

JA Operations Meeting

Minutes

April 5, 2019 9:30-10:45 at SALS

Present: Becky Fasulo (COR), Jen Ferriss (SAR), Lisa Flood (SCP), Sue Groesbeck (JOH), Devon Hedges (COB), Maggie Hume (CPH), Circe Johnson (GLV), Sue Laing (GLE), Michele Largeteau (JA), Kathy Naftaly (GLE), Sharon O'Brien (MVLS), Ike Pulver (SAR), Diane Robinson (JA), Jill Ryder (SALS), Jason Thomson (JA), Eric Trahan (MVLS), Paula Weaver (CPH), Sheila Woods (ROT)

Quipu

[How's it going with eCard and the eCardLookup tool?](#)

eCard seems to be going well. There was some discussion about specific instances.

It was discussed that libraries should use legal names when registering patrons, for duplicate checking and for collections. For example, use Jacqueline not Jackie.

If you encounter an address that you are sure will not work in eCard, it is ok to go right to Polaris to register.

[Can we turn off Express Registration system-wide now that eCard is the recommended method for registering patrons?](#)

After discussion, it was decided that we cannot turn off Express Registration at this time

[Next steps](#)

At some point (no projected date), we will investigate having eCard determine patron code automatically. This will require us to gather information from each library about how they would want the code determined in their library. We will also have to investigate cost.

We are also hoping to be able to implement Scrub, a Quipu product to clean up existing patron records. We have not determined specifications or costs for Scrub.

Proposal to implement Fine Free for MVLS libraries

The proposal outlined in the agenda was discussed. It was agreed that we do not need to implement any of the proposed changes. Libraries are not worried about the effect of lending to libraries that are implementing Fine Free. MVLS libraries implementing Fine Free will likely set PAC renewals to block when more than 5 items are overdue.

Proposal to implement Polaris “Patron Address Check”

The proposal outlined in the agenda was discussed. A message will be sent to site-contacts explaining the change and announcing the date that it will be turned on.

Proposal to add new Material Types: “Childrens Book” and “Childrens New / Popular Book”

We will be adding these new material types. All libraries will need to use these codes for their children’s materials, even if they do not plan to have differing loaning rules. Libraries must use the children’s fine codes as well, for items to circulate correctly at other libraries.

A new material code for “Museum Pass” will be added.

All new codes will be added and trainers will work with libraries to modify templates and bulk change items.

Other topics as needed

Diane Robinson mentioned the Polaris IdeaLab, which is Ill’s mechanism for enhancements. Please vote when Diane sends out messages asking for support.

The Polaris servers will be going end of warranty Fall 2019. JA staff is investigating options to replace servers or possibly switch to a Polaris Hosted option.

There was discussion about “bringing a patron home” and when it is appropriate to change the patron registration branch.