

**Joint Automation Project
Operations Committee Minutes
April 7th, 2010 at SALS**

Present: Vicki Adams (CPH); Valerie Catlin (MVLS); Sara Dallas (SALS); Becky Fasulo (COR); Jennifer Ferriss (SALS); Lisa Flood (SCP); Sally Gillich (CPH); Mary Ann Hunter (SAR); Donna Kuhner (GLV); Leah LaFera (CAN); Sue Laing (GLE); Michele Largeteau (JA); Christine McDonald (GLE); Tim McDonough (WAT); Kathy Naftaly (GLE); Sharon O'Brien (MVL); Diane Robinson (JA).

Welcome: by Michele Largeteau

Previous topics

- Address Check Verification Block- the decision of the last meeting to impose a block was reviewed and rescinded, due to the hardship that a block for a yearly address check would impose on Crandall Library, with their self check stations. A letter from Christine McDonald, explaining the problems that this block would impose was shared with the committee prior to the meeting. Other libraries also rethought the decision including SCP (hardship on staff, would prefer to limit # of materials new borrowers can have) COR (noticed that when you work with a patron record you are informed that the address date has expired and you can update it at that point, without a block), SAR (hardship on staff, customer service, and would prefer address and patron card expirations were the same for their library), CPH (agreed and would like to check every 3 years) Action: JA will not turn on address check blocks.
- Standard terms for Address Check/Expiration- the decision from the last meeting to set address check dates of 1 year, and expiration dates of 3 years was also discussed and amended. It was agreed to set expiration dates of 3 years with an expiration block applied for all libraries, but to allow individual libraries to decide on the period for their address check terms. Action: JA will leave address check terms as is. Libraries are encouraged to use the email reminder notices for almost expired patrons. Contact computersupport@sals.edu to set this up.
- Self-check- It was noted that for self-check units at GLE, free text blocks do not impede patron activity, but library-assigned blocks do; this may vary by vendor.
- Further discussion on having to reset the two dates individually in updating a patron record led to an enhancement request: to update both expiration date and address check date to their default periods with a single simple command. Action: JA will submit this request to Polaris.
- No ID Recorded- an announcement has been sent out that a block on patron records for no ID will be imposed and reminding staff of the correct format for

the ID number field. Cleanup was done of NYS licenses that were incorrectly recorded (about 13,000 of them!).

- Purging- JA staff have learned from Polaris that historical information is coming from the transaction history, not the item; therefore, items can be purged. If item purging is done, running reports for older time periods may result in some item categories showing as 'none', but the numbers will be correct.
- Action: JA staff will move towards monthly removing items that have been withdrawn for more than a year.
 - The first step is to review and fix, if necessary, custom reports that rely on item information.
 - Next, they will send an explanatory message and alert libraries to run any historical reports.
 - Then they will begin to remove the items gradually, working up to a regular monthly schedule.
- Fee resolution-
 - There had been no comments on the draft procedures for the Fees owed to others and Fees owed to us reports since the last meeting, but Sue Laing pointed out that no note can be added when a fee is paid on the self-check machine.
 - Also, several libraries do not update paid-for items to withdrawn, because they give refunds, within varying amounts of time, if the item is returned. These paid-for items then stay in the system as Lost. They said that people pay to unblock their records, and then return the item for a refund. SCPL's check issuance process is so cumbersome that they are reluctant to issue refunds checks, and encourage patrons to keep looking for lost items.
 - JA can mask in the PAC items that are lost, but it is a system-wide setting, and cannot distinguish between lost and paid and lost and unpaid. There is sentiment for allowing lost and unpaid items to display in the PAC.
 - Sharon O'Brien requested that libraries be alert to forwarding payments for replacement fees to the owner, specifically to MVLS if the item is owned by MVLS (CBA and rotating collections.) Finding the owning library requires opening the item record, which on-desk staff may not have time to do, or neglect to do, and patrons sometimes come with a check made out to the transacting library. Payments due to all SCP branches should go to SCPL. Knowing the correct library to whom to forward payments will become more complicated and more important if floating collections are implemented.
 - Actions: Val Catlin will update the relevant how-to documents. JA will send out a message to site-contacts about the "Fees owed" reports and subscribe for automatic delivery the director or designated contact at each library. The emphasis will be on using the "Fees owed to others" first, and using "Fees owed to us" as a check against fees received. The time period covered in the reports will lag by some weeks to allow initial forwarding to complete.

- Credit card transactions in the PAC, if/when offered, will also complicate payments, which will be credited to the patron's registered library.
- In-transit reports- It was felt that not all libraries are running and checking these reports as often as they should. Action: JA will automatically subscribe the director or designated contact at each library.
- Standard Registration Form- Leah Lafera reported for the subcommittee, which said that there were so many variations in information collected, and physical size/format of registration forms across libraries, that standardization was impossible. The main advantage would be patron data entry for accuracy. Decision: The committee agreed that registration form standardization was not worth the effort, and abandoned it.

New topics:

- Unclaimed date – It was noted that some libraries do not remove their unclaimed held items often enough, delaying item availability to other patrons. Decision: The hold period will be not more than 10 days. Action: JA will announce the change (which will apply to only a few libraries), with a reminder to check for unclaimed items. JA will write a report of unclaimed items and send to each library daily.
- Email Delivery Failure report- The 3.5 version of this does not give information about returned messages, and is redundant to the current e-mail report. Decision: don't use it

Updates and Other items discussed:

- New material type: New and Popular software was added.
- Billing mailer was fixed.
- Item label printing problem was fixed.
- Michele will work with Sara Dallas and Carol Clingan on possible expansion of bulk change permissions.
- Patron request for automatic renewals of items out without patron action: not easily implemented; would run into blocks, and would not be acceptable to many libraries who wish to have materials available to other patrons.
- Renewals over the limit: There was recently a reminder about not renewing over the limit, especially another library's materials; trainers will be checking for such instances, and notifying the offending libraries.
- Patron record merging: trainers will do on request; but put all registration information you wish to keep (addresses, phone numbers) into the record that will be saved, lest the information be lost. The barcode from the 'merged from' record goes into the old barcode field in the 'merged to' record. Transactions, items out, etc. carry over.

- Patron with two records: while duplicate records are generally discouraged, there are a few legitimate cases where a patron is entitled to full privileges at more than one library (e.g., owns property in two towns), and that person may have two cards. It is recommended to cross-reference these.
- Credit cards: the question of a consortial arrangement with a bank so that all libraries could participate was raised. Kathy Naftaly offered to reconvene the credit card committee.
- JA staff is building the new mail server.

Next meeting- June 8th 9:30 at MVLS

Respectfully submitted,
Valerie Catlin