Circulation Team Leader Meeting
July 16, 2015
Attending: Josh Barnes, Melanie Brennan, Andria Burton, Bob Holzmann, Natalie Manke, Sarah Wagner

1. Patron Purge Report
   a. The directions CTLs were provided were not very clear, however, since the switch to WMS will happen before another purge is done, there is no need for new purge instructions for Voyager.
   b. Patrons with “Historical Fines” were included so CTLs can check to ensure that patron accounts in Banner have no library-related holds.
   c. Counters do not need to be reset before patron account can be deleted.
   d. Bob will run purge again.
   e. Bob will also run lost items report so that shelves can be checked for those books.

2. NEWT
   a. Circulation Procedures manual will be housed on Andy’s KM guide. Procedures tab in New Staff Guide will link to that.
   b. NEWT Committee is currently in process of consolidating and reorganizing tabs.
   c. CTL Team’s opinions on tabs and other areas of guide:
      i. Home tab - “general overview for librarian” should say “general overview for library staff.”
      ii. Library Directory and Reporting Structure should be combined, with Library Directory above Reporting Structure.
      iii. Campus Safety – Nurse and Police should be combined.
      iv. Campus emergency procedures are too specific.
      v. It seems like a lot of information that could be linked to in other locations (including on TCC’s main site) is being unnecessarily duplicated.
      vi. Should have information about which programs fall under which divisions on each campus.
      vii. The three separate Programs and Services tabs should be combined into one, with sub tabs if necessary.
      viii. Information about working papers should be housed on the KM guide but not on the New Staff guide.

3. LibStaffer
   a. CTLs from West and Metro tested out LibStaffer.
   b. CTLs decided it is not really a good fit for how schedules are designed and would probably not be helpful.

4. Updates from Bob
   a. CTLs will be able to begin entering Reserve records into WMS in late November/early December.
   b. CTL team will meet to figure out which information will be included on Reserve records, and how the records themselves will be structured.
c. CTLs have access to training portal and should be able to watch tutorials on the Reserves module.

d. TCC has been assigned a cohort group for the transition from Voyager to WMS.

e. The go-live date for WMS is December 18.

f. Voyager will be kept intact for a few months after the switch.

g. For a couple of weeks prior to the go-live date the library will be using two systems. Every transaction during this period will need to be done in Voyager and WMS.

h. Bibliographic data will be transferred in September.

i. Circulation and patron data will be transferred in November.

j. Staff training will take place in October/November.

k. CTLs will look at training portal to figure out if OCLC should send someone out to assist with training.

5. Statistics
   a. It is important to reiterate to staff the definitions of each category so that tallies are being recorded consistently.
   b. Data Task Force will focus on (among other things):
      i. Collecting meaningful statistics
      ii. Reporting of data
      iii. Consistency between campuses

6. Guest users
   a. Procedures
      i. Metro is the only campus requiring guest users to fill out Guest User Agreement form.