Joint Automation Project
Operations Committee Minutes
8/17/2011 at MVLS

Attendance: Deb Callery (JOH), Val Catlin (MVLS), Jennifer Ferriss (SALS), Lisa Flood (SCP), Sally Gillich (CPH), Mary Hanley (JA), Mary Ann Hunter (SAR), Leah LaFera (CAN), Michele Largeteau (JA), Sue Laing (GLE), Sharon O'Brien (MVLS), Diane Robinson (JA), Jason Thompson (JA)

- **Welcome**- by Michele Largeteau

- **Previous topics**

  - **Purging**- No changes at present; the next purge category will be fines, then patrons.

  - **ILL loaning list**- see lending.mvls.info and lending.sals.edu. The list that CPH uses in-house is posted as an example. After extended discussion, it was decided to keep a table for each library, for <u>exceptions</u> to normal borrowing and ILL lending (to reduce size and data entry and maintenance), and to include the loan period but omit the fine rate. The top of each page will show a link to the library's web site for hours and contact information. The libraries on the Operations committee will serve as a pilot project.

  Polaris 4.0 Upgrade

  - **Text messaging notification**- was tested and functions.
    - Messages are limited to 160 characters; if that is exceeded, the notice sends as multiple messages.
    - Messages come through slightly differently on different phones.
    - Hold text message will not be generated if a hold has been picked up.
    - If the number is inoperative, the message is returned to the sender (xxx-notices). Whether or not it goes as print or email depends on 1) the notice type 2) patron settings and 3) if the library runs printed notices.
    - JA has asked Polaris for more flexibility in timing message release.
    - JA has filed iTrac for ability to remove notification options that we don't use from the patron workform.

  - <u>Recommendations</u>:
    - Libraries should use additional text messaging only, i.e. for requests and reminders only; not as primary notification, which would include overdues and bills.
    - The messages can be customized by library; the committee recommends against including library phone number, to reduce call-backs. The messages provided by Polaris are acceptable, except the committee changed the default registration update message to: "Your library registration will expire soon. Please visit your library to update your membership."
    - Libraries and patrons must understand that text messaging is opt-in, as there may be wireless carrier charges.
    - The "Patrons with invalid notification" report should be run and acted upon daily.

- JA will implement additional text messaging after Labor Day.
- Prior to implementation, these will be required:
  patron record cleanup, information and promotion to libraries, updating of how-to documents, amending library card applications.

- **First available copy holds-** This new feature is now working for serials records. JA had a conference call with John Barr at Polaris to explain how we would like this to work better for us. Trainers will continue with volume field cleanup, focusing on newer items.

- **New topics**

- **Telephony-** Some libraries have expressed interest; JA is researching needs and costs (hardware, licensing, fees, phone line expenses, as some calls will be long-distance)**.** Libraries may need to run and post holds notices daily.

- **New build**- Polaris has fixed almost all issues, so JA plans to take new build overnight 10/25-10/26, and on trainer in September.

- **Book clubs**- while libraries want to give good service to their book club readers, this has sometimes resulted in behavior unfriendly in a consortium-- old unclaimed holds, extended checkout periods, and monopolizing popular titles. After some discussion, Leah Lafera volunteered to draft guidelines for libraries.

- **Other items discussed**

- **Patron accounts, when patron is leaving the area:** patron requested that the record be removed from the database. Deleting the record would affect statistics, so it is recommended that after staff determine that there is nothing active on the account, that they expire the account, add a block, change address to "Bad address", name to something like "moved patron", and remove e-mail address and telephone numbers.

- **New patron code requested** for "new borrower SAR resident"; JA staff will discuss with SAR.

- **PUG Conference** (Fall, Dallas, TX)- Jennifer Ferriss will attend; JA staff will not.

Next meeting –October 5th at 9:30 at SALS

Respectfully submitted, Valerie Catlin