

JA Operations Committee

MINUTES

November 10, 2015 9:30 at SALS

Meeting started at 9:30am

Present: Vicki Adams (CPH), Lori Albanese (JOH), Karen Bradley (SCP), Deb Callery (JOH), Becky Fasulo (COR), Susan Groesbeck (JOH), Mary Hanley (JA), Circe Johnson (GLV), Sue Laing (GLE), Michele Largebeau (JA), Kathy Naftaly (GLE), Sharon O'Brien (MVL), Jennifer Olsen (CPH), Ann Passinault (SAR), Diane Robinson (JA), Jill Ryder (SAL), Jason Thomson (JA), Paula Weaver (CPH)

Previous Topics

Loan Periods

At the June 9th JA Operations meeting we decided to make some changes to Loan Periods. We added Magazine and renamed Audiobook Short to New Audiobook. We asked if these changes are working for libraries and everyone said they were working fine.

TXT message notices

At the June 9th JA Operations meeting it was agreed that if a library chooses to allow a patron to use TXT as their notification option, that library must print bills. We have discovered a problem that when a patron from a library that prints bills and allows TXT for notification transacts at a library that does NOT print bills, the patron is getting a TXT bill from that second library.

DECISION: If a library chooses to NOT print bills and use TXT notification, they will have to manually follow up on all bills that are sent via TXT (from their notification summary report) to send a print bill to that patron.

Libraries will have 3 options and option 3 can only be used with permission from training staff for their system:

1. Force bills to print – then they can send all other notification types via email and/or TXT.
2. Do not use TXT messages (the ability for that library to send TXT messages is deselected) – then all of their notification types are sent via email and/or print. Note: additional TXT messaging doesn't work either when we do this.
3. Need permission / approval of trainers to use this method: Continue to use TXT messaging, not force bills to print and manually send a printed bill to any patrons that were billed via TXT (using the notification summary report to determine who needs to be billed and the (Notices, Overdues) Patron Billing Statement by Patron Barcode to print the bill).

If a library does not currently do option 1, the trainers will change settings to option 2. If your library is interested in option 3, you will have to contact your system trainer.

JA Operations Committee

MINUTES

November 10, 2015 9:30 at SALS

Polaris Permissions

New documentation on the JA Intranet

We have updated the documentation that explains the different account types for Polaris. It can be found under Polaris Support & Training, Polaris How To's, General, "Polaris User Account Permission Levels"

Patron delete

DECISION: Currently Circulation Clerk 4 permissions include the ability to delete your library's patrons. Because patrons should only be deleted in very specific cases, and in most cases patron accounts should be merged, we are going to remove this permission. When a library needs to delete a patron, they should contact their system trainer to do so. If it becomes a hardship for the library to not have this permission, we will consider adding it back as an individual permission to be given only to a few staff.

Patron messages

DECISION: Currently the ability to add a message to a patron account (which will show in the PAC on My Account for the patron) is an individual permission that is only given to a few specific staff. It was discussed and decided that it should remain an individual permission, rather than granting to Circulation Clerk 4 or 5.

Purging Fines

We now have the ability in Polaris to delete patrons who have been inactive since a specific date or time period, AND owe less than a specific fine amount.

Some specifics are:

- The job cannot include or exclude based on Patron Code (for example, retain Delinquent Patrons)
- The job does honor the "Do not delete" field in patron registration
- It can be run for different values for different libraries, for all patrons that are registered there, regardless of where the charges occurred
- We can generate a record set to be reviewed by the library before we delete

DECISION: We will bulk change all Delinquent Borrower patrons to have "Do not delete" checked. We will delete all patrons who have been inactive for 7 years and owe less than \$5.00, by default. A library will have the option to choose different values and we will generate a record set for each library to review, if they wish.

Diane mentioned that we are still planning to purge Acquisitions records, but still have more testing to complete.

And Collection Agency is still planned for the near future.

JA Operations Committee

MINUTES

November 10, 2015 9:30 at SALS

Polaris upgrade to 5.0 SP1 & SP2

New permission – Bill a charge manually

This new feature will put a bill in the queue to be added the next time bills are run.

DECISION: This permission will be added to Circulation Clerk 5 level staff

Claim Missing Parts

This new feature was added with the 5.0 upgrade (and discussed at the June 9th Operations meeting) and some fixes are included in this update, but there are still problems. Namely that when an item is Claimed Missing Parts, the overdue is not charged, and when the item is returned complete, the blocks are not removed. The issues were discussed and libraries agreed that they are happy with their existing solution for items returned with parts missing, because they end up with a bill going to the patron. The conclusion was that we are not interested in this feature and do not see a reason to make any enhancement requests.

Changing Hold Pickup Locations

This new feature and its problems were discussed. The problems include:

- A pickup location can be changed to a branch where the patron would be ineligible to hold or borrow the item, or where there is no item to fill the request
- After the location is changed, the status is not always properly changed to “Not supplied”
- Sometimes a warning is issued for staff (or the request is prevented for patrons) when there is an item that would fill at the new location

We have the ability to block this feature for patrons in the PAC, but the most we can prevent for staff still allows holds that are for pickup at your library’s branch to be modified, but not holds that are for pickup at other locations. Staff can modified holds in any status, included shipped and held.

There is now a new section at the bottom of the Request Manager screen for “Held items for transfer”.

DECISIONS:

- We will not turn on for patrons in the PAC
- We will limit as much as possible for staff, but trainers will notify staff that they should NOT modify pickup locations but should delete and re-enter the requests, as then the system will abide by the defined rules. And if an item shows up in their “Held items for transfer” window, they should notify system trainers.

JA Operations Committee

MINUTES

November 10, 2015 9:30 at SALS

- We will put in an enhancement request to Polaris to fix the problems and to add permissions based on statuses to give us more control

Other upgrade discussions

It was asked if we would be displaying claims in the PAC. This will not be turned on by default and will be discussed at the next PAC Steering Committee meeting, which will be after the upgrade.

Other topics

LEAP

This upgrade includes some fixes to the permissions for LEAP. Our plans are to turn on access to LEAP after the upgrade is installed and stable. Trainers are looking for staff members who would like to be part of a focus group to evaluate LEAP, provide feedback to Polaris and provide advice to other libraries wishing to use LEAP. If anyone is interested, they should notify their system trainer.

eContent Integration

This will be the next big project after the upgrade, LEAP and Collection Agency. CPH will be purchasing 3M Cloud Library that product will be included in the integration as well as Overdrive.

Deleting finished transactions

We have the ability to delete finished transactions that are over a specific age, by branch. Finished transactions are fines and fees that have been fully waived or paid and are no longer outstanding.

DECISION: It was decided that we would announce that finished transactions over 7 years old would be deleted and if a library would like a different time frame that could be accommodated.

The meeting adjourned at 10:50 am.