303, Workers' Compensation Proposal, Workplace Safety, approved by the Board of Regents March 20, 2003.

PART E PROCEDURES
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1) GENERAL CIRCULATION DUTIES

a) Evening Desk

- i) Security Staff patrol the building in the evenings.
- ii) Elevator operates automatically all night.
- iii) After regular hours, when other staff leaves, lock all staff offices. The door to Technical Services will be kept closed, but not locked.
- iv) Supervise work-study students on duty at front desk during the evening.
- v) Make rounds of the library during the evening to check the condition of the building, and to take care of any problems which may occur.
- vi) Clear tables, study areas, and shelves of books and serials, check in, sort them onto carts or serials' sorting shelves.
- vii) Call Security (HELP=4357 or Boiler Room=4199) if a patron is not responding to library rules. Take names and report incident to supervisor.
- viii) Clear book return.
- ix) Fill copiers and printers with paper
- x) REFER ALL PATRONS' REFERENCE QUESTIONS TO REFERENCE DEPARTMENT FOR NEXT DAY by having the patron use the ASK link on our website.

b) Opening duties

- i) Unlock entrance doors outside and inside lobby. The keys and Allen wrench for this are kept on a hook on the right side of the locked key box. Turn on switches for Handicap access mechanism.
- ii) Bring in newspaper and books from book return in the closet in the lobby. Make sure to lock door again.
- iii) Check voice mail on 4281. Listen to messages and delete.
- iv) Disconnect voice mail: push FORWARD button (black sign should be on and turn off as you push button).
- v) Turn on all the lights on both floors.
- vi) Make sure security gate's switch is on NORMAL (on).
- vii) Turn on copying machines and printers.
- viii) Turn on pc's in REF area and upstairs - MTLIB LI33R
- ix) Turn on pc's along wall - MTREF LI33R
- x) Log on to Internet Explorer (Library Homepage)
- xi) Log on to Online Catalog (world icon)
- xii) Log on to 3 circ pc's: staff as staff, student as student
- xiii) Process newspapers, check in books
- xiv) Check room reservation calendar for the day and put up "Reserved" signs on study room doors as needed.
- xv) Check fax machine for items received and notify recipients
- xvi) Call patrons about items in CALL BOX
- xvii) Make rounds to collect any materials that may have been left out overnight. (check study rooms, photocopiers)
- xviii)
- xix) Run overdue notices (staff)
- xx) Processing newspaper: Montana Standard:
 - (1) Throw away ads except Wednesday's grocery ads.
 - (2) stamp with the receiving stamp
 - (3) Attach label to left top of first section, write date on it with black marker
 - (4) Put newspaper in CURRENT NEWSPAPER display.
 - (5) Inform Carol Reed if newspapers were not delivered (on weekends, Call MT Standard yourself.)

c) Closing duties

- i) Walk through library and tell all patrons, especially those in study rooms and on public access computers, how much time is left till closing (about 30 min before closing).
- ii) Close Circulation services 15 min before closing
- iii) all computers: log off and turn off, including peripherals
- iv) Make sure that all appliances and machines are turned off
- v) Leave fire doors open for better ventilation. They close automatically in case of fire.
- vi) Turn off copiers
- vii) Walk through both floors of building to make sure everybody has left.
- viii) Turn off all lights and lock outside and inner doors between 5 min to and on the hour.
- ix) Turn off switches for Handicap access mechanism.

- x) Do not turn off the front and back night-lights.
 - xi) Turn on voice mail: push FORWARD, push FORWARD.
 - xii) The student and supervisor leave together.
- d) Daily reports and notices of overdue items
- i) Use staff PC for printing overdue notices: logon to Windows as staff
 - ii) open REPORTER
 - iii) run overdues
 - (1) Add email address for all printed notices and add explanatory note to paper notice
 - (2) Mail without checking: all overdue notices
 - (3) Check Billing Notices against shelf.
 - (4) Check Reserve overdue notices against shelf and waive fines if item is here.
 - (5) Faculty: pull all faculty notices and mark out part about fines. Faculty will receive billing notices (charges for lost book or serial + processing fee.)
- 2) STUDENT RESPONSIBILITIES
- a) Be punctual for assigned shifts
 - b) Provide substitute if unavailable
 - c) Check items in and out
 - d) Answer the phone:
 - i) reply to questions if answer known – or –
 - ii) take messages for staff and give to supervisor
 - iii) transfer caller to appropriate staff
 - e) Check in items from book return and place in proper shelving area
 - f) Maintain supply of pens and pencils at desk (sharpen if necessary)
 - g) Check and refill paper trays in copiers, printers and fax machine
 - h) Send faxes for patrons
 - i) Retrieve and copy items for ILL
 - j) Process reserve items
 - k) Make rounds of both floors to pick up materials
 - l) Shelf books
 - m) Shelf-read
 - n) Do mail run
 - o) Help with light maintenance of circ desk and book shelves
 - p) Assist circ staff with projects
 - q) Other duties as assigned
- 3) SPECIFIC CIRCULATION DUTIES
- a) TELEPHONES
- i) Telephones are to be answered in a professional manner. State: "Tech Library, _____ speaking.
 - ii) No unauthorized calls are to be made over state lines.
 - iii) CONSOLE PHONE - FRONT DESK: indicators are flashing when phone is in use NEVER push these buttons
 - iv) TO TRANSFER:
 - (1) press call transfer
 - (2) dial extension
 - (3) press call transfer
 - (a) TO PUT ON HOLD: press hold button
 - (b) TO TAKE OFF HOLD: press button for number on hold
 - (c) TO INTERCEPT FROM DIFFERENT PHONE: press Call Pick-up
 - v) INDIVIDUAL PHONE:
 - vi) TO TRANSFER:
 - (1) press and release disconnect button
 - (2) dial number wanted and announce caller
 - (3) hang up to connect parties
 - (a) To intercept: dial 113
- b) VOICE MESSAGE SYSTEM
- (a) Access #: 2362
 - (b) Mailbox 4281#
 - (c) Password 4281#
- ii) The voice messaging is only turned on during closed hours.

- iii) There is a permanent external greeting with the library hours.
 - iv) During breaks and holidays record a temporary external greeting.

 - v) After external greeting has been recorded and you want to direct incoming calls to the voice messaging system:
 - vi) Push "FORWARD" button on phone.
 - vii) Enter 2362

 - viii) If you want to direct incoming calls to another phone:
 - ix) Push "FORWARD" button on phone.
 - x) Enter other phone #

 - xi) FORWARD function is set to go to mailbox or other phone #.

 - xii) To activate: push FORWARD twice (black light will be on steady).
 - xiii) To deactivate: push FORWARD once.

 - xiv) If there are messages, the black light next to one of the other lines will be on.
 - (1) Pick up receiver,
 - (2) push button next to MESSAGE
 - (3) 4281#
 - (4) 4281#,
 - (5) listen to messages,
 - (6) take action indicated (2 to delete)
- c) PROCESSING OF ITEMS FROM BOOK RETURN
- i) Books: on shelving cart
 - ii) Documents and journals: on labeled sorting shelf in office
 - iii) Clear sorting shelves:
 - (1) sensitize all items
 - (2) put documents and maps upstairs on desk outside offices
- d) SHELVING OF BOOKS
- i) Put all items on cart in call number order
 - ii) Sensitize before taking upstairs
 - iii) Put books on shelf on belly with spine facing up.
 - iv) Make logical breaks in call numbers between shelves
 - v) Straighten all books on shelves in vicinity
 - vi) Check for items that might have fallen behind books on shelves
 - vii) Move bookends to hold books securely
 - viii) Remove books that need mending
 - ix) Be alert for misshelved items
 - x) Pick up books which have been left on shelves by browsing patrons, check in, and put on shelving cart.
- e) ADDING ITEMS TO NEW BOOK SHELF
- i) All books and some documents being added to the collection (not REF or BIB) will be displayed on the NEW BOOK SHELF. Their LOCATION in Voyager will read as follows: NEW BOOK SHELF. These items may be checked out.
 - ii) New books added to the collection are assigned a status of either "Just Arrived" or "In Processing" by TS.
 - iii) They are routed to REF staff for viewing.
 - iv) REF staff routes the items to Pub Services for further processing.
 - v) PS staff adds a temporary location of new book shelf and removes the status of JUST ARRIVED.
 - vi) A small black sticker is attached to the spine above the call number label to designate NEW BOOKS SHELF.
 - vii) When an item is checked back in after having been checked out, the "FYI" field will say "route to B: first floor new book."
 - viii) A routing slip is automatically printed.
 - ix) Return item with routing slip to PS staff:
 - (1) Change location back to permanent location by deleting the temporary location.
 - (2) Remove black sticker from the spine.
 - (3) Put item on the shelving cart.
 - x) PS will periodically remove the unused items from the New Book Shelf, change the location, and return the items for shelving.

- f) ADDING ITEMS TO FACULTY HOLD SHELF (check w/ Technical Services for updated procedure)
- i) Books with faculty notification will go on the FACULTY HOLD SHELF.
 - ii) Only one person can be notified per item.
 - iii) Connie will notify faculty of books which they requested for the REF area.
 - iv) TS will process the item with a "Just Arrived" or "In Processing"
 - v) Books will be routed through Reference to Public Services for faculty hold.
 - (1) Remove status of "Just Arrived" or "In Processing"
 - (2) check item out to patron
 - vi) Books will remain on faculty hold shelf for 1 week.
 - vii) Books picked up by faculty:
 - (1) no special procedure
 - viii) Books not picked up by faculty:
 - (1) At the hold expiration date check in the item.
 - (2) Put item on New Book Shelf (follow procedure above), or shelved.
- g) USING PATENT CENTER COMPUTER (check w/ Marcia/Ref for any updated procedures)
- (1) Log on: when prompted, press Ctrl-Alt-Del. Username and password: see folder STAFF ACCESS
 - (2) Log off: NEVER TURN OFF THE CPU WITHOUT GOING THROUGH THE SHUT DOWN PROCEDURE
 - (i) Select SHUT DOWN (requires password)
 - (ii) Password:
 - (iii) Wait for message: It is now safe to turn off your computer
 - (iv) Turn off the CPU.
 - (3) Most of the time, you will only need to turn off the monitor, however on long weekends and when advised to turn off the computers, you will need to follow the shut down procedure.
- h) USING OFFICE SUPPLIES
- i) Replacement items for this drawer are found in the supply room.
 - j) Circulation supplies are kept in the bottom drawer at the west end of the circ desk.
 - k) Supplies taken from the supply room are to be checked off on the inventory lists kept on the clipboards.
 - l) Supplies needing to be replaced should be reported to Frances for reordering.
- i) USING RECHARGEABLE BATTERIES
- Batteries for the wireless mice are in the charger. The charger is on the table in Circ office. If you use rechargeable batteries, place them in the charger when they run down by following the directions (which are next to the batteries) only take 1 hour to recharge. Rechargeable batteries may also be left in the charger until needed (they receive a slow trickle charge). *Note: Those charged and stored in the drawer will lose power after 30 days so they will need to be checked for a charge by testing them in the charger before using.
- j) USING PAPER AND MAINTAINING SUPPLY
- i) Copiers and printers should be refilled daily by Circulation students. Paper/Printer supplies should be updated monthly or as needed.
 - ii) All Paper is supplied by Central Duplicating.
 - (1) Paper for student printers and all Xerox machines is paid for w/ student funds (not by library).
 - (2) Staff paper is charged to the library account.
 - iii) Staff paper:
 - (1) single sheet paper for fax and laser/desk jet printers is stored in locked hallway cabinet
 - (2) to get more paper:
 - (a) fill out 2 peach-colored slips (charge to library account)
 - (b) pick-up paper at Central Duplicating
 - (c) have Central Duplicating initial both copies of slip (they keep one copy)
 - (d) put paper in hallway cabinet on "Staff Paper" shelf
 - (e) give second initialed slip to Marcia
 - iv) Student and photocopying paper:
 - (1) single sheet paper for printers in lab/Ref area workstations, all three Xerox machines (including staff copier), and microform machines is stored in hallway cabinet
 - (2) to get more paper:
 - (a) fill out 2 green-colored slips
 - (b) pick-up paper at Central Duplicating
 - (c) have Central Duplicating initial both copies
 - (d) put paper in hallway cabinet on shelf marked "Student Paper" or "Photocopy Paper"
 - (e) give second initialed slip to Marcia

- k) **USING INK AND TONER CARTRIDGES AND MAINTAINING SUPPLY**
- i) Toner cartridges are for copiers and laser printers.
 - ii) Ink cartridges are for inkjet printers.
 - iii) Staff toner and ink are purchased off-campus with Library funds.
 - iv) Student and Xerox toners are obtained from CDO.
Used toner, including Xerox and staff toner cartridges, is sent to Central Duplicating for recycling.
Used ink cartridges are kept in a box in the storage room until there are enough to be sent for recycling.
 - v) **TONER cartridges for all Xerox machines and student & staff printers (stored in Circulation office).**
 - (1) Refer to labeling on the boxes as to which machine they are used for.
 - (2) Supply staff will request toner for student printers from Central Duplicating (student funds).
 - (3) Supply staff will label cartridges when received as to which printer/copier they belong to.
 - (4) No invoices are received for toner cartridges from CDO.
 - (5) Invoices are received for toner cartridges ordered off-campus. Supply staff checks in order received and gives invoice and packing slip to Marcia
 - (6) Replacing toner cartridges in printers:
 - (a) replace toner cartridge
 - (b) put used toner cartridge back in box
 - (c) send closed box to Central Duplicating (label "From Library")
 - (d) Notify supply staff when the last one on shelf has been used.
 - (7) Replacing Xerox cartridges:
 - (a) replace used toner cartridge
 - (b) send closed box to duplicating for recycling (label "From Library")
 - (c) if less than one cartridge is on the shelf, request more from CDO by filling out 2 green-colored slips (same as for student/Xerox paper—see above)
 - vi) **INK for printers IN REF AREA and STUDENT LAB (stored in Circulation Office).**
 - (1) Refer to labeled boxes in "ink box" on shelf in office.
 - (2) Ink cartridges are ordered from off-campus suppliers by Supply staff.
 - (3) Invoices are passed on to Marcia for payment.
 - (4) There should be at least 2 of each type of cartridges in this box at all times; if not, get from Supply Room and/or notify Supply Staff if running out.
 - (5) Replacing ink cartridges
 - (a) replace cartridge
 - (b) fill out pink slip noting which printer the used cartridge came from and attach to used cartridge box
 - (c) put back in original box and take used cartridge in box to back store room to be recycled (there is a box provided for storing these)
- l) **RESETTING POWER SAVER ON XEROX COPIERS**
- (a) Press Access button
 - (b) Type in Xerox Password
 - (c) Press Machine Set-Up
 - (d) Select Timers
 - (e) Select Auto Off
 - (f) Use the up/down arrows to set Power Saver to max of 240 minutes
 - (g) Use the up/down arrows to set Low Power mode to 235 minutes (5 minutes less than the Auto –otherwise this will cancel out Auto)
 - (h) Save
 - (i) Close & Exit
- m) **MAKING OVERSIZED BLACK/WHITE COPIES**
Copies of oversized black/white items will be made at Bureau: charge to library account BLI041 and inform Marcia so she can encumber our account.
- n) **MAKING OVERSIZED COLOR COPIES**
Copies of oversized color items will be made at CDO. These copies will be charged to our photocopy account with central duplicating. The photocopy account is only for copies made in central duplicating and the money can only be used for copies made in central duplicating. We get a reduced rate for all copying done by central duplicating so it especially important to have the large jobs done by central duplicating. They charge against our duplicating account on a monthly basis. Give receipts to Marcia.
- o) **CHARGING COPIES ON STAFF COPIER**
- i) Staff or students from other departments may use an account established by us on the staff copier.
 - ii) List of the account numbers is kept in folder STAFF ACCESS on Julie's desk

- iii) PS (or REF) staff will set up new accounts for authorized staff:
- iv) Departments will be charged monthly for copies made
- v) Add new account:
 - (1) ACCESS button on right top of control panel
 - (2) #22222
 - (3) Auditorium Setups
 - (4) Internal auditorium
 - (5) Account Setups
 - (6) Add Account
 - (7) Key in number chosen by patron
 - (8) Save, close, and exit all
 - (9) Give the account number, person's name, company and address, or Departmental Billing Account (Banner) number to the Circ Dept to record for billing.
- vi) patron uses staff copier without an account:
 - (1) Accept cash payment and put in cash box at desk
 - (2) Charge to Tech Dept by entering in log next to color copier.

- p) MAKING COLOR COPIES
 - i) Use color copier
 - ii) Enter charges in log according to price chart.

- q) MAKING MICROFORM COPIES ON PAPER OR PDF
 - i) Use scanning workstation
 - ii) Free for patrons
 - iii) Enter departmental charges in log.

- r) MAKING PHOTOCOPIES for patrons
 - i) Photocopying jobs will be done by trained students as time permits
 - ii) Charges: \$.15 per page, \$ 5 handling/postage
 - iii) May be billed

- s) COLLECT AND DEPOSIT FUNDS FOR FRIENDS OF Montana Tech LIBRARY
 - i) Accept new members and collect Annual Membership Dues.
 - ii) On the membership form check the type of membership being purchased:
 - (1) Student \$10
 - (2) Individual \$20
 - (3) Family \$35
 - (4) Business \$100
 - iii) Record receipt of the payment in the Friends of Montana Tech Library Receipt book (do this even if the member does not request a receipt). Fill the receipt out completely including what the funds were collected for and if the payment was cash check or money order. Sign the receipt.
 - iv) Give the top copy of the receipt to the member. If the member does not want the receipt, leave the receipt in the receipt book.
 - v) Place the funds and the dues form into the cash box labeled FOMTL Memberships.
 - vi) Collecting Funds for Journal Sales or other fundraisers:
 - (1) Record receipt of the payment in the Friends of Montana Tech Library Receipt book (do this even if the person does not request a receipt). Fill out completely including what the funds were collected for and if the payment was cash check or money order. Sign the receipt.
 - (2) Give the top copy of the receipt to the customer. If the customer does not want the receipt, leave the receipt in the receipt book.
 - (3) Place the funds in the cash box labeled FOMTL Journal Sales.
 - vii) Depositing Membership Dues with the Foundation: Marcia will deposit the FOMTL funds

- t) ACCESS SPECIAL COLLECTION ROOM
 - i) Direct access to the Special Collections room is prohibited.
 - ii) For large research projects, an appointment may be required, depending on staff availability.
 - iii) Patron wishing to view an item from the Special Collection will fill out a "call slip" at the circulation desk, and give it to a circulation staff member. Depending on the workload of the circulation department, the item may be retrieved immediately, or the patron may be asked to come back to view the material at a later time. One call slip per item is required.

- iv) Archival gloves must be worn while handling the retrieved item because oils, acids, salts and enzymes on fingertips damage paper and cause deterioration over time.
 - v) Patrons requesting photocopies from a Special Collection item will provide a library staff member with a call number and list of pages from the item they wish to have photocopied. The circulation staff will photocopy items at 15 cents/page for durable items. Turnaround time will depend on the staff workload. The user must follow copyright guidelines for copyrighted materials. Payment to the circulation staff is due when copies are made.
 - vi) EXCEPTION POLICY FOR SPECIAL COLLECTIONS MATERIALS
 - (1) Considering special circumstances, the Library Director may extend special privileges to an individual (not transferable) for the use of materials in the Special Collections room.
 - (2) A note outlining the special permission will be added to that patron's circulation record
 - (3) A SPECIAL PERMISSION FORM (kept in back of this manual) must be signed by patron and staff for each visit.
 - (4) The requirement to wear archival gloves while browsing or photocopying materials remains in effect at all times: oils, acids, salts and enzymes on fingertips damage paper and cause deterioration over time.
 - (5) The general use policy for Special Collection items to be checked out when removed from room remains in effect.
 - (6) The patron may be allowed access to the room without prior appointment.
 - (7) The patron may be allowed to photocopy items.
 - (8) Items used in room or checked out will be returned to the circulation desk to be shelved by library staff.
 - u) COPYING THESES for our collection
 - i) Certain theses not owned by Montana Tech Library may be borrowed through Interlibrary Loan, photocopied and added to the library's collection if they are determined to be relevant by the Library Director or a Reference Librarian. On occasion, original maps may be copied and placed with our library's copy (usually microfilm reproduction) of a thesis.
 - ii) All pages need to be copied single sided with a wide left margin to allow for permanent binding of the copy.
 - iii) To ensure good quality copies, edges should be masked to prevent any black marks from showing around the edges of the copies.
 - iv) All text pages are copied on acid free paper (archival), which is stored in the wooden cabinet in Technical Services to the right of the back doors.
 - v) All photos, either color or black and white, are copied onto photo quality paper (matte), which is stored in the Public Services office.
 - vi) Colored plates and maps (letter-size) are copied on photo quality paper (matte).
 - vii) Large maps, which need to be folded, are copied onto acid free paper (archival) on the color copier at the front desk. Central Duplicating also has a color copying service that can be used for color maps.
 - viii) It might be necessary to copy large maps in overlapping sections and piece them together with archival map tape stored with the paper in a labeled box in the Public Services Dept.
 - ix) After copying and proofreading, the finished copy is given to Technical Services for binding and cataloging.
 - v) MAINTAINING THE IVORY COLLECTION
 - i) Public Services will take care of the ivory collection.
 - ii) Recommended conditions for display:
 - (1) Humidity 45-55%
 - (2) Temperature: 70 F
 - iii) There will be no lighting in the interior of the ivory case.
 - iv) The water in the bowl inside the display case will be checked and replaced weekly.
 - v) The humidity will be checked weekly.
 - vi) If the humidity is too low, another container with water will be placed in the display case.
 - vii) Repairs to damaged pieces will be done by experts to be determined.
 - viii) Information at end of manual.
- 4) KEEPING RECORDS OF PATRONS
- a) STUDENT WITHDRAWING FROM SCHOOL, STAFF ENDING EMPLOYMENT – or - SUSPENDING LIBRARY PRIVILEGES
 - i) Verify that no items are checked out to patron in Voyager and ILLiad.
 - ii) **Change the expiration date in the patron's record to that day's date.**

5) INTERLIBRARY LOAN REQUESTS

- a) It is the responsibility of the borrower to ensure that all possible resources (print and electronic) in our Library have been exhausted before placing a request for an interlibrary loan. The logon page to Iliad provides a link to the library catalog and the journal title list. Direct patrons to the Reference Dept if necessary.
- b) A separate request must be submitted for each item.
- c) Items requested should be verified in an abstracting or indexing service or online source, not just online.
- d) Photocopies will be posted as pdf on the web server for the patron to view or retrieve, unless requested otherwise, and if received on paper.
- e) RUSH orders (receipt of item within one week) patron will pay:
 - i) postage charges like Federal Express
 - ii) lending library's RUSH charge
 - iii) Our RUSH charge (\$5.00), no extra charge for use of FAX or electronic delivery.
- f) Staff may designate a request as PRIORITY, which means delivery within week, no extra charge.
- g) COST of ILL: Charges from lending libraries are passed on to the user or the appropriate account.
 - i) Undergraduate: library absorbs cost, up to \$ 50/semester
 - ii) Graduate: INDIRECT COST RECOVERY account
 - iii) Faculty: FACULTY account
 - iv) Business Off-campus: \$ 10 per request, plus other library's charges
- h) COPYRIGHT ROYALTIES: the Library does not cover the cost of copyright. If royalties need to be paid, the department must be contacted beforehand and agree to cover the cost.

PART F RESERVES
11/19/09 FRESERVES.doc

1) GENERAL INFORMATION

a) Copyright Compliance

- a) All course materials will be on reserve for the current semester only. All materials will be removed from reserve at the end of the semester. A new reserve form must be filled out for all materials at the beginning of the new semester.
- b) Instructors' personal materials (written, audio- or videotaped / notes, presentations, text materials) may remain at the reserve desk indefinitely. We will send a reminder to the instructor at the end of each semester that the material is still at the library. Instructors are expected to retrieve items no longer used promptly. However, if the instructor wishes, the materials may be stored at the library. These materials will not be listed in the catalog and will not be available for checkout.
- c) Faculty are responsible for all copyright charges. The Library will take care of the paperwork and the mechanics of obtaining permission.
- d) Electronic copies from published materials: if no copyright has been paid under fair use exception, these items will not be put on reserve in the VOY module, since access to these files cannot be restricted to registered students. The library may do the scanning for the instructor so he or she can post the files in Blackboard.
- e) ILL books are never placed on reserve; ILL AV items may be placed on short-term reserve

b) Faculty and Library Staff instructions

- a) Faculty must fill out web form or paper form for each reserve item. No phone or verbal instructions will be accepted.
- b) Web forms are received in the LIBREQUESTS mailbox and moved from the inbox to the RESERVES CURRENT box.
- c) Print form when received, follow instructions, and file initialed form in CURRENT RESERVES box at circ desk.
- d) Faculty may send their files as attachments to the librequests address.
- e) Library staff may put items on reserve if there is a high demand. The instructor teaching this class must be notified.

c) Procedures, Notes etc.

- a) All bib records for non-library owned reserve items must be created (fastadds) in the other Circulation Happening Location: Montana Tech ILL. These items are suppressed in the OPAC at all times. They will be retrieved only through a RESERVE search when the item is on reserve.
- b) Blue sheet completed by instructor and staff is filed in the CURRENT RESERVES box on reserve shelf.
- c) If an item is on reserve for more than one class, it can still have only one call #, but must be put on reserve for both classes.
- d) There must be an individual reserve list for each instructor/class. If more than one instructor teaches the same class, create individual Reserve lists (including instructor's name) for each class. This will create individual pick lists for each instructor/class.
- e) "ITEMS" and "E-ITEMS" have separate tabs in the Voyager Bib record.
- f) Item types and Locations must be edited from the Reserve Tab.
- g) Only ITEM record information can be edited in the Circulation module.
- h) BIB and HOLDINGS record information must be edited or deleted in the Cataloging module. Circ staff has clearance to edit and delete bib and holdings records in Cataloging.
- i) Searching for a course reserve list in the OPAC will only display items that are on an active course reserve list.
- j) Three functions of the reserve list must be in place for the list and the attached items to be active:
 - (a) The effective dates in the header of the reserve list must include the current date
 - (b) The items on the Items tab must all be turned "On Reserve"
 - (c) The list must be linked to an instructor, course with current date, department, or section

d) Videotapes On Reserve For Viewing In Library

- a) A tv/vcr/dvd combination is kept in the upstairs storage room
- b) Students need to reserve a study room in order to view a video on reserve.
- c) Circ staff will move the tv/vcr to the study room and remove it promptly after use, or keep it in there for a short period of time
- d) Instructors may need to be asked to inform students of this policy.

2) PUT ON RESERVE IN VOYAGER

- o Create reserve list with appropriate dates
- o Link to the class and instructor

- o Add bib/holdings/item record to reserve list
 - o Reserve items by selecting On Reserve on the items tab
- a) Create a Reserve List - example at end of section
- | | |
|---|---|
| i) Click the Reserve icon. | (1) Examples |
| ii) Click Cancel on the Reserve List Search Screen | (2) List name: BUS 1234 Abbott
Marketing |
| iii) Select Create New List (Ctr+N) from the RESERVE menu | (3) Instructor: T: last name |
| iv) Complete Create New Reserve List Dialog Box: | (4) Dept Name: T: Engineering |
| v) List Name | (5) Dept Code: blank |
| vi) Effective date | (6) Course Name: Statics |
| vii) Reserve Location | (7) Course Number: T:Engr 2050 |
| viii) Reserve Item Type | |
| ix) Click ok | |
- b) Link Reserve Lists to Course Information- example at end of section
- i) Find Reserve List
 - ii) Select Courses>Link Courses
 - iii) Fill out Link Reserve List to Courses dialog box:
 - iv) Department Instructor Course
 - v) Click Link, Click ok
 - vi) To add a department, instructor, course or section, click on plus sign button and fill out as appropriate.
 - vii) To delete, select and click minus sign button
 - (1) If an instructor becomes inactive for a period of time, unlink them from that class.
 - (2) Multiple instructors can be linked to one class.
- c) Add items to Reserve List
- i) Library item with bib record
 - (1) Find Reserve list
 - (2) Click Reserve tab on Menu Bar
 - (3) Select Items>Add by Barcode
 - (4) Enter barcode
 - (5) Item is added to the items tab of the Reserve List
 - ii) Personal Item without bib record, such as folders for photocopies create new records in ILL module
 - (1) If only one reserve folder
 - (a) Find Reserve List
 - (b) Click on Reserve tab on Menu Bar
 - (c) Select Items>Create and Add Bib/Items
 - (d) Choose template FOLDERS
 - (e) Fill out Bib tab
 - (f) Fill out Holdings tab: Permanent Location, Call number type, Call number
 - (g) Fill out Item tab: Item type, item barcode. This creates bib, holdings and item records in the database.
 - (h) Click ok
 - (i) Right click On Reserve tab
 - (j) Click On Reserve
 - (k) Add to Reserve List:
 - (2) If multiple copies of reserve folder create new records in ILL module
 - (a) Create one Bib record for folders
 - (b) Attach multiple item records to bib record
 - (c) Find reserve list
 - (d) Add items by barcode
 - (e) Put On Reserve
 - iii) Personal copy of books, videos: create new records in ILL module
 - (1) Find Reserve List
 - (2) Click on Reserve tab on Menu Bar
 - (3) Select Items>Create and Add Bib/Items
 - (4) Choose template BOOKS
 - (5) Fill out Bib tab
 - (6) Fill out Holdings tab: Location: Reserve, Call number type, Call number (=Class number)
 - (7) Fill out Item tab: Item type, item barcode. This creates bib, holdings and item records in the database.

- (8) Click ok
 - (9) Right click On Reserve tab
 - (10) Click On Reserve
- iv) Copy Items from another Reserve List
- (1) Get reserve list
 - (2) Click Reserve tab
 - (3) Select Items>Copy items from another List (Ctrl-Y)
 - (4) Select type of search
 - (5) Enter search
 - (6) Click OK
 - (7) If the search matches on one list, all of the items on the list are automatically copied onto the Items tab of the open reserve list.
 - (8) If the search matches on more than one list, select a list from the Multiple Reserve Lists Found dialog box.
- d) Process and Label Books or Folders
- i) All reserve items
 - (1) Attach reserve sticker label with call number (class #) and abbreviated loan type
 - (2) Sensitize
 - (3) Initial blue sheet, fill in Class # on right top and note if Permanent Reserve
 - (4) Put in Frances' in-box
 - ii) Photocopy folders –
 - (1) use current folders to match colors and classes first (previously used folders are stored in office)
 - (2) Write number of pages in folder in pencil on label, to be updated as pages are added
 - i) Example: PHYS 2086 HOMEWORK SOLUTIONS
i. Sill 25 pgs.
 - iii) Printing Spine Labels and/or Folder Labels- example at end of section
 - (1) Select Item>Print Spine Label.
 - (2) Select the check box next to the type of label you want to print. For books only print the Spine Label, for folders print both.
 - (3) Add or edit information as needed.
 - (4) Enter the number of copies to be printed in the Number of Copies box.
 - (5) Click the Print button. Use 3 1/3 x 4 inch removable labels.
 - (6) Close the window.
 - iv) REFERENCE books
 - i) Place wooden block on REF shelf explaining book is on reserve.
- e) Add pages to an existing file
- (1) Add pages to the back of reserve folder (unless specified otherwise.)
 - (2) Put existing pages in numerical order
 - (3) Number the new pages consecutively with the old pages in pencil
 - (4) Place the new page number on label on front cover of the folder
 - (5) Write the pages added on the blue sheet (e.g. pgs 45-50)
 - (6) Write your initials and the date on the blue sheet
 - (7) File in staff inbox
- f) Replace worn out folders while keeping reserve items
- i) Keep old barcode for statistics
 - ii) Retrieve item record
 - iii) Add new BC for new folder (circ stats will transfer)
 - iv) Delete old BC
 - v) Discard folder
- g) Change Item Types and Locations
- i) From Reserve Tab
 - ii) Select Items>Change Item Types (or Change Locations)
 - iii) Select option from drop-down list
 - iv) Click OK
- h) Interlibrary Loan Materials
- i) ILL books are never placed on reserve

- ii) ILL AV items may be placed on short-term reserve:
 - (1) Create fastadd in VOY/RESERVE with ILL # as barcode.
 - (2) Add barcode to Reserve Label to be attached to cassette.
 - (3) Put on reserve
- 3) REMOVE ITEMS FROM RESERVE
- a) Monthly check of removal date
 - i) At the end of each month, the withdrawal dates need to be checked, and the affected items withdrawn:
 - b) Taking items off Reserve
 - i) Find Reserve List and items tab
 - ii) Select Items>Remove (Ctrl+M)
 - iii) May select more than one item
 - iv) Non-photocopied materials returned to the instructor should be deleted from the Reserve List and the barcode removed. It cannot be deleted if it has any outstanding fees/fines.
 - c) End of semester or expired Reserve List date
 - i) Take items off reserve
 - ii) Change expiration date of Reserve List Header
 - iii) Cross out on list of reserve lists
 - iv) Pull blue (or white) reserve sheet
 - v) Note actions
 - vi) Dispose of items according to instructor's direction
 - vii) Ereserves: mail copy of file to instructor
- 4) STORE ITEMS NOT ON RESERVE
- i) Fill out REMOVED FROM RESERVE information on reserve form.
 - ii) Note each item by barcode.
 - iii) File copy of reserve form in current reserve box under heading RESERVES BEING STORED.
 - iv) Store materials with second copy of form on office shelf.
 - v) Store materials for one year off-reserve, then return to instructor or department.
- 5) ELECTRONIC RESERVES
- Materials not violating copyright laws, such as instructors' personal notes and class assignments, may be scanned and put on electronic reserve.
 - Electronic reserve items can only be searched and found through reserve searches in OPAC.
 - Instructors will be given the option to have electronic or paper files or both on reserve.
 - Instructors may attach their files to email.
 - Break up notes into several parts if file too large.
 - Files may be reused in subsequent semesters if requested by instructor
- a) CREATE PDF FILE:
- i) NEW FILE
 - (1) Scan pages in ADOBE ACROBAT
 - (2) Save as pdf file on drive c: ph1046sillhw.pdf; bio1156kuenzicclassnotes.pdf
 - (3) Move file from c: to www.mtech.edu/library/reserves/
 - (4) Create separate bib/holdings/item record for each electronic file
 - ii) PROCEDURE FOR ADDING PAGES TO EXISTING FILE
 - (1) In Adobe, open existing file on c: drive
 - (2) scan new pages into existing file
 - (3) Save file under same name
 - (4) Close file
 - (5) Move file from c: to www.mtech.edu/library/reserves/ (MyComputer/MyNetworkPlaces/Library on mtech.edu)
 - (6) Replace existing file
 - (7) Test access to new file from OPAC
 - iii) PROCEDURE FOR FILE POSTED IN SEVERAL PARTS
 - (1) Scan pages in ADOBE ACROBAT
 - (2) Save as file bio1156instructorclassnotespt2.pdf
 - (3) Put on reserve as new e-item
 - (4) Name link: click here to view part #
- b) PUT FILE ON RESERVE IN VOYAGER
- (1) Create pdf file
 - (2) Create Reserve list, link course

- (3) Click on e-items tab
 - (4) In Reserve option on menu bar, click "e-items"
 - (5) Click "Create new bib/holdings/item"
 - (6) Bib Tab:
 - (a) use RESERVE FOLDER template
 - (b) add "ELECTRONIC FILE" to title
 - (c) Use instructor name for AUTHOR
 - (7) Holdings Tab:
 - (a) Use electronic reserve code (b8reso)
 - (b) Call number type: other
 - (c) Call number: leave blank
 - (8) Item tab:
 - (a) Link caption: click here to access homework (or: part 2 or: quizzes) in pdf format
 - (b) URL box: enter url <http://www.mtech.edu/library/reserves/phys1046sillhwpt2.pdf>
- c) REMOVE FILE FROM RESERVE
- i) Delete e-item record
 - ii) Delete pdf files from <http://www.mtech.edu/library/reserves/> and c:
 - iii) This preserves the BIB/HOLDINGS records
- d) REUSE BIB/HOLDINGS RECORD FOR NEW EFILE
- i) Create new electronic file (see above)
 - ii) Go to Reserve/eitem tab/add new eitem to holdings/bib record
 - iii) Search for existing bib/holdings record in
 - (1) Keyword search "electronic format..."
 - (2) limit search to LOCATION b8reso

PART G INTERLIBRARY LOANS

November 19, 2009 GILL.doc

1) GENERAL INFO:

- a) A patron may request an item only once per semester.
- b) Interlibrary loan requests will only be placed through the Illiad system for consistent workflow and statistics.
- c) All users must create an account before placing requests.
- d) Staff can place orders for patrons from the staff client.
- e) The OCLC interlibrary system is used for almost all requests.
- f) Requests are rarely sent by other means: email, fax or US mail.
- g) Distance Education (Online course) students need to be expired at the end of the semester (or status needs to be changed) in Illiad.
- h) We use ILLDirect: loan requests placed through FirstSearch are automatically requested in OCLC if setup conditions are met (our campus user, more than 1 library will lend without charges)
- i) We participate in the OCLC IFM program: the lending library charges us not directly, but through OCLC. The ILL charges are included in the monthly OCLC bill. We also receive an itemized statement.
- j) British Lending library (BRI) uses IFM
- k) CISTI (CAI) bills through BCR with a discount for our BCR membership.
- l) We are members of reciprocal ILL groups: LVIS, BCR, AMIGOS
- m) Copyright royalties will be charged to Dept
- n) Mailing books to CANADA or other foreign countries
 - i) Fill out customs declaration
 - ii) Mark CANADA etc. very clearly on package

2) ILLIAD BORROWING

a) PROCESSING RECEIVED ITEMS

i) BOOKS RECEIVED FROM ILL

- (1) Process through Illiad
 - (a) Receive
 - (b) Print label
 - (c) Notify patron
 - (d) Check out in Illiad
 - (e) Put on shelf
 - (f) Charge Business patrons \$ 15/transaction plus any copyright etc.
- (2) CHARGES:
 - (a) in-state: free
 - (b) out-of-state:
 - (i) usually IFM
 - (ii) If there is a bill with item: write control # on bill, make 2nd copy for Marcia to pay.
 - (c) RUSH: our \$ 5.00 charge plus lending library's RUSH charges.
- (3) Incorporate into monthly billing procedure:
 - (a) charge to patron personally if requested (staff, student, off-campus or company)
 - (i) Off-campus pays cash/check per agreement
 - (ii) After payment, put money in ILL box and record amount in receipt book.
 - (b) Copyright royalties procedure: reported to Copyright Clearance Center at the beginning of the calendar year, charged to individual departments.

ii) PHOTOCOPIES RECEIVED FROM ILL

- When Illiad moves a file from ARIEL to server, it converts the file from tiff to pdf and deletes the ARIEL coversheet.
- Files on server are available until deleted (manually by patron, or after 30 days by MTG)
- Older files could be retrieved by Mansfield technician from server back-up tapes
 - (a) FILE RCV: ELECTRONIC FORMAT RCV IN ARIEL
 - (b) Receives
 - (c) Electronic Delivery
 - (d) Process Electronic Delivery Files – 3 OPTIONS

- (i) Review
 1. Check quality of scan
 2. Deliver to patron
 - (ii) Print
 1. Print/Check in
 2. Follow Received Procedure
 - (iii) No match
 1. Try and match to one of our requests
 - (iv) Maintenance for b) and c)
 - a. Delete Electronic Delivery Files on that pc
 - b. C:/Illiad
 - c. Delete folder "elecdel"
 - d. Create new folder "elecdel"
 - (e) FILE RCV: ATTACHMENT TO EMAIL
 - (i) Open email
 - (ii) Open pdf attachment
 - (iii) Find Transaction number
 - (iv) Save file with transaction number.pdf to pdf folder on server (pdf on illiad.lib.umt.edu)
 - (v) Go to Illiad/Check items in from Lending library
 - (vi) Search for transaction and select status "no" to Request sent only in box below
 - (vii) Verify or enter number of pages
 - (viii) Click on "notify electronic delivery"
 - (ix) Move email to folder ILL RCV on Ariel machine.
 - (f) FILE RCV: PAPER, POST TO SERVER
 - (i) Find Transaction number
 - (ii) Open Adobe Acrobat
 - (iii) Import/scan file/done
 1. check image
 2. scan type: ADF
 - (iv) Save file with transaction number.pdf to pdf folder on server (pdf on illiad.lib.umt.edu)
 - (v) Go to Illiad/Check items in from Lending library
 - (vi) Search for transaction and select status "no" to Request sent only in box below
 - (vii) Verify or enter number of pages
 - (viii) Click on "notify electronic delivery"
 - (ix) Store paper copy in office for short period of time.
- (2) MICROFICHE or CD TO KEEP
- (a) Process as copy in Illiad
 - (b) Give to TS to be added to the collection.

b) EXCEPTIONS AND PROBLEMS

- i) ILLIAD UNFILLED REQUESTS Reordering
 - (1) In Illiad, open UNFILLED request
 - (2) Click on SHOW / OCLC REQUEST / DELETE / YES window closes
 - (3) Back in AWAITING UNFILLED REQUEST form
 - (4) Go to PROCESS / SUBMIT REQUEST FOR REORDERING
 - (5) Click on OCLC icon
 - (6) Follow ordering procedure
 - (7) On menu bar, click resubmit / yes
 - (8) Click Request sent.
- ii) WRONG or no LENDING STRING DISPLAYED WHEN RECEIVING ITEMS FROM LENDING LIBRARY
 - (1) Click on "View entire record"
 - (2) View correct record online in OCLC
 - (3) In "General Update Screen" erase wrong lending string and replace with correct one
 - (4) Save changes
 - (5) Select correct lender
 - (6) Process as usual

- iii) NO TRANSACTION NUMBER DISPLAYED IN RECORD
Follow procedure above
- iv) Problem in ELECTRONIC DELIVERY PROCESSING
 - (1) You have imported a file from ARIEL, but when you try to deliver it, you receive an error message "...sql..." And ELECTRONIC DELIVERY... is grayed out
 - (2) Open Adobe Acrobat
 - (3) Import file from c:/illiad/elecdel
 - (a) Select tiff format
 - (b) Select file by transaction number
 - (4) Save file with transaction number.pdf to pdf folder on server (pdf on illiad.lib.umt.edu)
 - (5) Go to Illiad/Check items in from Lending library
 - (6) Search for transaction and select status "no" to Request sent only in box below
 - (7) Verify or enter number of pages
 - (8) Click on "notify electronic delivery"
 - (9) Delete and restore folder "elecdel" on client machine
 - (a) Go to c:/illiad
 - (b) Select folder "elecdel"
 - (c) Delete folder
 - (d) Create new folder in c:/illiad
 - (e) Rename folder "elecdel"
- v) File sent to us in ARIEL by mistake and imported into Illiad Electronic Delivery
 - (1) ARIEL
 - (2) Import file (in tiff) from c:/illiad/elecdel (saved to ARIEL Archives)
 - (3) In ARIEL Archives highlight file
 - (4) send file to actual recipient
 - (5) in c:/.../illiad/ delete elecdel folder
 - (6) in c:/.../illiad/ create new elecdel folder
- vi) To move item to different queue, for example from print queue to matched queue
 - (1) Close ElecDel window
 - (2) go to C:/Illiad/ElecDel
 - (3) you will find 5 text files
 - (4) cut and paste TN# (without blank spaces) from print to matched file
 - (5) return to Illiad client
 - (6) open ElecDel window
 - (7) process as usual
- vii) Multiple ILL numbers attached to one Transaction Number
Examples: an unfilled item is resubmitted, and the old request not deleted;
System is slow, and we click on submit twice.
 - (1) Go to user record
 - (2) Add request
 - (3) Illiad assigns new TN #
 - (4) Request appears in AWAITING REQUEST PROCESSING
 - (5) Open request
 - (6) Copy the information (ILL#, lender string) from one of the duplicate requests into the new request
 - (7) Enter Illiad TN # in online request in VERIFIED FIELD in this format: <TN:142929> OCLC
- viii) ILLDirect leaves request in Review in Message File
 - (1) Go to OCLC / Search/Review Status / Review
 - (2) Delete request
- c) BORROWED ILL TO BE SENT BACK
 - i) Process through Illiad
 - ii) Check for special containers or handling instructions
 - (1) "No jiffy bag" note from lender
 - (2) Individual cloth bags
 - (3) AV or microform containers

3) ILLIAD LENDING

a) GENERAL INFORMATION

- i) Most requests are received through the OCLC interlibrary system.
- ii) When receiving a lending request on paper:
 - (1) Create a user address for requesting library in Illiad.
 - (2) Reset password to ILL.
 - (3) Enter request for requesting library.
 - (4) When filling request, include a copy of "Instruction to Libraries not using the OCLC on-line ILL module".
- iii) Follow same procedure when contacted by phone.
- iv) Montana State Prison Library has no internet access. Accept requests on paper.

b) ILL BOOKS SENT TO OTHER LIBRARIES

- i) Read new requests in Illiad
- ii) Find item
- iii) Process in Illiad
- iv) Checkout in Voyager to patron: B Loan
- v) Mail

c) ILL PHOTOCOPIES SENT TO OTHER LIBRARIES

i) General policies:

- (1) Up to 50 pages per request per volume will be photocopied or scanned, or not more than 1/3 of issue.
- (2) Send entire volume if:
 - (a) Copying against copyright restrictions
 - (b) Binding too tight for copying/scanning
- (3) Or –
 - (a) Copy on student copier with book-edge
 - (b) Enter charges in copying charge log for monthly internal billing
- (4) Read new requests in Illiad
- (5) Find item
- (6) Process through Illiad:
- (7) IF ARIEL address:
 - (a) Scan in ARIEL
 - (b) Send
- (8) If no ARIEL address:
 - (a) Go to
 - (i) View entire record
 - (ii) Show OCLC request
 - (iii) Find and copy email address
 - (iv) Go to Maintenance
 - (v) Find library symbol
 - (vi) Enter email address in ARIEL field
 - (vii) Save changes
 - (b) Scan in ADOBE
 - (c) Save file to desktop
 - (d) Email to library

d) ILL COPY REQUEST FILLED FROM MICROFORM

Update to SHIPPED in Illiad, send by email as pdf attachment, since we cannot import pdf into ARIEL at this time.

- i) Create electronic file from mf on reader/printer (details to be added, for sure!)
- ii) Lighten copy as much as possible, since dark pages increase file size
- iii) Software saves file to z:lodsusr.../title.pdf on
- iv) Print file
- v) Add ill paperwork and process through ARIEL

e) CHARGES: may be adjusted for unusual items

- (1) No charge: all in-state libraries
- (2) Charges for commercial enterprises and document suppliers:
 - (i) Photocopies, incl. patents, \$ 5.00 up to 20 pages.
 - (ii) \$ 5.00 for loans

- f) OUR BOOKS RETURNED TO US
 - i) Unpack book and save jiffy bag or box.
 - ii) CHECK in and process in Illiad
 - iii) Remove and discard paperwork...
 - iv) RESHELVE.

- 4) ILLIAD DOCUMENT DELIVERY

Users do not need to come to the Library to use in-house resources or Interlibrary Loan services.

 - a) Library users who may use this service
 - i) Distance education students (students who are enrolled in online courses at Montana Tech. They do not come to campus to attend classes, and therefore are not expected to come to the library to use its resources.)
 - ii) Graduate students working out of area
 - iii) Faculty and staff of Montana Tech and the Bureau of Mines working at out of town or out of state locations
 - iv) Faculty requesting electronic copies of our journals to add to their Blackboard pages
 - b) Materials we own
 - i) The library mails books and other library materials to the user's home address.
 - ii) The user returns the library materials to us by mail.
 - iii) The library scans copies of articles in library-owned journals and posts them on the web for the user's desk-top access or emails them directly.
 - c) Materials we don't own
 - i) The Library obtains books and other library materials through Interlibrary Loan and mails them to the user's home address.
 - ii) The user returns the library materials to us by mail.
 - iii) The Library obtains copies of articles from other libraries and posts them on the web for the user's desktop access.
 - d) Procedure to request these materials
 - i) Register as an Illiad (Interlibrary Loan software) user on the library home page at <http://www.mtech.edu/library>
 - ii) Use Montana Tech email address for contact.
 - iii) Identify yourself as "Online course student"
 - iv) Enter note in request identifying user as out-of-town staff
 - v) Enter note in request identifying request as needed for Blackboard.
 - e) Procedure for DOCUMENT DELIVERY
 - i) Request in Illiad Borrowing module is identified as one of our items
 - (1) Add our call # to request form
 - (2) ROUTE item to DOCUMENT DELIVERY module
 - (3) Open DOCUMENT DELIVERY module
 - (4) Click on SEARCH STACKS, THEN
 - (5) Click PRINT DOCUMENT DELIVERY PULL SLIPS (same as printing labels in other Illiad module) and print MAILING labels for loans since they can't be printed after updating the stacks search results
 - ii) Patron has registered as DISTANCE ED student and the request routes automatically to DD
 - (1) Click PRINT DOCUMENT DELIVERY PULL SLIPS
 - (2) add call number manually
 - iii) SEARCH STACKS
 - iv) UPDATE STACKS SEARCH RESULTS
 - (1) FOR LOANS:
 - (a) Click ITEM FOUND
 - (b) CHECK ITEM OUT TO PATRON IN VOYAGER
 - (c) Add due date on lending label
 - (d) Mail to patron
 - (2) FOR COPIES:
 - (a) ADOBE ACROBAT, scan item
 - (b) SAVE IN PDF FOLDER on server under transaction number.
 - (c) Click ELEC DEL (SCAN OUTSIDE ILLIAD)
 - (3) FOR COPIES INSTRUCTOR WILL SEND TO BLACKBOARD

5) OVERDUES (Borrowing)

- a) Produce email overdue notices daily.
- b) When a third overdue notice is produced:
 - i) Verify that user's Illiad account is blocked
 - ii) Charge patron's account in VOY \$ 50 + \$ 10
 - iii) Place block on patron's record in Banner.

-Or-

- iv) Find patrons with items > 3 weeks overdue
 - (1) Illiad Borrowing
 - (2) edit item
 - (3) custom search
 - (4) load query (on Julie's pc)
 - (5) change transaction date to 3 weeks previous
- c) When overdue item is returned, charge \$ 10 processing fee

12)OVERDUES (Lending)

- c) Produce overdue notices weekly.
- d) PROCESS/OVERDUES
- e) open item and check OCLC status.
- f) if status still not RETURNED, send email overdue notice
- g) more than 1 overdue notice may be mailed
- h) use 3rd overdue notice for billing letter

13)FIND BLOCKED PATRONS

- c) Illiad Borrowing
- d) edit item
- e) custom search
- f) Table: users
- g) Field: cleared = B

14)SEARCH/REVIEW STATUSES FILE IN OCLC:

- c) check periodically
- d) Files in Review Pending file need to be deleted, even though documentation says Illiad will delete.

15)RETURNING CASLIM BOOKS

- c) Not all books from other libraries were received through ILL. Patrons may have checked out items at other libraries through circulation, then return them through us. These items need to be returned to that library's CIRCULATION department, not ILL. Enclose a CASLIM return form with each book (second drawer by ILL pc).

16)FEDERAL EXPRESS

- a) Need Federal Express # for party paying postage (bill to borrower's account when possible). Our Federal Express # is: 1055-2069-7.
- b) All forms needed are available in ILL file folder in Circ office yellow filing cabinet.
- c) Fill out appropriate airway bill. Forms needed for shipment outside the US:
 - i) International Waybill (and)
 - ii) Commercial Invoice for items w/ a declared value above \$5.00
- d) Call 81-800-238-5355 to schedule pick-up (may call for overnight delivery until 3 pm.—driver needs 1 hr. travel time to get here).
- e) Package item securely w/ FedEx label showing prominently (or use FedEx package).

17)BILLING PATRONS ON CREDIT (ILLs to be billed to off-campus/businesses etc; other services)

Account statement is prepared monthly; copy of invoice to Marcia.

18) UNCLAIMED MATERIALS (can run a report in Illiad web reports)

- a) Add note "Not picked up" in Illiad record, return
- b) At end of semester, clear pc shelf of unclaimed copies (library will absorb cost.)

19) REIMBURSEMENT BY STATE LIBRARY (Fiscal Year)

A yearly report must be submitted to the State library for all requests filled in state to recognized libraries (see binder/Pubfiles).

20) INTERLIBRARY LOAN PROCEDURE FOR COT

21) by COT Patron

- a) Patron fill out online ILL request form
- b) Process at Tech, CKO.
- c) Courier to DT
- d) When returned, send back to Tech
- e) CKI at Tech, process.
- f) Allow for travel time -
- g) May be returned at Tech -

22) INTERLIBRARY LOAN from COT Holdings (do not fill during summer break)

- a) From requesting library patron record, place hold on item:
- b) Fax request including patron name
- c) Courier book to Tech (with paperwork)
- d) process at Tech
- e) when ILL returned to Tech, CKI, process,
- f) Courier to COT

23) TECH PATRON - COT BOOK

- a) From patron record, place hold on item
- b) Fax request including patron name
 - i) Courier to Tech (with paperwork)
- c) CKO at Tech: put pink banner on back cover of book. Remind students to give to supervisor when returned
- d) Record receive, date due, patron on paperwork, file in COT file.
- e) Courier back to DT, include paperwork, check in
- f) COT PATRON - TECH BOOK (follow reverse procedure under no. 18)
 - (1) Fax request with patron name
 - (2) Courier to COT
 - (3) CKO, CKI at COT
 - (4) Courier back to Tech

24) COPYRIGHT CLEARANCE CENTER Transactional Service Report (Calendar Year)

- a) We report copyright royalties to the Copyright Clearance Center at yearend. We receive a discount for doing this online. The charges are passed on to the individual departments for faculty requests. Charges incurred by students and library staff will be paid by Library. Grad student charges: to be determined (departments or IDCR). In January:
- b) Use ILLiad reports to enter individual transaction per title as per copyright report in online form.
- c) www.copyright.com ⇒ TRS ⇒ name : lending ⇒ password: ill987& (case sensitive)
- d) Include printout of "Preliminary Invoice Detail" for Marcia in case of questions.

25) ARIEL/Odyssey

PART H CIRCULATION

11/19/2009JCIRCULATION.doc

- A) PROCEDURE FOR TRACING MISSING AND LOST ITEMS, and COLLECTION OF PAST DUE FINES AND REPLACEMENTS COSTS
- 1) PREFIXES OF TABLES, QUERIES, REPORTS AND MACROS IN VOYAGER ACCESS REPORTS
 - a) W Weekly
 - b) M Monthly
 - c) S End of semester
 - d) FY End of Fiscal year
 - e) 0 created by Julie, not a canned file
 - 2) LOST ITEMS (checked out and overdue more than 1 month; except faculty)
 - a) Search shelves weekly, enter (students) in Banner monthly
 - (i) After 1 year, see 5c below
 - 3) MISSING ITEMS (items cannot be located on shelves)
 - a) Search shelves weekly
 - b) Cut and paste COT items from table 0ItemMissing Tech and email to COT librarian
 - c) Keep list for 1 year.
 - d) At end of fiscal year remove items older than 1 year from list:
 - (i) Retain status of Missing
 - (ii) add status "Lost: Library Applied"
 - e) Give list and individual bib records to director for deselection.
 - f) TS will retain same status but change the LOCATION to "...withdrawn" including year for State inventory purposes
 - g) Record will be suppressed from OPAC
 - 4) PAYMENT WITH CREDIT CARDS AT BUSINESS OFFICE
 - a) Students are paying their debts with credit cards now, or they are paying for their library fees in Banner at the Bus Office when they request a transcript.
 - b) Request receipt for our records.
 - c) I have informed Joan that when a student pays for lost library items with a hold in Banner,
 - (i) The \$ 10 processing fee is split up:
 - (ii) \$ 8 into the fines account (Tech administrative account)
 - (iii) \$ 2 plus the replacement cost for the book into Library Special, # BS3002.
 - d) The difference:
 - (i) Fines and processing fees: library gets 20 %, Tech 80 %
 - (ii) book replacement cost: library gets 100 %
- B) FACULTY RENEWAL AND FINES**
- 1) GENERAL PROCEDURE
 - a) Items checked out by faculty/staff are renewed each semester by Public Services (UM Intranet report).
 - b) After the initial loan period of 365 days, 3 notices are sent at 15 days intervals.
 - c) The replacement cost is "charged" to faculty only when employment is terminated.
 - d) No fines or processing fee if overdue item (or acceptable substitute copy) is returned
 - 2) ITEMS LOST MORE THAN ONE YEAR:

Faculty items are renewed each semester for another year; we do not bill for "lost" until the faculty member leaves permanently. At that time, the faculty lost items will be given to the Director to be passed on to the VC of Academic Affairs for payment. (Make sure to check Voyager when a faculty/staff/professional signs out)

 - a) Change status of items to LOST-LIBRARY APPLIED.
 - b) Print Report of current list, add full bib records
 - c) Give to Director/TS/Ref for deselection.
- C) STUDENTS and GRAD STUDENTS OVERDUE PROCEDURES, RENEWAL AND FINES:**
- 1) After the initial loan period of 28 days, 2 overdue notices are sent at 15 days intervals, followed by a billing statement with the replacement cost and \$ 10 processing per item.
 - 2) After 4 weeks LOST notice is sent, add block to student's name in Banner. Remove when item is returned.

- a) BANNER:
 - (I) Use Carolyn's/France's logon
 - (II) Enter blocks to be removed at Library only.
 - (III) List replacement cost and processing fee separately
- b) VOY patron record: add pop-up note: "Banner"
- c) File list in white folder
- 3) At the end of each semester, find items > 1 year lost
 - a) Remove library item and block from student's record; turn over to Bus Office for collection.
 - (i) We send certified letter for all amounts announcing turning the matter over to Collection Agency
 - (ii) Bus Office will not collect less than \$ 50
 - b) Give list of records to Director for deselection.
 - c) Run Macro: 0ItemLostSystemTech
 - d) Run Macro: 0PatronLostItems(unp)
- 4) Overdue ILL items:
 - a) add charge for replacement cost in VOY (\$50 default)
 - b) add processing fee (\$10) in VOY
 - c) Add block in Banner.
 - d) Mansfield Library charges \$ 20 proc fee for lost ILL, even if the item is returned.

D) OFF-CAMPUS RENEWAL AND FINES:

- 1) After the initial loan period of 28 days, 2 overdue notices will be sent at 15 days intervals, followed by a billing statement with the replacement cost and \$ 10 processing per item.
- 2) After item is lost, make attempts for one month to recover item.
- 3) Turn over to Bus Office for collection: Bus Office will send certified letter first, then collect.

E) MAINTENANCE OF RECORDS WITH EXCEPTIONAL STATUS

- 1) ITEM IS LOST or DAMAGED BEYOND MENDING and PATRON MAKES PAYMENT:
 - a) If book is out of print, the director will determine the replacement cost (usually 10c/page for copying)
 - b) Give record to Director for deletion of record or replacement.
 - c) The book is returned after payment has been made: if the replacement money has not been spent yet, patron will receive a refund (through Marcia), otherwise no refund, patron may keep book.
 - d) TO BILL: create invoice, give file copy to Marcia.
 - e) To clear patron and item record, follow procedure # 4.
- 2) LOST ITEM IS RETURNED
 - a) VOY: remove LOST status from item
 - b) Collect processing fee
 - c) Remove pop-up note
 - d) BANNER: remove block
 - e) Cross name off list, keep in binder
- 3) MONETARY CHARGES over \$ 10 monthly
 - a) Using report Patrons Fines>10, put block on record in Banner.
 - b) Add note in VOY.
 - c) If student claims to have paid Bus Office at next check-out, verify record in Banner. If block removed (money paid), mark student debt in VOY as PAID.
- 4) MONETARY CHARGES under \$ 10
 - Leave on student record for one year, and then delete charges.
- 5) LOST ITEM RETURNED AFTER BILLING
 - If a lost item has been billed, paid for and replaced, the payment will not be refunded if item is returned.

F) SETTING DUE DATE FOR END OF SEMESTER.

Set the due date for graduate students to the Wednesday preceding the start of finals for term renewal request rollover period of 2 weeks (Marcia does this w/ Mansfield)

G) VOYAGER - PATRON RECORDS

- 1) Add new user record
 - a) Fill out all pertinent information in patron record.
 - b) If no social security number, use birth date use BMMDDYY

- c) Set expiration date one year from current date.
- d) Choose patron status: B:Offcampus
- e) Enter barcode: this will save and close record.
- 2) Add second phone number to user record
 - a) Select patron record in edit mode
 - b) Click on "Phone Numbers <new>"
 - c) Select Phone Type "Other"
 - d) Enter additional phone number
 - e) Save
- 3) Add employer name or business address to user record
 - a) Select patron record in edit mode
 - b) Click on "Addresses <new>"
 - c) Select "Temporary Address"
 - d) Enter Business name and address
 - e) Choose effective date
 - f) Save
- 4) Add email address to user record
 - a) Select patron record in edit mode
 - b) Click on "Addresses <new>"
 - c) Select "Email Address"
 - d) Enter email address
 - e) Choose effective date
 - f) Save
- 5) Add patron barcode to blank field
 - a) Select patron record in edit mode
 - b) Click on "Patron Status", such as "B: Butte Students Active"
 - c) Cursor will blink in blank barcode field
 - d) Add barcode from card
 - e) Save
- 6) Replace existing patron barcode
 - a) Select patron record in edit mode
 - b) Click on "B: Butte Students Active"
 - c) Change status to "Other"
 - d) Save
 - e) Click on "Barcodes <new>"
 - f) Select Patron Status", such as "B: Butte Students" or "B: Butte Faculty"
 - g) Add barcode from card
 - h) Save

H) VOYAGER – BIB AND ITEM RECORDS

- 1) Existing bib record for item not owned by us
Create new item/holdings record and add to existing bib item.
 - a) Find existing bib record in VOY.
 - b) "Add item"
 - c) "Link item to existing holdings": NO
 - d) Fill out all 3 tabs
 - e) Add barcode
- 2) Existing bib record for item owned by us
Create new item record and add to holdings/bib item
 - a) Find existing bib record in VOY
 - b) "Add item"
 - c) "Link item to existing holdings": YES
 - d) fill out item tab
 - e) add barcode
- 3) No existing record in VOYAGER
 - a) Find bib record in OCLC
 - b) Give to TS to attach our holdings
 - c) Check out to patron

- 4) Create Fastadd
 - a) Click on ITEM
 - b) Ctr-A for ADD ITEM
 - c) Select appropriate template
 - d) Fill out 3 sections of record ALL IN CAPS
 - (i) Bib
 - (ii) Holdings
 - (iii) Item
 - (iv) Scan in barcode: this saves and closes item

PART I DEPOSITS, BILLING, STATISTICS
11/19/2009

Library Special Account: BS3002
Library Copying account: BLI042
Workstudy: BLI041

At beginning of month you need the following reports and information:

- a) Access reports VOY for circulation statistics:
 - i) Run 2 macros for circstats
- b) Access reports in Illiad for ILL charges to Business users
 - i) Find transactions for patron type OTHER
 - ii) Find transactions for status DELIVERED TO WEB
 - iii) Find transactions for status FINISHED
 - iv) Find transactions for current billing period
 - v) Change date to present day

NOTE: CUSTOM SEARCHES CAN BE SAVED ON INDIVIDUAL CLIENT
- c) OCLC download ifm report for ILL
 - i) <http://www.stats.oclc.org/cusp/nav>
 - ii) username: 100-087-934 pw: ill
 - iii) ILL Fee Management Program Borrower Report
 - iv) SHOW ALL REQUESTS
 - v) Copy and paste html table into Word
 - vi) Use smaller font
 - vii) Print in landscape and add to binder
- d) Gather invoices from CURRENT ILL BILLING folder
- e) Get fax and copy log from Kyocera for special off-campus accts. (we rarely have to bill for these services)

1) BILLING

- a) General
 - i) This department bills monthly for items listed below. Invoices and statements are created and distributed (one for files, one for Marcia and 2 for patron).
 - ii) You need the following:
 - (1) Current ILL to be billed (off-campus and borrowing libraries w/ lost books)
 - (2) Fax and photocopy log from Kyocera
 - (3) Business users ILL charges from Illiad
 - (4) Lost books borrowed from us by ILL libraries
- b) Categories of Charges
 - i) Charge for our ILL services to businesses (\$15/transaction plus lending library charges plus possible copyright royalties)
 - (1) Retrieve records for the month from Illiad.
 - (a) Edit item/custom search/ "ocfinished" and "ocdelivered" with date for current month (on individual machine)
 - (b) Save search results to html format to desktop/ILLBill
 - (2) Include transaction number on invoice; save in Pubfiles/Billing/Invoices/CurrentYR
 - (a) Charge \$ 15 each plus other charges if any
 - (b) Enter patron name and company name in appropriate fields (save as...)
 - ii) Charges for ILL items received (businesses) and for lost ILLs borrowed by our patrons
 - (1) Sources of charges
 - (a) PAPER INVOICES
 - (2) Process charges:
 - (a) Paper charges, initial, give to Marcia to be paid.
 - iii) Charges for color copying, copying, off-campus copying on Kyocera etc.
 - (1) Create Invoices using invoice form in Pubfiles (color copying, copying, FAX etc),

- iv) Charges for FAX
 - (1) Disregard all fax transactions charged to the library, and all transactions which have been paid for.
 - (2) Transactions charged to a department or to be billed to a patron are entered in the monthly billing database.
 - (3) In log, Draw line after last entry, enter billing date in red, initial.
- c) Distribution of invoices and statements
 - i) FOR OFF-CAMPUS: print 3 copies of RCV/Invoice and 2 copies of RCV/Statement. Staple together 2 copies of invoice and 1 copy of statement, mail to off-campus user.
 - ii) FOR CAMPUS: print 1 copy of RCV/Statement for each account
 - iii) Pass on to Marcia for payment:
 - (1) 1 copy of STATEMENT for all campus accounts (Faculty, IDCR, Library, departments)
 - (2) 1 stapled copy of invoice and statement mailed to off-campus, mark FILE COPY in red
 - (3) 2 copies of initialed invoices received by mail.
 - (4) If ILL bill arrives past billing period: to be determined

2) DEPOSITS

CASH AND CHECKS MUST BE DEPOSITED WEEKLY (State Auditor)

- a) Library - GENERAL
 - i) WE CAN ONLY DEPOSIT MONEY IN THE AMOUNT OF OUR INVOICE. Donations must be deposited to a Foundation account.
 - ii) ALL LIBRARY MONEY DEPOSITED MUST BE ACCOMPANIED BY AN INVOICE OR NUMBERED RECEIPT: a numbered receipt must be written for all money (checks or cash) received.
 - iii) Upon receipt all checks must be stamped immediately on back: FOR DEPOSIT ONLY
 - iv) CASH and CHECKS ARE RECEIVED FOR:
 - (1) Fax
 - (2) Photocopying
 - (3) Microform printing
 - (4) Color copies
 - (5) Binding etc.
 - (6) Replacement cost
 - (7) Overdue fines
 - (8) Processing Fee
 - v) If patron requires a receipt, use the numbered receipt book with carbonless copies.
 - vi) If a patron makes payment at the Business Office by credit card, make sure the money is deposited into Library Special.
- b) Library – PROCEDURE MONEY BOXES (weekly)
 - i) You need the following:
 - (1) Cash box
 - (2) Money bag or envelope
 - (3) Receipt book
 - ii) Empty box into a money bag
 - iii) Enter in Excel file Pubfiles/Deposits
 - (1) Overdue fines and processing fees into FINES ACCOUNT
 - (2) Money for copies on staff copier into AUDITRON account
 - (3) Everything else into LIBRARY SPECIAL
 - iv) Reconcile cash with deposit slip
 - v) Include in money bag
 - (1) printed deposit slip from EXCEL
 - (2) copy of receipts from book
 - vi) Take money bag to Business Office
 - vii) Send copy of deposit slip by email to Marcia
- c) Kyocera staff & student copiers (monthly)
 - (1) You need:
 - (a) Deposit bags from Bus Office.
 - (2) open coin box attachment
 - (3) Refill coin tubes to fill line; if too full, remove coins (red buttons on right side of door.)
 - (4) Empty coin box and paper bills into money bag

- (5) Use by-pass key to get reading of total copies and cash (follow instructions provided by Kyocera)
 - (a) turn key counter-clockwise for total copies
 - (b) use key pad inside of door to take readings in LED display on top of door
 - (c) return key to OFF position
 - (d) close door
- (6) Get machine status: on display on copier
 - (a) Machine status
 - (b) Counters
- (7) Add readings to Kyocera binder; send copies to Jackie Amaya

3) STATISTICS

- a) Get number for gate count.
- b) Run VOY access reports:

PART J DISTANCE EDUCATION STUDENT SERVICES

8/3/2005

Users do not need to come to the Library to use in-house resources or Interlibrary Loan services.

Distance Education (Online course) students need to be expired at the end of the semester (or status needs to be changed) in Illiad.

1) DOCUMENT DELIVERY

- a) Library users who may use this service
 - i) Distance education students (students who are enrolled in online courses at Montana Tech. They do not come to campus to attend classes, and therefore are not expected to come to the library to use its resources.)
 - ii) Graduate students working out of area
 - iii) Faculty and staff of Montana Tech and the Bureau of Mines.
- b) Materials we own
 - i) The library mails books and other library materials to the user's home address.
 - ii) The user returns the library materials to us by mail.
 - iii) The library scans copies of articles in library-owned journals and posts them on the web for the user's desk-top access.
- c) Materials we don't own
 - i) The Library obtains books and other library materials through Interlibrary Loan and mails them to the user's home address.
 - ii) The user returns the library materials to us by mail.
 - iii) The Library obtains copies of articles from other libraries and posts them on the web for the user's desktop access.
- d) Charges:
 - i) There are no charges for services to student requesting items.
 - ii) Student will need to pay postage for returning loans to Montana Tech Library
- e) Procedure to request these materials
 - i) Register as an Illiad (Interlibrary Loan software) user by going to the Library's ILLiad Welcome Page and clicking on "First Time Users Click Here" link and filling out the form.
 - ii) Use student Montana Tech email address for contact.
 - iii) Identify yourself as "Distance Ed".
 - iv) Use Illiad to submit request for copies of articles or loans of a variety of materials.
 - v) Consult Reference Department for help with citations or bibliographies.

2) REFERENCE SERVICES

Montana Tech Library provides full reference service to Distance Ed students at no charge. Please go to the reference link on the library homepage at <http://www.mtech.edu/library/librarian.htm> or call 406 496-4282 during business hours. Patrons can be referred to our AskALibrarian link on the Library homepage.

3) ACCESS TO LIBRARY DATABASES from off-campus

- a) All Montana Tech students have off-campus access to the databases listed on the library homepage. In order to be verified as a Montana Tech student, the user needs to provide his or her Montana Tech Library barcode, which is imprinted on the Diggercard, the Montana Tech ID card.
- b) Regular students need to have this barcode added to their user record at the library. They can do this in person or over the phone.
- c) Distance education students may not have been issued a Diggercard. They can contact staff at the Circulation Dept at 406 496-4281. Staff will use an off-campus card for the distance education student and
 - i) Add the barcode to the student's record
 - ii) Write the student's name and "Distance Ed" on the card.
 - iii) Mail the card to the student.

Montana Tech Library
Public Services
Policies and Procedures
Manual

- **Information Desk Procedures for Student Workers**

Opening Procedure

Get a 2 way radio (if needed)

Turn on staff and student computers

Turn off answering machine on both the circ and reference phones

Gate count

Check that handicap switches are on

Turn on thin clients and monitors

Turn on scanner computer
Turn scanner on 1st then computer

Turn on Lab computer 13 in the group study area

We do not turn on the computers in the computer lab and upstairs

Unlock staff copy room

Turn on printers and copiers
Staff copy room
Student lab printer
Staff printer
Student copy machine

Sign in; include date and have shift supervisor initial the time

Check paper in all printers and copiers
Including Circ Staff printer and fax machine at Info Desk
Color copier and staff copier in the staff copy room
Notify Circ Staff if the paper supply is getting low

Check study room book
Correct date on the top sheet
Move the previous sheet to the back of the book

Check pencil and scratch paper
Sharpen and/or replace pencils

Check work station
Empty the pencil sharpener shavings
Staples in the stapler
Tape in the tape dispenser

Log onto computer & open Voyager
Check your Tech email account (for messages from Library staff)

Use the disinfecting wipes to clean the front desk. Include the keyboards, mouse, phones, date stamp, pens, markers, pencils, scissors, etc.

Please use the disinfecting wipes and repeat the same process at the beginning of each shift change.

Check in Montana Standard – the Montana Standard is not included in the daily newspaper log in cards.

One copy for articles

There is a box in the circ office for articles

Top for articles about Tech

Bottom for sports articles

One copy on wall rack

Place a label (found in rack behind Info Desk) in the upper left hand corner of the 1st page with today's date using a black marker. Month top, day middle, year bottom. Use the date receive stamp and stamp each section with the day's date.

When your shift is finished **CLEAN** up the work area you used.

LOG OFF the computer that you were using

Put away pens, pencils, scissors etc...

Take any personnel property with you

If you have used any dishes from the back room please WASH them

DO NOT take any library property with you!

Everything in the library is bought with state money so it belongs to the library. You can be terminated for taking items that have been purchased by the library

Sign out; be sure to total your hours for the day

Circulation Work Procedures

NEVER leave the information desk unattended for any reason

If you are not sure ASK! Questions are free.

Reference

Please refer all questions about Library materials (what we have/where it's located) to Circ or Reference staff. If no one is available, please take a detailed message or have them use the "Ask" link on the Library homepage.

If you need a reference person to take a phone call that came in on the information desk phone (**4281**) please transfer the call to the reference phone at **4282**. Do not leave the caller on the information desk phone for an extended amount of time. The **INFORMATION DESK PHONE 4281** has to be available for incoming calls.

Study room procedures

Make sure that you are familiar with the study room procedures and rules
The procedures and rules are located in the orange study room book and there is also a copy in INFORMATION DESK PROCEDURES.

Mail

Check the mail labels to be sure that the mail we received actually belongs in the library
Circ students take only the ILL items and the newspapers from the mail
All other mail should be given to Carol in the back room.
When opening an ILL item make sure that there is paper work with the ILL
If there is not paper work leave the ILL in the envelope that it came in
Process all of the newspapers if you are not certain how this is done ASK!
Ill's go on the shelves in the circ office
Place them in the appropriate locations on the shelves if you are not sure ASK

Reserves

A blue Course Reserve Form must be filled out for any materials accepted for Reserves (new materials and additions); make sure it's completely filled out.
New reserves and additions go in the black tray on the reserve shelf for Circ staff to process. That shelf is located directly behind the student work station. Leave the blue form along with the course reserves in the black tray.
Reserves do not go on the shelving cart they go back on the reserve shelf
The reserve shelf is located behind the Information Desk
Unless other wise noted reserves are for in library use for 2 hours

Interlibrary Loans (ILLiad)

Our system for requesting loans from other libraries is called **ILLiad**; please refer all questions from patrons about their accounts/ILLs to Circ staff (Frances).

It is very important that you pay close attention to detail when doing ILL's

When locating journal articles for Circ staff place the paper with the with article information on the page where you have located the article

When you find a book place the label on the front of the book

When scanning be sure to do excellent work; we appreciate it when we receive articles that are scanned correctly so we like to reciprocate.

When mailing Ill's be positive that you have the correct mailing label on each package

Be sure old postage and shipping labels are covered or removed from every package

Interlibrary loan books are kept on the shelf to the right of the office door

Interlibrary Loan books are already checked out to the patron.

Always point out the due date to the patron

Put the book over the scanner to desensitize it before giving it to the patron

Checking in our books

Always check books in Voyager

Sensitize all books

Put in correct order on shelving cart under the stairs

Put journals away if time allows

Checking out books

Check out in Voyager

Desensitize

Put in book mark with due date circled on it and verbally tell patron due date

ITEM MISSING BARCODE

Photocopy information from item being checked out

Put new barcode on item and photocopy barcode

Photocopy patron ID

Give information to Circ Staff

Make sure you give patron a 4 week due date on item

Off campus patron cards are available; please check with Circ staff.

Faxes

Faxes are \$2.00 no matter how many pages are sent
There are cover sheets for the fax in the tan tray on the upper counter top
Record the fax information in the blue notebook next to the fax machine
Money collected for faxes must have a receipt
Use the LIBRARY receipt book ONLY
Put the money in the money box in the office marked Library on PINK PAPER
Instructions for using the fax machine are in the back of the fax log book.
Log all faxes that are sent in blue log book

Friends of the Montana Tech Library

For books that are sold from the rack you must make a receipt in the receipt book with the orange tag on it marked FRIENDS OF THE MONTANA TECH LIBRARY

The money collected goes in the money box in the office with the orange paper on it marked FRIENDS OF THE MONTANA TECH LIBRARY

A person that donates books to the FRIENDS OF THE MONTANA TECH LIBRARY should be given a form to fill out for their donation. Forms for the donated materials are kept in the letter tray on the wall behind the information desk in a green folder marked gifts

Have the donor fill out the middle of the form and sign the form at the bottom for the materials donated and give the form and the donated materials to Connie in Technical Services. Connie will fill out the DESCRIPTION OF GIFT MATERIALS.

PHONE CALLS FOR MARCIA

If someone calls the information desk looking for Marcia, Marcia has to be notified immediately.

Marcia also runs MetNet which is in room 225 in the ELC Building.

If someone is seeking information about Metnet or ELC 225 let the supervisor at the information desk know immediately.

If Marcia can't be found get a detailed message to leave for Marcia.

Give the message to the supervisor at the information desk.

Detailed means NAME OF PERSON CALLING, THEIR PHONE NUMBER, TIME, DATE, reason for the call and call taken by.

For any other calls for Marcia that come to front desk ask if the caller has tried Marcia's extension. If they have not then transfer them to Marcia's office **4287**.

If they have tried Marcia's extension and the caller needs immediate assistance notify the supervisor at the information desk that you have a call for Marcia.

GRAD STUDENT BOOKS

Graduate students can NOT renew their books by email or phone. The books MUST be brought back into the library and discharged from their Voyager account. If the grad student is returning the next semester the books may be checked out to the grad student again.

NO EXCEPTIONS!

If there is a problem have the grad student speak with the supervisor.

OVERDUE BOOKS

Library books cannot be renewed if they are overdue.

The books must be returned to the library and discharged and any fines or fees must be taken care of, and then if the patron needs the books back then the books can be checked out to the patron again. Get the supervisor for help.

STUDY ROOMS & RESERVES

Please discharge all study rooms and reserves and then charge them back out to the patron again.

Do not just renew the items.

If you follow the steps below the process is very easy.

Discharge

Patron

Charge

OFF CAMPUS PATRONS

No items in the library can be BORROWED OR CHECKED OUT by a patron that does not have a Digger card or a Tech Library Card. **NO EXCEPTIONS!**

IF YOU NEED SOME ASSISTANCE ASK THE SUPERVISOR

Library Patron (Customer)

Focus: The Ten Commandments

1. **A Patron**...is the most important person in any library. Just as a student is the most important person in any educational institution.
2. **A Patron** ...is not dependent on us. We are dependent on the patron.
3. **A Patron** ...is not an interruption of our work, but is the purpose of our work.
4. **A Patron** ...does us a favor when calling or coming to the library. We are not doing the patron a favor by serving him/her.
5. **A Patron** ...is a part of our process, not an outsider.
6. **A Patron** ...is not a cold statistic. She or he is a person with feelings like our own.
7. **A Patron** ...is not someone to argue or match wits with.
8. **A Patron** ...is a person who brings us his or her information needs. It is our job to meet those needs.
9. **A Patron** ...is deserving of the most courteous and attentive treatment we can give.
10. **A Patron** ...is the person who makes it possible to pay our wages, no matter what our position is within the library.

Remember... it only takes 7 seconds to make a first (and lasting) impression!

**Be attentive
Be courteous
Be efficient
...and SMILE!**

Library Patrons (Customers)... they ARE our business.

Study Room Procedures and Rules

- ❖ Reservations can be made by calling the Information Desk (496-4281) or by signing-up in person at the Information Desk.
- ❖ Reservations may be made 24 hours in advance. Study rooms are available from the opening of the library until **15 minutes before closing**.
- ❖ Study room reservations will be forfeited if the key has not been checked out within **15 minutes** of the reserved timeslot.
- ❖ To allow all users equal access to study rooms, reserving of rooms for more than a 2-hour period is not allowed. Renewals are allowed as long as the next available timeslot is open. Only one renewal is allowed per day. Only one time change is allowed per day.
- ❖ Keys returned late will result in a fine of \$1.00/hour (or a portion of an hour). Replacement costs for a lost key will be billed to the person who checked out the key in the amount of \$65.00.
- ❖ Report any damage immediately to the Information Desk. If any damage is discovered after your use, you may be held responsible.
- ❖ The library assumes **no** responsibility for personal property left in the study room at any time.
- ❖ Upon arriving to use the room, one person must check out the door key. **This key may not leave the library at any time for any reason!** The same person must also lock the room and return (check in) the key to the Information Desk when done.
- ❖ Violation of any of these procedures and rules could result in suspension of study room privileges!

Please Read!

Procedure for Newspaper Check-in

1. Place white newspaper label in upper right-hand corner of newspaper.
2. Write **THE DATE THAT IS ON THE NEWSPAPER, NOT THE DATE THE PAPER WAS RECIEVED,** on the white label.
3. Using the **Date Stamp**, stamp all sections of the paper with the stamp. Stamp all sections of the paper on the upper portion of each section.
BE SURE THAT THE DATE ON THE STAMP IS THE CURRENT DAY'S DATE. Not the date of the newspaper.
4. There is a blue box on the Reserve Shelf titled Daily Newspaper Log In Cards.
 - The numbers across the top of the cards are the dates of the month, which will be the dates on the newspapers.
 - The months are located on the left-hand side of the card.
 - Find the correct month on the card
 - Find the date on the newspaper
 - Find the date that is on the newspaper across the top row of the card
 - Record the date that the newspaper was received in the box

EXAMPLE

- The Billings Gazette was received on September 14th
- The date the newspaper was printed was September 13th
- Find the month of September on the left-hand side of the card
- Find the number 13 across the numbers on the top of the card that would be the date on the newspaper
- Write the 14th in that box that is the date that the paper was received on.

Be sure to write as neatly as possible and keep the cards in order.

After the newspapers are checked in they are to be put on the shelves.

Please keep the newspapers neat and in order.

If the shelves are messed up straighten them.

*Please pull out the book review and Times magazine from the **Sunday** New York Times and give to Carol in Technical Services.

If newspapers are missing please notify Carol in TS.

All ads are to be taken out of papers except for the Montana Standard's grocery ads on Wednesdays.

CALL NO.		VOL. PER YEAR		CLAIMED																															
BOUND		PREPARED		IN BINDERY																															
DATE OF NEWSPAPER		VOL.		DEMCO																															
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31			
JAN																																			
FEB																																			
MAR																																			
APR																																			
MAY																																			
JUN																																			
JUL																																			
AUG																																			
SEP																																			
OCT																																			
NOV																																			
DEC																																			
INC		JAN		FEB		MAR		APR		MAY		JUN		JUL		AUG		SEP		OCT		NOV		DEC		BIND									
10		20		30		40		50		60		70		80		90		100		110		120		130		140		150		160					
TYPYST PLEASE NOTE — START ALL TYPING AT SAME POINT ON SCALE THEN REMOVE THIS STUD. BE SURE YOU HAVE A WELL INKED RIBBON. CARE USED IN TYPING WILL IMPROVE REFERENCE DURING THE ENTIRE LIFE OF THE INDEX. TRY A FEW IN THE POCKETS TO SEE HOW THEY LOOK BEFORE TYPING THE ENTIRE LIST. FOR UNIFORMITY IN STOCK AND PRINTING ALWAYS USE FORMS MADE BY —		DEMCO, INC.		MADISON, WISCONSIN		FRESNO, CALIFORNIA																													
DEMCO, 33-555																																			

MONTANA TECH LIBRARY NEWSPAPER COLLECTION

Montana Tech Library receives the following newspapers regularly. The newspapers are checked in and labeled by Information Desk students daily. Label indicating the day of the paper is placed on the upper left hand corner on the newspaper and all advertising is removed before the paper is shelved.

If we do not receive an issue students report missing issues to Technical Services staff for claiming.

On the first working day of each month papers that are two months old are pulled, counted and recycled. Papers in the stacks are re-shelved so that the current month is on the top shelf.

Chronicle of Higher Education is kept for one year, so the papers that are a year old are pulled, counted, and recycled.

TITLE	ISSUES RECEIVED	BACK ISSUES KEPT
Billings Gazette	Daily	Current month + One back
Bozeman Daily Chronicle	Daily	Current month + One back
Christian Science Monitor	Monday – Friday	Current month + One back
Chronicle of Higher Education	Weekly	12 Months
Denver Post	Sunday	Current month + One back
Great Falls Tribune	Daily	Current month + One back
Independent Record	Daily	Current month + One back
Missoulian	Daily	Current month + One back
Montana Standard	Daily	Current month + One back
New York Times	Daily	Current month + One back
Seattle Times	Sunday	Current month + One back
Wall Street Journal	Monday - Friday	Current month + One back

TIME CARDS ARE DUE

Wednesday – 3:00 PM

November 18, 2009

Sign-In Sheet Procedure

1. You must fill in your sign-in sheet each shift.

- a. Record the date in the left hand column
 - b. Record the time your started your shift and the time you finished
 - c. If you leave and come back during the day, each shift change **MUST** be recorded
 - d. Total the hours and minutes for the day in the right hand column
 - e. YOU **MUST** HAVE YOUR SHIFT SUPERVISOR INITIAL YOUR SHEET!
2. Total the hours and minutes for the week as you go. That will speed up the filling-out of the timecard at the end of the pay period.
3. Add up minutes over/under the half an hour for the whole month. If they add up to 30 minutes, add those minutes as you reach the 30 minute mark.

Month/Day/YR		IN		OUT		IN		OUT		Hours	Minutes
10/4/09	Sunday	1:00		3:10						2	10
10/5/09	Monday	1:00		3:10						2	10
	Tuesday										
	Wednesday										
10/8/09	Thursday	1:00		3:10						2	10
	Friday										
	Saturday										
TOTAL										6	30

4. The current time sheet should be kept on top.

Time Card Procedure

- 1. Timecards are due on the 18th of each month, they must be filled out no later than the 18th (if you work on the 18th, it can be included on the timecard).
- 2. For each day worked, put whole number of hours on timecard in **PEN**. 30 minute increments are acceptable.
- 3. Write in "Total Hours" in pen, **sign card with signature in INK.**
- 4. Write in your Digger ID# on the timecard.
- 5. Leave card in folder to be collected
- 6. You will be paid on the 1st of each month. Your paycheck will be available on the 1st of the month at the business office. You will need your ID to pick up your paycheck. If you want electronic deposits check with Career Services.
- 7. IF YOU NEED HELP **ASK**

COMMITTEE BOOK COLLECTION ASSESSMENT PROJECT

On the shelf behind the circ student work area are clipboards for the book collection assessment project.

As the faculty work through this project they insert post-it-note colored flags in the books in the library.

The flags are green, red, yellow, blue, or pink.

If you check out a book with a flag in it ask the patron if they mind leaving the flag in the book. If they **do not mind** leaving the flag that will work out great. If they want the flag removed from the book please tell the supervisor when checking the book out so that the flag can be removed without a problem.

Checking books back in

When you check the books on shelving cart in Voyager and sensitize the books you must also check if the books have any flags to be put back in them. The sheets are kept in a blue file folder next to Carol Reed's printer.

SUPERVISOR INSTRUCTIONS FOR REMOVING FLAGS

In the patron record in Voyager open the icon for charged items index

Click on the print button

Put the flags on the printed sheet

Leave the sheet in Carol Reed's inbox.

Library Student Employee Guidelines

Welcome to Montana Tech Library. We hope your participation as a student employee will be enjoyable and educational. Your work will help you become familiar with the Montana Tech Library and with library procedures in general.

Probation Period and Evaluations

First four (4) weeks of employment. During this time employees are expected to:

- Be on time for all scheduled work periods
- Learn assigned duties and complete assignments as effectively as possible
- No unexcused absences will be allowed
- Evaluations are done at the end of each semester

Scheduling

- ❖ Employment is by semester. Individual hours are assigned in accordance with class schedules.
- ❖ Employees are expected to be consistently dependable, prompt, and reliable in attendance.
- ❖ Employees must sign in and out each work period and must work their scheduled hours.
- ❖ Planned Schedule Change at least 24 hours before your shift:
 - IT IS YOUR RESPONSIBILITY to arrange for a replacement. Call one of the other students BEFOREHAND and write the change on the master calendar
- ❖ Emergency absence (illness, death in the family). Contact the supervisor **BEFORE** you miss your shift (homework is not an emergency)
- ❖ Finals week schedules can be adjusted as needed with written arrangements submitted one week before finals.
- ❖ Missed hours can be made up depending on workload and with the approval of the Supervisor.

Student Duties

- ❖ Students are expected to assist staff in completing routine tasks and special projects as assigned.
- ❖ Student work assignments may vary depending on the needs of Montana Tech Library as a whole.
- ❖ Each assigned tasks should be completed as effectively, efficiently, and completely as possible.
- ❖ Telephones, computers, typewriters, and other equipment and supplies are for **business use only**.
- ❖ Doing your homework while at the desk is a privilege—not a scheduled event—and allowed with the Supervisor’s permission only after all Library tasks are complete.

Policies

- ❖ NO cell phones during working hours. Cell phones must be turned off and placed your backpack.
- ❖ Personal conversation in the library must be limited to 5 minutes
- ❖ Student employees are subject to “Work Policies For Student Employees” as presented by the Financial Aid Office.
- ❖ Dress appropriately for a work environment (no sweats or workout clothes, no bare midriffs).
- ❖ A student may terminate employment by giving at least two weeks written notice.

Student Signature _____ Date: _____

Expanded Policies

**For any emergency or problem requiring assistance, first dial H.E.L.P. on campus.
If no answer dial 911**

Personal Fragrances

Don't wear perfumes, colognes, or scented lotions. We have a number of people on campus who are sensitive or allergic to some scents. Be considerate of others.

Cell Phones

No cell phone or text-messaging during work hours. Turn your phones off and put them in your backpack when you arrive. Time spent on personal business (i.e. talking to friends, exchanging homework assignments, etc.) will be considered break time.

Computers

Never load software on the staff/student machines. Do not use messenger on work computers. Library computers are for business use only.

CONFIDENTIALITY

Libraries fall under strict Federal confidentiality laws. We do not provide personal information about our patrons, students, or staff member or the library materials a patron uses. Refer any such requests to a supervisor.

Student Signature _____ Date: _____

EXPANDED POLICIES

For any emergency or problem requiring assistance first dial
CAMPUS SECURITY

4357

(HELP)

If no answer dial

911

Personal Fragrances

Don't wear perfumes, colognes, or scented lotions! Some people are sensitive or allergic to some scents. Please be considerate of others.

Cell Phones

No cell phone or text messaging is allowed during working hours. Your cell phones must be turned off and put in your back pack when you arrive.

Conversations

Having your friends at the desk to visit is prohibited. That includes doing homework.

IPods

Please do not have your music on when at the front desk. Headphones are not allowed.

Computers

Never load software on the student or staff computers. Do not use Messenger on work computers. Library computers are for business only.

Laptops

Your laptop is not allowed at the front desk.

Clothing

Casual clothing is acceptable but do not wear anything that is offensive to others.

NO:

HATS

SWEATPANTS

BARE MIDRIFFS

LOW CUT FRONT OR BACK

CONFIDENTIALITY

Libraries fall under strict confidentiality laws. We **DO NOT provide** personal information about our patrons, students, or staff members or the library materials a patron uses. Refer any such requests to a supervisor.

Failure to follow any of these policies can result in your immediate termination.

Student Signature: _____ Date: _____

Montana Tech Library

Public Services

Policies and Procedures

Manual

- **Information Desk Procedures for Staff**

Basic Circulation Procedures

10/20/2009

PATRON RECORDS:Student withdrawing from school, staff ending employment – or - suspending library privileges

Leave a note for Public Services supervisor to check Voyager and ILLiad. Patron cannot be cleared until this is done. Ask patron to come back next business day if you cannot verify the status of their accounts. When a patron checks out leave a pop-up note that they have withdrawn

Policy for granting off-campus cards

Off-campus borrowing privileges will be extended to alumni and patrons of legal age who need to use the special resources of the Tech library. Patrons will be encouraged to use the Public Library for general resources and interlibrary loans. If patron is alumni, check Voyager to see if they have a record—if so, it can be edited to “off-campus” status. (See “Editing existing patron record” below**) Off-campus cards expire and must be updated after **one year**.

The patron needs to provide **TWO PROOFS OF CURRENT ADDRESS** such as:

- **Montana** Driver's License
- Rental or Lease Receipt of Payment
 - Landlord's name and phone number should be on receipt
- Utility Bill Receipt of Payment
- Telephone Book Listing/Cell phone bill
- Conservation License
- Bank Statement

If possible, have the patron provide:

Business address, phone & email—add to notes field in patron record

Social Security Number (we DO NOT use as ID#)

Always use **BMMDDYY** as the institution ID #.

OUT OF STATE Driver's License will be accepted **with**
TWO OTHER PROOFS OF CURRENT ADDRESS

Add new Off-Campus record – screen shots start on page 3

Fill out all pertinent information in patron record—do not click save yet.

We do not use SSN; please use birth date in this format: **BMMDDYY** (the letter “B” followed by the mmddyy, no spaces. Set expiration date one year from current date.

Choose patron status: B: Offcampus

Enter barcode: this will save and close record.

Editing existing patron record (for updating patron statuses, changing addresses, replacing lost off-campus etc.)

Bring up patron's existing record

Patron > Edit patron>

Under Name tab, the expiration date should be changed for off-campus users to one year from today. If changing to off-campus, re-write their name in ALL CAPS.

Under the Barcode tab, set their old barcode to “expired”.

To add a new barcode double click on [Barcodes](#) on the right hand side; scan the new barcode into the empty box and assign a new patron group from drop down

- B: Butte Off-Campus
- B: Butte Emeritus Faculty
- B: Butte Students
- B: Butte Professional
- B: Butte Faculty
- B: Butte Graduate
- B: Butte Staff
- B: Butte Special Students etc.

Make sure to save changes

Add second phone number to user record

- Select patron record in edit mode
- Click on "Phone Numbers <new>"
- Select Phone Type "Other"
- Enter additional phone number
- Save

Add email address to user record

- Select patron record in edit mode
- Click on "Addresses <new>"
- Select "Email Address"
- Enter email address
- Choose effective date
- Save

CHECK-OUT OF MATERIALS:

(See Circulation Matrix attached at end for check-out period and for fine amounts)

Click on Charge icon (if they patron doesn't have their card, you can find by last name etc.)
Call up patron record CAUTION be sure to use "Butte" patron type (some students have records from Mila or Western etc.)

Scan item barcode possible alert messages:
Item does not circulate from this location---means you have called up a non-Butte patron type
Item not found---means there is no bib record attached to the barcode
Item does not circulate---means item is REF or Superfund (staff may override this message)

Desensitize item

Circle due date on bookmarker and put in book (for students and off-campus only---faculty due is one year, however Public Services renews for them)

RENEWALS:

No phone renewals for grad students, or overdue items.

Actual renewal (re-check out) with patron and item present:

- Check item in
- Check item out again

Phone renewal or item not present:

- Find patron record
- Click on list of items checked out
- Highlight item to be renewed
- Click on RENEW button

CHANGE (modify) DUE DATE:

The due date can only be changed at the time of checkout when the checkout window is still open. Any other time, the item must be checked in and then checked out again. Right-click on the item in the charge window; select "modify due date." Click on the calendar and change the date as necessary.

CHECK-IN: PROCESSING OF ITEMS FROM BOOK RETURN:

Click on DISCHARGE icon

Scan barcode

Watch for special messages:

- Hold
- Cataloging Review
- Circulation Review
- Lost (please say yes to "remove status" message)
- Multiple items (count # of items to verify)

Sort items:

- LC Books: on shelving cart
- Documents and journals: on labeled sorting shelf in office
- ILLs on to be returned shelf

Clear sorting shelves: (students can do this when necessary)

- Sensitize all items
- Put documents and maps upstairs on desk outside offices
- Sort journals into the 4 alphabetical categories on wooden Serials Shelf outside REF offices OR shelve in stacks if time
- Re-shelve Reference materials, circulating theses, Special Collections as necessary

HOLDS:

- Only for items not checked out
- No message generated until item is checked in
 - Find item record
 - Click on HOLD button
 - Enter patron barcode
- IMPORTANT: select COPY, not TITLE (selecting copy will only put holds on Tech items)
- Select pick-up location: Montana Tech Library

RECALLS: Often it works to just call the patron and ask if someone else can have the item short-term. (If patron would like item back, be sure to place a hold on it for them after checking it out to new patron)

- Only for items checked out.
- Only staff can place recalls
- Recall changes due date to 1 week from recall date. An email is sent the next day to the patron with the item checked out.
- Follow HOLD procedure except choose RECALL.

FASTADDS: Items without Barcodes or no record attached to Barcode (Item not found)

- Photocopy the title page of the item and the barcode from the back; staple together and write the date and patron's name & ID number on the paperwork.
- If item does not have a barcode, put one on the back of the item in the upper right-hand corner and follow procedure in (a)
- Please put the paperwork in Public Services supervisor's inbox.

WAIVE FINES/FEES: please note patrons name and ID# for Public Services Staff and they will clear it up later. If they are blocked in Banner (Business Office), Circ staff will have to remove the block.

INTERLIBRARY LOANS: Reference staff can show patrons how to set up accounts and they can reset passwords.

- If patrons ask to renew ILLs, please let them keep the item until ILL Staff can check on the status for them. Take their name and the transaction number from the sticker on the front of the book, and leave the info for Circ staff. We will try to renew as soon as we can and email them the lending library's response.
- New ILL books picked up by patron need to be desensitized; the due date is on the sticker on the front.
- ILL books returned by patrons need to be placed on the corresponding shelf in the Circ office (Borrowing – to be returned).
- Incoming ILL books/photocopies can be left unopened on the corresponding shelf in the Circ office (Borrowing – To be processed). Note: Do not give new incoming ILLs (from the mail) to patrons unless they have been processed by ILL Staff—thank you!

ILLiad Patron Accounts (Web)

Passwords can be reset by Public Services. Other problems with patron web access to their accounts should be referred to PS staff. Patrons can email PS staff: librequest@mtech.edu.

Sending Faxes (\$2.00 each fax no matter how many pages)

Fax procedure is in the Fax log book

Please fill out log book completely and make sure to write a RECEIPT even if the patron doesn't want one.

Make sure patron stays until fax is complete (do not write receipt if fax doesn't send)

We receive faxes for patrons at no charge

Faxes to toll free numbers are no charge

Paper

Notify Public Services staff if more paper is needed to re-stock the paper cabinet.

Troubleshooting Copiers and Printers

**If all else fails, place an "out of order" sign on it and send an email to Public services staff & Marcia. Include the machine name/number, the problem and what you did to fix the problem.

Opening Procedure

Get a 2 way radio (if needed)

Turn on staff and student computers

Turn off answering machine on both the circ and reference phones

Gate count

Check that handicap switches are on

Turn on thin clients and monitors

Turn on scanner computer
Turn scanner on 1st then computer

Turn on Lab computer 13 in the group study area

We do not turn on the computers in the computer lab and upstairs

Unlock staff copy room

Turn on printers and copiers
Staff copy room
Student lab printer
Staff printer
Student copy machine

Sign in; include date and have shift supervisor initial the time

Check paper in all printers and copiers
Including Circ Staff printer and fax machine at Info Desk
Color copier and staff copier in the staff copy room
Notify Circ Staff if the paper supply is getting low

Check study room book
Correct date on the top sheet
Move the previous sheet to the back of the book

Check pencil and scratch paper
Sharpen and/or replace pencils

Check work station
Empty the pencil sharpener shavings
Staples in the stapler
Tape in the tape dispenser

Log onto computer & open Voyager
Check your Tech email account (for messages from Library staff)

Use the disinfecting wipes to clean the front desk. Include the keyboards, mouse, phones, date stamp, pens, markers, pencils, scissors, etc.

Please use the disinfecting wipes and repeat the same process at the beginning of each shift change.

Check in Montana Standard – the Montana Standard is not included in the daily newspaper log in cards.

One copy for articles
There is a box in the circ office for articles
Top for articles about Tech
Bottom for sports articles

One copy on wall rack

Place a label (found in rack behind Info Desk) in the upper left hand corner of the 1st page with today's date using a black marker. Month top, day middle, year bottom. Use the date receive stamp and stamp each section with the day's date.

When your shift is finished **CLEAN** up the work area you used.
LOG OFF the computer that you were using
Put away pens, pencils, scissors etc...
Take any personnel property with you
If you have used any dishes from the back room please WASH them

DO NOT take any library property with you!
Everything in the library is bought with state money so it belongs to the library.
You can be terminated for taking items that have been purchased by the library

Sign out; be sure to total your hours for the day

Closing Procedure

30 minutes before closing walk through the library and inform patrons of closing
Patrons on computers have until 15 minutes before closing to log off computers Study rooms keys must be checked in 15 minutes before closing Materials are to be checked in or out 15 minutes before closing
Pick up any books, journals etc., discharge in Voyager and put on sorting cart/shelves
Computer shut down procedure for Thinclient Log off of server Shut down computer and turn monitors off on ALL COMPUTERS
Shut off scanner, computer and monitor
Turn off copiers and printers
Check that the fans are off in all of the study rooms and elsewhere in the library Make a final walk around upstairs and downstairs if empty turn off lights
On Fridays, weekends, holidays, and summer hours shut off lights in rest rooms upstairs and in lobby
Shut down the student and staff computers and monitors
Lock outside doors checking the outside push button on the doors is locked
Turn off handicap switches (3)
Turn off foyer lights
Do not turn off the front and back porch lights
Put 2 way radios away
Sign out on time sheets
Put circ and reference phones on forward PUSH THE FORWARD BUTTON TWICE
Gate count
Close and lock circ office door
The student worker and the staff member <u>MUST</u> leave the building together at closing
<ul style="list-style-type: none"> Make sure that student/staff are in their cars and that their cars have started before you leave the parking lot – this is for safety reasons

Voyager Circulation Short Cuts:

Almost all of the Voyager Circulation activities can be accessed using the keyboard. When you see a word with an underlined letter, press **Alt** and the underlined letter to select the command. Likewise, some of the activities can be accessed using the control key (**Ctrl**) + the designated letter.

Choose <u>F</u> unction (main menu)	Alt + U
Open <u>P</u> atron Record	Ctrl + P
• Add Patron	Ctrl + A or RC
• Edit Record	Ctrl + E or RC
<u>C</u> harge/ <u>R</u> enew Items	Ctrl + H
<u>D</u> ischarge Items	Ctrl + D
<u>I</u> tem Record	Ctrl + I
Search (RC*):	
• Headings/Keyword	Shift + F1
• Barcode	Shift + F2
• Display Headings Index (results of last search)	Shift + F6
• Display Keyword Index "	Shift + F7
• Display Barcode Index "	Shift + F8
Add Bib/Item	Ctrl + T or RC
Add Item	Ctrl + A or RC
Edit Item	Ctrl + E or RC
Resequence Items (change order of items records linked to same holdings record by preference)	Ctrl + Q or RC
Search <u>R</u> eserve Items	Ctrl + R
Search (RC):	
• For Item	Ctrl + F or RC
• For List	RC
Create New List	Ctrl + N or RC
Edit	Ctrl + E or RC
Items	RC

(*RC=Right click, and indicates a sub-menu is available)

To activate a drop-down  or ellipsis  **F4 (or F8)**

Hint: When entering information, use the tab key to move through the dialog box fields. Press the **F4** (or **F8** in some instances) function key to display the drop-down arrow selections or ellipsis buttons. Use your keyboard arrows to move through a list of options. To tab in the reverse direction press **Shift** + the **tab** key (you can use this method to get back to the option buttons as well). Use the **up** and **down** arrow to select an option button. Once the search results are displayed, use the arrow keys to move through the list of options. Use your **space bar** to select the option if the results display in a list box with a header.

To Print Screen: hit "print screen" key; open WordPad and hit <ctrl> + v to paste

Creating Fast Adds:

Adding Patron Records:

Collecting Fines/Fees:

Placing Holds/Recalls:

Renew/Modify Due Date:

Modify Due Date

In order to change the due date for a charged item, the charged item must still be displayed in the list on the bottom half of the Charge window.

1. Select all of the items to which you want to assign a new due date.
2. Select **Modify Due Date** from the **Charge/Renew** menu (or click right mouse button on the charged items and select **Modify Due Date** from the submenu).
3. Enter the date on which the items are due in the **Date** field. You can enter the date manually or click the drop-down button to display the calendar dialog box.
4. Enter the time by which the items are due in the **Time** field.
5. Click **OK** to save your changes and close the **Modify Due Date** dialog box; click **Cancel** to close the dialog box without saving your changes. If you are printing due date slips, another due date slip prints with the modified due date. The charged items listed in the **Charge/Renew** window display the new due date.

Renewing Items

Renewing items follows the same procedure as charging items. The renewed item is identified in the list box with an **R** in the status column. You can also renew items from the patron's Charged Items Index.

1. In the **Charge/Renew** window, enter or scan the patron's barcode and press **Enter**.
2. Select **Charged Item Info** from the **Charge/Renew** menu or click the **Charged Items** button to display the Charged Items Index. The **Charged Items Index** dialog box displays.
3. Select the items in the index that are to be renewed.
4. Click the **Renew** button. The **Status** column will indicate that the item was successfully renewed and the new due date displays in the **Due Date** column.
5. Click the **Close** button to close the **Charged Items Index** dialog box and return to the **Charge/Renew** window.

Circulation Loan Policies

Patron Status	Library Material	Check Out Period	Fines/Fees	Services
Faculty Administration Bureau Staff Professional Staff Faculty Emeritus	Books, journals, maps GovDocs & other circulating materials AV materials	One year+ (renewed by Library)	No fines/fees	Remote database access Place hold/recall Reserves Special Collections - In House Use Interlibrary Loans
Graduate Students	Books, journals, maps GovDoc & other circulating materials AV Reserves	Current Semester (must renew each semester) One Week Varies by instructor	\$1/day (up to \$5) per item; after 28 days replacement cost + \$10 process fee is assessed Reserves = \$1/hr over	Remote database access Place hold/recall Reserves Special Collections - In House Use Interlibrary Loan
Undergraduate Students Special Students (other MUS students, Distance Ed)	Books, journals, maps GovDocs & other circulating materials AV Reserves	28 days/2 renewals One Week Varies by instructor	\$1/day (up to \$5) per item; after 28 days replacement cost + \$10 process fee is assessed Reserves = \$1/hr over	Remote database access Place hold/recall Reserves Special Collections - In House Use Interlibrary Loan
Non-Tech (off campus) Patrons	Books, journals, maps GovDocs & other circulating materials AV	28 days/2 renewals One Week	\$1/day (up to \$5) per item; after 28 days replacement cost + \$10 process fee is assessed	Onsite database use only Special Collections In House use by appointment Interlibrary Loans > NO Copies \$0.15/page plus \$10 service chg. per item
Tech Alumni (must have record updated to off- campus)	Books, journals, maps GovDocs & other circulating materials	28 days/2 renewals	\$1/day (up to \$5) per item; after 28 days replacement cost + \$10 process fee is assessed	Onsite database use only Special Collections In House use by appointment Interlibrary Loans > NO Copies \$0.15/page plus \$10 service chg. per item
Business Patrons	Books, journals, maps GovDocs & other circulating materials	28 days/2 renewals	\$1/day (up to \$5) per item; after 28 days replacement cost + \$10 process fee is assessed	Onsite database use only Special Collections In House use by appointment Interlibrary Loans (approved by dept. head - \$15/transaction) Copies \$0.15/page plus \$10 service chg. per item