**Department of Human Resources**

**OPSEU Job Description**

**Job Title:** Technical Services Associate (Serials, ILL/Financial & MRR)

**Job Number:** L-088

**NOC:** 5211

**Band:** 5

**Department:** Library Technical Services

**Supervisor Title:** Client Support and Technical Services Librarian

**Last Reviewed:** May 26, 2015

**Job Purpose**

Under the general supervision of the unit librarian the incumbent works within a dedicated Library service team and bears primary responsibility for these key areas:

* Management of the Library’s current serial subscriptions – duties assigned as part of restructuring due to colleague’s participation Retirement Incentive
* Management of financial transactions related to the Library’s Interlibrary Loans operations.
* Preparation of daily cash floats and reconciliation and weekly bank deposits for financial transactions at the Library, and administration of associated reports
* Fulfillment of Interlibrary Loan requests for Canadian and international institutions
* Maintenance of the collections and equipment in Library’s Multimedia Room (MMR)
* Provides support for Client Services as required

Activities are carried out using modules in the Library’s integrated library system (ILS), RACER (the provincially shared automated Interlibrary Loan system), OCLC, and vendors’ online systems for ordering, verifying and claiming serial subscriptions (e.g. EBSCO Information Services). In addition, the job requires knowledge of the serials industry and competence with a range of Microsoft Office tools (Excel, Word) and locally developed software. Work is carried out according to principles of library and information science and policies established by University Library, the University Financial Services Office, and the Ontario Council of University Libraries. Provides support for Client Services as required.

**Key Activities**

**Management of the Library’s serial subscriptions**

1. In managing the Library’s current standalone print, electronic, and microform serial subscriptions the incumbent is responsible for establishing the bibliographic details of the publication (e.g. format, frequency, publisher, price), and for ordering, receipt, renewal, payment, claiming, and processing for each title. Verifies that serials received are correct and returns materials received in error, ensuring appropriate follow up for credits/refunds. Transactions are carried out using the modules of the Library’s integrated library system (ILS) (e.g. serials check-in, acquisitions, fund accounting) and includes the creation of pattern, copy and profile records for serials. Maintains payment history for serial subscriptions in local file.
2. Using the ILS, regularly prepares and disseminates claims for missing issues to be sent to vendors. For print subscriptions, ensures that completed volumes are collected and catalogued for the stacks.
3. Processes the annual serial renewal invoice as required with attention to currency, format, frequency and/or publisher changes, and price increases. Processes remaining serial invoices throughout the year.
4. On an annual basis, the incumbent provides the unit librarian and budget manager with a report on projected expenditures for serial subscriptions and ensures that serials are renewed or cancelled in a timely manner so that additional charges are avoided.

**Management of financial transactions related to the Library’s Interlibrary Loans operations**

1. Using RACER and OCLC reports, the incumbent verifies, processes, and resolves all accounts payable and accounts receivable transactions related to Interlibrary Loans operations. Compiles semi-annual payment requests and sends compiled requests to appropriate external institution/client group for payment.
2. Administers accounts receivable for Interlibrary Loan requests for Canadian and international institutions. Bills internal departmental accounts as required for Interlibrary Loan services. Tracks recovery of accounts payable for exceptional costs from Library clients.

**Preparation of daily cash floats and reconciliation and weekly bank deposits arising from financial transactions at the Library, including administration of associated reports**

1. On a daily basis, ensures that cash float is prepared for Client Services and that a backup float is available. In the incumbent’s absences, coordinates coverage of this task with the budget manager.
2. Using locally developed applications, compiles reports for cash, debit, and credit card transactions for all financial operations in the Library, including revenues from Library fines and lost books, photocopiers, photocopy card dispensers and pay per use Microforms equipment.
3. Prepares weekly deposits for monies collected from all Library operations and arranges for pick up by Trent University Security.

**Interlibrary Loans Fulfillment**

1. Using RACER, extracts bibliographic pick-lists and fulfills Interlibrary Loan requests for loan of materials from Trent Library to other Canadian and international institutions.

**Maintenance of collections and equipment in the Library’s Multimedia Room (MMR)**

1. Responsible for the maintenance of Current Periodicals and Microforms collections by ensuring that materials are kept in order and shelves and cabinets are labelled appropriately. Reorganizes collections as required. Ensures that materials are re-shelved on a regular basis.
2. Collects Current Periodicals for binding, discard, or processing as required. Removes and recycles print newspapers as they are superseded by electronic or microform holdings.
3. Ensures that equipment in MMR (e.g. photocopiers, microform reader/printers, scanners) are in good working order and provides training to Library personnel when required. Orders supplies (e.g. paper, toner, lenses, lamps) and ensures that equipment has instructions for clients and user manuals for staff.
4. Provides first response for maintenance/malfunction of equipment in MMR (e.g. clearing paper jams, refilling paper trays, replacing toner cartridges). Arranges for maintenance and repair of equipment in the MMR by contacting service personnel and making appointments as required and keeps logs of incidents, maintenance and repairs.
5. Assists Library clients in locating materials and operating equipment in MMR.

**Education**

* College Diploma (Library Technician or Library Information Technician)

**Experience Required**

* At least two years and up to four of Library experience using an integrated library system (ILS)
* Knowledge of principles of library and information science including MARC coding, AACR2R cataloguing rules and materials processing techniques and of serials vendors’ practices, interlibrary loan procedures
* Ability to research and implement best practices for management of financial transactions such as control of cash floats, deposits, accounts receivable and accounts payable
* Demonstrated ability to operate and troubleshoot standard office and library equipment such as photocopy/fax machines, printers, scanners, reader/printers, and audio visual equipment
* Ability to build and maintain positive relationships with vendors, service providers, external institutions, members of the University community and Library clients
* Competence with Microsoft Office tools (Word, Excel, Outlook) and the internet
* Superior organizational skills combined with ability to pay attention to detail
* Flexibility, a positive attitude and ability to work within a team is essential