

# Circulation Services Group Meeting of February 1, 2022

2-3:30pm; Zoom (virtual)

Attendees: Blake Lindsey (EPS), Jen Osgood (AHD), Erica Howland (SSD), Tom Brown (DMCS), Paul King (IGS), Angela Arnold (MUSI), Brian Light (SSD), Albert Chung (EAST), Weston Tate (NRLF), Craig Alderson (SOCR), Molly Rose (ENVI), Kristen Van Vliet (ILL), Ellen Dario (NRLF), Phylcia Mossiah (LHS), Lillian Lee (SSD), Peter Basmarjian (SSD), Auggie Ramirez-Lee (ITSL), Tim Converse (NRLF), Samantha Teremi (AHD), Jackie Gosselar (LIT), Brice Sullivan (LHSD), Neda Salem (ESL), Beth Shippey (EPS), Peter Soriano (EPS), Sophie Rainer (Access Services), Sheehan Grant (AHD), Fedora Gertzman (Bancroft), Shannon Monroe (ILL), Ryan Barnette (Access Services), Mark Marrow (Access Services), Marito Solis (Access Services), Patrick Shannon (ILL), Francis Francisco (LHS), Rosemary Sallee (Preservation)

## 1. Introductions

## 2. Announcements

- a. Mark Marrow – Changes to Alma configuration  
There will be a change starting tomorrow (February 2) in Alma, with the disappearance of the “other institution” button during item check in/out. As some UC campuses use their self check-out machines for AFN materials, and there is no way to indicate it comes from another institution, Alma has been re-configured so that users no longer have to select institutions. All barcodes have been identified as unique (no duplication), so staff will only need to scan the item barcode at check in/out. For NRLF/SRLF items, please continue using the RLF barcode.
- b. Mark Marrow – Starting today, users that are blocked with a manual block on the Berkeley campus will not be able to request materials through the AFN or ILL
- c. Brian Light – Private Security guards have been hired by the Library to handle unmasked patrons in the Business Library.

## 3. Correcting items recently updated to MISSING (Peter Soriano)

- a. An automated Alma job updated Fall Semester UCBears items to missing (the job ran on January 15). The best way to handle this issue is to find the items and scan them in manually to clear the missing status. How to find which items were a part of this job is easy: using advanced search, search by physical items with the process type of missing, then add a second search field where modification date equals Jan 15 (and 20), and finally facet by your location. Be sure to do a shelf check for all items in case valid missing items are on those lists.

## 4. Reporting process for unmasked students (Blake Lindsay)

- a. Building off of what the Business Library has been doing, PSC talked last week about unmasked patrons in libraries. For students, we will take names and CalNet ID numbers and submit those names in one daily incident report to the

Center for Student Conduct. Blake walked the group through the website form. Even if they are compliant or apologetic, we will submit a report in case the person is a repeat offender. The Center will follow-up with any student reports. The messages will escalate if the student repeats the behavior.

- b. Blake asked the group how often they monitor for unmasked patrons. In most libraries, career staff have been doing hourly/daily sweeps, not SLEs. Blake will coordinate with Doe security regarding this new procedure. Some supervisors have posted signage about mask compliance (with language taken from [this statement](#) from CSC), and other units have been making hourly announcements.

## 5. Privileges update (Sophie Rainer)

- a. Handling a book return inquiry from a sick/quarantining patron
  - i. If anyone gets questions from patrons who are sick/quarantining, Privileges is not doing any batch renewals like we did during campus closure. Patrons are still obligated to return their materials, or have another person return the items for them. Patrons can also mail books back to the return address listed on the website.
- b. Issues with books billed in Millennium and moved to Alma
  - i. If a book that was billed in Millennium gets returned in Alma, the replacement fee will not be removed from the account when the book is checked in. Please refer patrons to Privileges when billed books are returned.
  - ii. If the patron wants to pay the replacement fee, manually check in the item off the patron's account and move the item into a replacement workorder. This will make the item unavailable. Peter Soriano clarified the current "referred for replacement" status is just a placeholder as the Analytics group is still working on the referred for replacement process.
  - iii. If the book was billed in Alma and paid in Alma, the book is not automatically cleared if the book manually marked "lost." We may have to run a job to clear billed & paid items
  - iv. Do not mark a book as lost unless a patron is ready to pay the replacement bill right now.
  - v. (Peter offered another plug for Alma's advanced search: process type=tech migration + item 1 note = BINDERY, IN REPAIR, etc.)

## 6. Brainstorming a process for making bulk requests from NRLF (Albert Chung)

- a. A patron requested 100 items from NRLF. The workaround was to have NRLF check out items to the departmental account before sending the items to campus, but this didn't allow tracking of the items, and would require the books to be checked in and then out to the patron. In addition, some items were BUO. The patron would never receive any hold notices. A temporary location change was considered a possibility, but the process still needs to be thought through. We do have a need for a bulk request option, so a small group will get together and decide if a new restricted temp location with a set of specific TOUs would work.

- b. Tim Converse cautioned that we need to be careful, because this is actually multiple problems and each one will need to be considered separately.

## **7. Introduction to Alma analytics (Peter Soriano)**

- a. Peter ran us through an introduction to Alma Analytics and the various reports that a person could run. Peter offered to help anyone get at data if they have ideas and don't know how to configure the report. The Analytics subgroup is determining how to train staff on using this function, as it may require certain authorizations not open to staff currently.

## **8. Open discussion**

- a. Brice Sullivan asked a question about a library patron he recently worked with—can they make article scan requests of NRLF material? Yes, they should be able to, but when logged in to their UCLS account, they don't see the scan request option. It may be that the item is not scannable. It may also be related to the display rules related to user requests that can be adjusted on the backend of UCLS.