**CSU Northern California Access Services Meeting Minutes**

July 28th, 2016

San Jose State University

King Library

Rm. 225

Minute taker: Natasha Allen

*Present:*

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| *Natasha Allen, SJSU**Mario Alvarez-Fernandez, CSUMB**Aleta Asbury, SFSU**Jesse Ataide, SFSU**Ashour Benjamin, SJSU**Jason Chavez, CSUEB**Carolyn Chun, CSUEB**Mallory Debartolo, CO**Brandon Dudley, CO**Christine Evans, Fresno**William Folden, HSU**Ginnie Fong, SFSU**Jeff Frank, SJSU**Andrea Guidara, SFSU* | *Astra Gleason, CSUS**Julie Kowalewski-Ward, SJSU**Jamie Lamberti, CSUS**Judy Pan, SJSU**Mary Reddick, CSUS**Loren Rendler, SJSU**Dawnelle Ricciardi, Sonoma**Jodi Shepherd, Chico**Sarina Sinick, CO**Rae Ann Stahl, SJSU**Dennis Sun, CSUMB**Linda Torres, Sonoma**Tamara Valerio, SJSU**Paula Woods, Chico* |

Introductions and Welcome

 Tracy Elliott - Dean of Libraries, SJSU

 Rae Ann Stahl - Digital Futures Manager, SJSU

 Julie Kowalewski-Ward - Access Services Manager, SJSU

10:00 – 10:30 ULMS Overview - Julie Kowalewski-Ward

* Remember to sign up for the ULMS Access Services Listserv to get updates on what is currently happening with the ULMS and ask questions.
* The ULMS Wiki site is also a great resource: [https://calstate.atlassian.net/wiki/display/ULMS/Unified+Library+Management+System](https://calstate.atlassian.net/wiki/display/ULMS/Unified%2BLibrary%2BManagement%2BSystem)
* Brandon Dudley, Chancellor’s office
	+ The Official timeline for the ULMS is located here: [https://calstate.atlassian.net/wiki/display/ULMS/ULMS+Project+Timeline](https://calstate.atlassian.net/wiki/display/ULMS/ULMS%2BProject%2BTimeline)
	+ According to Brandon, we are hitting a lull in the project. From now until Spring, this is the time to focus on campus data issues, functionality, and decision making.
	+ The CO is looking to make decisions on how collaborative we want this group to be. The NZ can manage loan rules, etc, but we need to make decisions on whether or not this is advantageous for us as a group to centrally manage this or manage on a campus level.
	+ Alma configuration will remain as-is, and these changes/decisions have to be made by spring before the configuration freeze.
	+ It’s going to be fairly quiet on the Ex Libris side, but resource sharing will be gearing up very quickly here.
	+ The sooner we can decide what we want the initial configuration to look like, the sooner we can make other decisions related to resource sharing.
	+ Tech services has to deal with a longer freeze than we do, but AS only needs about 48 hours to deal with this.
	+ Brandon is open to any questions we have.
	+ Make sure to know your Go-Live date. The schedule is not finalized but Brandon will send it out when it is ready.
* Sarina Sinick, Chancellor’s office
	+ Post Migration Clean up - Suppressed Items
		- Follow these methods to find out how to migrate suppressed items: [https://calstate.atlassian.net/wiki/display/ULMS/Suppressed+Items](https://calstate.atlassian.net/wiki/display/ULMS/Suppressed%2BItems)
	+ Suggestions for how to treat Item Statuses in migration to Alma: [https://calstate.atlassian.net/wiki/display/ULMS/Item+Statuses+in+migration+to+Alma](https://calstate.atlassian.net/wiki/display/ULMS/Item%2BStatuses%2Bin%2Bmigration%2Bto%2BAlma)

10:30 -11:30 Taskforce Updates

* ULMS Financial Data Subgroup – Jamie Lamberti, Julie Kowalewski Ward, Bill Folden
	+ Report from Financial Data Subgroup (Jamie, Sacramento; Bill, Humboldt)
		- Survey sent out because there was inadequate information available about current fine policies and wish lists from other libraries.
		- 20 Campuses responded, but campuses who have not should do so ASAP
		- Summary: many campuses charge some sort of fine. Wide range of fines being charged. Most campuses charge for recalls or holds. Lost books have a wide range of charges from $40-165. Jamie thinks there is room for improvement the standard charges here. Main curiosity: would people consider an amnesty prior to cutover? The split on this is evenly between yes and no. Jamie believe this might be something to discuss in the near future.
		- **Question** from Fullerton: How should we approach talking with certain constituencies such as Academic Senate when discussing changes in policies? **Answer** from Jamie: they are aware of this, are considering it but there are currently no answers. Julie also says we are starting the conversation but at this stage is information gathering and the Committee will put forward a recommendation to COLD. Aleta says that San Diego re-did their fine structure and will send out the presentation they gave to their academic senate to the listserv
		- **Question** from Dwayne online: what if a campus does not want to participate? Answer from Julie: this is to be determined. At this point we are just starting the discussion.
		- From Bill: Based on studies that they found, this is the time to rethink why we have fines and if this is still a good model. The evidence suggests that patrons seem to respond more readily to lost charges than they do with daily fines.
		- Sacramento dealt with this by switching to automatic renewals but it became very controversial. Librarians were concerned about books not being on the shelf for browsers. Ultimately they switched it and moved it to 3 years of automatic renewals.
		- Basically, we want to know what makes sense for us to move forward as a group and what makes sense to move forward with individually. Many campuses are considering a change in fine structure and loan policies so this is a good opportunity.
* ULMS Policy Decision Subcommittee – Aleta Asbury
	+ - Aleta recommends simplification for as much as we can to make our lives easier and considering all libraries are dealing with shrinking staff, the less work they will be able to take on. This will alleviate some of the pressure.
		- Recalls: Should we consider doing recalls if we are doing auto-renewals? There was no final decision on this but there were a mix of answers.
		- Mallory: CO is considering how to create documentation for best practices on notices
		- Jamie: Considering a mass recall or a mass check-in and check-out so there won’t be any issues with weird due dates coming over from the old system.
		- East bay: many campuses currently run record hold lists then uploads to Peoplesoft.
		- Lots of campuses don’t take cash but only take checks, money orders, or student ID card.
		- Mallory: there is a working group in the systems and development area. A task force for Bursar integrating: [https://calstate.atlassian.net/wiki/display/ULMSS/Alma+Bursar+Integration](https://calstate.atlassian.net/wiki/display/ULMSS/Alma%2BBursar%2BIntegration)

11:30 – 12:30 Fulfillment Data Cleanup: Patron, Fine and Billed Items

Julie(SJSU): clean up related for SJSU: we cleaned up our old fines and did a patron purge. We also cleaned up some of our location names and merged others in the spirit of simplification.

Natasha(SJSU): cleaned up multiple names field because it was causing problems for our patron load.

East Bay: audited and cleaned up all of the circulation parameters and is still in the process of doing so. We are planning a purge of all library fees that were assessed prior to July 1, 2012.

Humboldt: They cleaned up old patron records, suppressed item records, and withdrawn items. They also cleaned up course reserves records.

Dwayne: suppressed items in Link+ but show up in their screens. Brandon says they should make that distinction in their migration form.

Notices: make sure that you clean up what information you want your notices to convey.

Jamie: abandon model of specific types of notices and move to considering what type of information your students are supposed to have.

Mallory suggests making sure your notices as similar as possible to prevent confusion.Mallory also says that the CO is working with the systems work group to figure out some helpful documentation for XML notification letters. More to come on this in the near future.

SMS Notices: we have to have a texting mechanism already to add to this. And you have to have a designated cell phone in their record. It would have to be an opt-in function. It’s not something that comes automatically set up with Alma.

Borrowing activity letter: it’s a regularly scheduled job that can be run manually as well.

Jamie says they have removed overdue notices and don’t do courtesy notices but do appreciate the borrowing activity letter.

1:00 – 1:30 Course Reserves

* New Migration Option for Course Reserves – Sarina Sinick and Aleta Asbury
	+ Course reserves can be migrated now and it will make it easier during the migration process.
	+ Aleta mentioned that a lot of the profile information got migrated to the notes section so it will need to be copy and pasted into Alma
	+ You can run a list of your current course reserves and copy and paste into those fields in Alma. You have to link the two profiles for course reserves but it’s only a little bit of clean up. It’s better than starting over.
	+ Sarina will be doing this separately from Ex Libris. Instead of giving ExL the file, you will give the file to Sarina if you choose to do this.
	+ Suggestion from Aleta: if you have a large collection, you should consider migrating over. If you have a small collection, you might consider starting from scratch.
* General Course Reserve questions
	+ Suggestion from Julie: start cleaning up course reserves now rather than later.
	+ Most schools are considering clean up and some are considering starting fresh.
	+ Jamie: they keep copies that have circulated 5+ times and remove the item if it doesn’t meet that criteria.
	+ Suggestion: CSU could have some better coordination and resources for encouraging faculty members to use more open access resources and less expensive resources.
	+ Idea from CSUEB: A2E2 funding(fee paid by students for student benefit): uses funding to buy expensive textbooks to put on reserve.
	+ Humboldt also looks for funding for course reserve textbooks. These programs are popular with students but there are concerns from other schools that this would be too cost-intensive due to the cost of the books and having to re-purchase them whenever a new edition comes out. The suggestion here is to encourage faculty to purchase cheaper textbooks or pick and choose which textbooks to purchase for that year.

1:30 – 2:00 General Test Load Discussion

* SFSU: Item types from migrated with weird names that are too granular (2 week dvd instead of just DVD). Sarina suggests looking at Alma to see if this is an issue with anyone else. She says it may also be a tech services issue.
* SJSU: Generally data migrated well, but we suggest that everyone check to make sure odd and unique data migrates over in a way that’s readable.
* Suggestion from Natasha: have a list of items from each policy you can use for testing. You don’t have to have them physically, just keep a list on your computer with the barcodes for the items so you can copy and paste them.

2:00 – 2:30 General Training Discussion

* Fresno: get functional areas together and follow along on laptops to learn together rather than on their own.
* East bay: small groups and a quiz at the end for training
* Suggestion from Mallory: have a buddy system so that 2 people can work together on learning how to use the system rather than on their own.
* Aleta: Drop in sessions and asking questions in small groups
* Suggestion: One-on-one training is really important
* Mallory: we have a lot of good information but use the website to add information in a knowledge repository. The issue with this is that the accounts are paid accounts
* Suggestion from Brandon: consider how what you learn in the workshop can be used to help those who don’t learn the way Ex Libris teaches.

2:30 – 3:30 Open Forum

* Circulation history discussion:
	+ Conversation started 15 years ago discussing not keeping patron history for privacy purposes because the government or law enforcement could use it to subpoena the library to see patron’s history, which is a concern for many schools.
	+ SJSU: Reading history is currently used for Sierra and Millennium libraries but Ex libris doesn’t have an equivalent.
	+ Issue with Alma: it keeps financial information which includes patron information but goes against the best practices for privacy set out by ALA.
* Aleta question about book fines: people currently do book fines but libraries are currently moving toward a non-fine model.
* Chico stopped fining because the money went to the university rather than to them so it eliminated some work for them.