



**Helmke Library**

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# **Service Desk Manual**

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Student Employees

Summer 2025

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# Service Desk Employee Expectations

If you have questions, please speak to the Service Desk Director. If you need an accommodation to fulfill any of these activities, please notify Human Resources.

## Work Hours, Time Management, & Attendance

- Be on time for your scheduled shift and arrive ready to work.
- You are **eligible** for breaks based on the number of **consecutive hours** you work:
  - 4 hours: 15-minute paid break
  - 8 or more hours: you may choose to take both 15-minute paid breaks at the same time for a 30-minute paid break or you can take a 1-hour unpaid break. If you choose a 1-hour unpaid break, you may still take your 15-minute paid breaks, but your breaks cannot be taken in combination or at the same time.
  - Breaks cannot be taken at the start or end of your shift. If you are working a closing shift, your break must be completed at least 2 hours before the building closes.
  - Discuss timing of your break(s) with the full-time staff on duty to make sure the desks remain covered.
- Requests for ongoing schedule changes must be sent by email to the Service Desk Director and approved prior to the impacted shift(s).
- Any assignments outside of your regular tasks should come through your supervisor. If another employee comes to you with a project—even if a library employee—please direct them to speak with your supervisor.
- **Do not leave the Service Desk unattended.** If you need to take a bio break, or if your shift is over and no one is at the desk to take over, press the buzzer or notify a full-time employee.
- Plan for absences ahead of time and request the time off as early as possible. *See the Library Attendance Policy for specific expectations and requirements.*

## Communication, Confidentiality, & Customer Service

- Be a positive representative of PFW and the library.
- Uphold library and university policies.
- All library transactions are **confidential**, including materials checked out, rooms reserved, and searches done. Always check ID before interacting with a patron's account and do not share information with a third party. For example, do not share information about a student account with a parent. If a government official asks for information, get a supervisor immediately.
- Be aware of your surroundings (ex: noise, loitering, etc.) and topics discussed. Consider what you are saying, who is able to hear it, and if it is an appropriate topic for discussion at the service desk.
- **No cell phones or personal devices at the Service Desk**, except when necessary to log in to university software. If you are experiencing an emergency situation and need to be accessible, notify your supervisor and keep your phone on vibrate.
- Keep personal computers in the coat alcove during your shift. Homework may only be done only with permission from a full-time employee and after all expected tasks are complete.
- **No headphones while at a service desk.** One headphone can be in place while shelving or tidying, as long as the audio cannot be heard by others, and you are able to concentrate on your task and hear patrons should they approach you with a question.
- No Facebook/social media, games, etc., outside of break times unless directly work-related.
- Keep personal phone calls and visitors to a minimum; chat with friends and family outside of work hours.
- Handle one patron at a time and ensure confidentiality (do not discuss personal, confidential, or sensitive matters in front of other patrons).

- If you wish to borrow library materials, you must have someone else check the items out to you. When those items are returned, someone else **MUST** return the items for you.

## Dress Appropriately for Work

Dress appropriately for your role in the library. This means, while on shift or university business:

- Clothing should be neat, clean, and unwrinkled. No dirty clothes or clothes with holes (even if designed that way).
- No clothing with other school logos.
- Clothing should be practical for work tasks, and not offensive to others.
- No clothing that reveals too much skin (cleavage, back, chest, stomach) or shows your underwear when stooping, kneeling, bending, and stretching (within reason).
- Shoes must be worn, should be appropriate for work tasks, and should allow you to exit the building safely and quickly in case of an emergency.

## Relationships, Collaboration, & Teamwork

- Be respectful of your co-workers' time and areas of responsibility and experience.
- Do not undermine the authority of your coworkers. Instead, work together to support each other and present a united front—especially when upholding unpopular policies.
- Listen to concerns expressed by others, and encourage others to express their views with an open mind.
- Share information and keep co-workers up to date on projects and library events or issues.
- Be inclusive and respectful of all people and points of view, treating others with dignity and respect.
- Support efforts that ensure a safe and healthy work environment.

## Accountability & Attention to Detail

- Take ownership and accept responsibility for your own actions and areas of accountability.
- Understand how your choices impact others.
- **Record all patron interactions in the appropriate statistics tracking form.**
- Accuracy is more important than speed; take the time to be accurate and correct, but be mindful of deadlines and communicate with the team when you need assistance.
- Complete the projects you are assigned. If you run out of time, communicate that to your supervisor so someone else can complete the task.
- If you see suspicious or worrisome behavior in a co-worker or patron, privately notify your supervisor immediately.

## What you are not responsible for:

- You are not expected to monitor other employees' attendance, but please notify your supervisor if someone is missing, has not arrived, or has left early.
- You do not need to listen to a patron berating, belittling, or otherwise verbally attacking you. When emergencies or problematic behavior happen, call a full-time employee—service desk, librarian, tech services, etc.—by speaking with them, calling them, or pressing the buzzer at the service desk. The full-time employee will handle the situation, which may include calling campus security or emergency services.

## Consequences of not meeting expectations

It is understood that employees will follow the expectations outlined above. Not following these expectations will incur occurrences. These occurrences accumulate with attendance occurrences (explained in the *Library Attendance Policy*), and follow the same progressive discipline and measuring period: the first occurrence starts a rolling 12-month measurement period, where occurrences in that period earn verbal and written warnings and the fourth occurrence results in termination of employment.



# Working the Service Desk

## Helpful Links

- Internal Library Incident Report: <http://pfw.libwizard.com/incident>
- CARE Team: <https://www.pfw.edu/student-conduct-care/care-team>
- ITS Help: <https://www.pfw.edu/purdue-information-technology>

## Cataloging stickers and their meanings

Materials may have stickers on the spine or front cover in addition to the LC call number sticker. Each has a purpose, and indicate special shelving locations or loaning processes.

- Large green sticker with barcode on a paper strap: DDS/ILL Item. Do not use Alma; use ILLiad to loan.
- Large gold sticker with barcode and loan information on the cover: Course Reserve item. Use Alma to check in and out, using the barcode on the gold label. Beware short lending periods. Resecure RFID if not to leave library.
- Red dot on spine: Secure item. Reshelve to the range behind the service desk.
- Pink dot on spine: Children's book. Reshelve to 3rd floor Juvenile section on the Children's Books range.
- Pink YA sticker on spine: Young Adult book. Reshelve to 3rd floor Juvenile section on the YA range.

## Alarms

The library has security sensors on all emergency exit doors. The control panel is next to the Service Desk, and should be armed (stay); there is no need to turn it on and off during regular operations. If an emergency door is opened, the panel sounds an alarm. Full-time employees will handle the situation.

The panel in the vestibule near the IDEASpace is for campus alarms. One may sound, but unless it's continual for a significant amount of time, there is no need to act. If it's sounding for a long time, make sure a full-time employee is aware.

## Statistics

Statistics are used for many things, including determining funding and staffing for our building. Statistics should be recorded for any non-circulation interaction. All service desk employees should use the Service Desk Stats tool.

## Collecting Patron Interactions

The transactions are described as follows:

Type	Description
Directional	"Where/What is..." questions. Usually less than 1 minute. Does not require knowledge of our services.
Informational	Requires knowledge of campus or library services. Includes patron accounts and simple catalog searches. Usually under 3 minutes. <b>When in doubt, use this type.</b>
Consultation	This is when your research skills are being used. Usually longer than 3 minutes.
Referral	Referral to a Librarian, Writing Center, or other campus entity.
ITS	Helped with IT-related information.

## Hourly Counts

There are times when we need to take hourly counts of all the patrons in the building. A student worker or an IA will walk each floor and count people. Use the forms provided as well as the tally counter to help you keep track.

## ITS Issues

Library patrons will come to the desk with ITS Issues. When this happens, check for a lab consultant first. If one is available, direct the patron to the lab consultant desk. If there is no lab consultant:

- If a printer is out of paper, we can fill the printers. Paper is stored in the 1<sup>st</sup> floor lab cabinets.
- If it is something simple, feel free to help. Be sure to mark the stat in the Service Desk Stats App.

- If it's something more difficult, help the patron fill out an ITS Help Desk Ticket. If the patron needs help ASAP, call the ITS Help Desk.

## First Floor Service Desk Staff Areas

### Materials on hold for patrons (DDS, Hold, PurdueBorrow)

Items waiting to be loaned to patrons are located at the Service Desk on a short cart beneath the counter, and will have either a book strap wrapped around the front cover with a green sticker or a Request Receipt folded inside.

### Secure area

The Secure Area is on the back side of the range behind the Service Desk wall. Secure materials have red dots on the spine and yellow tags sticking in the pages. Most have short loan periods and must be renewed in person.

### Course Reserves materials

Course Reserves materials are located on the back side of the range behind the Service Desk wall. They are alphabetized by course, and then instructor name. There are tags on the shelf to help with discovery.

### The staging area

The staging area is the range behind the Service Desk, where we place items needing to be shelved. The shelves are labeled and include gov docs, CD and DVDs, and LP Records. Materials lying flat are not in LC order; upright items are in LC order.

## Service Desk Computer Information

### Service Desk links

#### General

- **Alma:** Circulation software for PFW and PurdueBorrow materials.
- **Group Study Rooms:** Group study room internal page. For patron bookings, use the library website link.
- **ILLiad Webcirc:** Software for Interlibrary Loan and Document Delivery.
- **Laptop Status:** Tool shows which laptops are in place and which are away from the Service Desk. This page is checked each night before close.
- **Primo:** Patron side of the catalog. PFW and PurdueBorrow catalogs for physical and digital items.
- **Service Desk Stats:** Statistics platform for recording interactions with patrons.
- **Navigate Appointment Setup:** link to the Navigate site to schedule Writing Center Appointments

#### Resources

- **BUGS:** Internal LITS concerns are logged in this system by full time staff.
- **Campus Events:** A link to the campus events page.
- **Campus Map:** A link to the campus map PDF.
- **Honor's Events:** A link to the Honor's event page.
- **Reference Analytics:** Site where librarians record their interaction stats.

### Workstation/Display function

The Service Desk computers have dual monitors, one staff-facing and one patron-facing, and a keyboard and mouse associated with each. When a patron would benefit from viewing or participating in what you're doing, such as searching the catalog or reserving a group study room, you can toggle between Workstation and Display mode.

Display mode shows library information slides on the patron-facing monitor while workstation mode projects whatever is on the staff-facing monitor onto the patron-facing monitor. **Be aware of what is on your screen when you switch modes, and switch back to Display when the interaction is complete.**

Push the white button on the end of the box to toggle between modes. A blue light will indicate the current mode; D is for display mode and W is for workstation mode. For example, in the image, the station is in Display mode.



## Second Floor Service Desk

The primary function of this desk is to keep an eye on the group study rooms and to answer questions. If you are scheduled to work the 2<sup>nd</sup> floor desk, clock in like normal and leave your personal items in the alcove behind the 1<sup>st</sup> floor desk.

### Workstation

The workstation has the same set up as the first-floor desk workstations, except for the RFID pad. Until a RFID pad is available for this desk, direct all patrons needing to check out materials to the first-floor desk. If patrons have general collection items to return, place those in the book drop at the back of the desk area. The person working the last shift at the desk will collect all the return items and check them in downstairs. If a patron wants to return a Course Reserve, Equipment Item, Secure Item, or a DDS item, direct them to the 1<sup>st</sup> floor desk.

### Group Study Rooms

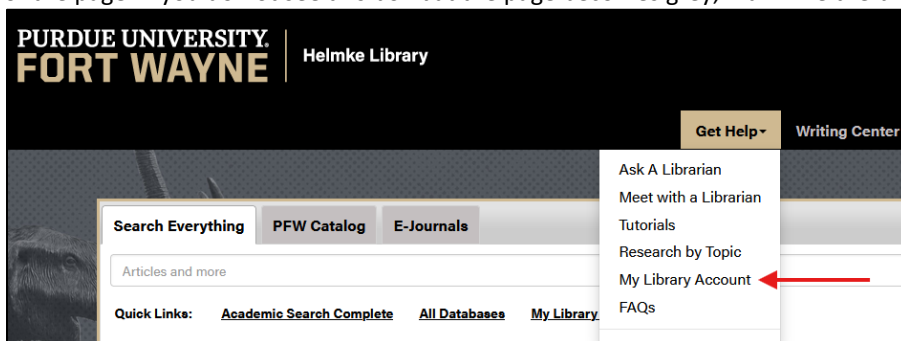
Group study rooms are available [by reservation](#) for students only (staff and faculty cannot use these rooms). Students can book a room on their own, and reserve any room for a maximum of two hours per student per day. Only the student who made the reservation is able to check in for the reservation and gain access to the room. Study Room users check in at the 2<sup>nd</sup> floor desk when it is staffed.

## User Accounts

### Patron Library Account Login

Any patron, regardless of status, may log in to their library account for information on what they have on loan, due dates, and any money owed.

1. Go to the library's website. Click on "Get Help" and select My Library Account. A login box will appear in the middle of the page. If you do not see this box but the page becomes grey, maximize the browser window.



2. Choose the appropriate option to log in.
  - a. If a campus patron, click "Mastodon Card Holder" and have the patron log in with their PFW credentials.
  - b. If not a campus patron, have the patron choose Guest Card Holder.
    - i. Click the green button to sign in, enter the email address they used to register, and click send. This will send a login link to that email address.
    - ii. If they don't remember the email account they used when signing up, but are in the building and can confirm their identity, look them up in Alma and tell them their email address.
    - iii. If they aren't in the building, they can click on the link for *Need Help Signing In?* This will open a form which creates a LibAnswers ticket. They will need to wait for the system to contact them.
3. Once logged in, the "My Library Card" page will open. This screen lists current Alma checkouts (no ILLiad transactions), requests that may be unfulfilled or waiting for the patron, any blocks, and money owed.

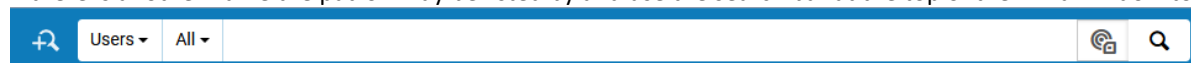
### Campus Patrons

PFW and IUFW students have full access to the items and offerings in the library. Campus faculty and staff have almost full access (they cannot reserve Group Study Rooms). All campus patrons use a Mastodon ID card (IUFW students have a version of this card) to borrow materials, or they may present a current (not-expired) and original (no photocopies or digital

versions), government-issued photo ID such as a State ID Card, Driver's License, passport, or similar. These accounts are loaded or updated in Alma every semester.

### Search for an Alma user account

Alma uses preferred names if the patron has entered one into Banner. If you're not finding the correct person in Alma, ask if there is another name the patron may be listed by and use the search bar at the top of the Alma window to search Users.



### Missing Campus Users

If a student registered late for classes or if a new employee joined the staff after the semester's patron load, they may not show up in Alma. In this case, get a full-time service desk employee to create a profile for them.

### Alumni and Indiana Resident Users (INRE)

Alumni and Indiana residents may borrow general collection materials, though some items, like laptops, are reserved for campus patron use only. INRE patrons have shorter loan periods, are immediately blocked from borrowing as soon as they owe money to the library, and may not use PurdueBorrow or ILL/DDS. Alumni may reside outside of Indiana and have an account created. *INRE patrons only receive on-site access and loaning privileges; privileges do not include access to licensed databases off-site, non-guest computers, printing, or Wi-Fi.*

### Borrowers under age 18

Anyone enrolled in at least one PFW class, no matter their age, is considered a PFW student and can borrow materials with the same rights and privileges. They should be loaded into Alma as a student user and have a Mastodon ID card.

Indiana Residents under 18 may obtain a borrower's card and check out materials with consent from a parent or guardian. The parent or guardian must be present when the account is created, have a valid Indiana government-issued photo ID, and present one official document with a current address and the signed Parental Consent Form on our website (About > Policies and Forms).

### Proxy Accounts

A Proxy Account is a designation in Alma that authorizes someone to check out items on behalf of another, generally a graduate assistant or departmental secretary for an instructor. On rare occasions, a student may request a caregiver or family member have proxy. These are reviewed on a case-by-case basis and authorization must come from the Library Management Team. If there is a patron wanting to set up proxy, get a full-time service desk employee.

### ALI Users

ALI stands for "Academic Libraries of Indiana." Participating libraries extend lending privileges to faculty, staff, and students of member institutions (<https://academiclibrariesofindiana.org/rbp/home>). The home library has final authority to issue or deny this privilege and determines the expiration date on the ALI Borrower's Card. **ALI users are not able to use PurdueBorrow, and must access ILL/DDS through their home library.**

Like Indiana Residents, ALI applicants should obtain an Associate Mastodon Card from Campus Credentials in Walb. If Campus Credentials is closed, the full-time service desk employee can issue them a Temporary Borrower's Card.

### Issuing ALI cards to PFW users

PFW students, faculty, and staff in good standing are eligible for an ALI card. Patrons must complete a registration form, and then are issued an ALI borrower's card to present to the lending library. Registration forms and cards are in the top drawer in the middle of the Service Desk. Forms can be printed from <https://academiclibrariesofindiana.org/rbp/home>

### Returning ALI Patrons

If they have already borrowed from PFW and have an Alma account, they may present an Associate Mastodon Card or a Temporary Borrowers Card. Encourage anyone with a paper Temporary Borrowers Card to obtain an Associate Mastodon Card from Campus Credentials.

Check the expiration date on the ALI card to ensure it is still valid, and check the name on the ALI card with the ID provided. If all match and are current, [loan the materials](#). If they are not current, get a full-time service desk employee. If the card is

expired and the patron is not an Indiana resident, they cannot check out material. If they still are a student at their home university, advise them to go to their home library for a new ALI card.

## **Policies Regarding Library Public Access**

Helmke library is not a community or public library, though we welcome community members. Any [user account](#) other than a campus patron has limitations on what they are able to do or borrow. In general, non-campus patrons may not reserve group study rooms or borrow laptops. There are also limitations and additional steps needed before non-campus patrons can access the network and/or Wi-Fi and print.

As a government repository, we are required to enable all patrons access to our government documents collection. They can access these documents physically, or digitally on our guest computers. This may include printing (blank) government forms or documents.

### **Computer Access**

All users must abide by the following:

- Purdue University Fort Wayne's Ethical Guidelines for Information Technology Users ([https://catalog.pfw.edu/content.php?catoid=51&navoid=1582&\\_ga=2.119353482.2096860230.1607454390-1255754777.1591914180#ethical](https://catalog.pfw.edu/content.php?catoid=51&navoid=1582&_ga=2.119353482.2096860230.1607454390-1255754777.1591914180#ethical))
- Purdue University's Anti-Harassment Policy (<http://www.purdue.edu/policies/ethics/iiic1.html>)
- PFW Code of Student Rights, Responsibilities, and Conduct ([https://catalog.pfw.edu/content.php?catoid=60&navoid=3117&\\_ga=2.40674593.2008590871.1742823025-798668172.1608041597#code](https://catalog.pfw.edu/content.php?catoid=60&navoid=3117&_ga=2.40674593.2008590871.1742823025-798668172.1608041597#code))

Two guest computers are located by the public elevators. These computers can access the internet and library databases, but are not connected to printers and do not have licensed software (Microsoft Office, Adobe products, etc.). Anyone is welcome to use these machines to search our electronic databases without needing to have a network account. Patrons with disabilities have priority for the ADA workstation. If the guest computers are logged out by a user, restart the machine; there is no password or username.

### **Troubleshooting and Tech Support**

All non-staff computers and printers in the library are owned by ITS. When issues arise with these computers or printers, direct patrons to ITS (start with the lab attendant when available). We may offer limited support when possible.

### **Printing, Wi-Fi, & Network Accounts**

ITS controls access to printing, Wi-Fi, and network access; the library is unable to grant access or create accounts. Students from campuses that use eduroam should be able to log into the eduroam Wi-Fi network using their home campus username and password.

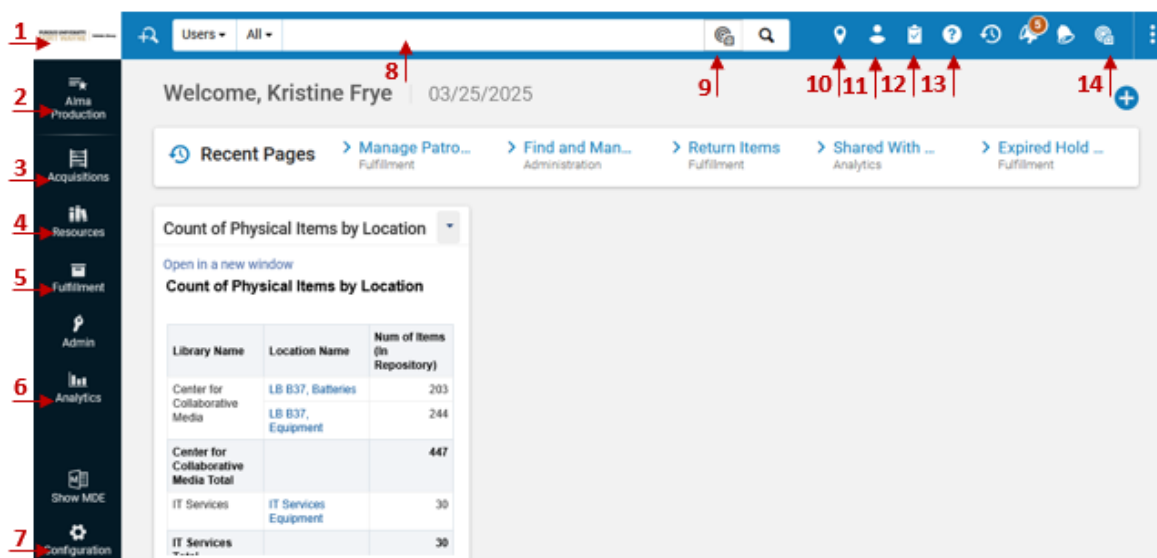
Non-campus patrons or students without eduroam access must request access through ITS. If the library lab attendant is not available, the patron must visit the ITS Help Desk (KT 206) with a current government photo ID to request a network and/or Wi-Fi account. They can request access for 24 hours with an account “sponsored” by the library. Network accounts can be used to access any computer on campus.

Guests wanting to print must request a network account, then visit the Bursar’s Office and add money to a PaperCut account. **Under no circumstances may patrons email a file or plug in a device to use staff printers to print a document.** This violates library and campus policies as well as makes our computers and system vulnerable to mal-ware and viruses, whether intentional or unintentional on the part of the patron.

# Circulation

## Alma

Alma is our circulation database. When you log in, you'll see the following screen, which is your Alma dashboard. (Note: default screens may look different; the dashboard varies with user roles). Log into Alma with your PFW credentials.



1. **Home Button:** the PFW Library logo in the left upper corner will return you to the Alma home screen.
2. **ALMA Production:** Allows you to customize your Alma dashboard.
3. **Acquisitions:** Menu for the acquisitions department, which orders the materials in our collection.
4. **Resources:** Cataloging menu, or adding items to the library's collection.
5. **Fulfillment:** Used most frequently at the Service Desk. It contains most circulation, patron account, and item tasks.
6. **Analytics:** Menu that allows users to run reports for weeding and other statistical analysis.
7. **Alma Configuration:** Allows the user to change which links show up in each menu in their personal ALMA environment.
8. **Persistent Search Bar:** Lives at the top of the screen and doesn't change from page to page. Useful for searching.
9. **Read RFID:** Button to use the RFID pad for searching titles in the persistent search bar.
10. **Location:** Changes your location in Alma. It should be set to "Purdue Fort Wayne Library – Main Circulation Desk".
11. **Account:** Click here to log out. **You MUST log out every time you step away the Service Desk.**
12. **Tasks:** List of items that need to be accomplished. Typically used in Tech Services and LITS.
13. **Help:** Link to the ExLibris knowledge base.
14. **Connect to RFID Reader:** Button to toggle RFID reader on and off.

## Circulation Policies and Loan Periods

### Confidentiality of library records

Any documentation pertaining to a patron's interaction with the library is considered a circulation record, and all circulation records are confidential. The library does not reveal the titles or nature of materials checked out or researched by any library patron. The library does not knowingly issue materials to anyone but the card owner.

### Circulation periods

Circulation period refers to the duration of time that a patron can have a material type on loan. For the most up-to-date information on loan policies, please refer to the library's website at <https://library.pfw.edu/about/policies> and <https://library.pfw.edu/about/circulation>. **Note:** the owning institution sets the loan period; PFW has no control over the

loan period of items loaned through ILL/DDS.

Indiana Residents (INRE) & ALI Card Members have shorter loan periods than campus individuals and are excluded from borrowing some items, such as laptops. They are also not able to participate in PurdueBorrow or DDS/ILL to borrow materials from other libraries.

### Fines and fees

As of 2024, the library is fine-free. Patrons may be charged a replacement cost for lost or damaged items, but there is no charge for the length of time something is overdue. Campus patrons are blocked from borrowing materials when they owe the library \$100 or more; non-campus patrons are blocked as soon as they owe any amount of money. Unpaid bills may be sent to collections by the university (multiple communications are sent to notify the patron). Once the bill is sent to collections, we are unable to rescind the amount owed, even if the patron returns the item.

Note: fines on items loaned through PurdueBorrow and ILL/DDS do not follow the same policies as PFW materials; loan periods, fines, and fees are set by the owning institution.

### Library Fine Appeals

If a patron thinks the library has made an error, if there are items on their account they believe they have returned, if they have a question about money owed to the library, or if they believe they have a special situation that warrants elimination or reduction of money owed, they may file an appeal. The Library Fine Appeals form is located at the bottom of the Circulation page of the library web site (<https://library.pfw.edu/about/circulation>) and on the Policies and Fines page of the library web site (<https://library.pfw.edu/c.php?g=915923&p=6600189>).

**Note:** items loaned through PurdueBorrow and ILL/DDS, or by another department using Alma (such as the Center for Collaborative Media), are not eligible for the fine appeal process; we are unable to grant appeals on items we do not own.

## Alma Circulation Procedures

Alma is used for all Purdue library-owned materials (For DDS materials please refer to [DDS Procedures](#)). This includes items in our PFW library collection and materials circulated through PurdueBorrow, the fulfillment network that allows all Purdue campus users easier access to materials held in Purdue libraries.

### Confirming a patron's identity

Because circulation records are confidential and we hold the borrower responsible for material condition and return, we must ensure we are loaning items to the correct person. Before you perform a circulation activity, you must confirm the patron's identity by asking for a photo ID and verifying it matches the user. Acceptable IDs include: a PFW/IUFW Mastodon Card or an original, valid photo ID (not expired, no photocopies or pictures of IDs). **If the patron does not have an acceptable ID, do NOT provide account information or loan them materials.**

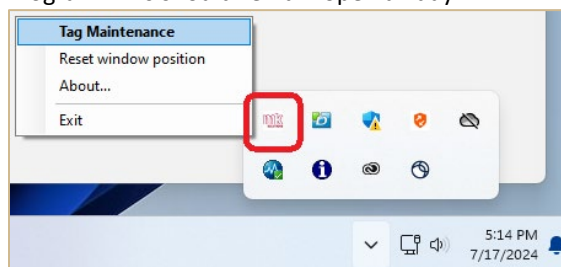
When confirming a community patron's identity, always check for updated contact information. Click the ID number in the patron info box, then click on the Contact Information tab and verify the information.

### Loaning PFW materials

There is a difference between loaning PFW Library items, items that have been tagged with RFID, PurdueBorrow (other Purdue campus library items), and DDS/ILL items. Check each item to ensure you are processing it correctly.

### Open the RFID Tag Maintenance program

In the bottom right corner of the Windows Task Bar, right-click on the Mk Solutions icon to open the Tag Maintenance Program. This should remain open all day.



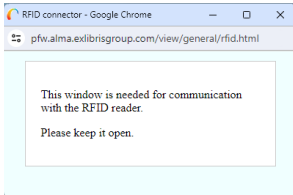


## Loaning PFW items to patrons in Alma

1. Log into Alma using your university username and password.
2. Click the grayed-out RFID icon in the top bar to start the connection to the RFID software.



3. The icon will turn white, indicating Alma has initiated communication with the RFID pad. A browser window will open, which you can minimize but don't close. You might need to "allow" this popup if your browser blocks it.

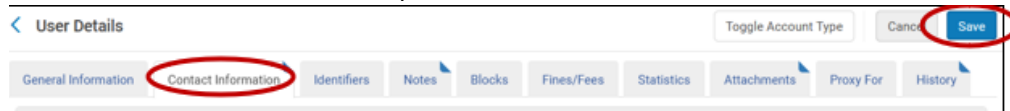


If Alma tries to communicate with the RFID pad but cannot (for example, the popup window was closed), Alma will prompt you to try reconnecting. Click the RFID icon in the upper right to turn it off, and then back on again.

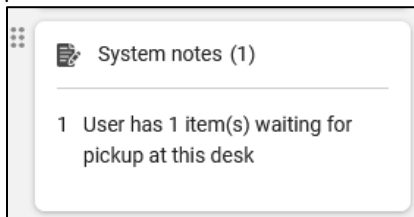
4. When it is connected, click on Fulfillment > Manage Patron Services.
5. Confirm the patron's identity. If you cannot, do **NOT** loan them materials.
6. Click in the Scan Patron's ID or Search for Patron field and run their Mastodon Card through the reader, or if they did not present a Mastodon Card, type the patron's name into the search box. As you type, names will appear. Click on the name that matches the ID and click Go.

Guest users might have a "Purdue Fort Wayne Library Borrower Card" which has a barcode instead of a mag strip. Click in the search box and scan the barcode. You must verify their contact information.

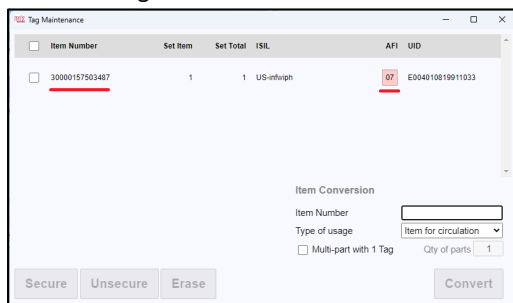
- a. When the Patron's record opens, click on the Patron's name in the info box on the left.
- b. Click on the Contact Information tab and verify the information is correct and complete. When finished, click the blue Save button to return you to the screen to loan materials.



7. Alma will include a system note on the left side of the screen if there are any items on the hold shelf for the patron. Make them aware of these items if they have not asked for them.

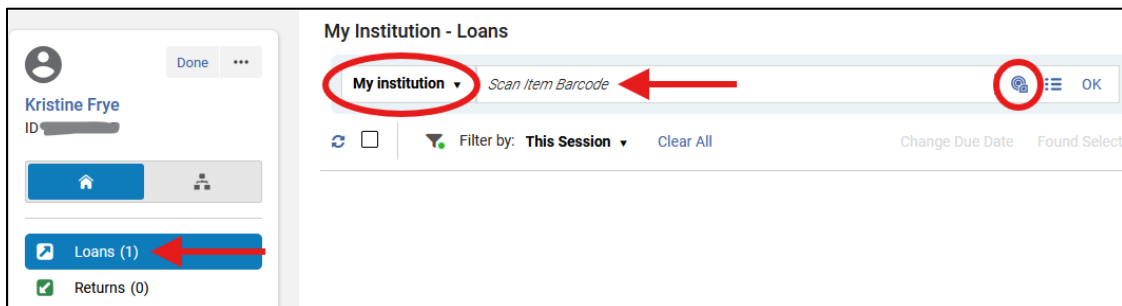


8. Place up to 5 items to be checked out on the RFID pad. Center them on the pad to make sure the tag can be read.
9. Check the Tag Maintenance window. Items with RFID tags will appear in a list. Remove items not on the list.



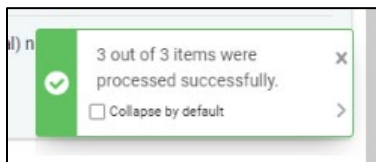


10. Switch back to Alma. Make sure you are on Loans, the item owner is set to My institution, and the cursor is in the Scan Item Barcode box.

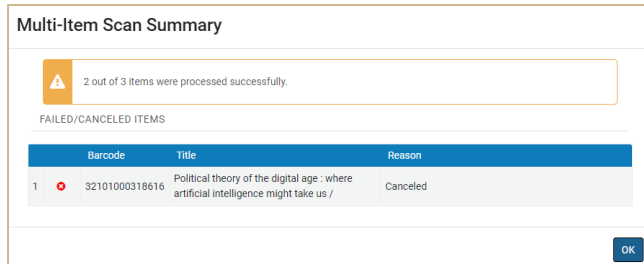


11. For items with RFID:

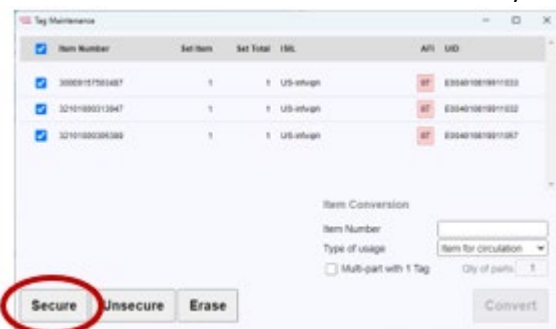
- Click the RFID icon next to the scan box. You can also use the keyboard shortcut Alt + A. The RFID software will send each item's information to Alma one-by-one. Leave the items on the pad while Alma is processing and watch for pop ups on items that have notes. If the item contains multiple pieces or has a special checkout procedure, a pop-up will ask you to confirm an additional step. **Thoroughly read the text before proceeding.** Clicking "Confirm" will complete the loan to the user.
- When the RFID software is done, Alma will show a green pop-up on the right side to confirm how many items were successfully checked out. Verify the number of items match the stack on the pad.



- If you canceled out of a popup notice (for instance, if the number of pieces didn't match), Alma will show a summary of canceled items.

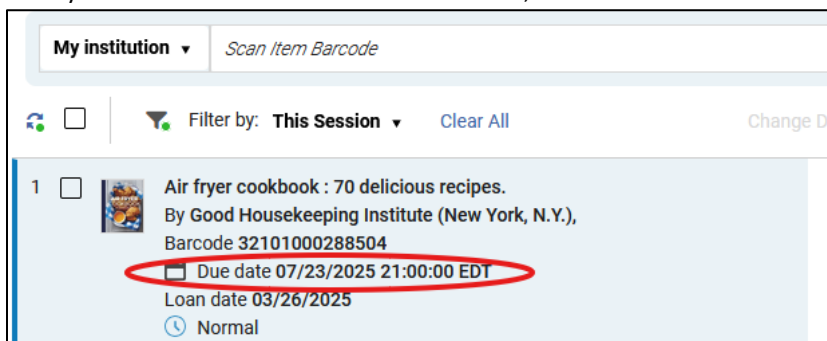


- You must re-secure items marked "Not to leave the library" (course reserves, secure items, etc.).** Place these items back on the RFID pad and remove all other items.
  - Go to the Tag Maintenance program and click the checkbox to select the item(s).
  - Click the Secure button to reactivate the security feature.

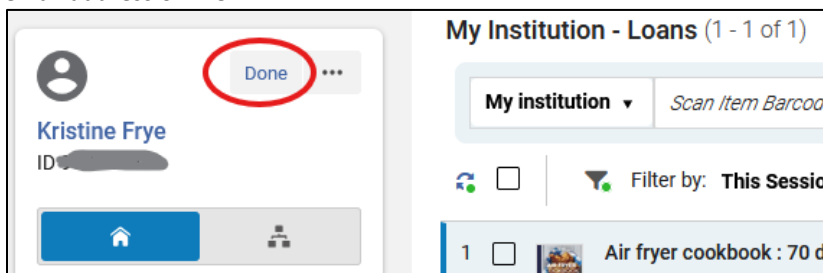


- Let the patron know alarms will sound if they leave the library with items marked not to leave.
- Once all items are checked out and security is set, you can remove the item(s) from the RFID pad.
12. For items without RFID tags:

- a. Scan the item's barcode. If the barcode won't scan, type the number in the Scan Item Barcode field, but ensure the correct item has been loaned.
  - b. If the item contains multiple pieces or has a special procedure, a pop-up will ask you to confirm an additional step. **Thoroughly read the text before proceeding.** Clicking "Confirm" will complete the loan.
13. Once you have checked out all items to the user, tell the user the due date. Alma adjusts for holidays or closures.



14. Click "Done" for Alma to send an email confirmation to the patron's PFW email address, or if a guest user, the email address on file.



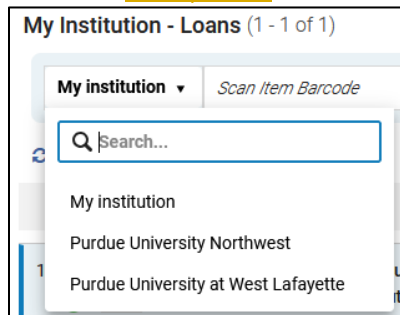
### Adjusting due dates

Though its rare, only for PFW materials, and most often done in conjunction with instructors needing course reserves materials, the due date for an item may need to be adjusted. A full-time service desk employee will process the loan.

### Loaning PurdueBorrow items

#### For PFW patrons borrowing other Purdue campus materials

Follow the [usual process](#) to check out an item, but first select the owning campus from the Item Owner dropdown menu.



#### For other campus patrons borrowing PFW materials

This process allows users from other Purdue campuses to check out items while they are here. Users who haven't yet borrowed from our library have additional steps.

1. Go to Fulfilment > Manage Patron Services. Check the Find User in Other Institution box and choose the campus.

Find user in other institution ☒

Institution

Scan patron's ID or search for patron ☒ Purdue University Northwest

Use proxy ☐ Purdue University at West Lafayette

2. If the patron has not borrowed materials from our campus before, you must find the patron in Alma using their PUID. We are not able to find other campus users with just their name.
  - a. If patron is using a school ID, you can attempt to run their card through our scanner. If the scanner does not work, check if the PUID is printed on the card and use it to search.
  - b. If the PUID is not printed on the card or they do not know their number, the patron will need to look up their PUID. They can find it in their campus version of goPFW:  
West Lafayette – <https://mypurdue.purdue.edu/>  
Northwest – <https://www.pnw.edu/mypnw>
3. Once you have found the user by entering their PUID, click Update User in the upper right corner of the screen. If they have borrowed materials before, proceed as usual.
4. Scan the barcode and [complete the transaction](#).

## Loaning laptops and equipment

Laptops are kept in locked charging carts, are highly susceptible to damage, and can retain user information. Only PFW campus individuals are allowed to check out laptops, with a priority for students over staff or faculty. Patrons are not allowed to renew or continue to check out the same laptop, even if there are no more laptops left in the cart. Both PC and Mac laptops have the same software pre-loaded on them, and it matches the software available on the ITS Lab computers—except for Adobe products due to licensing issues.

**Patrons must log in to the laptop before leaving the Service Desk or they will not be able to use the computer off campus.** If the WiFi is down, there is a cable you can use at the desk. They must also download any PFW software from the Software Center while on campus. Software not in the Software Center cannot be downloaded onto the laptops.

## Equipment locations

At the Service Desk:

- The laptop cart with most of the PC laptops.
- The laptop cart with 10 MacBook Airs, which also contains the MacBook Air power cables and adaptors. Match the power cable and adaptor to the MacBook you are loaning. \*These power cables and adapters should only be loaned with a MacBook laptop.
- The bottom drawer in the Service Desk contains the PC power cords.

In the alcove:

- A third laptop cart with the additional PC laptops.
- All headphones.
- Computer mice. They have two parts: the mouse and the connector. The barcodes to loan them are on a ring of index cards, and the mice are numbered to match a barcode card. Use the barcode ring to loan the mouse, but do not give the barcode to the patron.
- DVD Drives and BluRay Players, Cassette tape player, and LP Record players
- Cords and cables. \*Including two MacBook power cables and adapters able to be loaned separately from a laptop.
- Remote controls for the monitors in the group study rooms.

**It is important to follow these steps when checking out a laptop to a patron.**

1. Ask the patron if they would like a Mac or a PC laptop. **Note:** PFW students needing to take an exam requiring Respondus should borrow a PC. IUFW students cannot use our laptops to take Respondus exams for non-PFW classes due to licensing. They must contact IUFW's ITS and reserve a seat and time in their lab.

2. Retrieve the laptop from the charging cart. If there are no PC laptops available, get one from the alcove. If there are none left, or no MacBooks, they may NOT keep the same laptop.
3. Ask the patron if they need cables or adaptors (power cords, VGA cables, HDMI cable, Mac USB-C adaptor, etc.).
4. Explain the rules for checkout to the student.
  - a. Laptops have a 7-day loan and cannot be renewed.
  - b. If the laptop is overdue so long it is considered lost, they will be charged for the replacement of the laptop and a University Hold will be placed on their account until it is returned or the fee paid.
  - c. Patrons who have laptops go to lost twice in one academic year lose the right to borrow laptops for the remainder of the academic year.
5. Loan the item(s). (see: [Loaning Materials](#)).
6. **Before they leave the desk**, they must log into the laptop with their university credentials. If they do not, the laptop will not allow them to log in off-campus.
  - a. Power on or wake up the laptop and make sure it is connected to campus WiFi.
  - b. Have the patron log in to the computer with their PFW credentials. Wait until the patron's desktop shows up completely before they leave.
  - c. For MacBooks: If the student logs in and gets a message about a Keychain password, click on the box that says "Create New Keychain password." This happens because the MacBook needs to update its certificate with the campus network. **THIS CAN ONLY BE DONE WHILE CONNECTED TO CAMPUS WIFI.**

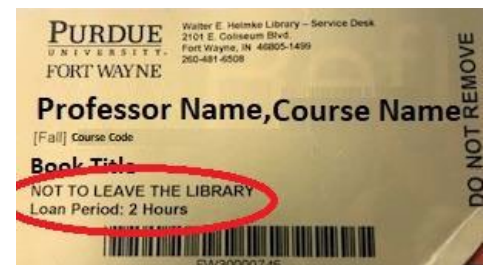
## Loaning reserve items

Reserve items are on the shelves behind the Service Desk and are organized alphabetically by course. Shelf tags include the course and the instructor's name. Some courses may have multiple sections taught by different instructors, and each section may have a different collection of materials on reserve, so the student may need to provide the course and the instructor's name as well as the material's title.

To loan a Reserve item:

1. The student will come to the desk and ask for the item, most often by course number. If the student cannot provide the course or instructor name, suggest they access Brightspace or goPFW to find the information.
2. Retrieve the item(s) from behind the Service Desk.
3. Follow the usual procedure to [loan materials](#), but use the barcode on the gold sticker on the front of the item.

Note: Some items have a short loan period and/or cannot leave the library. Alert the student to the loan period, and recommend they hand it to a desk worker rather than return it in a drop box. The loan policy and restrictions are set by the instructor, so if the student has concerns over the time limit or restrictions, direct them to speak with their instructor.



## Loaning items to a proxy user

[Proxy](#) is used mainly for the convenience of faculty members, allowing assistants to pick up items from the library and have the loan charged to the faculty member's account. Before proxy can be granted, the faculty member must complete the form on the library's website (found here: [Library Policies and Forms](#)). Completed forms can be brought to a full-time service desk staff member, who will create the proxy.

1. In Alma, go to Manage Patron Services.
2. Use the Search for Patron field to find the Proxy's (the person in front of you) name. Click the box for Use Proxy and click Go.

- Click on the username of the sponsor (the person the items are for) and click "Go." If there is more than one name listed, ask the patron which name should be used.

- [Loan the item\(s\)](#) as usual. Note: the patron services screen will show you the sponsor's account, not the proxy.
- Alma will send an e-mail to the sponsor, detailing what has been checked out in their name.

## Returning materials

### What to look for when an item is returned.

Frequently, patrons will return textbook rentals, items from other libraries, or even personal items, especially at finals time. Look for signs of ownership when beginning the return process.

Every time you check in an item you need to look for:

- Bookmarks, receipts, or other materials left in the pages
- Pencil, pen, and highlighter markings
- Water damage
- Loose pages

Materials left in the pages should be thrown away or recycled, as appropriate. If the item is identity-related or similarly important, contact the patron who returned it, if possible.

### Patrons returning non-PFW items

Items returned from other Purdue campuses are always accepted, whether it was checked out on our campus or not. If it is a PurdueBorrow item, [follow that procedure](#).

We can accept items from other libraries and return them to their owning location through our courier service. However, let the patron know we cannot determine how long it will take the item to arrive at its destination and we are not responsible if an item becomes overdue or lost in transit. **We do not offer any kind of proof or documentation.**

### Returning PFW items

- Go to the Tag Maintenance program window to see if there are RFID tags. Remove items without RFID tags.

- In Alma, click on Fulfillment > Return Items and make sure the Item Owner is set to My Institution.
- If the item has an RFID tag:

- a. Place up to 5 items on the RFID pad and click the RFID button at the end of the scan box. You can also use the keyboard shortcut Alt + A.

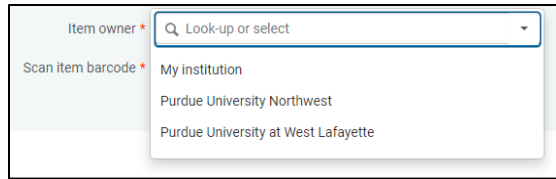
- b. The RFID software will send each item's information to Alma one-by-one. Keep the items on the pad during this whole process; Alma may show pop ups for items that have notes.
  - c. When the RFID software is done, Alma will show a green pop-up on the right side to confirm how many items were successfully returned. If you canceled any pop-up notices, Alma will show a summary of canceled items.
  - d. Verify the total number of processed items match. If there are any titles that did not return via the RFID pad, return them using the regular barcode scanner.
4. For item(s) without a RFID tag:
    - a. Scan the barcode for each item needing to be returned. Course reserve items must use the gold sticker on the front of reserve items. If the barcode won't scan, type in the number manually, but check the confirmation message to be sure the correct item has been returned.
    - b. If the item contains multiple pieces or has a special return procedure, a pop up will ask you to confirm.  
**Thoroughly read the text provided in the box before clicking Confirm.**
  5. When items are returned, the confirmation screen provides important information:

- a. Look for the next steps. If it shows Reshelve to Main Stacks, put it on the cart for RFID tagging behind the Service Desk.
- b. If the item has a Work Order, the Next Step will show its destination. The service desk printer will print a Work Order transit slip, but there may be a delay before the job prints. Billing work orders go to the Billing Specialist or on the cart outside her office. **If the billing work order is on a laptop, the sheet that prints goes to the Billing Specialist and the laptop goes in the "in transit" drawer by the service desk sink.**
- c. Technical Services items go up to the 4<sup>th</sup> floor for Technical Services. You can place it in their mailbox in the mail room.
- d. Display items need to be taken to the correct display. DO NOT put them on the reshelving cart or they will be mis-shelved.
- e. If the item has a request for another user, a pop-up will let you know to put it on the hold shelf. A request slip should automatically print from the desk printer and an email sent from Alma to the requestor. Fold the request slip in half, and place the book alphabetically by requestor last name on the hold shelf.
- f. Requests for "Office Delivery" will automatically check out to the requestor and a pop up will notify you to how to send them. The printer at the desk will print a request slip with the user's name to be included with the item, but there is a delay before the job prints. Put "work address" items on the shelf with new items that have come in on faculty request.

6. Click Done in the upper right corner of the screen when finished with the return.

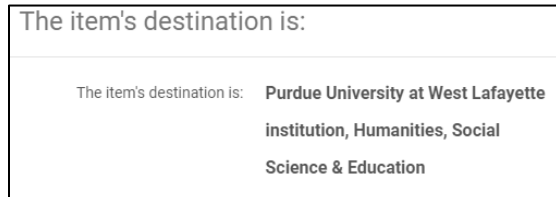
### Returning PurdueBorrow items

1. Choose the owning campus from the Item Owner drop-down menu and scan the barcode.



The screenshot shows a web interface with two labels: 'Item owner \*' and 'Scan item barcode \*'. The 'Item owner \*' label is next to a search box containing the text 'Look-up or select'. Below the search box, a drop-down menu is open, displaying three options: 'My Institution', 'Purdue University Northwest', and 'Purdue University at West Lafayette'. The 'Scan item barcode \*' label is to the left of the drop-down menu.

2. A pop-up window will show the item is in transit, and Alma will print a transit letter to the Service Desk printer.



The screenshot shows a pop-up window with the title 'The item's destination is:'. Below the title, there is a table with the following content:

The item's destination is:	<b>Purdue University at West Lafayette</b>
	<b>institution, Humanities, Social</b>
	<b>Science &amp; Education</b>

3. Fold the transit letter in half length-wise and place it in the inside front cover of the book. Give it to the DDS Coordinator to be added to the courier shipment.

### Laptop and equipment returns

Laptops have additional steps to ensure they are undamaged and loanable.

1. Ask the student (and then check to be sure) if they have logged out of the laptop. If they have not, give it back to the student to have them log out of the computer. **This is imperative for the MacBooks as restarting the computer to log the patron out only works on the PCs.**
2. Check for damage—not just the laptop, but accessories, too.
  - a. **If there is damage, do not process the return.** Have a full-time service desk employee place a work order (see: [Placing Work Orders](#)) for repair. Route the item(s) appropriately. Also submit a BUG for LITS staff and place the item(s) in the Work Orders drawer.
  - b. If there is no damage, process as normal and check the item(s) in via Alma.
3. Restart the laptop and place it back into the charging cart in the appropriate position. Be sure to plug in both the power and ethernet cables numbered to match the laptop.

### Returns with adjusted due dates

There may be a need to adjust the return date of an item. Full-time service desk folks may override return date and time.

### Renewing materials

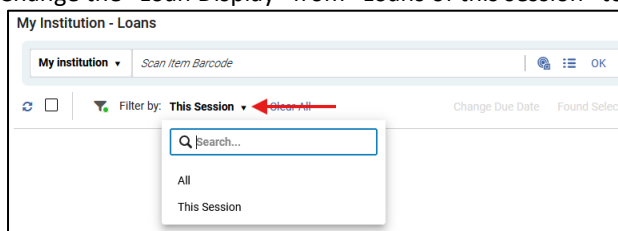
Patrons can renew items online through their library account or we can renew items in person; we do not renew materials over the phone or through email without extenuating circumstances. The patron must be present with an acceptable photo ID for us to renew the items, or you can walk them through the process of renewing through their library account. Patrons can renew an item until it becomes “lost” at which time they can only renew in person with the item.

We cannot renew items loaned through PurdueBorrow, BUT patrons may renew through their library account, as long as the item is not considered lost or must be returned per that campus. DDS renewals must go through the DDS platform (ILLiad). Please see [Renewing DDS Materials](#) for procedures.

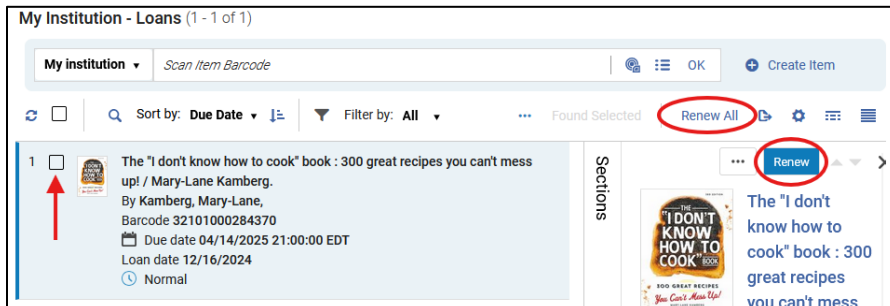
### Renewing in Alma for a patron

1. In Alma, click on Fulfillment, then Manage Patron Services, and [confirm the patron's identity](#). If the patron has no current, acceptable ID, do not renew the materials for them. Let them know they can return the items to avoid a fee, or show them how to [renew through their library account](#).
2. Make sure the cursor is in the Scan patron's ID or Search for Patron box and swipe the card through the reader with the mag stripe facing you. If they do not have a Mastodon Card but have presented another acceptable ID, type the patron's name into the search box. Guest users might present a “Purdue Fort Wayne Library Borrower Card” which doesn't have a mag strip. For these cards, scan/type in the barcode instead.

- Choose the name that matches the ID and hit enter/click Go.
- Change the “Loan Display” from “Loans of this session” to “All Loans”.



- Choose the best option for the patron to renew their item(s). Clicking Renew All will renew everything that is checked out without additional clicks needed.



- Look for a green box to appear on the right side of the screen. Be sure the box indicates the number of renewals matches the number attempted. If a red box appears, double-check which renewals were processed.

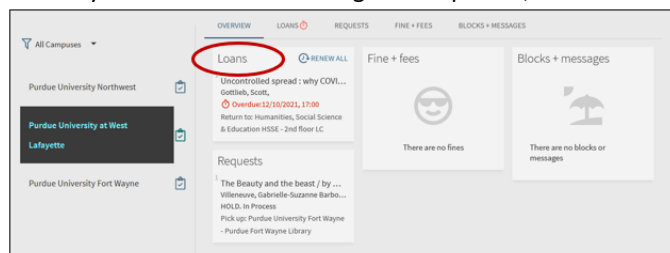


- Inform the patron of their new due date(s) and click Done.

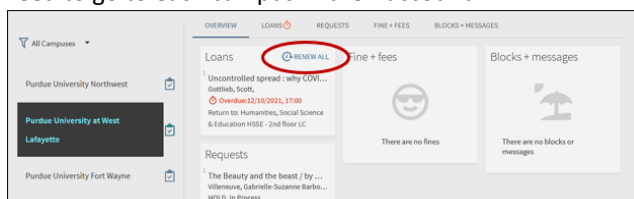
## Patron process for renewing materials

Utilize the workstation function on the computers at the front desk for this task.

- Have the [patron log into their library account](#).
- The “My Library Card” page will open. This screen lists current Alma checkouts (no ILLiad transactions), requests that may be unfulfilled or waiting for the patron, if blocks are in place, and money owed to the library.

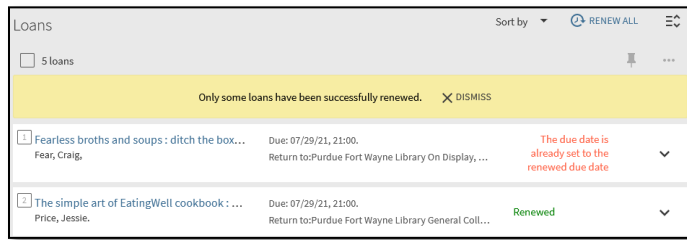


- If the patron wishes to renew all of their materials, instruct the patron to click “Renew All”. Note: this only renews items at the selected campus. To renew items loaned from other Purdue campuses, the patron will need to go to each campus in their account.





- b. If the patron would like to renew select titles, have them click on any of the titles listed under “Loans”. This will open the Loans page. Note: for PurdueBorrow items, they will need to select the correct campus, then loans to see the individual titles. Have them locate the title(s) they wish to renew and click the RENEW button.
- c. A yellow bar to appear at the top of the loans list. This will indicate if the renewal was successful. Successfully renewed titles will also show the word Renewed in green.

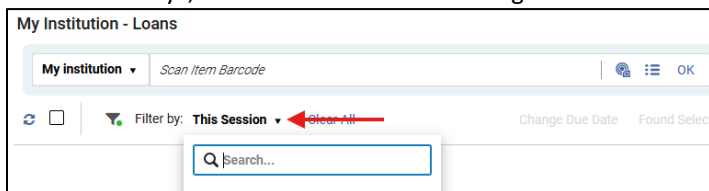


3. Have the patron log out: click their name in the upper right corner of the window and then SIGN OUT. Be sure to switch the computer back to Display mode when you are done.

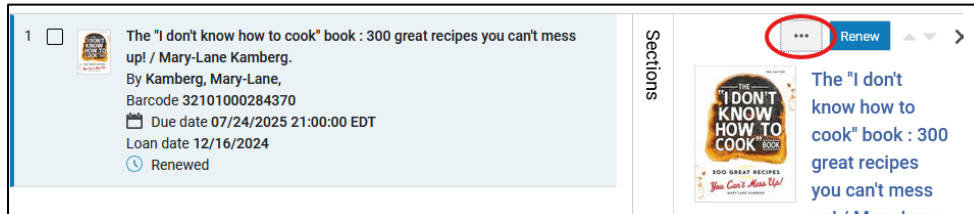
### Renewing items that have been marked lost or billed

Items so long overdue they are considered lost and have gone to billing may be renewed—but it must be done in person, **with** the item to be renewed; patrons are not able to renew “lost” items on their own through their library account. Renewing will remove the replacement cost for items that have not been sent to collections. If the item has been sent to collections, the patron will still owe the replacement cost so there is no need to return or renew the item.

1. Go to the patron’s record (Fulfillment > Manage Patron Services > Scan Patron ID).
2. Under “Filter by”, click “This Session” and change it to “All”.



3. Find the item(s) to be renewed in the loans list and click the ellipsis (three dots) at the right.



4. Click on “Found Item” in the menu that opens. This will change the status from Lost to Active and will cancel the replacement cost charges. Repeat for each billed item to be renewed. Then follow the normal procedure for renewing items (see: [Renewing Materials](#)).
5. E-mail the Billing Manager to let them know that you have renewed an item that has been billed.

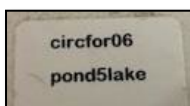
### Document Delivery Services (DDS) and InterLibrary Loans (ILL)

Document Delivery Services (DDS) and InterLibrary Loan (ILL) items are materials on loan from non-Purdue libraries. Only patrons with valid PFW credentials are able to use this service; IUFW students are encouraged to request through their library of record (IU Indy). The lending library sets the loan period and policies. Most materials will be allowed to leave the library, but some may not. Pay attention to the loan stickers from the lending libraries and alert the patron.

#### Loaning DDS Items

1. The patron will ask for their requested item(s). They may not mention DDS, so be prepared to ask questions.
2. Ask for the patron’s ID. ILLiad does not require an ID in their interface, but we require the patron to show a current photo ID to prove their identity and ensure the item is going to the correct patron.

3. DDS items are on the hold shelf, inter-filed by the patron's last name. Log in to the ILLiad client on the desk using the username and password on a white sticker to the left of the computer (image below is not current).



4. Click in the box to the left of Check Out and scan the barcode on the DDS/ILL label (usually on a strip of paper around the front cover). Look for the message that the material has successfully been checked out (circled in the image below). If an error has occurred, contact the DDS manager.

**ILLiad Web Circulation**

Text to say if book is loaned/returned/if an error has occurred

Main  
Home  
Change Password  
Logoff circfor01

Quick Tasks  
Enter transaction number

Requests Users In Transit Items Returned

Search

Drag a column header here to group by that column

Transaction	Title	Author	Username	Status

No data to display

5. Put the item on the RFID pad with the Tag Maintenance window open to check if RFID is active. If yes, check the box(es) next to the secured title(s) that are able to leave the library and click Unsecure so it won't set off our gates.

Tag Maintenance

Item Number	Set Item	Set Total	ISIL	AFI	UID
<input checked="" type="checkbox"/> 30000157563487	1	1	US-rtwph	07	E004010819911033
<input checked="" type="checkbox"/> 32101000313047	1	1	US-rtwph	07	E004010819911032
<input checked="" type="checkbox"/> 321010003063369	1	1	US-rtwph	07	E004010819911057

Item Conversion  
Item Number:   
Type of usage:   
☐ Multi-part with 1 Tag  
Qty of parts:

## Returning DDS materials

1. Log in to ILLiad using the username and password on a white sticker by the computer.
2. On the homepage, make sure the cursor is in the box to the left of Mark Returned and scan the barcode on the DDS label (usually on the front cover or a strip around the front cover).

**ILLiad Web Circulation**

Main  
Home  
Change Password  
Logoff circfor01

Quick Tasks  
Enter transaction number

Requests Users In Transit Items Returned

Search

Drag a column header here to group by that column

Transaction	Title	Author	Username	Status

No data to display

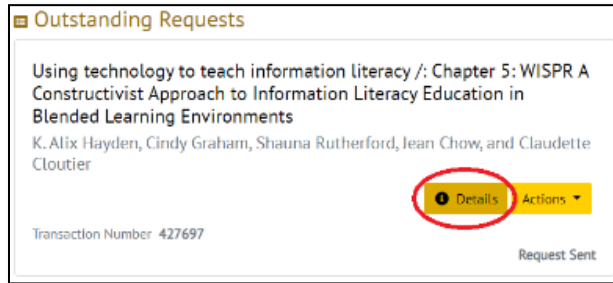
3. Watch the top of the screen. ILLiad will notify the operator that the material has successfully been returned. If an error has occurred, contact the DDS Manager.

## Renewing DDS materials

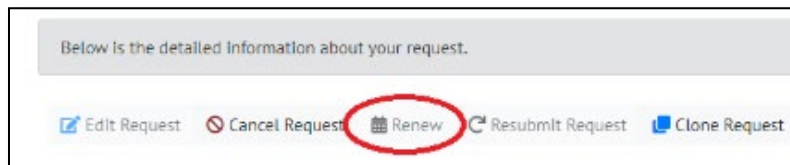
It is best if the patron renews materials on their own, so use the patron interface whenever possible. Switch to workstation mode to assist, if needed. If you have difficulties, contact the DDS manager.

1. Go to the Helmke Library homepage and click the Services menu>Document Delivery>Log in to Document Delivery. Have the patron log in with their PFW username and password. Remember: only patrons with valid PFW credentials can use DDS.

- On the main page, find Outstanding Requests. Click on 'Details' to see more about the material to be renewed.



- Click Renew above the item information. If the button is greyed out and unable to be clicked (as seen below), it means the patron is not able to renew the item.



- Watch for Error messages on this screen. If no errors occur, ILLiad will provide the patron with a new due date. **This due date may change once the lending library processes the renewal.** Inform the patron that they need to watch their DDS page/email for an updated due date.
- If the item cannot be renewed, explain the item(s) must be returned but we can process a new request. Inform the patron they should expect to wait 1 – 2 weeks for the material. If they wish to proceed, follow the instructions for [Reordering a DDS Request](#), beginning with step 3.

## Reordering a DDS request

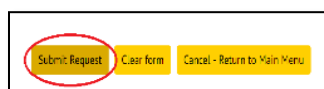
- Go to the Helmke Library homepage and click the Services menu, and then Document Delivery. Have the patron log in to Document Delivery with their PFW username and password.
- On the main page, find Outstanding Requests. Click on Details to see more about the material to be reordered.



- Click Clone Request above the item information.



- If the patron does not wish to change editions or languages, there is no reason to edit the pre-filled form. Go to the bottom of the form and click Submit Request.



## PurdueBorrow

PurdueBorrow is a service that allows all Purdue campus users easier access to materials held in Purdue libraries. Students, staff, and faculty with Purdue West Lafayette, Purdue Northwest, and PFW credentials are able to use PurdueBorrow.

Each Purdue campus and library determines what can be requested. PFW allows requests for general circulating material (general collection, children's, Gov Docs, CDs, and DVDs). We do not allow requests for equipment, reserve items, secure items, or keys. West Lafayette and Northwest allow similar items to be requested but include some periodicals.

## How to use PurdueBorrow

Patrons search using the “everything” search.

By default, users search PurdueBorrow and all PFW holdings.

If a user doesn't want to include the other Purdue campuses in their search, they can use the drop-down menu to select just PFW's physical collection (PFW Catalog) or all of PFW's holdings (PFW Everything). They can also use the limiters along the left side of the page to limit by campus.

If the user is not signed in to Primo and the item is not available at PFW but is through another location, the search result will say, “Check request options.”

Clicking Check request options opens the results for that item and, if it's available from another Purdue campus, shows where it's available.

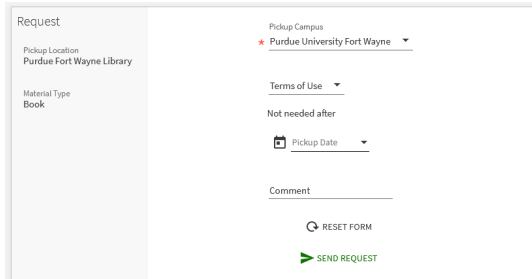
If the patron is a Purdue user, choose PurdueBorrow over Document Delivery. There are better options—longer loan period, easier to renew, and likely to receive it faster—and it is less expensive for the library. **The request option is only available if the user is signed in to Primo.** Once the user is signed in, the option to Request Hold appears.

If the item has multiple sets or pieces, they may show up as a list of separate items that need to be requested.

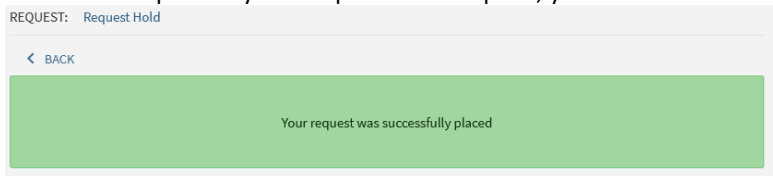
If the request button does not appear, that could be because:

- The user is blocked in the system and not able to check out materials.
- The item is not loanable, but able to be viewed in person.

When the user requests the hold, they have the option to choose what campus to pick it up from (default will be PFW), how long the loan is (most likely there will be one choice here), and if there's a date they won't need it after (which means if it can't get to the person by that date, the request will be canceled).



Click Send Request. If you completed the request, your screen will show a green bar stating it was successful.



If the user is picking the item up from PFW, when it comes in, they will receive an email from Alma indicating the item is here and ready for pick-up. If the user is getting the item from another campus, they will need to look for emails from those institutions regarding information on how, when, and where.

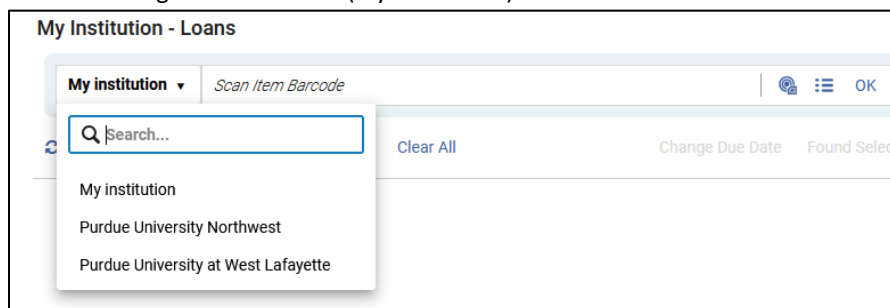
If the user wants to verify a request, see what materials they have checked out, check fines and fees at each campus, or verify any blocks, they can find this information in their library account.

A few things to keep in mind:

- We cannot renew material from other campuses. The user must sign into their library account and use the renew options available.
- Clicking Renew All only renews items from that campus. If the user has materials checked out at multiple campuses, they will need to go to each campus in their account to renew everything they have on loan.
- We cannot accept payment for fines and fees charged by other Purdue campuses.
- The loaning library sets the loan period and fines or fees.

## Loaning PurdueBorrow items to PFW users

1. [Confirm the patron's identity](#) and begin the loan process.
2. In the Loans screen, select the owning campus from the institution dropdown menu, then scan the barcode. The default owning location is PFW (my institution).

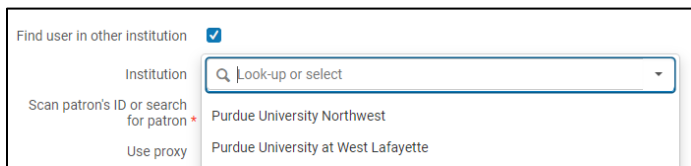


3. [Complete the loan process](#) as you would for any PFW campus item.

## Loaning PFW items to PurdueBorrow users

This process allows users from other Purdue campuses to come to our campus and check out items.

1. Check the Find User in Other Institution box and choose the correct campus.

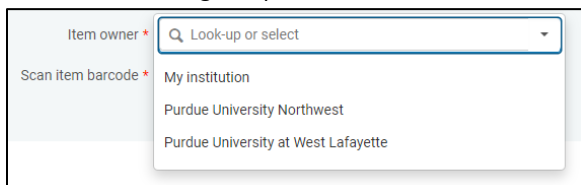


2. Ask for a photo ID and verify that it matches the person. If patron is using a school ID, you can attempt to run their card through our scanner. You cannot look up users from another campus by name. You must use their PUID.
  - a. If the scanner does not work, see if their PUID is on the card and use it to search for the patron.
  - b. If the PUID is not printed on the card or they do not know their number, the patron will need to look up their PUID. They can find it in their campus's version of goPFW:
    - i. West Lafayette – <https://mypurdue.purdue.edu/>
    - ii. Northwest – <https://www.pnw.edu/mypnw>
3. If this is the first time the patron has checked out materials at our library, they must use their card or we need to type in their PUID and click Find User. When the person is found, the screen will display contact information. Click Update User in the upper right corner of the screen.
4. Scan the barcode and complete the transaction.
5. For these patrons, we only see our transactions as well as identifying information (name, address, email, phone).

## Returning PurdueBorrow items

When receiving items, be sure to look for the property stamp to tell you which campus the item belongs to. Purdue users can return items borrowed from any Purdue campus back to any Purdue campus. If the item belongs to PFW, return it as you would any other item. If it belongs to another campus:

1. Choose the owning campus from the Item Owner drop-down menu and scan the barcode.



2. A window will pop up with the Next Step showing the item is in transit, and Alma will print a transit letter to the Service Desk printer.
3. Fold the transit letter in half length-wise and place it in the inside front cover of the book. Give it to the DDS Coordinator to be added to the INfoExpress shipment.

# Material Record Procedures in Alma

## Missing Items

Materials will go missing, and service desk employees regularly look for these items in case they have been mis-shelved or returned without being checked in. When you check for missing items, be sure to check in LC number ranges that could be the result of misreading a call number. Be sure to check in all sections (main stacks, Children's, secure, etc.) to see if it was placed in the wrong section. Get creative!

## Claimed Returned items

A patron may believe they have returned material we show as still in their possession. In these cases, the item is marked as "Claimed Returned", which removes the replacement cost and any associated blocks or holds (pending circumstances), but it can only be used once. If a patron says they have returned an item that is still on their record, call a full-time employee.

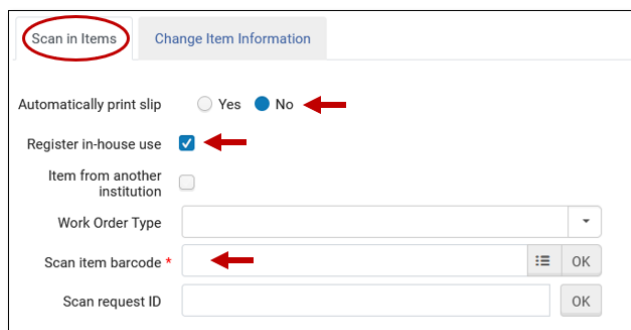
## Scan In Items

There are many reasons to Scan In an item: to mark it used, to discover where it should be shelved, to change the temporary location, in conjunction with other processes, etc.

### Marking Items as Used

Items found on tables, stacks, the return bins on 3<sup>rd</sup> and 4<sup>th</sup>, and elsewhere in the building should be marked as used and brought down for RFID tagging (if needed) before returning them to their proper location.

1. In Alma, go to Fulfillment > Scan In Items. In the screen that opens, set the following options, then click into the Scan Item Barcode field and scan the barcode or use the RFID pad, as appropriate.



2. Verify the information in the table that appears (next steps, location, etc.).
3. Place the item(s) on the RFID pad to check if the item(s) need tagging. If there is no RFID, place the item(s) on the RFID cart. If it has been tagged, place the item appropriately in the staging area.

### Setting a Temporary Display Location

1. In Alma, go to Fulfillment > Scan In Items.
2. Choose the Change Item Information Tab.
3. Set the fields to the following parameters:
  - a. Change Type: Temporary.
  - b. Due Back: Date the display ends.
  - c. Location: which display it will go to
  - d. Check Requests: selected.
  - e. Leave all other options blank.
4. Scan the barcode/use RFID for each item. Verify the record is updated correctly in the list that forms.

### Restoring books to regular location

1. In Alma, go to Fulfillment > Scan In Items.
2. Choose the Change Item Information Tab.
3. In the Change Type field, choose Restore.
4. Scan the item barcode/use the RFID pad. Alma will 'restore' the item back to its permanent shelving location.
5. Repeat until all items have been restored. Be sure to check the Destination field to see if the item should be reshelfed or if it needs other processing (such as RFID).

## Work Orders

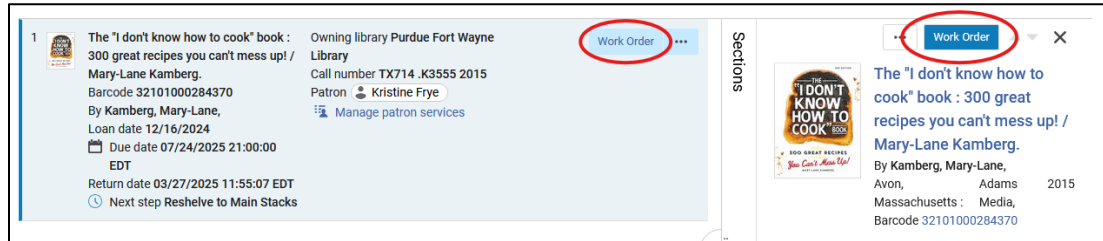
There are many reasons why an item shouldn't be in circulation: repair work, billing issues, circulation changes, and more. Creating a work order indicates when items aren't available and helps departments track workflow. If you encounter an issue you feel warrants a work order, get a full-time employee.

### Placing a work order for an item upon return

If you notice an item is in poor condition upon return from a loan—such as a loose call number label, or similar—create a Work Order as you discharge the item. If there is damage likely caused by the returning patron, **DO NOT** discharge the item.

Give it to the Service Desk Director immediately.

1. Process the [return](#) as usual, but do not click the Done button to exit the screen.
2. Click on a Work Order button for the item (either is fine).



3. Follow the steps to [Place a Work Order](#).

## Notes in Alma

Notes can be placed on items or patrons accounts to keep employees aware of issues. Notes on patron accounts can include group study room use problems or repeated claims of returning items we cannot find. Notes on material records can include their use for course reserves, inventory information, damage notations, or purchasing information.

## Hold Shelf

The Hold Shelf is where requested items are stored, which is on a short book cart underneath the Service Desk counter. Items on the hold shelf are kept in alphabetical order by the requester's last name.

## Physical Item Requests (Holds)

Alma calls items on hold Physical Item Requests. Patrons make requests through their library account, or we can place requests for the patron. Always show the patron how to make a request whenever possible: switch the computer to [workstation mode](#) and walk the patron through the process.

### Placing a Hold in Primo

For a patron to place a hold on an item:

1. Search for the item in Primo.
2. Click on the title to expand the information on the title.
3. Have the patron [log in to their library account](#).
4. Click on Request Hold
5. Choose a pickup location
  - a. For students or community patrons: "Purdue University Fort Wayne – Purdue Fort Wayne Library".
  - b. For Faculty or Staff members, they may choose the library or: "Personal Delivery – Office Delivery"
6. Click Send Request. A green bar should appear that says your request was successful.

### Placing a request for a patron in Alma

To place a physical Item request:

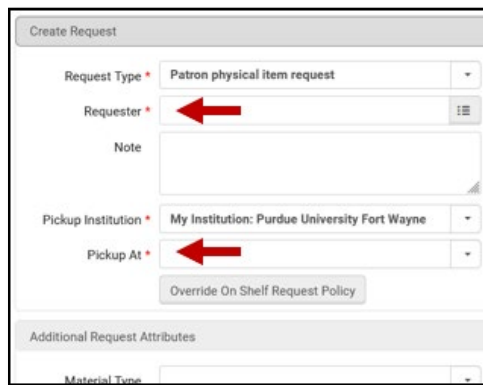
1. In Alma, set the search bar to "Physical Titles" and the Search field appropriately (barcode, keywords, etc.).
2. Scan the item's barcode or type in the title.
3. Click on the ellipses and choose Request from the drop-down menu.



4. From the Request Type drop-down menu, choose Patron Physical Item Request.



5. In the screen that opens, scan the person's Mastodon Card or look up their name in the Requester field. Provide the correct Pickup location. **NOTE:** materials to be picked up at other Purdue campuses should use PurdueBorrow.



- For students or community patrons: "Purdue University Fort Wayne – Purdue Fort Wayne Library".
  - For Faculty or Staff members: "Personal Delivery – Office Delivery" or the library.
6. Click Submit.

## Paying Fees and Marking Bills Paid in Alma

As of Spring 2024, the library is no longer charging late fees. However:

- Items that are returned damaged may still be charged a repair or replacement fee.
- Items long enough overdue they become lost incur replacement costs. Returning a lost item will remove the replacement cost charged to the patron's account, unless the bill has been sent to collections. Patrons receive several notifications and warnings before being sent to collections.
- Patrons who have a laptop overdue long enough to be considered lost a second time in an academic year will be blocked from checking out laptops for the remainder of the academic year.

If someone wants to pay money owed to the library, get a full-time employee.

## Building Procedures

### Opening Procedures

All tasks are to be completed by staff and student(s) equally. Ideally, one person will complete the first-floor tasks while a second person completes the second-floor tasks. If only one Service Desk person is on duty, open the second floor first to control access to the first-floor desk. The Service Desk full-time employee responsible for opening the building must arrive 15 minutes prior to the library's opening time to ensure they are present and able to complete all the associated tasks.

The key box, which contains most of the keys to access library spaces, is located next to the sink in LB 104. The keys to open and close the building are on the key box door along with a chart that indicates what keys are to what locks. If you do not have a key to the key box, there is one on Amy's building key ring in her office, and one in Shannon's office. All full-time service desk employees, Amy, Sara, Shannon, Erika, and Deb have keys to the key box.

### Time: 10-15 minutes before opening:

#### First Floor

- Check the blue book drop in the Atrium (key 22). Bring items to the service desk.
- Unlock the top drawer of the Service Desk (key 24) and the laptop carts (key 23).
- Check Service Desk printer for notices from Alma that printed overnight.

#### Second Floor

- Take your ID card (to re-enter the floor before opening), the second-floor book drop keys (keys 27 & 28), a group study room key, and a book cart with you to open the floor.
- Ensure all the group study rooms are clean and trash is emptied. Close each door and ensure it is locked.

3. Check the drop box next to the second-floor doors on the bridge and place any items on the book cart. If it is more than 5 minutes to opening, do not leave the doors open or allow patrons to enter the building early.

### Time: Opening

#### First Floor

The ADA door will unlock automatically at the building's set open time. Unlock the remaining entrance doors. Push the crash bar in and use an Allen wrench (key 27 or any of the Allen wrenches in the key box) to turn the bolt ¼ turn so the crash bar doesn't pop back out.

#### Second Floor

Within 5 minutes of opening time, open the skybridge doors and make sure they make contact with the magnet to hold them open. You may need to adjust the magnets on the door.

### Immediately after opening

1. Return all keys to the key box and lock it. If you have used someone else's key, return it.
2. Check in any items collected from the book drops and stage them appropriately (DDS return bin, staging area, or RFID cart).

### Closing Procedures

All tasks are to be completed by staff and student(s) equally. Employees are welcome to divide the tasks as works best for them, but no one person, staff or student, should be shouldering the majority of the work.

The key box, which contains most of the keys to access spaces in the building, is located next to the sink in LB 104. The keys you will need to close the building are hanging on the key box door along with a chart indicating what keys are to what locks. If you do not have a key to the key box, there is one on Amy's building key ring in her office, and one in Shannon's office. All full-time service desk employees, Amy, Sara, Shannon, Erika, and Deb have keys to the key box.

### Time: 2 – 3 hours to close

1. Tidy the 3rd and 4th floors. This task should take 30 minutes to an hour per floor, and can be a shared task as long as there is always someone at the Service Desk. Use the walkie talkies to communicate. Take a large book cart, a microfiber cloth, and the 2nd floor book-drop keys (keys 15, 27 & 28) with you.
  - a. **Walk every row**, looking for books lying on shelves, shoved in strange places, and sitting out of place. Add these items to your cart to be marked as used.
  - b. Straighten shelves as you go: ensure books are upright, fronted, and have bookends. If there are gaps between books, close them by carefully shifting the books between the gap and the bookend.
  - c. Push in chairs at empty tables and grab miscellaneous items you find to add to lost & found or throw away, as appropriate. Add library materials to your cart to be marked used, including items in the return bins. Clean white boards not in use with the microfiber cloth.
2. One employee must stop on 2nd floor and empty the skybridge and service desk book drops. Be sure to keep book drop items separate from items picked up on the floors.
3. Return to the Service Desk. Check in book drop items and mark found library materials as used, then distribute them to their appropriate location(s). Add non-valuable items to the lost and found box. Notify University Police of valuable items (wallets, credit cards, etc.) and place them in the Service Desk top center desk drawer.

### Time: 30 minutes to close

1. Everyone should log off of Lib Chat.
2. One employee should sanitize the Service Desk area. Spray and wipe down counters, keyboards, phones, and mice.
3. One employee should clear the Study Rooms. They are not reservable 30 min before close, and should be empty:
  - a. Take a study room key, a few clean microfiber towels, and extra markers to the second floor.
  - b. Knock on the doors of anyone still in a room and let them know they must vacate the study room immediately. Leave the doors open to encourage them to depart.

- c. Check each room for markers and refill the spray bottles with water, if needed. Wipe dry erase boards, push in chairs, and switch out microfiber cloths that are too dirty to erase cleanly. Leave each room tidy and ensure each door handle is locked (waiting for students to vacate, if necessary). Leave the door open.

### Time: 15 minutes to close

#### First Floor

1. Complete the first closing announcement. If the PA doesn't work, click the lights off and on twice for each floor to indicate we are closing.
2. Ensure the IDEASpace doors are locked (if not in use). Check the main entrance as well as the one near the guest computers.
3. Check the blue book drop (key 22) in the atrium and bring any books to the front desk.
4. The ADA door will lock automatically. Lock the remaining entrance doors. Use an Allen wrench (key 26 or any Allen wrench in the key box) to turn the bolt so the crash bar releases.
5. Lock the top Service Desk drawer (key 24).
6. Check in materials from the book drops and stage them appropriately, along with materials on the cart at the desk.
7. Open the Laptop Status tool and verify that all laptops are in place, then lock the laptop carts (key 23).

#### Other Floors

1. Walk all floors, beginning with 4th and moving down. Take a walkie-talkie with you.
2. If the PA didn't work, speak to all patrons to let them know we are closing. Whether the PA worked or not **speak with all patrons not actively packing their things**, especially anyone wearing headphones. Be on the lookout for students who are tucked away and unaware we are closing, or who appear to intend to stay past closing.
3. Close the skybridge doors on 2<sup>nd</sup> as you walk past.

### Time: Close

1. Complete the final closing announcement. If the PA doesn't work, click the lights off and on twice for each floor to indicate we are closing.
2. Make sure all keys have been returned to the Key Box, and box is locked.
3. If there are two full-time employees on shift in the building, the student employee(s) may clock out and leave. **There must be at least two employees in the building.**
4. A full-time staff member will complete a final walk through the building to ensure all patrons have left; **one employee must remain at the service desk**. If someone is packing up, wait to make sure they leave. Circle back to a floor if necessary. If anyone refuses to leave, contact Campus Police to escort them out.
5. While on 2nd floor, make sure the bridge doors are closed and locked, and the group study rooms are empty and the doors are open to air out overnight.
6. Double-check the ADA door to be sure it is locked and latched.
7. Close the doors to LB 104, and go home. Make sure the outside door closes and latches behind you.

### Things to be aware of:

- Look for people tucked away/hiding behind desks (especially in LB 440A, in the seating areas on the tile on each floor, computer labs, and study rooms) who may not realize the library is closing, or who are intending to stay past closing. If you locate someone, please remind them we are closing, and ensure they leave.
- If you find items out of place, bring them downstairs to be marked as in-house use.
- Make a note of anything unusual or concerning, or damaged or in need of cleaning/repair, and report it accordingly. In particular, be on the lookout for water leaks and broken chairs.

### Light Switches, Automatic Shutoff, and Computer Refresh

- The master light switches are on the wall behind the Circulation Desk. Each button controls a floor's lights.
- Lights will automatically shut off at 12:55 AM and turn back on at about 7:30 AM.
- Circulation Terminals will automatically restart at 12:00 AM.

## Using the Intercom

Closing announcement instructions are on the wall above the receiver, as well as a script. Speak slowly and clearly into the microphone, and be sure to enunciate. If the intercom is not working, e-mail Amy Harrison.

## Group Study Rooms

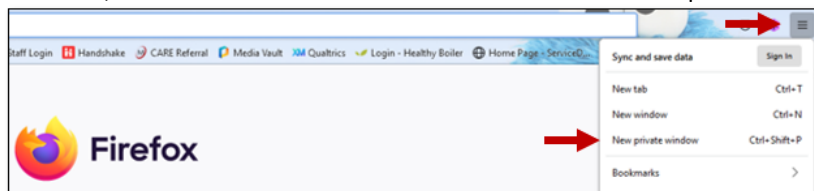
Group study rooms are available for students only (no staff or faculty can use these rooms). When the Second Floor Desk is staffed, they facilitate room use. When the Second Floor Desk is not staffed, the First Floor Desk is responsible for letting students into the spaces and marking reservations. Students can reserve any room for a maximum of two hours per student per day. Only the student who made the reservation is able to check in and gain access.

Booking a study room requires two windows in different browsers. The browser window you intend for the student to use must be a separate incognito or private setting so the patron's login information is not retained.

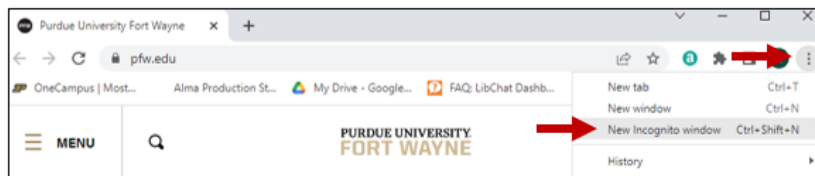
## Reserving a Study Room

### Student Side

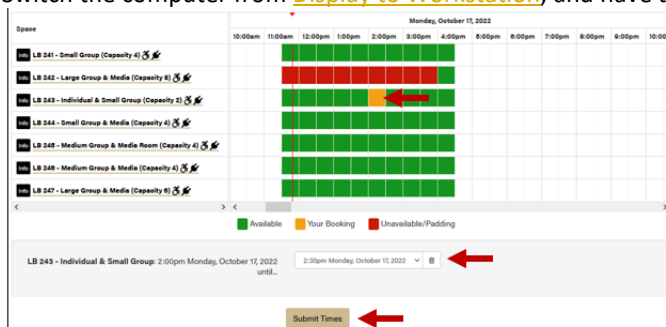
1. Open your browser with a private/incognito window
  - a. In Firefox, click on the button with three lines and choose New private window.



- b. In Chrome, click on the button with three dots and choose New Incognito Window.



2. Go to the library website and click the Group Study Rooms button.
3. Switch the computer from [Display to Workstation](#), and have the patron complete the following:



- a. Click on a green square at the **start** time for their reservation. The square will turn gold.
- b. A box will appear directly under the grid with a drop-down menu to select an end time for the booking. Have the patron choose their end time and click the Submit Times button.
- c. The student will log in with their PFW account. IUFW students must use PFW credentials.
- d. The next screen is the Booking Details, which provides the terms and conditions for room use. Make sure the patron reads this page before hitting "Continue".

- e. Have the patron indicate how many people will be in the room, then click *Submit my Booking*. When the booking is complete, have them click the Logout button.

### Staff Side (once the booking has been completed)

Room check-ins should happen at the second-floor desk when staffed. For bookings when that desk is not staffed, mark the student as checked in, then walk upstairs to let the student(s) into the room.

1. Login to LibApps. You can use the Service Desk Login (username: ref@pfw.edu password: Helmke123).
2. In the gold bar at the top of the screen, go to LibCal, then click on Spaces. Click on the Booking Grid & Availability tab, and then the blue Go button.

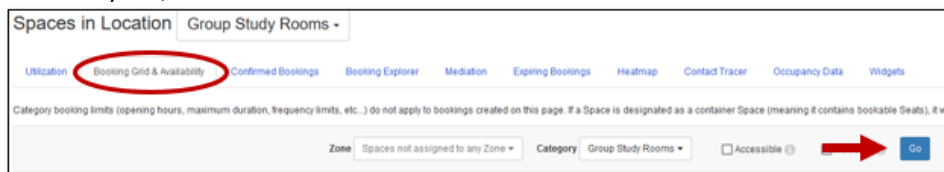
3. Locate the booking. Red blocks are reservations that have not been checked in. You can hover over the blocks for a pop-up with the student's name and email. Click the correct reservation block and scroll down to view details. Ask for a photo ID and confirm the person in front of you matches the reservation, and is not faculty or staff.

- a. If the name does not match, you CANNOT allow the patron access to the room. Explain that only the person who made the reservation can check in for the room, even if the patron is a group mate.
- b. If the person who made the reservation is a no-show, 15 minutes after reservation begins, you can cancel it and book the person who is at the desk for the room.
- c. If the patron is faculty or staff, explain the rooms are for students only and cancel the reservation.
4. If the previous booking has not ended, inform the patron that their booking has not begun and they can return at their reservation time. Do not check students in more than 10 minutes early for reservations.

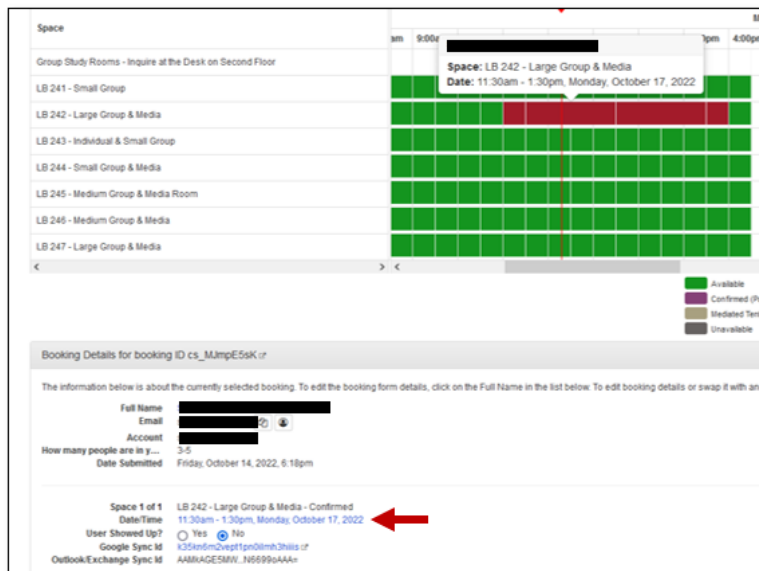
5. If the room is available and the reservation time accurate, click “Yes” to confirm the patron has shown up for their booking. The booking will turn gray once confirmed.
6. Open the door to the correct room, but do not unlock the lock fully. If the previous group is still in the room, let them know their reservation has ended and ask them to vacate. Stay until they leave to ensure the following group gets their reservation time.
7. Keep an eye on the reservations and, if a group isn’t leaving, knock on the door to alert them of their reservation ending time. If they are still refusing or are causing an issue, contact a full-time staff member or member of LMT.

## Update or cancel a Booking

1. Ask the patron for their ID (student or government ID) and ensure the patron listed on the booking is the patron wanting the change.
2. Login to LibApps. Use the Service Desk Login (username: ref@pfw.edu password: Helmke123).
3. In the gold bar at the top of the screen, go to LibCal, then click on Spaces, then click on the Booking Grid & Availability tab, and the blue Go button.



4. In the grid, locate the time slot for the room you are changing/canceling. Click on the red reservation blocks to open the booking details below the grid. In the Booking Details, click the blue link next to Date/Time to open the Update Booking window.



5. The Update Booking menu has multiple functions.
  - a. New Space – Use this drop-down menu to change the room assigned. Be sure you’re moving to an available room and not double-booking. **This is a rare action.**
  - b. New Start Date/Time – It is easier to cancel a reservation than change the date and time. Use this feature only to shorten a booking if they have left the room early.
  - c. Cancel Booking – Click the red Cancel Booking. Click the box to send a confirmation email to the user. If canceling a booking without the patron present (a full-time employee should be the one doing this), include a note to be emailed to the patron. **Most reasons to cause this would also require a note in their Alma patron record.**

## Study Rooms Policies (what students agree to when reserving a room)

- The Group Study Rooms are for the use of Purdue Fort Wayne and IU-Fort Wayne students only.
- Students may reserve up to four half-hour slots per day.
- Group Study Rooms should be reserved in advance. Bookings are made via the Helmke Library website or at a Library Service Desk.
- Group Study Rooms are for groups of two or more people with the exception of the smallest room, LB 243, which may be used by individuals.
- Group Study Rooms should not be reserved for attending virtual classes.
- Students must check in for their reservation at a Library Service Desk with their Mastodon ID card or a current, government-issued photo ID. Reservations that are not checked in within 15 minutes of their reserved start time may be canceled and room access granted to another student group.
- Group Study Rooms are not soundproof. While we encourage users to be respectful of their peers in neighboring rooms, students should not expect to have complete silence.
- Students must continuously occupy a Group Study Room after checking in to retain their reservation. Group Study Rooms checked in but found empty may have their reservation forfeit and access revoked. Items left in the room will be removed.
- Reservation cancellations may be made through the link in the confirmation email or by contacting a Library Service Desk. Repeated no-call no-shows may result in a loss of Group Study Room privileges.
- When leaving a study room, users should dispose of trash, clean the white board, restore furniture to their original locations, and close the door.
- Laptops, HDMI cords, and adapters are available for checkout at the First Floor Service Desk.
- Please report problems to a Library Service Desk employee.
- Abuse of these policies can result in the loss of study room privileges for the semester. The individual who made the reservation is responsible for any violations of the policies, whether done by them or a member of their group using the room during their reservation.

## Other Things of Note

- Every 30 minutes or so, get up from the desk and check each group study room to make sure the rooms are being used appropriately. If you see an empty room that should have students in it, and their belongings are still in the room, please call one of the Senior Library Assistants or the Service Desk Director.
- If your shift is ending and no one has shown up to replace you or there is a gap in coverage, call a Senior Library Assistant.
- All Writing Center questions/scheduling/appointments should be directed to the first-floor desk.
- Just like the first-floor desk, this desk is not to be left unattended for longer than it takes to let a group into a study room or tell a group their time is ending. If you need to step away longer than that, please call one of the full-time Service Desk employees.

Do not hesitate to ask for help through our Teams channels, or call downstairs to either the first-floor desk or one of the full time Service Desk employees if you have questions or if there are problems

## Blocking Patrons from Using Study Rooms

When patrons break room policies too frequently or in such a way that we need to bar them from using the rooms, or if a patron who is no longer a student continues to use the group study rooms due to having an active account, we can block them in SpringShare. If you feel there is a situation that warrants action, send a detailed email to the Service Desk Director.

## Library Room Reservations

The library has several meeting spaces, all of which are very popular: the IDEASpace (LB 137), the classroom (LB 440a), the conference room (LB 112), the Administrative Conference room (LB 114a; library use only), and the Reference Suite (library use only). Reservations are made through Amy Harrison, and her back-up is Deb Haley. Policies on room use are posted on the Policies and Forms page of the library web site (<https://library.pfw.edu/c.php?g=915923&p=6600189>).



Reservations must be made by a member of campus; outside groups can use these spaces if sponsored by a campus individual who will be present for the event. Student group reservations must go through Student Life and Leadership.

When someone requests the room, they must indicate whether they need additional technology (laptop, camera, audio, etc.). If they do not include technology needs at the time of the reservation, we may not be able to accommodate them.

All reservations are posted to the Library Event calendar in Outlook. Typically, the event name and the organizer are included on the reservation block along with the specific space reserved. The Library Event calendar is printed every morning and placed at the Service Desk. When someone comes in for their reservation:

1. Verify the group and reservation against the Library Event calendar.
2. If there is a reservation and the room is available (previous group has left the space):
  - a. **Classroom (LB 440a):** the door should not be locked except in special circumstances. Let them know where the room is located and, if they seem confused or hesitant, take them upstairs.
  - b. **IDEASpace (LB 137):** walk them to the MAIN door (in the library entryway) and use your Mastodon card to unlock the door. Ask if they want that door to be unlocked. If yes, the Allen key is in the metal storage cube under the printer. Push the crash bar in and turn the key ¼ turn. **DO NOT unlock other doors.**
  - c. **Conference Room (LB 112):** Amy will generally unlock the door. If Amy is out, take the key from the Service Desk drawer and open the door—don't unlock it unless it is requested.
  - d. **Library Admin Conference Room (LB 114a):** almost exclusively used by library personnel who can access the space. In rare circumstances someone outside of the library has it reserved, Amy or LMT will notify the desk and provide instructions.
  - e. **Reference Suite** used by library personnel. Very rare exceptions will come through Amy or LMT.
3. If we have unlocked doors (IDEASpace, 112, 114a), when the reservation ends, make sure the doors are locked.

## Using the Phone

### Phone Basics

The library's main number is 260-481-6505. When someone calls in, it will ring to all of the Service Desk employees' phones as well as at the desk itself. If no one picks up, it is sent to the library's voicemail which should be checked every morning.

Each phone has its own number, which is shown beside the top button on the left side of the phone display. When a call is placed to an extension and it is not picked up, the caller has an option to leave a voicemail. If a voicemail is left, the red message indicator light at the top of the phone will light and stay on until the message has been received (listened to). If you see the light is on, notify a full-time service desk employee.

### Answering Calls

Answering the phone is a primary duty at the Service Desk. Greet the person in a friendly voice with one of the following:

- Library phone: "Thank you for calling Helmke Library. How may I help you?" Or "Purdue Fort Wayne Library. How may I help you?"
- Writing Center phone: "Purdue Fort Wayne Writing Center. How may I help you?"

If the phone rings while you are helping a patron and no one else can get it, pick up and use the greeting, "Purdue Fort Wayne Writing Center/ Purdue University Fort Wayne Library, would you please hold?"

**Note:** While answering the phone is very important, helping the person at the desk takes priority. If you are on the phone when someone walks up, acknowledge the person at the desk and, if no one else is available to speak with them immediately, let them know you will be with them as soon as possible.

### How to Make a Call

#### On Campus Calls

To make a phone call to another department on campus, pick up the phone and dial 1 and the extension. (For example, to



dial the WC number from another office on campus, you would dial 1-5740.)

### Off Campus Calls

To call a number off campus, you must first dial 9 for an outside line, then the number.

### Put a Caller on Hold, then Return

1. While connected to the caller, push the button labeled HOLD (bottom left of the LCD screen).
2. To take the caller off hold, push the button for the phone line. This connects you to the caller. Wait a beat to be sure the line is engaged, then say "Thank you for holding" before continuing.

### Transferring A Caller to Another Number

It is good practice to give the caller the number you plan to transfer them to before transferring, just in case something happens in the process. Transfer a caller to another person or department:

1. While the caller is on the line (not on hold), hit Transfer (3<sup>rd</sup> key on the bottom of phone display)
2. Dial the extension.
  - a. If you just need to connect the caller to the number you're transferring to, hit the Complete button (1<sup>st</sup> key on the phone display) as soon as the extension begins to ring.
  - b. If you would like to speak to the person you're transferring the call to, stay on the line. To complete the transfer, hit the Complete button (1<sup>st</sup> key on the phone display) to connect the caller to the extension.

## Equipment Procedures

### Copiers

The library has one public-use copier in the building, one in the lab, and one in Amy's office. The library is responsible for public-use copier paper, and paper levels should be checked once a week. If needed, add paper to bring the level to a half inch from the top of the receptacle to prevent jamming. Whether paper is needed or not, pull the current paper out and fan the stack to separate the pages, and put it back in.

Copier toner spills easily and can ruin clothing. Toner doesn't need changing often. A full-time employee will do this.

### Using the Microform Scanner

Lenses for the microform equipment are stored in the cabinets in LB 104, and must be checked out to the patron. The microform is located in the cabinets near the scanner, which is in the last row of the 1<sup>st</sup> floor computer lab. Instructions on how to use the scanner are on the table next to the computer.

## Writing Center

The Writing Center is a student-centered, collaborative resource where trained consultants help their fellow students with writing and public speaking assignments for PFW Campus classes and academic-related events (this includes assistance for IUFW students). Simply put, writing centers are places for writers to seek feedback on their composition assignments at any point in their process. Writing centers help writers improve their writing, knowledge of disciplinary conventions, and confidence by offering advice based on training, skill, and experience.

We meet with students virtually and in-person to help with compositional questions and concerns, like developing and supporting a thesis, understanding the rhetorical situation, organizing ideas, citing sources, improving clarity, incorporating peer and instructor comments, and more. We don't tell students what specific changes to make in an assignment, but we work with them to understand what is working--and what isn't working--in the assignment, and to make revisions.

### Writing Center Policies

Because the Writing Center has a limited number of staff but serve all courses that take place on the Purdue Fort Wayne campus, we must enforce several policies:

- Students may schedule one appointment per day. If more than one appointment is scheduled on the same day, the first appointment will be kept and the following appointments will be canceled.
- Students may schedule up to three appointments per week.
- If you are more than 10 minutes late to a consultation, you may lose your appointment time; we will hold appointments for 10 minutes after the scheduled start time before assisting a walk-in.
- Students should not overlap submissions to the eConsult service with in-person or virtual appointments for the same assignment.
- Students should plan to have no more than 10 pages of text consulted on in a single appointment.
- Virtual appointments require a device with a microphone and speakers or a headset. Video and/or screen-sharing is encouraged but not required.
- We do not provide transcription or dictation services.
- We are not a drop-off proofreading or editing service.
- We are closed on all days the university suspends class and/or when the library is closed.

## Types of Appointments/Assistance

### One-on-One (Synchronous) Consultations

These are in-person or online consultations happening in real-time, allowing for conversation between the student and the consultant. Appointments are scheduled through Navigate and are available for both speech and writing assistance. In-person consultations happen in the Writing Center space on the library's first floor. Online synchronous consultations are held through Zoom.

The Writing Center encourages appointments as we have a limited number of staff serving thousands of students. When appointment times are not filled, they become available to students for drop-ins.

### eConsult (Asynchronous) Consultations

For students who don't want or need conversation, or who have schedules that don't match with appointment times, we offer the eConsult service. Students submit requests through an online form on the Writing Center's website. (Go to [pfw.edu/writing](http://pfw.edu/writing) and click on Online Assistance from the menu on the left.) Consultations are returned to students within 2 – 3 business days.

### Ask-A-Consultant IM Chat Service

The Writing Center offers a chat option through the same platform as the Library—though we use a different instance. (Writing Center chats don't appear in the library's queue.) During their shifts, consultants log in to SpringShare and monitor (and respond to) student questions.

### “Proof” of a Visit

Sometimes instructors will require students to use the Writing Center or offer extra credit if a student has an appointment. We do not “report” on student use of the center, but Navigate will indicate on the student's record if they have completed a consultation. The faculty member will need to indicate to the student how they will require “proof”.

### “Late” appointments

If 10 minutes pass and the student has not joined the meeting online or arrived for their appointment, the time block becomes available for a walk-in or eConsult request.

### Orientations & Workshops

The Writing Center and Speech Service offer orientations and workshops to all classes on campus. The Director schedules these events. Refer anyone interested in an orientation or workshop to the Director, in person or by email.

## Navigate

Because Navigate holds a significant amount of FERPA-protected information, employees must sign a confidentiality notice and complete an annual FERPA certification to have the level of required access. There are handouts on the Writing Center's webpage that show students how to schedule appointments, see the appointment notes, and more.

# Stacks Management

## Collection Locations

Material	Location
Microfilm/ Microfiche	1 <sup>st</sup> floor by the computer lab
Secure Books	LB 104
Board Games	1 <sup>st</sup> floor stacks
Hold Shelf	1 <sup>st</sup> floor Service Desk
Staff/ Faculty Works	Archives (Basement)
Course Reserves	LB 104
DVDs	1 <sup>st</sup> Floor in the book case by the elevators
Reference	1 <sup>st</sup> Floor stacks
Library of Things	1 <sup>st</sup> floor stacks
Books A – O	3 <sup>rd</sup> Floor Stacks
Music CDs	3 <sup>rd</sup> Floor, in the CD shelving by the elevators
Books P – Z	4 <sup>th</sup> Floor Stacks
Government Documents	4 <sup>th</sup> Floor Stacks, north east corner of the building
Vinyl Collection	3 <sup>rd</sup> Floor

## Material Damage

If the item is damaged in any way, **DO NOT IMMEDIATELY DISCHARGE THE ITEM OFF THE PATRON'S ACCOUNT!** You can assure the patron returning the item will remove any charges other than those related to the damage. Immediately get a full-time employee to show them the damage.

Note: If you find hate speech of any kind **do not erase the markings**. Show them to a full-time employee.

## Shelving & Retrieving Materials

### Shelving

- Books should be shelved vertically with the spine facing out, and placed on the shelf with a large bookend for support. If you see a shelf with leaning books, push them together gently and secure them with a bookend.
- If a book is too tall for the shelf, shelve it with the spine down.
- Make sure the shelves are not packed too tightly. Books should be loose enough that a volume slides easily in or out, but not so loose they lack support from the other volumes and the book end.

### Retrieving

When retrieving a book, remove the book in a safe manner to protect the spine.

- On a shelf that is loose enough to remove a book, push the two volumes on either side of the item and grab the spine of the book you are looking for.
- If the shelf is too tight or if the book is at the end of the shelf, press down on the center of the pages at the top of the book and gently tilt the book forward.
- No matter how you remove the book, be sure to close the gap so that each book supports the other.
- When retrieving a book from the top shelf, be sure to use a stool regardless of how tall you are. This will put you in the proper space to work to protect yourself and the book.

## Shelf Reading

The purpose of shelf reading is to ensure items are shelved correctly. **Books shelved incorrectly are as good as lost.** Student employees who are no longer flagging should shelf read at least once a shift.

Things to keep in mind:

- Pay attention to the call number, not the title.
- Read each label. Don't just scan down the line.
- You may wish to take a flashlight with you to read the labels on the lowest shelves.
- Stop at the bottom of a section, not just at the end of a shelf.
- Clean as you go. Take a duster with you and dust the shelves as you complete them.
- If shelves are too crowded, shift items to the row before or after (as appropriate).
- Record your progress on the shelf reading logs at the service desk when finished.

## Shifting Materials

While the Library of Congress number rarely changes for a book, where the book is physically on a shelf often does as collections grow and shrink with material loss, weeding, purchasing, and age. Some shifting will happen naturally, but we will also have large shifting projects when reorganization is necessary.

## Oversized Books

When it is not possible to have shelves adjusted for larger materials, oversized books are shelved on the top or bottom shelf of their section, in some cases on the dust catcher. A red flag is placed in the appropriate location indicating where to look for the book.

## SpringShare

SpringShare is the program that houses the Library's website, IM Chat, the Topic Guides, and more.

## LibChat

LibChat is the library's IM Chat interface. The Writing Center also uses an instance of it, but questions come in separately for the two services.

## LibGuides

LibGuides houses much of the library's patron-facing information, from the web site to the Topic Guides. Full-time Service Desk employees typically check for broken links within the LibGuides to ensure our patrons receive the best experience.

## Course Reserves

Course reserves are additional materials an instructor sets aside to be available for their class. Students come to the first-floor Service Desk and request access to the item. The Service Desk employee retrieves it and checks the material out to the student. Once the loan period has ended or the student has finished with the material, they return it to the Service Desk.

## Placing Items on Reserve

To put material on reserve, the instructor or their proxy must complete the Reserve Request Form, which is on our website. Reserve items can be part of the library's collection or from the instructor or department's collection. A form must be completed for each item to be placed on reserve, and a printed copy must arrive with materials not owned by the library.

## Processing Time

We require two weeks processing time for reserve requests. While we process requests as quickly as possible, we must also accommodate instances where an item is already checked out to a patron and we need to recall it.

## Course Reserves labels

Materials on reserve are given special labels that must be used for circulation while the item is on reserve. These labels are gold and are placed on the cover of the reserve item. Even if the item is owned by the library and has a regular barcode, while on reserve, use the reserve label. The labels indicate the courses they are on reserve for and show the loan period.

### Barcodes for non-library materials

As non-library items do not have barcodes for circulation, the library assigns temporary barcodes for personal or departmental-owned items. These barcodes begin with FW to help designate their status as non-library owned. They appear on the gold course reserves label on the front of the material. We do not RFID non-library items.

### Reserves Contact

Communication regarding reserves should be through the reserve email account at [reserve@pfw.edu](mailto:reserve@pfw.edu).

## Better World Books (BWB)

Books that no longer benefit our library, whether withdrawn from our collection or donated, are sent to Better World Books (BWB). The company diverts books from landfills by collecting material from libraries, bookstores, college campuses, and other sources with surplus or unneeded materials. Any book that can't find a home through BWB is recycled. Books donated to BWB books may be resold (for which we receive a percentage of the profit) or donated to non-profit organizations. BWB uses the profit they keep to support global literacy through grant opportunities and to partner with organizations to help them fundraise.

### Packing a BWB box

Items that can be sent to BWB are placed onto carts and left in the space behind the elevators on 4<sup>th</sup> floor where the necessary materials for packaging and sending materials to BWB are stored. We will wait until there are about 25 boxes ready to ship before printing labels and scheduling a pick-up.

When packing a box for BWB:

- Fill the box to capacity. Underfilled boxes may collapse when stacked.
- Stack the books flat in the boxes to create columns, with the spines facing outward and ISBN barcodes facing upward. The top of the columns should be flush with the top of the box.
- Fill any gaps with books placed vertically in the box.
- The contents of a box that is properly packed will vary and weigh between 35 and 50 pounds.

Click [here](#) for photo examples.

## Abnormal Situations & Emergency Procedures

### Technology issues

#### Printing in Alma

If the slips don't print, check the printer has toner and paper, or if there is a jam. If there is a problem with library software, hardware, copiers, staff printers, alma, Primo, DDS, or similar, a full-time employee should put in a BUG (the library's ITS reporting system).

#### Student Can't Log Into their PFW Account

If the student is having problems logging in to their PFW network account, most often it is because they have forgotten their password and need to reset it via goPFW. If the student is still having trouble or they are locked out, refer them to the ITS lab consultant. If there is no lab consultant, refer them to ITS. They will need a photo ID to reset their password.

#### Student is Having Trouble with a Lab Computer

The first and second floor computer labs are run by campus ITS. If a student comes up to the desk requesting help with technology-related issues, direct them to the ITS lab consultant located at the large desk in front of the computer lab. If there's no lab attendant, send an email to [helpdesk@pfw.edu](mailto:helpdesk@pfw.edu).

### The Internet Goes Down

Sometimes ITS will need to bring the network down for scheduled service or there will be a disruption caused by outside

sources. When possible, alert patrons to how this will impact their use of library services as early as possible. If there is an unplanned outage, notify a full-time employee as soon as possible to determine next steps.

## Offline Circulation

If we lose our internet connection, we can use the Offline Circulation tool to track checkouts and returns, and then update Alma when our connection is online. Use only one of the circulation workstations for Offline Circulation, and click the “Alma Offline Circulation” or “OffCirc – Shortcut” icon on the desktop.

**Note:** We are unable to loan materials to patrons who do not already have a campus account. Let the patron know we would be happy to create their profile and process their loan once we are back to normal operations.

### To Check an Item Out

1. Select the Loan transaction type.
2. Scan the user’s card into the Borrower field.
3. Scan each item into the Item Barcode field.
4. Look at the box below for a confirmation that it will record a transaction with that item’s barcode.
5. After all items are checked out, click “Save to File”.
6. Clicking “Save to File” updates a data file containing each transaction, so it’s important to do this after each user.

### To Return an Item

1. Select the Return transaction type.
2. Scan in the Item Barcode. Look at the box below for a confirmation that it will record a return for that item’s barcode.
3. After all items are returned, click “Save to File”.
4. Clicking “Save to File” updates a data file containing each transaction, so it’s important to do this after each user is helped or after every batch of returns are processed.

Note: Because the transactions are recorded in sequential order, it’s important to make sure that items are processed immediately through the Offline Circulation program when they are checked out and returned. Do not store up a pile of returned items to be processed later.

## When the Internet is Restored

When internet access is restored, the data file containing the offline circulation information needs to be uploaded into Alma as soon as possible. **LITS should always complete the circulation data file upload when possible.**

## Locked Out of the Building

Most access to the building is done through Mastodon ID readers, so if the power goes out and someone leaves the building, they will not be able to regain entry without someone inside to let them in. Campus police have access to all buildings on campus, and are able to give you access.

## Power Goes Out

There are emergency lights in the building that run on battery when the power is out. Most cell phones have a flashlight app you can use to get to the library’s flashlights. You will want to conserve power on your cell phone in case of an emergency. The library has flashlights in the copy room, in the top drawer on the side opposite the printers. One is a handheld and one can be worn as a headlamp. A full-time employee will take charge for what to do next.

Use the [physical check-out forms](#) to complete circulation tasks. **Please note:** laptops cannot be loaned during a power outage as there is no way to log in to the network when the power is out. We can receive them, but we cannot loan them.

**Note:** We are unable to loan materials to patrons who do not already have a campus account. Let the patron know we would be happy to create their profile and process their loan once we are back to normal operations.

## Circulation During a Power Outage

Without power, we have no option to loan laptops and patrons without existing Alma accounts are not able to borrow materials. We use carbon forms to circulate materials, which are located in the top center drawer of the Service Desk.

## Stacks Items

Complete the form carefully and neatly, ensuring your handwriting is legible. Print firmly to make a clear copy to the carbon. DO NOT loan materials to anyone without a current Alma account, and do not loan laptops.

1. Complete the form. For the Barcode field below the dotted line:
  - a. For patrons with Mastodon Cards/Associate Mastodon Cards, print the patron's e-mail address associated with the account.
  - b. For temporary INRE cards, print the barcode.
2. Print the date/time the item is due in the box in the top right corner. [See below for loan lengths.](#)
3. Hand the yellow half to the patron; place the white half in the top drawer of the Service Desk.
4. If the patron returns the item before the power returns, match the yellow slip with the white slip, write "RETURNED" and the time and date, and staple both pieces together, and place the stapled pair back into the top Service Desk drawer.

Call #      Due Date

Author

Title

Barcode

-----

Name

Barcode

## Reserve Items

Reserve items have a lot more information to fill out. Follow these steps and print neatly:

1. Use the gold reserve label to complete the form. Remember: only students should need to access reserve items.
2. In the box on the top in the right corner print the date and time the item is due. Using the loan period information printed on the gold label.
3. Hand the yellow half to the patron; place the white half in the top drawer of the Service Desk.
4. When the patron returns the item, match the yellow slip with the white slip, write "RETURNED" and the time and date, and staple both pieces together, and place the stapled pair back into the top Service Desk drawer.

RESERVE

Instructor:      Due \_\_\_\_\_

Course #:      Date \_\_\_\_\_

Copy #:      Time \_\_\_\_\_

Author/Title:

Barcode:

-----

Name:

Barcode:

## Circulation lengths

For campus individuals:

- General Collection books and Government Documents: 17 weeks
- Media: 6 weeks
- Course Reserves and Secure Area items: loan length is indicated on the item
- Laptop equipment: 5 days
- Mother's room: 2 hours

For campus guests:

- General collection items: 3 weeks
- Media: 7 days.
- Secure Area items: a variety of due dates from 2 hours up to 2 weeks
- Mother's room: 2 hours

Material such as reference books and journals may be consulted on site. Guests are also limited to checking out 10 items.

## When power returns

1. If the building has not closed, notify your supervisor and/or LMT that power has returned.
2. Enter the barcodes for any materials that were circulated during the power outage. Be careful and take your time to ensure the data is entered correctly.
3. Resume processes as normal.

## Something is Wrong with the Building

If you notice something broken, see or hear dripping water, or any other service problem, immediately let a full-time employee know!

## Patron refuses to leave

If you find a patron in the building after close or if a patron refuses to leave during closing, politely let them know the library is closed and they need to exit the building. Be sure they leave; wait for them to pack up or circle back to check.

If they refuse to leave, become upset or belligerent, or ignore you, do not engage in similar behavior. Warn them you will call campus police if they choose not to leave. If you must call campus police, follow all directions given to you and comply with their reporting methods. Also, email LMT to let them know.

## Inappropriate Graffiti or Vandalism

Patrons will leave a variety of sayings and drawings on spaces throughout the building. They will also sometimes break or vandalize things. Erase phone numbers, social media handles, and similar notations, or drawings that appear inappropriate but are essentially harmless.

If you find intentional damage or hate speech:

1. Do not immediately erase the material or clean up the damage. If you have the ability, take pictures and e-mail them to your supervisor.
2. Call campus police at their non-emergency number and wait at the location for them to arrive. They will take your statement and take pictures. If they do not, inform your supervisor of what happened.
3. After you are done speaking with the police, you can clean up the area or alert maintenance to the situation and they can take care of it.

## Wet Books

If we receive a wet book, let a full-time employee know immediately, and keep it separate from other materials so they aren't impacted. **Ensure Your Safety** – If there is a possibility that a wet book was contaminated by sewage, dirty water, or similar, do not handle it with bare hands. Wear gloves or do not handle it at all.

## Emergencies

The university has an Emergency Handbook which is linked online at <https://www.pfw.edu/safety-security>. It details response plans, evacuation maps, and other critical emergency information. The library also has emergency plans in place, which are accessible in O:\Library\Library Information\Procedures.

In general: If you're in doubt, always err on the side of safety.

## Severe Winter Weather

Campus administration will evaluate severe weather, and if the situation is severe, campus will close. Make sure that you have signed up for emergency text alerts and calls. If the campus closes, you do not have to come in.

If the campus has not closed and you do not feel safe driving or walking to campus, call your supervisor following the same practices as if you were to call in sick. Be aware of the Library's Attendance Policy and how an absence may impact you.

If you are here and severe weather starts, the campus may close. If the campus closes, you will receive a call from the campus. Follow closing procedures and let LMT know what has happened.

**Note:** If you are here late or on the weekend and the weather turns severe, the campus may close and you may not get a call. Keep an eye on the website of local news stations and, if you see that campus is closed, notify your supervisor.

## Robbery & Theft

The library does not have a cash drawer so it is highly unlikely that someone will rob the library, but items may be stolen from patrons. If you hear or see a robbery, call 911. Take note of the person's height, weight, clothing, and any distinguishing marks to give to the police. Call a member of LMT to let them know.



## Active Shooters

The university provides training on surviving active shooter situations. However, in general:

1. Remain calm.
2. Don't delay, act. If you hear something like fireworks, don't just shrug it off.
3. If you can safely exit the building, leave as quickly and safely as possible. Do not look for or confront the shooter.
4. If you cannot leave the building (the shooter is in the building or right outside), hide. Barricade yourself in a room with one entrance, turn the lights out, and put your phone on silent. The rooms behind the elevators are an excellent choice.
5. Once you are in a (relatively) safe space, call 911 and listen to the directions of all emergency responders.
6. When the police enter, drop anything you are holding and face your palms outward and up. Follow all directions you are given.

## Patrons who Pose a Threat

Patrons can pose a variety of threats, and the library has options in place for employees to receive help. Remember: if you feel unsafe, call 911.

If you are dealing with a patron who is being unruly, or is threatening you, or someone else:

1. Press the buzzer fixed to the underneath side of the Service Desk counter to call for staff assistance.
2. If you feel unsafe but cannot safely call 911, take the following steps:
  - a. Be calm and polite; do not escalate the situation.
  - b. Tell them you need to call your manager to help them.
  - c. Stick your head around the corner of the Service Desk or dial any library extension and say "Hi, is NORA there with you? I have a patron who needs help, and I think she can assist." NORA stands for Need Officer Right Away. If anyone gets a NORA call, they know to immediately dial 911.
  - d. Tell the patron NORA will be right out.
3. If you receive a call asking for NORA.
  - a. Stay calm. Let them know you'll be right there.
  - b. Dial 911.

## Accidents in the Building

All accidents should be reported, but the severity of accident will dictate what steps you need to take. Minor injuries can be reported through the Library Incident Form (<http://pfw.libwizard.com/incident>). Medical emergencies should be reported to University Police by calling 911; they will dispatch the appropriate response and call for an ambulance if necessary. Stay on the phone with the emergency dispatcher as long as possible to answer questions and provide updates.

Be prepared to provide the following information:

- Exact location of the people involved (building and room number)
- Primary injury(ies) and the number of people injured
- Approximate age(s) of the injured
- Is the person breathing?
- Is the person conscious?
- Is the person experiencing chest pain?
- Is the person experiencing severe bleeding?

It is also helpful to know which campus door you are near so Emergency Personnel can find you; building entrances are numbered on campus to indicate your location. While you wait, keep the scene clear and encourage people not to gather. Enlist other staff members to help.

If the injured person is an employee, notify their supervisor as well as the Service Desk Director and the Library Director. For all employee job-related illnesses and injuries, the employee's supervisor must complete a First Report of Injury Form. Download the form at the [Worker's Compensation site](#) and call Human Resources at 260-481-6840 for more information.