LSP Circulation Work Group Webinar
Chat transcript with answers
November 15, 2019 – 2:00 p.m.
Hosted by Michelle Ohnstad, LSP Circulation Work Group Lead

00:21:56   jishibashi:How are the reports/analytics? I hope it's easier to pull reports in ALMA than it was in Voyager!

Reports in Analytics are fairly easy once you get the hang of it. Including an SQL string is a little more complex, but once you have it down, you can apply it across the board. There will also be an opportunity to share reports across the state. The Analytics Group might be working on that. I will put an SQL document together soon.

00:23:43   Roger R. Bell - College of the Desert - III Polaris: Are you using generic user name logins for student workers?

Roger, we have created generic user accounts. I'm still testing to see if you can log in at more than one browser with the generic account.

00:24:00   Cecilia De Anza: Can this account place a hold for others at the circulation desk?

Need to test this – I can't remember what we found at the time online.

00:25:24   erica: We are still unable to print from Alma. Any suggestions?

If you have email enabled printers, it is just a matter of mapping to those. My college doesn't use this method in our networked printers, so I haven't looked into it too deeply. You may have to get your IT folks to help.

00:29:35   Patricia Martin: and I've logged into the same machine many times using the same login

00:30:29   Jon Stocker Merced College: I've heard conflicting things about the generic student worker logins. Have you tested if you can use the same student worker login at 2 different computer stations at the same time? We have 4 circulation stations. Do we need 4 student worker logins?

I will be testing this out and will report back.

00:30:53   Citrus College: Not a direct circulation question, but our cataloger cannot see the technical services desk on her log in. Can anyone advise how to fix that?

Check the roles on that user's account – there might be a role or two that they need that was missed.

00:31:55   Lisa Hatt (De Anza College):Back in mid-October I raised concerns on the LSP-All list about the Quick Cataloging records you

recommend making for course reserves getting published to OCLC. Was there ever any more discussion about that impact among the Circ workgroup and/or Cataloging?

Lisa – Per Jane at ExLibris, if you create a brief record and keep it in your institution local zone, it will not go to the network zone. There is no automated process that would override the selection of creating the record in the institution zone.

00:33:44   Citrus College: What roles do people need to have in order to access this?

If you are reading this, please email me and tell me what specifically you were referring to. Sorry.

00:36:23   Lisa Hatt (De Anza College): This is a relative date expression that means "Yesterday"?

00:37:01   Sara Cassetti: Yes, Lisa.

00:37:44   Patricia Martin: this formula wouldn't pick up overdue items that are measured in hours, I believe

Yes, that's correct. I'm going to look at the short loan parameters and options to see how it works.

00:38:24   Jeffrey Sabol: Can you put that formula in the chat

I sent this information to Jeff directly and will be including it in a guide at some point soon.

00:38:48   jhartzell: Lisa, my understanding of our quick cataloging procedures is to catalog it at the institution level, not at the network level. Are you saying that institution level reserve records were being published to OCLC?

00:39:00   Lisa Hatt (De Anza College): As far as I can tell, yes.

00:39:06   Lisa Hatt (De Anza College): According to ExL's documentation.

00:39:25   Lisa Hatt (De Anza College): "Publishing to OCLC is processed at the local institution level since this process is used to expose institutions' physical holdings. Each institution in a collaborative network determines how bibliographic and holdings records are published based on their requirements, regardless of any links to corresponding records in the Network Zone."

00:40:03   Lisa Hatt (De Anza College): So if an institution is publishing at all, these records would be caught in it unless they take steps to prevent it, is what it looks like to me.

Lisa, I answered this earlier – per Jane at ExLibris, our method is fine – a locally entered brief record can stay in the institution zone.

00:40:16   Alison: Could this report be shared? Thanks!

00:41:15   Sara Cassetti: Alison, anyone from your institution who can get into Analytics can access the report if it's in the reports folder.

00:41:43   Sara Cassetti: You can also export to Excel and email.

00:42:05   Alison: Excellent. Thanks, Sara!

00:43:13   Patricia Martin: michelle - would love the code for the 2 hour overdue material you are talking about - can you share the code for that

Patricia, I will share after we test a bit more.

00:44:12   Mary-Catherine Oxford: will the overdue analytics report automatically update, or do you have to run it every time then add it to your dashboard?

00:45:12   Sara Cassetti: Mary-Catherine, I believe it runs when you log in, so the results will be as of the time of your login.

00:45:45   Mary-Catherine Oxford: ok thanks, Sara.

00:47:29   Citrus College: We never print anything. Do we actually need to set up printers? What is everyone else doing?

I'm not sure you need it – I guess it depends on the institution. We are starting with not printing at all – everything is emailed. We will likely have to address the situation of a student or community member not having email, so I'll report on that later – I might have some instructions for adding a receipt printer that Ian at Cal State San Marcos sent me, so I'll look for that, too, and share out when I have some more clarity.

00:47:44   Deborah - Hartnell: If you set up the new quick printing, you don't need an email-enabled printer

00:47:58   erica: thanks.I would like the option. some students want a reciept

00:48:08   Kellye Cohn: we have to keep receipt printing as it's an equity issue

00:48:58   Citrus College: Thanks!

00:49:13   Deborah - Hartnell: I shared an example xsl file of the loan receipt letter formatted to fit a receipt printer. It's under the letters discussion in Canvas

00:49:30   Lisa Hatt (De Anza College): I really think that's not how it works though.

00:49:44   Lisa Hatt (De Anza College): You can upload new records that don't already have new OCLC numbers and they are assigned.

00:53:45   Patricia Martin: please share what you have and we can sort through what we need; any time saved on creating reports is great

00:54:47   Patricia Martin: printing is useful for hold shelf requests

00:55:29   cgerloff: We usually run our overdue long term book reports once a week, that is would be just a change in date parameters, right?

If you set it up with the SQL string, it should automatically run when you want it updated.

00:55:46   Cecilia De Anza: "Mary-Catherine, I believe it runs when you log in, so the results will be as of the time of your login." Just to disambiguate, this means it updates the display what was run the previous evening, yes?

00:57:48   Sara Cassetti: The report runs when you log in, but the data is only as of the last time it was updated.

What Sara says is true. If you hover under the Analytics menu, there are two dates and times. On the left is when the data grab was completed; the right shows at what time the system grabbed a snapshot of the data. So reports run after the time on the left includes data only up to the time on the right. There is about a four hour delay, in my case. Unfortunately, we are open until 9 at night, so after the 4 pm grab of data we can't see transactional data from 4-9 pm until the following 24 hours.

00:58:05   Lisa Hatt (De Anza College): When you were in Manage Patron Svc it didn't offer Create Request?

Need to double check on this one. Will get back to everyone.

00:59:50   Greg (College of the Redwoods):   This has been the most useful zoom meeting! Please do these once a month if you can, Michelle. Thank you!

01:00:30   Mary-Catherine Oxford: help with overdue letters and notices would be great!