

Joint Automation Project
Operations Committee Minutes
October 7, 2009 at MVLS

Present: Vicki Adams (CPH); Deb Callery (JOH); Valerie Catlin (MVLS); Jennifer Ferriss (SALS); Mary Ann Hunter (SAR); Leah LaFera (CAN); Sue Laing (GLE); T. McDonough (WAT); Kathy Naftaly (GLE); Diane Robinson (JA); Peggy Stringer (SCP).

Welcome: by Michele Largeteau

Previous topics

- Lost Item Recovery Options: Polaris can automatically waive the replacement fee when a lost item is checked in.
Various scenarios were discussed: if returned at another library (transacting library's setting prevails); if the item has already been replaced, and the library does not want to issue a refund; differing library policies for time period within which to waive the fee; if the returned item is damaged (assess fine manually); if returned after the time period set (staff must resolve fee).
Action: JA will send a message that this will be turned on with a default period of 1 year, except for those libraries that have previously set a time period for this option; libraries can request change to the time period (range from 1 month to 999 years).

New topics

Polaris 3.5 Upgrade: the committee discussed various new options and settings.

- Circulation
 - Check In: Prompt for in-transit message in bulk Check In (message now displays in regular check in) (by branch)
Action: JA will not turn on, but will announce as an option
 - Check in: New Listview options- can add call number and/or shelf location (by branch).
Action: JA will leave as is, but announce options.
 - Check out: note the big Polaris icon where the patron picture would display.
 - Check-out: warn if item is from another branch
Action: JA will not turn on
 - Check-out: warn to send item in-transit
Action: JA will leave this on
 - Check out: new listview options- can add call number and/or shelf location (by branch).
Action: JA will leave as is, but announce options.
 - Patron Registration: Can filter patron codes displayed for a branch if there are some patron codes that will never be used at a branch;
Action: JA staff will decide the logical codes for each branch [though this may be more difficult than first thought]; will announce, and libraries can notify if they need changes.

- Patron Services
 - Patron registration fee: option to charge fee for registering paying patrons (by Patron Registration branch)
Action: JA will announce, explaining implications. If any library uses, all will need to know about it, in case the fee assessment shows up at another library.
 - Patron registration: UDF fields (ID, etc.) can be a drop down menu instead of free text. Action: JA will analyze data to investigate further

- Holds
 - Can maintain queue position for re-activated requests (by branch)
 - Action: The committee thought to leave default of No. [However, after further research and testing, it was learned that this setting has changed. In 3.3, there was a similar setting, which we have had on, and in 3.5, they revised that one slightly and added another one. We decided that we want to keep both of these 3.5 settings on (Maintain queue position for suspended/inactive requests; and Maintain queue position for re-activated requests) to be more consistent with 3.3 functionality and setting.]

- Notices:
 - Organization phone number added to from address on all e-mail notifications
Action: JA will notify libraries of change and suggest they review their specific wording, as phone number may also be in the subject; also verify all phone numbers in SA settings
 - Multi-lingual notices (Spanish): requires also changing preferences in patron records (can be done in bulk from record set).
Action: Announce as option
 - Oversize Z-fold mailers for notices (8.5 x 14): long lists would be fewer pages
Action: JA staff will customize when time permits and then announce

- Cataloging
 - Bib record display: Default view for bib records can be MARC21 (as it is now), PAC or Statistics Action: JA will announce option at staff level
 - Item record: has new history display (system wide setting)
 - Display Assigned Branch: Action: leave default Yes
 - Display Patron ID (control no.): Action: leave default No
 - Display time threshold: Action: set to 2 years, look at data retention issues
 - Permissions: Action: set to all for access, none for modify until/if we implement floating collections
 - Floating collections: Action: investigate later
 - Bulk change: warn if item assigned branch or home branch is changed
Action: set to Yes
 - Default undefined fine amount (used when a fine cannot be calculated) (system-wide): should not happen, as fine code is in each item record.
Action: set to \$5.00

- Acquisitions:
 - Acq. Fund Droplist setup – can filter funds that display for branch or staff member. Action: set to Yes to display all funds linked to parent library for those with branches.
 - Filter branches in line item segments- defaults to branch and funds in PO header Action: set to Yes for all libraries, but SALS will need to test for centralized ordering.

- Serials:
 - Delete linked issue / part when a serials item is deleted Action: set to Yes

- Permissions
 - Manage item more options from check in:
Action: For Circulation Clerk 3 and higher
 - Patron Registration: Merging patron records
Action: For trainers only for now. Trainers will develop guidelines.
 - Label Manager new options: Action: JA will investigate further
 - Bulk Change
Action: JA will test later and investigate extending permissions, with training required.

- Notifying Users: JA staff and trainers will develop a single email announcement. Each system will do its own training, if necessary.

- Upgrade date: November 11; expect to be up by morning of November 12; CPH, GLE, and SAR should be able to install staff clients by morning of 11/11.

The committee discussed a possible SMUG meeting for January 2010.

Next meeting: December 8th, 2009 9:30 at SALS

Respectfully submitted,
Valerie Catlin