

Joint Automation Project
Operations Committee
Minutes
October 6th, 2010 MVLS 9:30

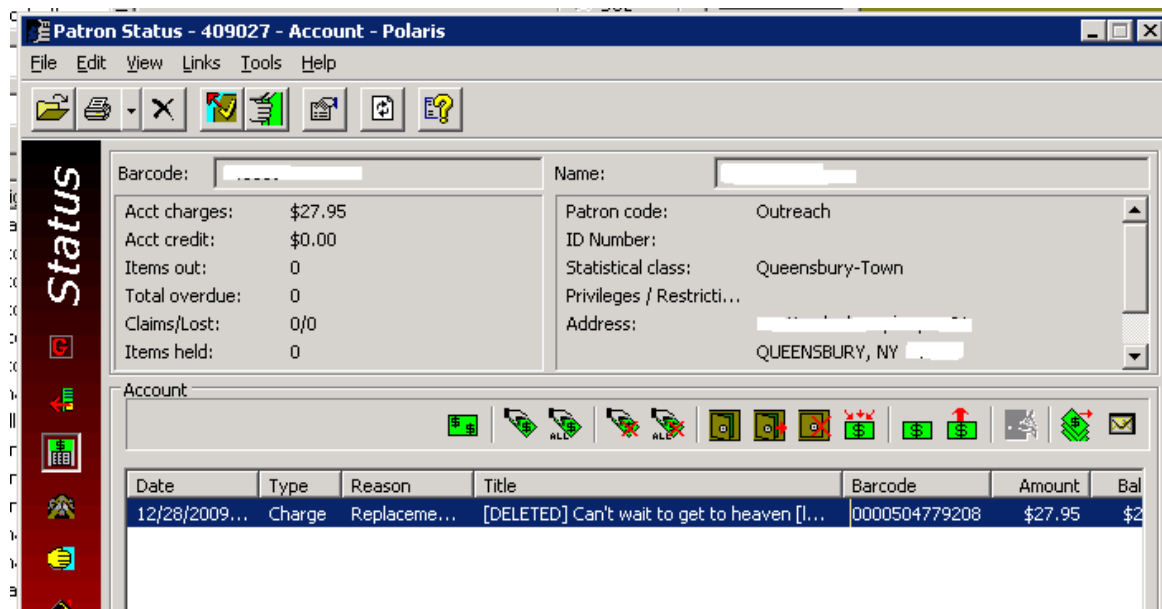
Present: Rebecca Fasulo (COR); Jennifer Ferriss (SALS); Lisa Flood (SCP); Sally Gillich (CPH); Mary Hanley (JA); Mary Ann Hunter (SAR); Barbara Germain (JOH); Donna Kuhner (GLV); Leah LaFera (CAN); Sue Laing (GLE); Michele Largeteau (JA); Kathy Naftaly (GLE); Sharon O'Brien (MVL); Diane Robinson (JA).

Welcome: by Michele Largeteau

Old topics:

- Purging

JA staff and trainers started deleting items and bib records on 6/15 and continue to do this on a monthly basis. Lost items will be added to the monthly purge starting in October. Lost items will be deleted if they have been Lost for over 7 years. The charge will remain on the patron record, and the word [Deleted] will appear in front of the title on the patron Account view.



If the Lost item was also on the patron's "Claims" list, then it will be removed from the "Claims" list and the patron "Total Claims" will be decremented for each lost item removed from the list.

- 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). Trainers revised and updated the volume field convention document. Actions: Trainers will send a message to libraries along with the new document. Libraries should ask trainers if they don't know how to format an item. Jennifer will create 2 different record sets for libraries: 1) unidentified volume fields 2) volume fields that are shelf locations.
A bulk change will be made to fix volume fields that are shelf locations before the next Polaris upgrade.
- Unclaimed Holds report
Laura Baker announced that the Unclaimed Holds report is available by subscription starting in October 12th 2010. JA will subscribe at least one person at each library to the "Unclaimed Holds Greater Than 10 Days" report. The automatic subscription will deliver a report (daily) of any holds that have been unclaimed for more than 10 days. If there are no "Unclaimed" holds over 10 days old, then no report will be sent.

Someone at the library should use the request manager to review and process "Unclaimed" holds at least 2 times per week. "Unclaimed" items that have been on the holds shelf for more than a few days should be checked in and sent to the next location if applicable. For more information about using the Request Manager to process Unclaimed Holds, please see [Instructions for Using the Polaris Request Manager](#).

There was discussion about Book clubs and unclaimed holds. Actions: There are none at this time

New topics:

- Lost Item recovery
JA logged an iTrac with Polaris over the summer. Currently if the original charges (that were created by the bill) have been changed at all (for example if the overdue fine is paid, or a partial payment is made on the replacement cost), then the automatic behavior does not occur.
- Downloadable Audiobook Collection
The upcoming NYS Annual report requires libraries to count Electronic versions of books (eBook), audiobooks (eAudiobook) and videos (eVideo). In order to count these items new material types will be added. Actions: JA will add new material types, trainers will update documents and an announcement will be sent out to the libraries. In addition Electronic

music (eMusic) will be added since in the future this might be a requirement.

There was a discussion about the naming scheme for Electronic/Downloadable collections. Actions: Each system will discuss with their members how their downloadable service should appear in the PAC for patrons. Jennifer and Sharon will discuss changing the GMD for Downloadable audiobooks from [electronic resource] to [eAudiobooks.]

- Registration permissions
After a brief discussion, the committee decided that Registration date and Maintain a Permanent Reading List fields in the patron record should have Polaris permissions associated with modifying the field. Actions: JA will create an iTrac to request that these two fields have permissions associated with modifying patron records.

- ILL loaning list
In order to provide public services staff at libraries the ability to provide better information to their patrons regarding materials at other libraries, there was a request to create a document that outlines what libraries are willing to Intralibrary loan as well as what a patron can borrow if they want to travel to another library to take out materials. Actions: Sally Gillich and Mary Ann Hunter will create a form for libraries to complete.

In addition there was discussion about email distribution lists. It was requested that an email be sent out at least twice each year to remind libraries to update their staff responsibilities. Actions: JA will send out an email to update contacts on distribution lists.

- Collection cleanup
There are several collections that have not been maintained/updated since we started using Polaris in 2005. Actions: Trainers will contact your library if there is a collection name that is relatively small and could move to another collection in your library. Trainers will also send an email to each of their members requesting information about the use of the qualifier "Adult" in your library.
- PUG 2010 summary
The main focus of the PUG2010 was the mobile PAC, iPod and Droid apps and Polaris 4.0. You can find documentation on 4.0 on the Polaris extranet. The tentative plan is to upgrade to 4.0 the first week of March.

Next meeting – December 1st 9:30 at SALS

respectfully submitted by Jennifer Ferriss 10/7/2010