NE Library Think Tank

Attending: Josh Barnes, Melanie Brennan, Travis Budd, Emily Tichenor, Sarah Wagner

Notes: Sarah Wagner

Purpose: To discuss training LibGuide for WMS and divide up areas each team member is responsible for; and to discuss NEWT checklists for Library Assistant IIs

- Methods and schedule for writing the LibGuide: The group agreed that we could have a rough draft ready by our next CTL Meeting, which is March 11, at Southeast. There was some discussion about making our own training manual or using OCLC’s stuff (links v. screenshots.) We will make our own but include links to some of their training videos on youtube. We agreed to use our fake patron, Percival A. Bumbler (CWID# T12345678) as our patron for the manual. We decided that we will have the following 8 tabs: Assist Patrons, Check In, Discover Items, Reports, Analytics (circulation reports), Admin (adding new patron and OK Share), Reserves and ILL. Emily emailed us all a copy of the guidelines for Libguides. We will proceed to work on our sections/tabs.

- Areas of LibGuide to divide up (see attached sheet) – we were able to divide the areas fairly quickly. Josh will send out an amended spreadsheet.

- Banner Holds – We had a short discussion about Banner Holds. We all agree that the Hard Holds have more clout than the “soft” transcript holds do. We would like to start using the Hard Holds year round. Josh will send the hold information to Emily (Hold types/verbiage.) Emily will then follow up with LMT (?) and Chelle (dawn.davison@tulsacc.edu). We agreed that we should be running the reports in the same cycle. We will all run next Monday, February 15th and run the report every two weeks. We will continue with “soft” holds for now. Josh showed us an Overdue/Aging items spreadsheet. If any overdue date is 9999, don’t place a hold on that item. It hasn’t been overdue long enough.

- NEWT checklist for Assistant IIs: Next we talked about the NEWT guide. Josh did use the generalized checklist during recent training and he found it to be very useful. We decided that the sheet for the Assistant IIs read too much like a job description and also acknowledged that
not all Assistant IIs do the same jobs. Sarah will work on a rough list for the CTLs first 30 days. We all agreed that this is not urgent. We can all look at it and give input. Emily pointed out that we do need to utilize the information found on the KM and NEWT guides. We can always add more checklists.

- **Reserve User Agreement Form** – WC is piloting a new, all-in-one, Materials and Devices User Agreement form. This means less forms for students to sign, less space to store them and another way for us to market our services. We had a spirited discussion. The other campuses do not favor having just one form because of the different stipulations/devices being used at different locations. Emily asked if two forms might work – one for reserve items and one for technology. There was no consensus on this subject. WC will pilot the form for now.

- **WMS issues to address**: The group agreed that WMS works pretty well and there haven’t been many issues. Emily reported on ILLs. The Illiad date will always be the correct due date for an ILL. We will need to manually edit the due date in WMS to reflect this. She and Evelyn will try to change dates weekly, but we need to make sure we check the due date when checking the ILL out to a patron. Change the date to match ILLiad. Josh pointed out a quirk about Batch Updating on Temp Items like “New Books”, WMS only updates the first 10, unless more are selected. One more thing that came up – we all agreed that we want a “My library Account” link somewhere on our library homepage so that patrons can access their accounts without going through Discover. Sarah will ask Megan.