Circulation Team Leaders’ Meeting Notes

11/13/15

West Campus Library Classroom

Attending: Josh Barnes, Melanie Brennan, Andria Burton, Travis Budd, Bob Holzmann, Natalie Manke, Sarah Wagner, Emily Tichenor and Andy Taylor

Notes: Sarah Wagner

Josh created the agenda with the list of training topics for the WMS Training Sessions

  o What to cover? – We all agreed that we would need to cover the following:

    ▪ Signing in
    ▪ Looking up and navigating patron records
    ▪ Check-in and check-out
    ▪ Placing, editing, and removing holds
    ▪ Replacement fees
    ▪ Adding and removing patron notes
    ▪ Course Reserves
    ▪ Looking up item records
    ▪ Changing shelving locations
    ▪ Reports
    ▪ What else? – Emily said that the plan was to have ILLs incorporated with WMS by January (hopefully)

Timeline and how many sessions:

We agreed that we would have two formal training sessions per campus, one prior to winter break and one after.

December 8 – Begin keeping manual record of items checked out. Josh will create a google.doc for this. When items are returned, set them aside. Don’t check in until we have already gone live.

December 15 – WMS Go Live date

December 16 – Proposed formal training, times TBA. SEC in the morning, Metro in the afternoon.

December 17 – Proposed formal training, times TBA. NEC in the morning and West in the afternoon.

We will flip-flop when we come back from the winter break. Training will commence the week of January 4.

January 6 – Proposed formal training, times TBA. West in the morning and NEC in the afternoon.

January 7 – Proposed formal training, times TBA. Metro in the morning and SEC in the afternoon.
**Training:**

Natalie pointed out that actual on-the-spot training/one-on-one will be more crucial training. Andy agreed that pre-live training would be helpful. We want to be able to share the tutorials with the other staff. On our own we can also show staff the Weaver Library and the Check-in/Check-out tutorial. Also have them go over some of the other tutorials prior to going live. As far as the formal training – we all agreed that it needs to be hands on training.

We also had decided to have a separate meeting to discuss the formal training. Our proposed date for this is November 20th, at 2:00 pm at Metro. Andria will run this by LMT to make sure of coverage, etc. We also want to discuss reserves and list naming conventions at this meeting, so it’s paramount that we meet soon if we can’t meet on the 20th.

**Courier Cards:**

The question posed was “Can we get rid of them?”

We can run an in-transit report on the new system, so it looks like we will no longer need them. Reach day, or every two days, we can run an in-transit report. We all agreed that we want to try this because in theory we should get all the information about an item on the report. We can thus be rid of the courier cards for now. We can always go back to them if need be. Natalie pointed out that running reports is easy, at least the canned reports. There is a webinar about designing our own. We’ll have to see how that works. The canned reports are easier and prettier than Voyager’s reports.

At this point, “Soft Check-ins” came up. They are our equivalent of Browses. They are also referred to as Non-loan items. This can be included in the “Check-in/Check-out training”.

**Reserves:**

We want to be consistent. We should be able to at least make some reserves lists, even prior to going live. Josh proposed getting together at one campus and each person just putting in a few. Reserves need to reflect what campus they are from, the local bib data at least, somewhere on the list. For laptops, bones, etc. – Possibly create as a Temp Item. This won’t be searchable in Discovery or added to a list, but can still be checked out. We actually had more of a talk about Reserves when Bob and Cary joined the meeting at 9:00 am.

**WMS Task Force Portion of the Meeting as pertaining to CTLs:**

We asked about the following:

- For the purposes of training, will the CTLs have access to OUR modules? Bob said not until our module is loaded. Unknown, likely no.
- When can lists for reserves be made? Bob said that since lists are set up in Discovery, we should be able to input them as long as we have access and have been assigned the role as a Reserves Manager. Any of our items already in system can then be added to the lists. This prompted a short talk about “roles”.
- Can we allow staff to access OCLC training and videos? Bob will check with Denise Weaver about how to do this.
Bob wants our manual stuff to be entered when we go live.

Bob asked us about the Reserves Process. He reminded us that we create and maintain our reserve lists in Discovery as well as add items that way. Search for the item in Discover and then add it through the Circulation Module. At this point, Bob signed in to the TCC circulation module so that we could see what it looks like. He demonstrated how to search/add an item to an existing list. However, we couldn’t see the pop-up note (showing item as a reserve item) in Discovery yet, because it is still linked to Voyager. We definitely need to put in the pop-up note so that patrons and the general public realize that reserve items can only be used in the library.

Andria asked if item history is going to migrate. The checkout history will only reflect the last patron to check out an item. This is another reason to get rid of the courier cards. Fines will not migrate and neither will “lost status”.

When adding a Pop-up note, make sure to preface it with “!” in front of the note, so that it will pop-up.

Bob showed us the University of Louisville, which went live over the summer. We looked at their course reserves as an example.

Bob asked what kind of Reserve Locations we wanted. We all use 2 hour checkouts, except Owasso, which uses a 4 Hour checkout. Emily pointed out that they don’t check things out too often, but that there are two people out there who will also need training.

We talked some about Temp Items. Emily wants to use these for ILLs to track them in our system. We also want to use them for other items, such as Laptops, Puzzles, Lungs, Bones, etc. It could be that one will need to have cataloging access to make a Temporary item record. This opened the discussion about cataloging stuff. In our old system, temp items just needed a Barcode and that was it. Can this be done now? Sarah gave the example of WC’s DVD drives. Bob pointed out that both Metro and NE had theirs bolted to the desks by IT.

Bob is still working on locations for New/Display items.

As far as patron updates, they will only be updated once a day.

We will not be migrating any Holds and so will start fresh.

As said before, no user history record will be recorded other than the last user to check out an item.

There will need to be an in-transit task for Tech Services. They will need their own branch/campus. When we send our items to them we will need a barcode to charge the item to them.

Talk then turned to some final records that will need to be cleaned up. Bob said it has been a good migration. There were only 5 duplicate items!

Andy had a question about items that showed up as in-transit in Voyager. If they are found, check them in. The records/bib information has already been migrated.

Bob told us that ExLibris will cease support of Voyager on December 31st.

He talked a little bit about serials check-ins and how that is a small part of the Acquisitions module.

The next proposed WMS Task Force meeting: December 4th, after the Librarians’ Instructional Meeting.