Library Functions & Processes

February 2008

UM-Helena
Janice Bacino
Director of Library Services
Core Library Functions

- Collection
- Services
- Facility
- Administrative
Library Functions

Collection

- **Acquisition**
  - Selection, soliciting suggestions, ordering, accounting for expenditures (*Faculty, Business Office, Bookstore*)

- **Cataloging**
  - Adding to UM and international systems for access and inventory control (*Mansfield Library*)

- **Processing**
  - Preparing for orderly storage, checkout and loss prevention of items
Library Functions

Library Services

- Circulation
  - Loaning of materials to patrons -- students, faculty, staff, community -- including overdue notices, holds on accounts (Mansfield Library, IT, Business Office)

- Reference
  - Helping patrons find information (Faculty)

- Instruction
  - Teaching research skills in formal classroom presentations, “Book a Librarian” sessions, and on demand as staffing allows (Faculty, IT)

- Interlibrary Loan
  - Borrowing books from other libraries and lending books to other libraries (Montana Libraries)

- Access to Information
  - Acquiring and maintaining functionality of electronic resources, including website maintenance and proxy service (Mansfield Library, Montana Library Network, Webmaster)

- Course Reserves
  - Establishing print and electronic reserve collections for instructors (Faculty)
Library Functions

Special Library Services

- **Test Proctoring**
  - Proctoring tests for UM-H students and members of the community taking distance ed, including faculty (*Faculty*)

- **Microsoft Office**
  - Checking out MS Office packets and monitoring student compliance with contract (*IT, Bookstore*)

- **Faculty/Student Document Drop Off**
  - Handling exchange of documents between faculty and students outside of the classroom environment (*Faculty*)

- **Journal Subscriptions**
  - Renewing, receiving, and routing all institutional journal subscriptions (*Faculty, Business Office, Maintenance*)

- **AV Equipment**
  - Reserving, loaning, and helping with use of AV equipment (*IT*)
Library Functions

Library Facilities

- **Study Space**
  - Staffing library morning, afternoon, and evenings (*FA*)

- **Access to Copying**
  - Collecting money, instructing in use, fixing problems (*Business Office, Maintenance*)

- **Exhibits**
  - Scheduling, working with artists, publicizing (*Marketing/PR, Artists*)

- **Computers**
  - Troubleshooting, assisting students with problems (*IT*)

- **Book Displays & Cultural Activities Bulletin Brd**
  - Creating and publicizing (*Marketing/PR*)
Library Functions

Library Administration

- **Personnel**
  - Hiring and training work study students (*Financial Aid*)

- **Planning & Assessment**
  - Defining and reporting on departmental goals, objectives and outcomes

- **Budgeting**
  - Formulating and tracking library budget

- **Library Software**
  - Installing all Library software updates and troubleshooting (*Mansfield Library*)

- **Institutional Committees & Communication**
  - Web Committee, Enrollment Management, Budget. etc.

- **Policies/Procedures**
  - Drafting and maintaining accurate record of procedures
Library Processes

- Policies
  - Posted on website

- Library Operations Manual
  - Documents procedures for Librarian and Library Assistant

  - Training and resource manual for student workers
Library Processes

Library Policies

Published on Website

- Student Borrowers
- Community Borrowers
- Faculty Borrowers
- Interlibrary Loan
- Collection Management Policy
- Reserve Collections
Library Processes

Library Policies

Student Borrower Policies

All currently enrolled UM-Helena students are allowed use of library materials, under the following guidelines:

- A current UM-Helena student ID is necessary to check out library materials. You can obtain a student ID at Admissions & New Student Services.
- Books in the general collection may be checked out for a period of 2 weeks.
- Videos, DVDs, and other audiovisual materials may be checked out for 1 week.
- The most recent issues of magazines do not circulate, but may be used in the library. Back issues of magazines circulate for 2 weeks.
- All items are renewable once if they are not requested by another patron. Renewals may be made in person or by phone. All items are subject to recall after 2 weeks, if requested by another patron.
- Library materials more than 30 days overdue are considered lost. If an item is lost, you will be billed the replacement cost of the item. If the item is no longer in print, you will be billed the average cost for a body/video in the same general subject area. If a magazine issue is no longer in print, you will be billed a flat $15 fee.
- At the end of each semester, unpaid fines will be transferred to the Business Office for collection. The Business Office will add the amount due to your student account and may withhold academic transcripts and other university services from you until the amount is paid in full.
- Borrowing privileges will be suspended if your bills are transferred to the Business Office, and/or recalled items and interlibrary loan materials are not returned on time.

If you have any questions or concerns, please contact the library staff at 444-2743.

Questions | Comments:
LibraryStaff@umh.edu
Library Processes

Library Operations Manual

- Documents procedures for Librarian and Library Assistant
- Constantly in revision
- Copy at Library front desk
- Electronic copy in shared drive
Library Processes

Library Operations Manual

TABLE OF CONTENTS

- TABLE OF CONTENTS & CALENDAR
- GENERAL OFFICE
  - Phone
    - Greetings & Messages
      - Accessing Meridian Mail
      - Phone Greeting
    - Long Distance
  - Copier
    - Codes
    - Paper
    - Repairs
    - Copyright Notice
  - Recycling
  - Money Box
  - Lost & Found
  - Supplies
  - Maintenance
  - Opening and Closing
    - Opening the Library
    - Closing the Library
Library Processes

Library Operations Manual

- PERSONNEL
  - Work Study
    - Staffing
    - Pay
    - Training
    - Job Description
    - Performance Evaluation
  - Library Assistant

- BUDGET & PURCHASING
  - Budget
    - Fiscal Year
    - Expenditure Files
    - FINDW
    - Sample Budget
  - Purchasing
    - Purchasing Forms
      - Purchase Order Number
      - Signatures
    - Bookstore Purchases
    - Procard
ACQUISITIONS

- Collection Management Policy
- Inventory
- Vendors
  - Baker & Taylor
  - Amazon
- Receipt of Ordered Items
- Procedure for Acquisitions and Cataloging – General Workflow
  - Ordering
  - Receipt
  - Processing
  - Cataloging
    - Search OCLC Connexion
    - Downloaded from OCLC/To be imported to Voyager
  - Final Processing
Library Processes

Library Operations Manual

- CATALOGING
  - OCLC
  - Voyager
    - UM Help Desk
    - Voyager Cataloging Overview
      - Importing a MARC Record to Voyager
      - Creating a Holding Record in Voyager
        - Book with CD
        - Creating an Item Record
          - Two Copies in Different Locations
    - Proofing Cataloging Records
  - Cataloging Magazines
  - Processing Laptops/Equipment for Circulation
    - Processing Laptops
    - Cataloging Laptops
    - Cataloging Accessory Bags
  - Holter Special Collection Items
    - Processing Holter Special Collection Items
    - Cataloging Holter Special Collection Items
  - College Archive Items
    - Processing Archive Items
    - Cataloging Archive Items
  - Withdrawing Items from Collection
Library Processes

Library Operations Manual

- **CIRCULATION**
  - Voyager
    - Overdues
      - Lost Discharged Items
    - Patron Loads
    - UM Help Desk
  - Borrowers
    - UM-Helena Borrowers
    - Community Borrowers
  - Microsoft Office Agreement
    - Microsoft Office IT Policy
    - Library Procedures for Microsoft Software
      - Processing of MS Office
      - Cataloging of MS Office
      - Circulation of MS Office
  - Common Circulation Procedures
    - Adding or Changing a Patron Record
    - Checking-out Periodicals
    - Checking-in Periodicals
    - Adding a Reserve Item Into Voyager
    - Lost-System Applied
Library Processes

Library Operations Manual

- **SPECIAL SERVICES**
  - AV Equipment
    - Reservations
    - Circulation of Equipment
      - Laptops
      - Projectors
  - Test Proctoring
    - Instructions for UM-Helena Faculty
    - Instructions for Faculty from Other Educational Institutions
  - Faculty/Student Document Drop-Off
    - Students Turning in Work to Faculty
    - Faculty Dropping off items for Students
  - Exhibits
    - Exhibiting Procedures

- **INTERLIBRARY LOAN**
  - OCLC
    - Processing ILLs
      - Borrowing
      - Recordkeeping
      - Lending
  - Media
Library Processes

Library Operations Manual

- **SERIALS**
  - Ebsco
  - Access Database of Subscriptions
  - Receiving and Routing
    - Procedures for Mail and Serials Control
      - Serials Check-In Sheet

- **ONLINE RESOURCES**
  - Database Licenses
  - Serials Solutions
  - Statistics on Database Use
  - Off Campus Access
    - Troubleshooting Off Campus Access Problems

- **COMPUTERS & WEBSITES**
  - Computers
  - Acceptable Use Policy
  - Deep Freeze
  - Website
    - Replicating Links sidebar
    - Font
    - Linking to an Internal Page
    - Linking to a PDF in Webfiles
    - Linking to an Internal Page
    - Color
    - WEBfiles
  - Outlook
Library Processes

Library Operations Manual

- **STATISTICS**
  - 13.1 Daily Statistics
  - 13.2 Monthly Statistics
    - 13.2.1 Procedure for Monthly Statistics
    - 13.2.1.1 Interlibrary Loan
    - 13.2.1.2 Cataloging
    - 13.2.1.3 Desk Statistics
  - 13.3 Semester and Annual Reports

- **APPENDICES**
  - Collection Management Plan
  - Student Borrower Policy
  - Faculty & Staff Borrower Policy
  - Community Borrower Policy
  - Reserve Policy
  - ILL Policy
  - Library Exhibits Policy
  - Acceptable Use of Electronic Resources
  - Blank
  - Cooperative Agreements with Other Libraries
Library Processes

Library Operations Manual

- **FORMS, HANDOUTS, & SIGNS**
  - Blank
  - Maintenance Form
  - Work Study Performance Evaluation
  - Purchase Form
  - Blank
  - Projector Hints
  - Community Borrower Library Card Application
  - Test Proctoring Cover Sheet
  - Interlibrary Loan Cover Sheet
  - Serials Routing List
  - Blank
  - Blank
  - Daily Statistics Sheet
  - Monthly Statistics Sheet
  - MS Office Agreement
  - AV Schedule
Learning Processes

Work Study Resource Manual

- Training and resource manual for student workers
- Copy kept at front desk
- Each student employee provided their own copy
- Electronic copy on shared drive
Library Processes

Work Study Resource Manual

TABLE OF CONTENTS

- TABLE OF CONTENTS & CALENDAR
- COMMUNICATION & SAFETY
  - Phone numbers of staff
    - Emergency evening numbers
    - Faculty & staff numbers
  - Fire evacuation & earthquake
    - Building floorplans & maps
- PERSONNEL
  - Time card
  - Job description
  - Evaluations
- GENERAL OFFICE
  - Phone
  - Workspace
  - Noise and food
  - Homework
  - Opening & closing the library
    - Opening
    - Closing
Library Processes

Work Study Resource Manual

- Copier
  - Money box
- Supplies
- Testing
- Faculty/Student document drop-off
  - Students turning in work to faculty
  - Faculty dropping off items for students
  - Students picking up items from faculty
- Cleaning schedule

- POLICIES
  - Confidentiality – FERPA, circulation records, reference requests
  - Acceptable use
  - Loss control program policy
  - Sexual harassment

- COMPUTERS & WEBSITE
  - Front desk computer login
  - Student computers
  - Website
  - Deep freeze
  - Acceptable use policy
  - Wireless access
Library Processes

Work Study Resource Manual

- **CATALOG**
  - Voyager
  - Dewey decimal system
    - Reference books, videos, cds, dvds
    - Dewey decimal system chart

- **ONLINE RESOURCES**
  - Remote access

- **STATISTICS**

- **CIRCULATION**
  - Voyager
    - Login for voyager
  - Borrowers
    - Community borrowers
  - Lost items
  - Lending magazines (periodicals)
  - Reserves
  - Microsoft office
  - Interlibrary loan (ILL)
  - Common circulation procedures
    - Adding a patron record
    - checking out periodicals
    - checking in periodicals
    - renewing items
Library Processes

Work Study Resource Manual

- **AUDIOVISUAL (AV) EQUIPMENT**
  - Equipment
  - Reservations
  - Charging & discharging
  - Troubleshooting

- **MAGAZINES AND DAILY MAIL**
  - Newspapers
  - Mail
  - Magazines

- **REGISTRATION**
  - Class Schedule
  - How to Register Online

- **APPENDICES**
  - Library Work Study Orientation
  - Library Staff Phone Numbers
  - “Job Description for UM - Helena Library Assistants”
  - Loss Control Policy Statement
  - Acceptable Use of Electronic Resources Policy
  - Troubleshooting Off Campus Access Problems
  - Logins for Voyager Circulation
  - Current Class Schedule
Library Processes

Work Study Resource Manual

- **FORMS, HANDOUTS, & SIGNS**
  - Map of Campus Locations
  - Donaldson Building Main Floor
  - Donaldson Building Upstairs
  - Airport Building Main Floor
  - Airport Building Upstairs
  - Work Study Timesheet
  - Work Study Performance Evaluation
  - Faculty Request for Test Proctoring
  - Library Desk Statistics
  - MS Office Acceptance Form
  - Community Borrower Library Card Application
  - AV Schedule
  - LCD Projector
  - Magazine Check-in Sheet
  - Serials Routing List
  - How to Register Online
Library Functions & Processes

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