Circulation Team Leaders’ Meeting Minutes

1/8/16

The Vault

Attending: Josh Barnes, Melanie Brennan, Andria Burton, Travis Budd, Bob Holzmann, Natalie Manke, Sarah Wagner

Notes: Andria Burton & Josh Barnes

- **WMS Training—how did it go?**
  - All agreed that it went well.
  - Helped that staff could use it ahead of time, but many still learned things in training.
  - Tech Services sat in at Metro and appreciated seeing the front side of it.
  - OCLC liked Josh’s training PowerPoint and would like him to lead an online training session for a WMS user community.

- **In transit reports**
  - The in transit report can be filtered by campus [branch in WMS] origin, destination, etc....
  - Each CTL will look at items coming to our location.
  - There is a delay of 1 day on items appearing on the in transit report.
  - According to Denise Weaver, only currently in transit items will appear, and that is what we have found as well.
  - Held items which have been checked in twice show as “dispatch” but still appear on the in transit report.
  - Anytime we send emails about an in transit item, include Hans in the email.
  - Send Bob examples of strange things we are not sure about.

- **Date due slips**
  - LMT has approved of doing away with date due slips.
  - We will now email date due receipts.
  - We will print a copy of a date due receipt upon request.
  - Remind patrons to check their Clutter and Junk folder.

- **Student Holds and Overdue Materials Aging Reports**
  - Long overdue in WMS is equivalent to Lost in Voyager.
  - We will continue doing our own Bursar reports, using the Overdue Items Aging report.

- **Adding reserves, including those not in WorldCat**
  - The process went well.
  - Searching WorldCat by ISBN was very helpful.
  - Would like if Course Reserves had more options than just “and” searches, such as “or.”
  - For items not in WorldCat such as books which are combinations of multiple texts, these will have to be catalogued.
This semester we will add temporary item records for the above items, and catalogue them next intersession.

Bob is working with Emily, Evelyn, and OCLC to make Reserve items not requestable through ILL.

- **Procedures Manual**
  - Megan has recreated a LibGuide for our procedures manual.
  - We will either have a separate meeting or an email where we divide up who will be doing what on the manual.
  - We agreed that will be use screenshots, rather than just linking to OCLC YouTube training videos.
  - We agreed that no paper copy is needed.
  - We need to look at the NEWT checklists and determine what we all agree on for aides and assistants.

- **Materials Agreement Forms**
  - A suggestion had been made that we have on material agreement form (for laptops, reserves.) We decided that separate forms were better due to the length and amount of information that would need to be one form.

- **Wi-fi hotspot devices (Natalie)**
  - Natalie covered the information about the new Wi-Fi hotspot devices at the Library Retreat.

**Action Items:**

**ALL CTLs**

- Discuss NEWT checklists.
- Restart Banner holds using Overdue Items Aging reports.

**Andria**

- Contact bursar and tell them we will be doing Banner holds again.
- Check with LMT to see if we need to keep a record of deleted (weeded) items.
- Check with LMT to see if we can have a procedures manual meeting.

**Bob**

- Check with OCLC to see if a “clear temporary location” can be added to batch editing of temporary shelving locations.