CTL Meeting Notes

Attendees: Josh Barnes, Melanie Brennan, Travis Budd, Natalie Manke
Location: Northeast Campus Think Tank
Date: May 11, 2018
Time: 8-10am
Notes: Natalie Manke

Agenda Items

• WMS Manual – reviewed manual Libguide page by page and noted necessary changes/updates:
  o All pages – make sure all links work, especially links to YouTube tutorial videos.
  o Check Out page – add that hitting “cancel” on any popups that need to be acknowledged will prevent the action from completing
  o Patron Holds page – add that some fields are hidden by default, but can be unhidden by clicking on the gear icon
  o Patron Bills page – add that when resolving a bill for a lost item, the book must be marked “Claimed Lost” (which can be done from the Patron Checkout page) before the bill is resolved, otherwise the bill will be generated twice.
  o Patron Profile page/Item Notes page – add that date, in addition to initials and campus, should be added to all notes
  o Modify Temporary Locations page (single item) – add image showing how to remove a temporary location by clicking the little x
  o Modify Temporary Locations page (multiple items) – add warning that removing temporary locations is a side effect of changing the branch location and that all items modified in this way must have the same permanent location
  o Reports page – add that pickup location is hidden by default but can be unhidden by clicking the gear icon
  o Admin page – replace image for creating a new patron with updated version
  o Reserves page –
    ▪ Add info about adding temp items to Reserve lists
    ▪ Add that when putting an item from another campus on temporary reserve the holdings location for the item must be changed or else the book will be marked “In Transit” upon check-in.
    ▪ Add different terms used in popup notes for the Reserve forms
  o ILL tab – maintained by Lisa H.

• Guest User 1-hour logoff
  o If the shortcut does not appear, a group policy update may fix it, hit Windows key + R and type in “%GPO%”
  o Issue – clicking the 1-hour logoff shortcut will restart the hour countdown, and patrons may catch wise to this and keep extending their hour
    ▪ IT has been contacted to see if there is a fix for this
    ▪ Possible workaround – hide shortcut and use run command to activate script: Windows key + R, then type “C:\TCC\Scripts\Logoff\Call60minLogoff.vbs”
• **Scheduling reports in WMS**
  o found under Analytics > Reports Launch Pad
  o Group reviewed the procedure for scheduling recurring reports and how to modify them

• **Action Items**
  o Check with Bob about WMS override credentials not working
  o Josh will send group links to their new barcode scanners
  o Natalie will add owner to all temp items on Reserve lists
  o Melanie will contact Lisa H. about ILL page on WMS Manual
  o Travis will follow up with IT about getting 1-hour logoff set up on all campuses and also ask about the reset issue
  o Group will make necessary updates to WMS manual by next CTL meeting
  o Group plans to review and update WMS manual every May