

Joint Automation Project
Operations Committee
Minutes
February 16th, 2011 SALS 9:30

Attendance: Val Catlin (MVLS), Becky Fasulo (COR), Jennifer Ferriss (SALS), Lisa Flood (SCP), Mary Hanley (JA), Mary Ann Hunter (SAR), Donna Kuhner (GLV), Leah LaFera (CAN), Sue Laing (GLE), Sharon O'Brien (MVLS), Diane Robinson (JA)

Absent: Deb Callery (JOH), Michele Largeteau (JA)

Guests: Vicki Adams (CPH), Bridget Crouch (BUR), Sally Gillich (CPH), Judy Gerwitz (CPH), Susan Groesbeck (JOH), Christine McDonald (GLE), Kathy Naftaly (GLE)

Previous topics:

Purging : Item and bibliographic records are an ongoing process. After the 4.0 upgrade, Authority records and fines will be investigated.

Lost items are deleted after 7 years. If you would like them to purge sooner, they can be checked in and withdrawn (then purged) or they can be immediately purged if they have been Lost for over 1 year. Contact system trainers to discuss your options.

Volume field data entry conventions:

On October 8, 2010 an email regarding volume field conventions with examples was sent to site-contacts. 4.0 can process requests for the first available copy of identical items on books (travel guides, tests, etc.), serial (magazines), and multi-part sets (e.g., TV series on DVD) from the PAC and the Polaris staff client. This makes it possible for patrons and staff to place a request not just for any item linked to a bib (a bib-level request) or for one specific item (an item-level request), but also, for example, the first available copy of the July 5, 2010 issue of Time or Season 1 of The Sopranos.

Uniform data entry is necessary to allow volume specific requests in the PAC.

Downloadable Audiobook Collection :

New collections have yet to be created at a library's request. eBook and eAudiobook material types were added and were useful for the NYS Annual Report.

ILL loaning list:

Sally Gillich shared CPH's lending policies to the committee. Their policies are posted on their website:

<http://cphlibrary.org/documents/services/materialborrowing.pdf>

It was requested that libraries share their policies and the information be posted electronically with easy access for public service staff. Trainers and JA staff will continue to work on this project.

Collection Cleanup:

Several libraries had library specific collections with few items attached. Those collections have been cleaned up after a discussion with the director. MVLS and SALS conducted a survey to library directors regarding the use of "Adult" as a qualifier for collections; in particular, "Adult Magazine" and "Adult Video." 13 MVLS/SALS libraries were in approval of eliminating "Adult" and 4 libraries wanted to keep "Adult."

ACTION: An email will be sent to directors announcing the survey results and offering another opportunity to voice an opinion.

New topics:

AudioGo, EDI list on JA Intranet:

http://japroject.sals.edu/Polaris_Help/HowTos/acq/suppliers.html

Polaris 4.0 Upgrade:

Diane reported that there is an issue with Reports and web services and the issue has been sent to Bill Schickling. There are also some issues with the Mobile PAC. Both of these issues are not "showstoppers" so the upgrade will go as planned on the evening of March 1, 2011. The intentions are to finish the upgrade before libraries open to the public around 9 am on March 2, 2011.

The Operations Committee discussed the following (optional) settings in 4.0 with the caveat that if the setting is not system-wide, we can then offer libraries: to have any of these options changed from the default, please send a request to computersupport@sals.edu

Patron Services / Circulation:

Patron Registration / Status:

Registration - Required Fields: Currently it is possible to save a patron record without an address or birth date. In Polaris 4.0 we can make those fields required. (Branch level)

Default: address and birth date are not required to save a patron record.

Patron Messages: You can now post predefined and free-text messages to specific patron accounts. The messages are sent and managed from the Patron Status workform - Notes view, and patrons can read and delete them from the PAC patron account. (4.0 – 103) Patron messages have an expiration period and are deleted automatically after the registration period. The default expiration

period is 14 days. There can also be “canned” (pre-defined) patron messages (Branch level)

Default: do not give anyone permission. Directors can request permissions for their own staff and request branch specific “canned” messages. Directors can request a message expiration period other than the 14 day default.

Duplicate Patron Detection: Duplicate detection by birth date is now included in Polaris 4.0 (no options to turn that off). Voice Phone 1, and Email address can be added to the fields used for duplicate detection. (Branch level)

Default: do not add new fields to detect duplicates.

ACTION: Date of birth appears to narrow the search by looking at an exact match on D.O.B. as well as last name and similar first name. Continue to test this on Trainer and see if an iTrac should be written. Please provide Diane with samples of where D.O.B. interferes with the duplication process instead of catching duplicate patrons.

Holds / Request Manager:

Held and Shipped Requests in Hold Limit Calculations: In Polaris 3.5, hold requests with a status of Active, Inactive, and Pending were counted when calculating the total number of hold requests a patron can have and the limits by material types. Polaris 4.0 offers the system-level option to add requests with a status of Held or Shipped to the calculation. (System-level)

Default: only Active, Inactive and Pending holds are counted towards the limit.

Hold Requests – PAC Display note: Staff members with permission can add or modify a PAC display note on the Hold Request workform - Notes view. The note is available to the patron in the PAC Patron Account - Requests page and in the detailed information for a specific request. (Branch level)

Default: do not give anyone permission. Directors can request permissions for their own staff.

Check Out / Check in:

Check-in Listview: Collection is now available to display on the check-in listview. For “Normal” and “Bulk” the fields available to display are: Title, Material Type, Shelf Location, Call Number, Patron Name, Assigned Branch and Collection. In 3.5 at the system level (production), we have turned on: Title, Material Type, Shelf Location and Patron Name for both modes. (Branch level)

Default: Keep 3.5 settings and libraries can choose which fields they would like to display

In-Transit Slips: Have the option to print the branch abbreviation instead of the branch name. (Branch level)

Default: Turn it on system-wide to print branch abbreviation

Mobile Phone: You can add the patron mobile phone number field to the header information in the Check Out workform and the Patron Status workform.

Default: Leave the display as it is in 3.5 and each library can change if they want.

Check-in Receipts: You can specify the information on the new check-in receipts. Available data elements are: Author, Due date, Item Assigned Branch, Item barcode, Item call number, Item material code, Patron barcode [limited or full], Patron name, Status and Title. (Branch level)

Undecided: library will determine what they want

Lost Item Charges: In previous versions of Polaris, the replacement cost, processing fee, and overdue charges were calculated when the item's status changed to Lost, and the patron account was charged. In Polaris 4.0, it is possible to charge only the replacement and processing fees for a lost item. If the lost item is later recovered, but not yet paid for, the library can waive the replacement fees and instead calculate and charge the overdue fine at that time. If the item is later recovered and the replacement fee has already been paid, the library can refund or credit the replacement fee but charge the overdue fine, calculated up to the point when the item was returned. Note: it is important to set lost item recovery and lost-and-paid recovery options to match what you do with the lost item charges. (Branch level)

Default: Lost item charges will continue to work as they did in 3.5; library will determine what they want in 4.0

Notices:

Text message notification: Text message notification is possible. (4.0 – 92) There are several issues that we need to investigate more and test, so we may not be ready to implement this until after the upgrade is complete. (System level)

Default: Text messaging might not be turned on for March 2nd. It was decided that the notifications will run at 6 am once the issues have been resolved. Circulation staff can collect mobile phone for the new text message service, but they will need to inform patrons that they will receive a text message at 6 am if a notice is pending.

ACTION: System trainers will create a brief how to for the new notice option.

PAC:

Patron Expiration and Renewal from PAC: In Polaris 3.5, patrons were not allowed to renew items out from the PAC if the renewal would cause the item to be due after the expiration date of the patron's library card. Now it is possible to allow the patron to renew if the patron registration will expire. (Branch level)

Default: Renewal is allowed even when the patron registration will expire.

Block patron for verification: In Polaris 3.5, if the patron has a "verification" block, we do not prevent requests. In version 4.0, a patron can be blocked from placing requests if she/he has a "verification" block. Verification blocks are added when the patron has registered online or has requested updates to certain patron account information. (Branch level)

Default: patron is not blocked.

Patron Update Options: Patrons can update their phone and email without a block being placed on their patron record. They can also add their mobile phone and choose their notification option. (Branch level)

Default: Leave 3.5 settings as default

Acquisitions:

"Other" header charges can be renamed: You can choose another description for "Other" header charges on POs and Invoices. (Branch level)

Default: "Other".

Circulation item status for EDI receipts: In Polaris 3.5, when on-order items are received due to receipt of an EDI invoice, the item status is changed to "Processing". With Polaris 4.0, it is possible to leave the item status as "On-order". (Branch level)

Default: Item circulation status will be changed to "Processing" when the EDI invoice is received.

Serials:

Serials Check In: In Polaris 3.5, only "Expected" issues are displayed. With Polaris 4.0, you can display issues that are "Expected", "Claimed", "Pending Claim", "Never Published", and "Not Available". (Branch level?)

Default: display "Expected", "Claimed", and "Pending Claim" - libraries can choose to remove any of those statuses add "Never Published" and "Not Available"

Staff Client – General:

Patron, Bibliographic and Item Record Find Tools: When searching with a search type of keyword or phrase, for some "Search by" values, the find tool displays automatic suggestions (you can turn them on or off). (System level)

Default: This feature still is up for discussion with the PAC Steering Committee; the Operations Committee recommends that this feature not be turned on.

New Features in 4.0:

Diane went through several new features in 3.6/4.0 taken from the Polaris What's New documents.

First Available Copy Hold Requests:

It was decided to turn on Serials and continue to investigate and clean up monographs.

ACTION: Trainers will investigate volume fields further and decide on a method to clean up the field (e.g., shelf locations, # of discs, etc...) that prevent the first available copy request to work smoothly for the patrons.

Next meeting – April 6th 9:30 at MVLS

Respectfully submitted by Jennifer Ferriss