

**Joint Automation Project
Operations Committee Minutes
June 8th, 2010 at MVLS**

Present: Vicki Adams (CPH); Deb Callery (JOH); Valerie Catlin (MVLS); Jennifer Ferriss (SALS); Sally Gillich (CPH); Mary Ann Hunter (SAR); Leah LaFera (CAN); Sue Laing (GLE); Michele Largeteau (JA); Kathy Naftaly (GLE); Sharon O'Brien (MVL); Diane Robinson (JA).

Welcome: by Michele Largeteau

Previous topics

- **No ID Recorded-** Most patrons comply; some will show ID but do not want it recorded (staff put free text block in record); CPH has caught some duplicates. Suggestions for talking to patrons: JOH has a sign up stating there are 338,000 patrons are in the database and they want to prevent confusion; Jennifer Ferriss produced talking points for SALS libraries; point out that it is for patron protection, to keep anyone else from using their card intentionally or accidentally. Actions:
 - ILL agencies: JA staff will change so block will not display
 - Outreach: are both persons and agencies, so the block will remain.
 - ID shows on top of check out screen: some libraries find this useful, but staff should be careful that other patrons cannot see the screen. No change will be made.
- **Purging-** JA staff will start deleting items on 6/15, as stated in earlier message to libraries. This will be done in phases, as it must be done off-hours and manually. First will be items without blocks withdrawn over a year ago. It will be helpful to delete unused record sets first, to prevent having to approve each item. Also helpful would be to remove withdrawn items from record sets, but this is tedious. Bib records, except serials, will be deleted at the same time if not modified within the past year.
- **Fee resolution-** is under discussion at both Directors' councils.
- **Unclaimed date-** After last meeting's decision that the hold period will be not more than 10 days, it was learned that Polaris counts only open days, so this could extend the 'held' period to three weeks at a library that is open only 4 days per week. Action: JA will adjust unclaimed period based on the number of days open per week to approximate 10 calendar days.

New topics:

- **Volume field data entry conventions-** Polaris 3.6 can match on item volume field to fill holds, but only if the match is exact (including punctuation and

spaces). The committee discussed the Volume Field Conventions. Actions: trainers will revise the document. When that is available, a message will go out to libraries. Libraries should ask trainers if they don't know how to format an item. Cleanup will be done after purge.

- **Volume field on notices-** this is desirable in case patron requests wrong volume in a series, or needs to know which one is overdue. At present, volume field is included in printed notices, but not e-mail notices. Action: JA staff will try to add volume to e-mail notices.

Updates and Other items discussed:

- **Shelf location display-** has been wanted for a long time in Find and other screens, and itrac was filed. It can be displayed in 3.5 in Check out and Check in workforms, and will display in more places in 3.6. Action: JA staff will turn on shelf list display in Check out and Check in workforms.
 - **Billing full page mailer-** \$ amount shows in envelope window if there are three items on the notice; there was a fix a few months ago on notices with three items. Action: JA staff will contact Polaris to fix again.
 - **User-owned record sets-** There are old record sets owned by users that should be cleaned up, and the owners have been unresponsive or unreachable. While the clutter is undesirable, users like to make their own sets for various reasons, and permission to create user-owned sets will not be limited. Sets owned by staff that has left are deleted with their user name; an audit of user accounts will be made soon.
 - **Patron's Registered at library-** If a patron moves and uses a new library, and the Registered at library is not changed, holds, overdue and bill notices come from the new library, but reminders and expiration notice come from the Registered at library. Generally, the new library would change the Registered at field. If the former library discovers that it is unchanged, add a free text block. Exceptions are made for patrons who want to keep their old Registered at library for reminders, or their old barcode for database use.
- Next meeting – August 4th 9:30 at SALS

Respectfully submitted,
Valerie Catlin