



# **Circulation Services: Workflow Improvements through Technology**

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# Introduction

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- Circulation Services Manager
- Extensive experience in circulation services and staff training.
- Passionate about leveraging technology to optimize library day-to day operations.

# Learning Objectives:

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- By the end of this session, I hope you will:
  - Identify opportunities to improve circulation workflows through technology.
  - Learn best practices for implementing new tools and training staff.
  - Explore strategies for reducing repetitive tasks and transitioning to digital processes.

# About St. Charles PL

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- Monthly physical circulation between 70,000 and 80,000
- Annual physical circulation 854,511

# Agenda

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- Automated Material Handling (Lyngsoe)
- staffCirc TRAK Shelf Manager
- Inventory
- MobileStaff app for faster, more flexible library card registration.
- Digital reporting to eliminate paper-based processes
- Bluetooth Scanner



# Technology Enhancements

## **CircTRAK Shelf Manager**

- Second scans & inventory
- Increased accuracy & speed
- Allows us to connect dynamically to our ILS for real-time shelf scanning.
- Alerts staff of any items in an exemption status. This includes holds, items in transit, lost, missing, claimed returns, and even RFID-tagged items that have been deleted from the catalog.
- Can scan multiple items at once with greater accuracy and speed.
- Streamlines our workflow, reduces staff workload, and improves accuracy.



# Cost

Shelf Management System w/14" Laptop	\$4,995.00
Extended Warranty year two	\$272.80
Inventory Wand License Year 2	\$220.00
Total	\$5,547.80



[https://www.youtube.com/watch?v=PnOn\\_H1VwK4](https://www.youtube.com/watch?v=PnOn_H1VwK4)

# Vendor





# MobileStaff app: Library Card Registration

- For faster, more flexible library card registration

7:13 PM Thu Jun 5 84%

**Add User**

Take Photo  
Delete Photo

**General**

Options  
☐ Auto Generate ID

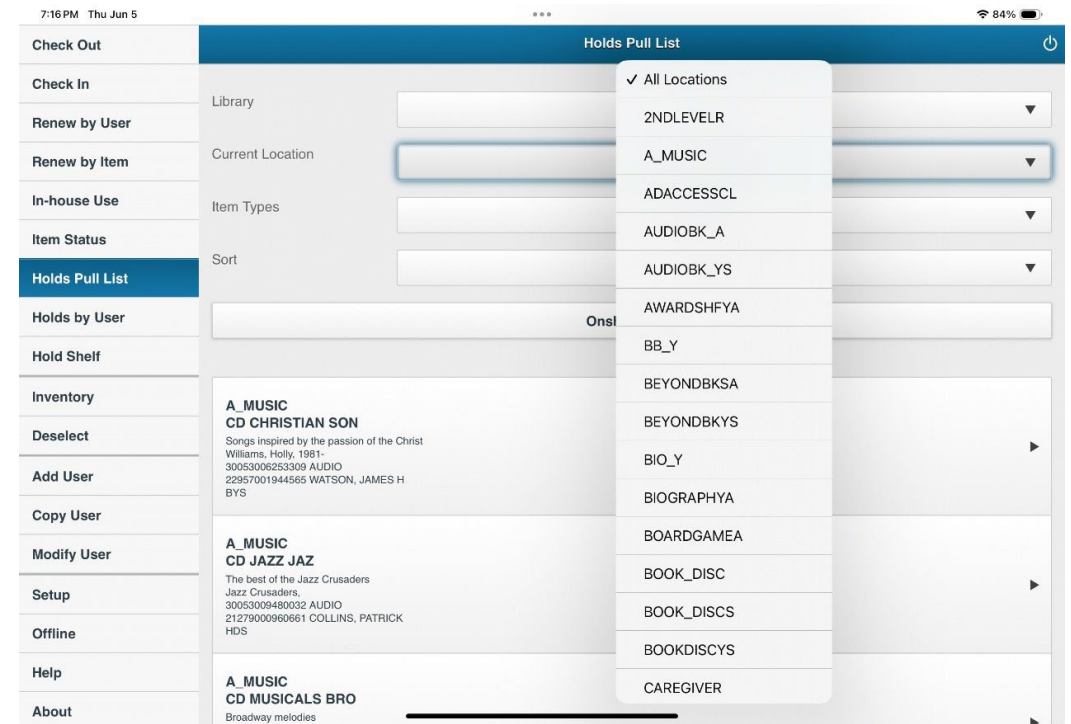
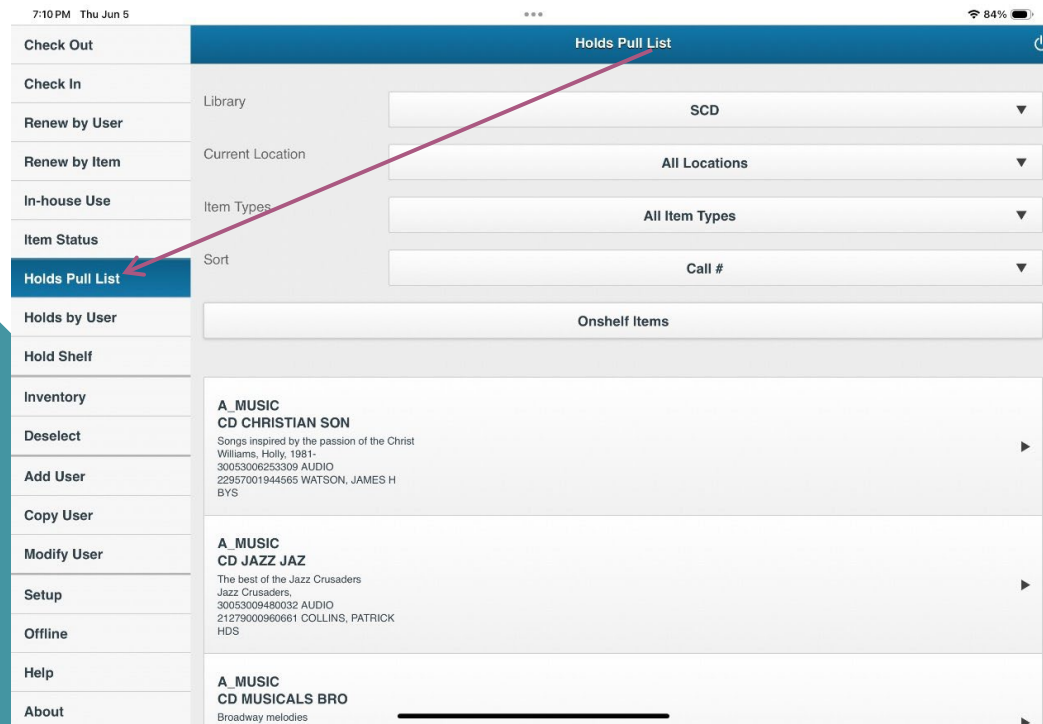
Barcode \*  
User Type \*  
Library \*  
Keep Circ History  
Language

No History Circ Rule All Charges

Scan Driver License Barcode

Title  
First Name

Add Cancel



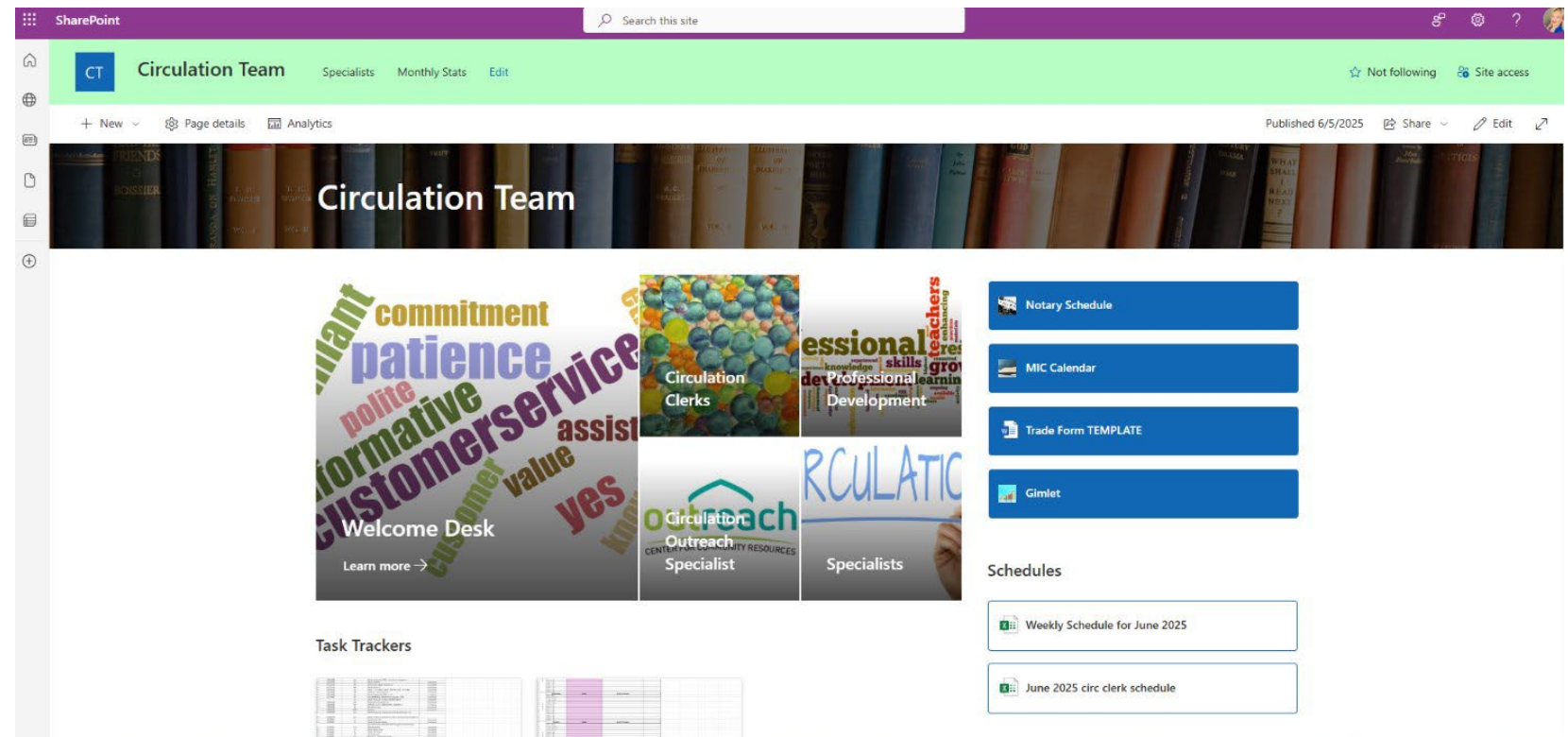
## MobileStaff app: Digital picklists

# From Paper to Digital: Streamlining Reports

- Items in Transit 10-30 days Paged by Transiting Library and Paged by Item Library
- Missing from hold shelf items
- Missing items
- Pre-billing Shelf-Check. Items 30 days Overdue
- Pre-Collections Shelf-Check. Items 45 days Overdue
- Holds SCD-D In-transit with Copies On-Shelf
- Holds SCD In-Transit with Copies on Shelf
- Picklist
- Item Library and Patron Library - Shelf Check for Custom Longoverdue Report



# Circulation Team SharePoint



The screenshot displays the Circulation Team SharePoint site. The top navigation bar is purple with the 'SharePoint' logo and a search bar. Below it, a green header bar features the 'Circulation Team' logo and links to 'Specialists', 'Monthly Stats', and 'Edit'. The main content area has a background image of book spines and the title 'Circulation Team'. On the left, a sidebar contains navigation icons. The central content area includes a 'Welcome Desk' with a 'Learn more' link, a 'Task Trackers' section with two calendar views, and a 'Schedules' section with two calendar links: 'Weekly Schedule for June 2025' and 'June 2025 circ clerk schedule'. On the right, a vertical list of blue buttons provides quick access to 'Notary Schedule', 'MIC Calendar', 'Trade Form TEMPLATE', and 'Gimlet'.

SharePoint

Search this site

CT Circulation Team Specialists Monthly Stats Edit

Not following Site access

+ New Page details Analytics

Published 6/5/2025 Share Edit

Circulation Team

commitment patience polite informative customer service assist value yes

Welcome Desk  
Learn more →

Circulation Clerks

Professional Development

Circulation Outreach Specialist

Specialists

Notary Schedule

MIC Calendar

Trade Form TEMPLATE

Gimlet

Schedules

Weekly Schedule for June 2025

June 2025 circ clerk schedule

Task Trackers

- Ongoing tech upgrades
- Utilizing RFID technology
- <https://www.youtube.com/watch?v=R5AMHSnccNs>



# Looking Ahead

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# Thank You & Questions

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