**Circulation Workgroup Meeting**

**Dec 3, 2019**

**In attendance:** Michelle Ohnstad (Chair), Sara Cassetti, Amy Carbonaro, Lori Lisowski, Lauren Saslow, Sheila MacDowell, Romelia Salinas, Melissa Taylor, Anne O’Toole

# **Agenda**

1. **Alma Quick Tip: Finding Current Patron for Checked Out Item**

Michelle reviewed the document Sara created, an Alma Quick Tip guide for finding the current patron of a checked out item. The group reviewed the document and agreed it was ready to share out.

1. **Review ExLibris response to brief record cataloging**

The group discussed the issue raised by Lisa Hatt that brief/reserve records may publish to OCLC unless they’re appropriately suppressed. There continues to be confusion as to whether or not this is the case – whether or not publishing a brief record to the Institution Zone (as opposed to the Network Zone) means that it will also not publish to OCLC. Amy doesn’t feel we should be concerned because this issue hasn’t been encountered by other users, but Amy and Michelle will continue to discuss to with ExLibris to get clear answers on this. Michelle will provide an update once she gets clarification. Lori also mentioned having access to documentation in her department that addresses this and will update the group once she knows more.

1. **Idea for a “book” like version of all our guides as one document**

Michelle and Sara presented the idea of combining all of the “Alma Quick Tips” as a comprehensive single guide (as a combined pdf) with a table of contents. Lori mentioned that she has been adapting the Word doc versions of the guide to her own unit’s workflow and needs, and she prefers to organize the guides in an order that makes sense for her unit. The group agreed that continuing to provide the option to work with the documents as individual items as well as a combined guide will be helpful. Sara will work on creating the combined guide.

1. **Ideas for more guides**

* Printing
* Short loan courtesy and overdue notices
* Using Alma for print serials management
* Resource Sharing/ILL within the consortium
* Billing for lost items
* Inventory and weeding

1. **Alma vs. EBSCOnet for Print Serials**

Michelle mentioned the email she received from Amanda Robertson (ExLibris) regarding using the Circ Work Group recommendation to use EBSCOnet for print serials management. ExLibris wants to be sure we’re not suggesting that CCCL libraries *not* use Alma given that it’s the only way to connect current periodicals holdings with the user view in Primo. The group agreed that, post cutover, we will investigate further the procedure for managing print serials in Alma and will develop training documentation around that. Josh mentioned that we can still insert general holdings statements into the serials titles bib records if we aren’t concerned about an individual listing of issues holdings for those titles.

1. **Letters & Notices**

Michelle is working on the Letters & Notices training document. It is still in progress.

1. **Other feedback**

Michelle asked Romelia if there was any feedback on Michelle’s Circ Work Group webinar. She said her staff thought it was helpful but would still like more hands-on training/information. Melissa said that the webinar served its purpose, which was to provide a summary of the work of the Circ group – what has been accomplished and what’s to come. She explained that ExLibris is available for more hands-on training if that’s what’s needed.