Joint Automation Project
Operations Committee Minutes
April 15, 2013 at MVLS

Attendance: Deb Callery (JOH), Val Catlin (MVLS), Becky Fasulo, (COR), Jennifer Ferriss (SALS), Donald Flinton (SAR), Lisa Flood (SCP), Mary Hanley (JA), Mary Ann Hunter (SAR), Leah LaFera (CAN), Michele Largeteau (JA), Sue Laing (GLE), Kathy Naftaly (GLE), Sharon O'Brien (MVLS), Diane Robinson (JA), Angela Strong (CPH), Jason Thomson (JA)

The meeting was mainly dedicated to "Decisions for Polaris 4.1 Settings", by Diane Robinson. *Decisions made are in italics below.*

Permissions
Overriding patron / item barcode blocks: Decisions made ahead of meeting:
1. Override invalid item barcode message: *allow to Training staff only*
2. Override invalid patron barcode message: *allow to Training staff and trainer-approved selected people* (SCP has been using for Outreach patrons, but is transitioning to standard borrower cards.)

New circulation permissions replacing "Override circ blocks: These blocks are now assigned to library2 level. *Allow all 9 to Library2 staff*
1. Override claimed item limits: allows checkout when the patron has exceeded the current or total limit for claimed items.
2. Override item assigned blocks: allows checkout when there is a library assigned block on the item.
3. Override item free-text blocks: allows checkout when there is a free text block on the item.
4. Override item limit blocks: allows staff to continue a check-out or renewal operation when the item exceeds the limit for items out by material type, total items out, material type group, or reserve items out. [Note: Interacts with "Override non-circulating blocks", which is assigned at the Library2 or 3 level as each library chooses.]
5. Override overdue limit: allows checkout or renewal to a patron who has exceeded the limit for overdue or long overdue items.
6. Override patron assigned blocks: allows staff to continue a check-out or renewal to a patron who has a library assigned block.
7. Override patron blocking note: allows staff to continue a check-out or renewal to a patron who has a blocking note.
8. Override patron free-text blocks: allows staff to continue a check-out or renewal to a patron who has a free-text block.
9. Override request limits: allows staff to continue a check-out or renewal for a patron who has exceeded the total request limit, a request limit by material type or the ILL request limit.

Override associated patron block: Allows staff to continue a circ transaction when an associated patron is blocked. *Allow to library2 staff.*

Reset total claims count: to 0 (does not include current claims): *allow to Training staff only*

Permission to work with deposits: not used, so *allow to nobody.*

Manage import jobs for this branch: *allow to Technical Services Managers.*

SA Settings-- System-wide settings

Renewal with Optional Holds Block: Block if there are holds: *Set to No [But there has been further discussion and testing on this.]*
Renew items with holds: allows staff to renew an item that has holds on it. In 4.0, a permission was not required (a Library1 could do this). *Allow to Library4 staff.*

Fines at Check In – Auto charge: controls whether overdue fines are auto-charged when an item is checked in from the Item workform, the find tool or the items out view in patron status. *Set to No to duplicate 4.0 behaviors and allow staff to manually resolve fines.*

Notices
For reference: How Polaris settings interact-- Assuming that the branch supports sending all formats (Email, Print and TXT) and the SA Notification method is patron preference:

Notice Type	Patron Notification Method	Patron Additional Text	SA Additional Text	Resulting notices to patron
All types	Email	Yes	Yes	Email and TXT
All types	Email	No	Yes	Email only (when the patrons primary is not TXT and they are not flagged for an additional TXT, they will never get a TXT even if a mobile phone and carrier are entered).
All types	Email	Yes	No	Email only
All types	TXT	Yes	Yes	Only one TXT message (TXT messages are not repeated when the selection is redundant)
All types	TXT	No	No	One TXT message (Additional TXT does not have to be selected in SA when the patron preference is TXT)
Notices eligible to print (Request, Overdue, Bill)	Print	Yes	Yes	Print and TXT
Notices eligible to print (Request, Overdue, Bill)	Print	No	Yes	Print only
Notices eligible to print (Request, Overdue, Bill)	Print	Yes	No	Print only

Note: TXT messages for notification (for requests, reminders, expirations, overdues, etc) are still sent when notices are run (between 9:00 – 9:30 am daily). A patron is **not** texted when an item goes to hold.

TXT Notification:
Patrons can select their own notification options in the PAC, currently mailing address or email address; in 4.1 additionally, each library can choose to have text messaging enabled as a patron choice. If the text option is chosen, the library can also choose to force all bills to patron mailing address. *Text option off by default*

eReceipts: E-mail and TXT receipts for check-outs, renewals, renewals from the PAC, and fines: are produced within minutes of the transaction. The patron has the ability to change their own settings in the PAC.

- Patrons who choose to receive email eReceipts will get them for check outs, renewals and fines (even if the library doesn't print receipts for fines). *Default set to Yes system-wide*
- TXT receipts vary by phone; when multiple items are checked out, patron can get a TXT for each item, and long messages may be truncated or take up more than one message.
- *Off by default, optional by library*
- Send receipts for renewal from PAC: *Set to Yes.*

[See also related settings below in branch section.]

Note: eReceipts will come from the xxx-notices account for the library. Staff receiving that distribution list will need to respond to patron replies and returned (undeliverable) messages (correct patron data).

Fee Descriptions: *not all are used; those crossed out will be suppressed, and the list alpabetized:* ~~Borrow by mail charge~~, Case / Cover, Collection Agency, Copy / Print, Credit Card Processing Charge, Credit Refund, Damage, Hold Request, ILL, Manual Fine, Misc, New Card, Overdue Item, Overpayment, Patron Registration Fee, Phone / Fax, ~~Polaris Fusion purchase~~, Postage, Processing Charge, Rental, Replacement Cost

SA Settings-- Branch settings

Associated Patron Blocking
1. Linked record limit (default 20, up to 999 allowed) *leave 20 as default*
2. Block by default (default no) *No, but library can request change*

Charge for Checkout: can charge for checkout or renewal (e.g., up-front rental fee) and prompt in the staff client (which can be turned off); also available for SIP (self-check).
Check out charges use the settings for the item's assigned branch, so travel with the item. *Need to know which libraries use this (SHO does); affected items should be Holdable/ Limit to Pickup at this branch so that other libraries are not confused by checkout charges.*

Check out limits for Material Type Groups: a library can create a group that restricts borrowing of the total group of material types: (e.g., "Videos" might include Video, Children's Video, New / Popular Video and Children's New / Popular video). Thus a patron can be limited to 4 videos altogether, instead of 4 of each video type to total many more. Patron types that are already restricted to none, or lesser numbers, will continue to be so restricted. (e.g., Delinquent Borrower 0, New Borrower 1, Juvenile with Restrictions 0 adult materials, etc.)

Suppress Holds Checking on Offline Upload: *set to Yes, so staff do not have to search the logs from the upload to find items that would go to hold (they should appear on the RTF the next day).*

Optional Receipts: Print receipts only with prompt- *set to Yes, changeable by branch*
Note: receipt printing happens when all transactions for a patron are complete (at the end); it changes workflow and may make the transaction take a bit longer.

Suppress Waive all Function: *set to Yes; staff can still select some charges to waive. Can change (e.g., for amnesty period).*

<u>Length of time to retain notice history</u>: (for hold notices and item/account notices) *leave at default 90 days.* Note: Overdue notice and bill dates remain.

<u>Patron Registration Options</u>: "Default" values for some patron fields can be defined; the default value will automatically complete the corresponding item when a new patron is registered. New defaults and required fields are available for patron registration (regular and express). *Leave defaults as they are, and tell libraries what is available.*

Available in 4.0	Default
Registered at	Your library
Patron Code	None
Statistical class	FIX ME
Expiration term	3 years
Address check term	1 year
Postal Code	None
Language	English
Notification	Email Address
Voice Phone 1 Area Code	518
New in 4.1	
E-mail notices in plain text	No
eReceipts – E-mail receipts	
eReceipts – TXT receipts	

Required Fields: the patron registration cannot be saved until data is entered in the field.

Available in 4.0	Default
Address	No
Birth Date	No
Password	No
Statistical class	No
Available in 4.1	
Gender	No

<u>Check-out: Optional patron data</u>: (the information that displays in the upper right portion of the check-out work form) What is displayed and the its order can be set by library. Default display: ID Number, Statistical class, Privileges / Restrictions, Address, Phone 1, Email address. New in 4.1: eReceipt. *Leave as is, and remind libraries of what is available.*

<u>Check-out Receipt Options</u>: The content of check-out receipts can selected by each library (the display order cannot be controlled). *Leave as is, and tell libraries what new options are.*
1. Printed and e-mail Receipts- The fields selected to print on printed receipts will also be included in email receipts. Printed receipts also always include the "custom note" that is in the "Message text" entered in Circulation, Options, Receipt printer options.
2. *e-mail Receipts only- e-mail receipts can be sent for checkout and renewal; renewal receipts contain the same content as check-out receipts. Default contents: Custom note and summary data included; also include a Subject, Introduction and Footer.*

String name	Default	Recommendation
RECEIPT_CHECKOUT_EMAIL_INTRO	The following items were checked out by you on [DATE] from [BRANCH}	
RECEIPT_CHECKOUT_EMAIL_SUBJECT	Checked-out from your library	Checked out from [library name]
RECEIPT_EMAIL_FOOTER	Abuse message	
RECEIPT_RENEWAL_EMAIL_INTRO	Items renewed on [DATE]	
RECEIPT_RENEWAL_EMAIL_SUBJECT	You renewed library items	

Operations committee members look at and notify JA if they think any changes should be made. JA tested afterwards and inserted [short branch name] where no library name appeared in the notices.

3. TXT receipts- TXT messages beyond 160 characters may be truncated on some phones; selected fields should be minimal.
   Recommendation:

RECEIPT_CHECKOUT_TXT_SUBJECT	Checked-out from your library
RECEIPT_RENEWAL_TXT_SUBJECT	You renewed library items
RECEIPT_TXT_FOOTER	Access your library account for additional information

Hold Pickup Slips: are not enabled at present. They only printed for items that go to hold at the check-in branch; in 4.1 they can be printed with different orientations: Horizontal, Vertical or Tag. It is also possible to print the branch abbreviation on the hold slip.
Enable and let libraries know they exist and what options are available.
Note: patron privacy is better protected with less information on the slip.

In-Transit Slips: In 4.1 can print the patron name and/or barcode on the In-Transit slip as well as to add trailing blank lines. *Leave as they are; they work well.*

Items Out Receipt content: from the patron status workform (with CTRL-ALT-P).
Leave as in 4.0: Due Date, Material Type, Title; libraries can select other fields:
Fields available in 4.1: Author, Call number, Collection, Due date, Include custom note from printed receipts, Item assigned branch, item barcode, item count, Library phone, Material Type, Patron barcode [limited], Patron name, Renewals left , Title, Web address, ID Number, Privileges / Restrictions, Voter Registration, Cassie Use Only,
Question: can "renewals left" be re-named to "potential renewals" to be consistent with PAC?
Answer (following investigation): No

Fine Receipts: available fields unchanged from 4.0 to 4.1. If eReceipts are enabled for a branch, fine receipts will go automatically to patrons who select to have eReceipts with the same content as the printed receipt; the TXT receipt does not appear to contain everything that the e-mail receipt does
JA will check with Polaris about text receipt content.
Leave as in 4.0: Library phone, Web address, Suppress for waived charges

Other topics
Bills: Printed bills work well, and require less followup; for email and texted bills, a library must be attentive to rejected emails and text messages, and may have to generate a bill manually.

Volume field holds: Mary Ann Hunter reported that SAR has been using volume field holds (first available copy) for 2 months, and it has worked well. It will be rolled out for other libraries after 4.1 upgrade.

Respectfully submitted,
Valerie Catlin