



Configuring and Using Reading Rooms

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Agenda

- Reading Room Overview
- Configuring Reading Rooms
 - Location
 - Circulation Desk
 - Terms of Use
 - Fulfillment Unit Loan and Request Rules
 - Fulfillment Unit On Shelf Request Policy
- Using Reading Rooms
 - Submitting Requests
 - Checking Items In and Out

What Is a Reading Room?

- Reading Rooms allow users to use items in a supervised setting either once or multiple times over an extended period
 - Staff can check items in and out multiple times without the item being reshelfed (item is placed back on hold shelf when checked in)
 - Items are not reshelfed until staff indicate a check in is a “final check in”
- Users can request items be held in a reading room via Primo and/or they can ask for items in person (local policy decision)

When Would I Use a Reading Room?

- Reading Rooms are ideal for managing the use of closed stacks collections that users aren't allowed to take from the library (Special Collections, Archives, etc.)
 - Easy for users to request items through Primo
 - Staff can easily keep track of which items are being used
 - Use statistics can be gathered via Analytics
- Can also be used for ILLiad "In Library Use" items
 - In Library Use info not passed from ILLiad to Alma, so In Library Use restriction can't be included in Alma notices
 - Staff must switch circulation desks

How Do I Configure a Reading Room?

- Library Level Configuration:
 - Create a Location for Reading Room Items
 - Create a Reading Room Circulation Desk and attach Locations to that desk
- Institution level Configuration:
 - Create Loan and Request TOUs for your Reading Room
 - Create Fulfillment Unit Loan and Request Rules for your Reading Room
 - Check Fulfillment Unit On Shelf Request Policy
- Roles Needed: Fulfillment Administrator

How Do Reading Rooms Work?

Roles Needed

- Circulation Desk Operator
 - Scoped to library and circulation desk
- Requests Operator
 - Scoped to library and circulation desk

How Do Reading Rooms Work?

Placing Items On Hold

- When an item is requested for reading Room use, it will appear on the Reading Room Circ Desk's Pick From Shelf List
 - This Pick From Shelf list behaves like any other Pick From Shelf list
- Users receives On Hold Shelf Letter when item is available
- Users do not need to request items to use them in a reading room

How Do I Use a Reading Room? Checking Items Out

- When checking out a reading room item, you must use Manage Patron Services for the first loan
 - No difference between this process and the regular check out process
- Once the item is checked out, the Hold Until date changes from the date defined by the circ desk's maximum Time On Hold Shelf setting to the due date given by the Loan TOU

How Do I Use a Reading Room?

Checking Items In

- When checking in a reading room item, you must indicate whether the check in is **Not-Final** or **Final**
 - **Not-Final**: the user still wants to use the item, so it will be put back on the Hold Shelf
 - **Final**: the user no longer wants to use the item, so it will be reshelfed
- Both Final and Non-Final check ins can be done through either Manage Patron Services or Return Items

How Do I Use a Reading Room?

Active Hold Shelf

- A reading room's Active Hold Shelf has three tabs:
 - Waiting for Pickup: items that have been placed on hold but have yet to be checked out
 - Held By Patron: items that are currently checked out
 - On Shelf (Not Final): items that have been checked out and then back in (Not-Final) and are still being held for further use
- Items can be checked out from the On Shelf (Not Final) tab but not the Waiting for Pickup tab
- Items can be Not-Final checked in from the Held By Patron tab (Final check ins must happen in either Manage Patron Services or Return Items)

How Do I Use a Reading Room? Expired Hold Shelf

- The Expired Hold Shelf lists holds past their Held Until date
- A reading room's Expired Hold Shelf behaves like any other Expired Hold Shelf
- For more information, see:
 - FAQ: <https://slcnyc.libanswers.com/faq/281684>
 - Webinar: <https://public.3.basecamp.com/p/PtY5Cpza6MWzh9uAUb8ztawq>

How Do I Use a Reading Room?

ILLiad Requests

- You can manually change the request's location to a reading room location using the Scan In Items function
- If you attach the Main-Borrowing location to a reading room circulation desk and include that location in the Loan TOU, you can switch to your reading room circulation desk and then check out any ILLiad item

Reading Room FAQs

- How to Configure Reading Rooms:
 - <https://slcnny.libanswers.com/faq/283073>
- How to Use reading Rooms:
 - <https://slcnny.libanswers.com/faq/283097>