

Public Services Team

Agenda

- Collecting and entering statistics (Due Friday 7/19)
 - Piloting use of electronic statistic collection at Scholes. Mechele would eventually like to move to this method at both libraries.
 - Patty will help correct dates on Herrick headcount form for current year.
 - Have students help finish any remaining entry.

- Summer Alma timeline and projects
 - Cutover and data review completed.
 - We are Live!
 - Are log-ins working? (Patty reports some failed attempts. Everyone please report any problems.)
 - Are students able to check in/out and track in-house use?
 - Linda has Herrick Per binder, Mechele has Scholes Per binders. Both library desks will attempt to do in-house in Alma without binders. Monitor for good workflow. Report back.
 - Staff only make new accounts until we are clear on the process.
 - Some things are being worked out in Primo still-Summon should still be used for ILL. Patrons can't log in yet so account info for Ill requests not available yet-that's why use Summon in the meantime.
 - Continue to make note of any configuration changes or issues in Alma. Please email Mechele so we can track and resolve efficiently.

Priorities:

- Library Card Application (simple paper form now and possibly a Google Form later)-Mechele will draft application and new patron account work flow.
- Patron record clean up (assigned to Dave).
 - Brett is doing batch deletes of old records that were not supposed to migrate from Aleph. When that is completed Mechele will share a workflow for cleaning up some duplicate or incomplete records.
- Prepare for Overdue Notices to be sent (Assigned to Marilyn).

- Requires renewing items at the 3rd notice stage. Also contacting faculty with long overdue items.
- Discuss workflow for billing long overdue items.
 - Possibly moving this task to one person running the report for both libraries and a person in each building checks shelf. One person then places bills and/or contacts patron. Needs further discussion.
- Continue to look through our desk/student worker materials now and get a sense of what needs updating.
- Update circulation policies on our websites (Mechele will create drafts)
- Course Reserves (Marilyn and Dave)
 - Paper form and Google Doc on our website for professors to request reserves. What address would it go to?
 - Marilyn will send out meeting invite
- Student workers
 - Projects for students
 - Fall Training, look for dates for planning meetings. (Mechele needs Team to take the lead on planning. Marilyn will send meeting invite.)

Next Public Services meeting: Thurs. July 25th 2:00pm?