

Circulation Services Group Meeting of July 12, 2022

2-3:30pm; Zoom (virtual)

Attendees: Craig Alderson (SOCR), Angela Arnold (MUSI), Peter Basmarjian (SSD), Tom Brown (Access Services), Albert Chung (EAST), Ellen Dario (NRLF), Bonita Dyess (EPS), Michael Golden (LBNL), Sheehan Grant (AHD), Mary Hardy (ILL), Dori Hsiao (SSD), Paul King (IGSL), Brian Light (SSD), Blake Lindsay (EPS, co-chair), Shannon Monroe (ILL), Phylcia Mossiah (LHS), Jen Osgood (AHD, co-chair), Sophie Rainer (Access Services), Neda Salem (ESL), Beth Shippey (EPS), Marito Solis (Access Services), Peter Soriano (EPS), Brice Sullivan (LHS), Weston Tate (NRLF), Nga Tran (Access Services), Kristen Van Vliet (ILL), Michael Villarreal (EPS)

- **Introductions**

- **Announcements**

- Sheehan Grant – Samantha Teremi took a new position in the Scholarly Communications office and will be moving departments on July 5.
- Peter Soriano – EPS/EAL has a new evening/weekend work leader, Jose Hernandez. While Jose watched the Alma Fulfillment training videos, he added captions to all the videos that did not yet have them. Thanks Jose!
- Brian Light – SSD is going to have a new night/weekend person starting next week.

- **Remote training for new hires (Bonita Dyess)**

Bonita created a virtual training and orientation for new SLEs in Fall 2021 as a way to train them during the pandemic. She sent a “when is good” link to all her students to determine what days and times the majority of her SLEs were available, so she could train them as a group. It was held over 3 days, two hours in total. She aimed to create a comfortable, collaborative environment, with ice breakers and quizzes, and employed a mix of reading documentation at their own pace and activities such as virtual call number sorting. The feedback she received was generally positive and she found the new SLEs retained more information. She’ll send the slideshow out to the group and offered to help other supervisors develop their own remote training.

- **Return Items, Scan In Items & Statistics (Peter Soriano)**

Peter presented on Alma Fulfillment Analytics and the differences in using Return Items vs. Scan In Items. When staff use Scan In Items, you are given the option to register in house use. If you have the box unchecked, Alma will not add a count use to the item. Return Items is very different and can create statistics we do not want. If staff choose to use Return Items for an item not currently checked-out to a patron, Alma will automatically register a count use. (If you want to test this, please only use the sandbox.)

Therefore, our FY 21/22 statistics for internal use counts are going to be inaccurate.

The group further discussed whether we should even use Return Items given this problem. While there are good reasons to use each option, it can be hard to know which one to use and when. Would backdating be a problem if we only use Scan In items? How would this affect BUO items in Reading Room locations in Alma?

- **How to look up patrons from other UC campuses in Alma** (Sophie Rainer)

Patrons from other UCs no longer need to be issued a separate, UCB-specific library card to check out books. You can search for a patron by name or by scanning their ID barcode, and they'll have the user group "network" if their account is active in our Institution.

If they do not already have an Institution account, there are two ways for patrons to have their account brought in: either through using the AFN to make a request on a Berkeley item, or Privileges can search and retrieve a patron account in Alma.

There is additional information that needs to be added to the patron record, and their email needs to be validated, so it is best to send them to Privileges when the desk is staffed, or send an email if outside of open hours. If a field is missing—such as an email address—in the patron record, a pop-up will appear. If there's no pop-up, then their record is complete. All check-outs will display under "network activity."

- [Reviewing training documents for submission to fulfillment](#) (Sheehan Grant)

The co-chairs sent out the first four Alma Fulfillment documents to the group. This is just the beginning of the document review process. We plan to revisit these documents again, and we are hoping to continue refining the documents as we learn more about Alma.

Sheehan thanked other Alma Fulfillment group members for their work on creating documentation, and CSG members were welcome to add comments to the documents as they found new information or had questions.

Since the Return Items and Scan In Items documents did not account for the new issues with statistics, both documents will be discussed at the next CSG meeting. The **AFN Patron Physical Item Request Workflow** and the **Simple Checkouts & Proxy Checkouts in Alma** documents were generally approved, with a few additional comments and conversation about who the audience of these documents are.

For questions about formatting and language, a group is currently working on the wording of notes for statistics and tracking purposes. They are looking to follow what we did in Millennium, with the yyymmdd format and initials (unit and initials). When we migrated to Alma, all of the old internal notes were dumped into one field (Internal Note 1, with separate notes divided by a pipe | character). The group discussed

where to append new notes—front or back—and when to get rid of notes. Can we rely on the item history instead for certain things?

To the question about screenshots: Alma documentation is not going to include screenshots as Alma changes too frequently. For example, ExLibris is currently working on a new way of handling proxies, so this document will change.

- **Open discussion**