

# Circulation Services Group Meeting of August 3, 2021

Tuesday, August 3, 2021; 2-3:30pm [Zoom Link](#)

Attendees: Augustin Ramirez, Angela Arnold, Beth Shippey, Blake Lindsey, Bonita Dyess, Brian Light, Brice Sullivan, Craig Alderson, Dori Hsiao, Eileen Pinto, Ellen Dario, Erica Howland, Fedora Gertzman, Francis Francisco, Helena Meier, Jenifer Carter, Jenna Jackson, Jennifer Osgood, Jenny Schulke, Kristen Van Vliet, Lee Ann Titangos, Lillian Lee, Marito Solis, Mary Hardy, Michael Golden, Michele Buchman, Molly Rose, Nancy Lewis, Neda Salem, Paul King, Peter Basmarjian, Peter Soriano, Phylcia Mossiah, Robert Toyama, Ryan Barnette, Scott Peterson, Shannon Monroe, Sheehan Grant, Sophie Rainer, Tim Converse, Weston Tate, Whitney White

## 1. Introductions

## 2. Announcements

### 1. ETAS and Paging update

1. ETAS searching is still in effect; do not use Alma's pick from shelf list yet.  
On-site teams should only pull items on the daily paging lists

## 3. Alma Roundtable

### 1. AFN and ILL processes (Kristen)

1. Not starting until 8/25
2. Patrick Shannon shared an AFN proposal document with the group (see draft proposal below)
3. Will we be scanning articles on location?
  1. Try to do as much digitization on-site as possible using the Scannex machines at each library
  2. Ideally circulation staff would verify that the article is in the requested item
4. Morrison will be closed for the first month of the AFN, so a separate process will be required to grab them
5. Need to get permissions sorted out so that items can be lent from closed locations

### 2. How to triage emergent Alma issues (Brian)

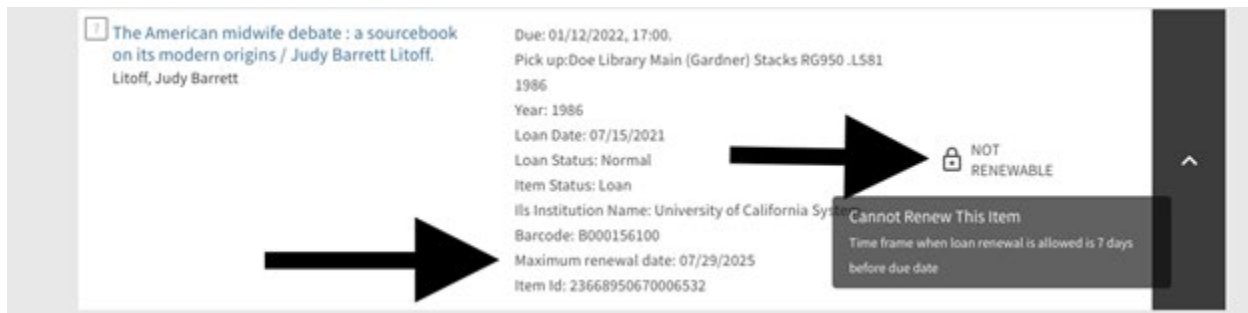
1. The group discussed a centralized reporting structure so CSG can escalate issues to PSC
  1. Concerns that helpbox may be overwhelmed
  2. Currently have a question submission form on the Fulfillment Google site.

### 3. Known unresolved processes

1. Searches / claims returns
  1. [Draft searching procedures](#) (shared by Peter Soriano)
  2. Staff talked about many searches we should do, and how often to perform those searches

1. Performing three formal searches—with some extra informal searching if the item is urgently needed or time permits—appears to be a good average, and keeps us consistent with other UC Libraries
2. Items from places that aren't currently requestable in Alma also can't be renewed (seen with ANTH/OPTO items)
  1. It appears to be tied to open hours
    1. As of earlier today, that has been resolved for ANTH
    2. OPTO is closed for the foreseeable future, so all future dates are closed. There is workaround in place to temporarily change the location of checked-out OPTO books in order to allow renewals
  3. LBL also having issues renewing items
3. Recalled items have due dates far into the future—beyond the normal 7-day window—as most libraries do not have open hours until late August
4. When data migrated, patron fines were severed from the individual item records, so checking in items that were billed doesn't automatically reduce the fine
  1. No clear instructions on how to handle as of yet
  2. Tell patrons to contact Privileges, who will determine their course of action soon
5. For several days post launch, the Patron/Pin login wouldn't accept new passwords
  1. Some patrons still encountering issues saying they were unable to reset
  2. Patron/Pin is for unaffiliated patrons only; people with CalNet logins must use CalNet
6. Some students report having issues logging in to their library accounts
  1. Recent graduates require manual changes in order to log in
7. Mass emails
  1. An email went out to every user with a list of any items they have out or any fines associated with their account
    1. The fines were associated with the old Millennium accounts, but not all the information migrated over.
      1. Can check the spreadsheet or the Millennium Training Server to determine what items the patron is billed for
    2. 150 different "letter" templates in Alma; many were set to active at launch
      1. We were not expecting the emails to go out, and are hoping to keep similar unexpected events from happening
8. "Unrenewable" message in Library Search patron accounts
  1. Items can't be renewed until 7 days prior to due date

2. There is a dropdown arrow that provides the relevant information



9. A number of items that should have been automatically renewed earlier this year appear not to have been, due to open hours issues

10. Old Millennium fines:

1. Access Services is dealing with dozens of open tickets, with several staff members working on it through the day
  1. Looking into surging remote staff to help work through the backlog
2. A number of staff have expressed interest in waiving Millennium-era fines, though no plans to do so as of yet
  1. Most other UC campuses have not granted an amnesty when they migrated to Alma, and amnesty is not a direction the Library wants to explore at this time
3. Some students are having issues registering for classes due to outstanding fines
  1. This only applies to "re-enrollment" students and staff can direct them to Privileges

11. Processing fees and limits on renewals have both been re-implemented, so any new billed items going forward will have processing fees, but items that have already been billed don't have a processing fee

4. **Reopening Concerns and Preparations**

1. Branch libraries may have more limited mail deliveries

5. **Open Discussion**

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### DRAFT AFN Proposal Document – Patrick Shannon

As we prepare for the launch of the Automated Fulfillment Network, I wanted to share with you the draft plan that ILL has developed for picking up and dropping off material at the subject libraries. I welcome your feedback and assistance in fleshing out the details.

As of now, we intend to have two campus paging runs each day, one in the morning and one in the afternoon. The morning run will be between 9:00 a.m. and 11:00 a.m., during which time our SLEs (and occasionally staff) will visit your library to collect the following:

-- Returnable items that you have pulled and barcode-scanned for AFN requestors (please remember to insert the Transit Slip)

-- Material that you have pulled and barcode-scanned for AFN digitization requests (please insert the printed 'pick from shelf' slip with each item - we will need it for the citation information).

Please designate a shelf or some specific location in your library for this material. If you have not had time to do your morning paging, don't worry, we can get it in the afternoon run.

At the same time, we will drop off the following:

-- Items from other UC campuses requested by Berkeley patrons via the AFN

-- Items from non-UC lending institutions received through traditional ILL channels.

In addition, we will be pulling items for non-UC borrowers, as we have always done.

Our afternoon run will take place between 1:00 p.m. and 4:00 p.m., and will likely contain most of the drop-offs, due to the schedule on which we receive shipments from the mailroom and the UC courier service.

Of course, we are dependent on SLE support to make all of this work, and almost all of our SLEs in August will be new-hires. We will be relying on our staff, and may have to improvise some processes in the short term.

Again, I welcome your feedback. The AFN is new to all of us, and ILL wants to work with you to make it a success.