

Operations Committee Meeting Minutes

September 18, 2018 9:30 am MVLS

Present: Becky Fasulo (COR), Jen Ferriss (SAR), Lisa Flood (SCP), Susan Groesbeck (JOH), Mary Hanley (JA), Devon Hedges (COB), Maggie Hume (CPH), Sue Laing (GLE), Michele Largeteau (JA), Sharon O'Brien (MVL), Jennifer Olsen (CPH), Ann Passinault (SAR), Ike Pulver (SAR), Diane Robinson (JA), Jill Ryder (SAL), Jason Thomson (JA), Eric Trahan (MVL), Sheila Woods (ROT)

Quipu eCard

- Questions, problems or issues -
 - How to enter County Routes in Quipu? We were unable to figure this out at the meeting.
 - On 9/21/2018 Diane Robinson sent email to the committee with the resolution:
 - You can enter a County Route as “CR 10” or “County Route 10” or “County Rt 10” or “Cty Rt 10”; Quipu will standardize it to “County Route 10”.
 - There is a difference between the Quipu error messages “Home Address: The street name entered is not recognized” and “Home Address: Street number incorrect”. In the first case, eCard doesn’t recognize the street name, and in the 2nd case it does not recognize the street number.
 - Procedures were discussed – A staff member registering a new patron would first enter the patron’s information in eCard, then immediately go to Polaris Registration to change fields as desired (such as patron code). (All the required fields should be completed by eCard.)
 - It was asked if a block could be added to block a patron at self-check? Verify address? We discussed that if the patron is added to the “Temporary” patron code (in order to limit type of material and quantity that can be borrowed), then a block should not be necessary.
 - After meeting information: Quipu has added a checkbox that can optionally be used to create a “Verify Address” block on the new patron.
 - Out of system patron code – We will be adding a new code for patrons who are not in the MVLS/SALS service area so that each library can enforce their own policies for these patrons. It will be called **Outside MVLS/SALS**.
 - Birthdate is a required field per the existing JA policy **Identification Information in Patron Registration**. It will be a required field in eCard and we will be making it a required field in Polaris. In those rare instances where a birthdate cannot be identified (examples – organization cards, resident of a group home) staff should enter 1/1/1900. It was requested that eCard data entry be changed to numeric instead of alphanumeric for month to be consistent with Polaris.

- It was noted that eCard will create each new patron record with the Polaris creator field of PolarisExec for all patrons. There was discussion about a way to determine who created the original patron record. JA will investigate options with Quipu.
 - Since the meeting Quipu has modified eCard to automatically fill in a field on the eCard screen called Creator using the username of the staff person who logged into eCard. This field data will be moved to a new field on the Custom Data page of Patron Registration labeled **eCard Creator**.
- It was asked if there is a way to retain address information when registering patrons in the same family so that staff do not have to enter the same fields repeatedly. JA will investigate options with Quipu.
 - Since the meeting it was determined that there is a family registration add on that we will purchase that will allow a staff person to “Register another family member”. This will display the form again, retaining previous applicable entries.
- There was discussion about bringing patron home. Different patron fields affect different services. Should registration branch be changed to always match statistical class (which is the chartered service area)? There was no resolution.
- Required fields – It was decided that all of the current required fields in eCard are acceptable.
- Field order – The field order is acceptable.
- Access URL – We will create eCard.sals.edu/?lib=xxx and a separate page eCard.sals.edu that will allow a staff member to choose the library
- Style – The current page is acceptable.
- Form timeout – We will see if it should be adjusted after Quipu eCard is in use.

Patron codes

- Delinquent Borrower – It was discussed that the current Delinquent Borrower patron code is no longer needed. Patrons are blocked and/or purged based on money owed, not patron code. Collection Agency does not use this code. Trainers and JA staff will work to remove this code. DB was removed on 10/02/2018.

Overdue/Billing intervals

- In order to effectively manage overdue notices and bills in a consortia environment, for the recovery of your own library’s items, as well as items belonging to other libraries, the committee discussed the need for shorter timeframes and more consistent settings.
- Operations will recommend to the Policy Committee to standardize overdue and bill settings in Polaris to the following:
 - 1st overdue no longer than 14 days
 - Bills no longer than 30 days
 - Lost item charge options changed to “Charge overdue when returned” (as opposed to when billed)

New “Childrens Book” and “Childrens New / Popular Book” Material Types

- To be consistent with other material types, such as Audiobooks and Music, and to allow better control of loaning rules for children’s materials, new Children’s material types will be created.

- Polaris settings, item templates and vendor ordering settings will need to be changed. Trainers and JA staff will work through an implementation plan and notices will be sent as tasks need to be completed by libraries.

Polaris IdeaWall

- Polaris has revised their enhancement process and we may ask libraries to help us to keep our requests in the queue, or to promote them.

The meeting adjourned at 11:20am.