

Joint Automation Project Operations Committee
Minutes June 4, 2008 at MVLS 10:00

Present: Deb Callery (JOH); Valerie Catlin (MVLS); Becky Fasulo (COR); Jennifer Ferriss (SALS); Claudia Hayes (CPH); Mary Ann Hunter (SAR); Michele Largeteau (JA); Sharon O'Brien (MVLS); Diane Robinson (JA); Mary Ann Warner (SCP). Guest: Jennifer Jones, MVLS Intern

- Welcome by Michele Largeteau
- Topics from last meeting:
 - SS numbers/ID Standards- JA staff will work on this as time allows
 - Serials status- stalled at SAR; Mary Ann Hunter will convene a meeting of libraries interested in serials.
 - Credit Card use – JA committee met on June 2nd; with preliminary information from Polaris on how it works; payments may be made at a library that accepts credit cards, or from the patron PAC account. JA will poll libraries to see who now accepts credit cards, and who is interested in implementing credit card payments. Policies and procedures will have to be worked out for accepting payments due to other libraries. It is hoped to have this operational by the autumn.
 - Patron codes were added for CAN Friends, FTP Friends, and CAN/FTP Friends, as some people support both. Other Friends codes will be added for those libraries that have been using Staff/Board code grant fine-free privileges to Friends, which may affect transactions at other libraries.
 - New material types were added: Children's Audiobook and Children's Music, so that differing fine rates could be applied to children's materials.
 - PAC changes were made:
 - New link to library website from log in library name
 - RSS feeds for New Stuff
 - Single Login to enable patron to place multiple requests without repeated entry of barcode/PIN.
 - Logo and colors were changed.
 - Novelist Plus was approved and installed for nonfiction content; Novelist is not linking to selected title, and library holdings link is not working as well as expected.
 - New Polaris build was installed on 5/28 with little ado.
 - Claudia Hayes asked about display of request activation date in patron record; staff should instruct patrons to click on the "i" icon for this (and more) information. Cancelled requests are not displayed, where they formerly were for two weeks.

- Purging- Diane Robinson distributed a draft plan for purging. She had started by deleting about 5000 withdrawn item records. Because of differences in Polaris 3.3 from 3.2, missing information from patron and item records affects transaction history and reports as well.
 - Lost items- after discussion, it was decided to let them continue to display in PAC rather than be suppressed.
 - Withdrawn items- bib. and authority records where all items are withdrawn will be deleted.
 - Patrons- before purging any patrons, it is necessary to locate and separate any that libraries do not want to purge, and to purge old fines before purging patrons. DB patrons would not be purged.
 - Fines >7 years old would purge unless patron account was sent to collections agency, in which case, make patron Delinquent Borrower.
 - Find by \$ threshold (default \$50, library can request change) potential delinquents and place them record sets to change to DB class, and mark 'do not delete'; library can add/remove patrons from record set before purge.
 - Side issue: what to do with problem patrons who don't owe money (e.g., banned from Internet); solution: class as DB, with block explaining problem.
 - Missing for >2 year items - process monthly into record sets; library should check shelves, clear if found, and remove from record set. Record set will be bulk changed to withdrawn/ uncheck display in PAC/ non-holdable.
 - Lost items- need to delete these also before deleting patrons; purge if >7 years, and not associated with DB patron.
 - Patron record sets to be created for purging: owe fines and inactive >7 years; and no fines, inactive >3 years.
 - Bibliographic records- planned purge of bib. records having no items or serial holdings not modified in > 1 year; Diane Robinson to investigate what happens to patron reading history when bib. record is deleted.
- Other issues
 - Patron lacking statistical code- after discussion, it was decided to set the default patron statistical code for all libraries and branches to "--FIX ME—"; if record is not updated by library, trainers can find records by stat. class and have libraries update them on the 15th of each month.

- Cleanup jobs-
 - items that are In but not displayed in PAC (some deliberately so)
 - items without collections
 - record sets- while cleanup is a goal, it is not desirable to purge by age and lack of modification, as some are stable over time. Each library should check and weed their record sets.
- Trainer job: ensure that libraries run and post overdues and bills, in fairness to other libraries, whose materials patron may have.
- Reports- cleanup and menus were discussed
 - Identify and remove from menu canned reports that no libraries use. Feedback is needed from libraries.
 - Indicate which reports should be run only in off-hours, so as not to affect system performance.
 - More and better report descriptions
 - Remove reports from Polaris client that can be run from web.
- Next meeting – August 6th 10:00am @ SALS

Respectfully submitted,
Valerie Catlin