

## **Library Staff request Annexed Material for Visitor Service Desk Staff Procedure**

**Purpose:** To allow visitors to University Park Campus Libraries access to annexed material (books, bound journals, copies). A visitor may have a library card, but does not need one to use annexed material.

Staff conducting the reference interview will determine:

- The patron is not a current Penn State faculty, staff or student
- Whether an item is needed from the Annexes
- Whether needed item is loan (book or bound journal volume) or copy (article)

### **Use Sirsi Workflows for:**

**Loan** of circulating material – Visitor **with** a library card

- Place hold on Sirsi Workflows for visitor (No need to use ILLiad, nor follow below procedures)

### **Use [ILLiad](#) for:**

**Loan** of circulating material - Visitor **without** a library card

**Copy** or **non-circulating material** - any visitor

- Log onto ILLiad using your Penn State Access userid and password
- On the ILLiad menu bar, refer to section “Library Staff Only”
- Select “Request Annexed Item for Visitor”

Follow the instructions on the “Library Staff request Annexed Item for Visitor” request form page.

- Use a separate request for each copy or loan
- Include patron contact information to assist in completing the delivery
- All service units in Pattee and Paterno will choose the Lending Services desk as the Pick-up location
- Submit Request

Delivery arrangements should be discussed with the visitor and clarified with other staff at the requesting location to ensure proper visitor notification when material arrives. Depending upon condition of materials or length of articles, the scanned copy or a department charged loan will be sent to the Pick-Up location you select on the request. For Pattee and Paterno Libraries, Lending Services staff will contact the visitor when material arrives.

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Email contact for questions or problems: [annex@psulias.psu.edu](mailto:annex@psulias.psu.edu)

No books or bound journals will be checked out on your (staff person requesting for the visitor) ILLiad or Workflows account, unless you specify to do so. Instead, books or bound journals will be department charged to your branch library or to Lending Services for Pattee and Paterno library locations. To request a department charge loan, choose the "Department Charge Loan-see notes field" from the drop down box in the "Pickup location / Delivery" field on the request form. In the "Notes" field specify to which department you want the volume charged and delivered.

Each request you submit for the user will be on **your** ILLiad Account.

Where to find the **status** of the request on your ILLiad Account:

- If request has not yet been supplied -- refer to "View - Outstanding Requests"
- If you received an email about the item being available at your designated Pick-Up location refer to "View - History of Requests" or "View - Notifications"
- If you chose to have the copy posted to your ILLiad account for you to deliver to the visitor and you received an email about it being available electronically refer to "View - Electronically Received Articles"
- To remind yourself why you placed this request, you can add "requested for visitor" in notes field

## **Receiving Annexed Material for Visitor Service Desk or Lending Services Staff Procedure**

Staff conducting a reference interview with a visitor determine whether annexed material (books, bound journals, scanned copies) need to be delivered from the Annexes for a visitor to use.

If so, that staff member placed a request on their ILLiad account for the Annexes to supply.

Annex staff will check shelves for availability and deliver according to the directions on the request form.

### **1. Annex Can supply**

#### **Loan - Visitor Library ID Supplied**

If the Visitor Library ID was on request, Annex staff will 'trap hold' the volume(s) in Sirsi Workflows under the visitor's ID and forward the volume(s) to the pickup location listed on the request. The visitor will receive the Sirsi Workflows generated email when the volume is ready for pickup.

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A tangerine-colored request form/bookband will be attached to the material with the patron information clearly indicated.

**Loan – No Visitor Library ID Supplied**

Book(s) or bound journal(s) will be department charged on Sirsi Workflows to the requesting branch location or to Lending Services for Pattee and Paterno Library locations.

A tangerine-colored request form/bookband will be attached to the material with the patron information clearly indicated.

Staff at the pickup location need to notify the visitor about availability.

Material is “in-library use only” unless the user is subsequently able to qualify for borrowing privileges. Staff at the service desk will determine whether to charge the item out to the visitor.

**Copy**

Copy will be sent to the Pickup location/Delivery specified on the request. The copy will have a cover sheet with the user contact information entered on the request so that library staff can complete the delivery.

Staff at the pickup location need to notify the visitor.

**2. If Annex Cannot supply (Unfilled/Incomplete Requests)**

The staff person who assisted the visitor will receive an email from the Annexes (generated via ILLiad) stating the material cannot be supplied. This staff person will notify the visitor. The cancelled request will be in the ILLiad account of the staff person who requested the material under View – Cancelled Requests.

## **Annexed Material for Visitors – Annex Staff Procedure**

The requests will be in the “Annex nonPSU” queue in the ILLiad Document Delivery Module. Annex Staff will follow delivery instructions on the request.

### **1. Can Supply (filled)**

#### **Loan – Visitor Library ID supplied**

If the Visitor Library ID was on request, Annex staff will ‘trap hold’ the volume(s) under the visitor’s ID and forward the volume(s) to the pickup location listed on the request.

The tangerine colored request form/bookband will be attached to the material with the patron information clearly indicated. Fold the request in half vertically with the “Loan” side displayed to create bookband.

#### **Loan – No Visitor Library ID Supplied**

Book(s) or bound journal(s) will be department charged to the requesting branch location or to Lending Services for Pattee and Paterno Libraries.

The tangerine colored request form/bookband will be attached to the material with the patron information clearly indicated. Fold the request in half vertically with the “Loan” side displayed to create bookband.

#### **Copy**

The request form will indicate how the copy (scanned article or physical volume) is to be delivered. Staff submitting the request have different options. Below is a listing the options and what Annex staff are to do with each option:

1. *Annex Staff - forward article to visitor*
  - Scan article and send to the visitor via the email supplied on request form
2. *I will forward article to visitor*
  - Post the scanned article to the staff person’s (one submitting request for visitor) ILLiad account
3. *Lend.Serv/lendingsvcs@psulias.psu.edu*
  - Scan article and send via email to Lending Services (lendingsvcs@psulias.psu.edu)
4. *Architecture Lib./ arch@psulias.psu.edu*
  - Scan article and send via email to [arch@psulias.psu.edu](mailto:arch@psulias.psu.edu)

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*EMS Lib./Ariel:146.186.39.75*

- Scan article and send via ariel to EMS Library

5. *Engineering Lib./Ariel:146.186.119.138*

- Scan article and send via ariel to Engineering Library

6. *PAMS Library/ PAMS@psulias.psu.edu*

- Scan article and send via email to PAMS library at [pams@psulias.psu.edu](mailto:pams@psulias.psu.edu)

7. Department Charge Loan-see notes field

- Do not scan article. Charge the volume(s) to the department indicated in the notes field

8. Other - Instructions in notes field

- Follow instructions in the notes field

Include a copy of the request form with the scanned article or physical volume(s). For a scanned copy, fold the request in half vertically and scan the "Article Copy" side of the form. This cover sheet includes the user contact information entered on the request so that library staff at the pickup location can complete the delivery.

## **2. Cannot supply – Unfilled/Incomplete Requests**

If material is not available at the Annex, Annex staff will cancel the request on ILLiad, generating an email to the staff person who assisted the visitor.

To cancel the request and notify the staff person submitting the request:

Pull up the request in the ILLiad Document Delivery Module – Select Edit – Edit Request

From the menu bar within the request (General Update Form) - Select Cancel Request

Choose the reason and add comments. Click on "Cancel Request" button