**Circulation Workgroup Meeting**

**Sept 17, 2019**

**In attendance:** Michelle Ohnstad (Chair), Sara Cassetti, Antonio Lopez, Karen McCoy, Anne O’Toole, Sheila MacDowell, Lauren Saslow, Josh Hughey

# **Agenda**

1. Look at Survey Data
   1. What things seem to stand out as similarities/differences in policies/practices?
   2. Look at previous areas we focused on
   3. Are some things already not needed because we have our production environments? (i.e. User and Staff Management, physical items)
      1. Vendors and Print Periodicals

Receiving and managing print serials in Alma was discussed. The group agreed that print serials management in Alma is complex and requires many steps that are not necessarily relevant to many libraries. Sara Cassetti agreed to take on looking into alternative ways of managing print periodicals outside of the LSP, including through EBSCO.

* + 1. Resource Sharing

The group discussed resource sharing/ILL in Alma. Most use OCLC for ILL management per survey results (?%). The Alma Resource Sharing module could be useful as we work toward a resource sharing network among the CCCs.

* + 1. Reciprocal Borrowing

Is this currently a priority for discussion? How does everyone, if applicable, manage reciprocal borrowers? The group agreed to table this for later exploration and discussion. Establish best practices?

* + 1. Student Workers

Michelle explained how student worker logins are handled at MiraCosta. They have created generic circulation desk logins and assign Circ Desk Limited role to those logins.

The issue of overrides was briefly discussed. In Alma no override password protection is available. How does this impact practices at the circ desk? Ann discussed the Override Exceptions report they use in Voyager. While this issue wasn’t deemed a priority, Michelle said we should look into if similar tool/report is available in Alma.

* + 1. Letters & Notices

Should the group come up with some best practice recommendations? Can we share letters and notices through our network zone?

Michelle mentioned the letters & notices zip file that can be downloaded from the ExLibris Knowledge Center. She also discussed uploading the library logo into the letters and notices; she struggled initially with the size specifications required after several attempts and Sales Force cases. She will share out all Letters & Notices what they (MCC) have discovered and developed thus far.

* + 1. Circulating multi-part items

How is it done at your library? (Personal request of Michelle’s)

The practices varied among the group. Some barcode only one item (the main/parent item), indicating elsewhere in the record how many pieces are in the set. Others barcode each item.

* + 1. The topic of integrating reserve materials into class schedule was discussed. Ann and Antonio volunteered to look into how this can be achieved so that students can see what textbooks are on reserve before or at time of enrollment.