# **Circulation/ILL Advisory Group**

# **Agenda – December 9, 2022**

# **Zoom, 9:30 a.m.**

Meeting Access Information:  
URL: <https://us02web.zoom.us/j/84142368400?pwd=dEJub1BYbmh1WTVLcjhBaUFDd1VuQT09>   
Meeting ID: 841 4236 8400  
Passcode: 543136  
Dial-In: +1 312 626 6799

1. **Call to order** 1 min
2. **Approval of minutes from last meeting** 2 min
3. **Additions to the Agenda**   1 min
4. **Old Business**
   1. None
5. **New Business**
   1. CCS-hosted department distribution email (DISCUSSION) 10 min
   2. Polaris phone verification settings (DISCUSSION) 20 min
   3. Circulation report guidelines (DISCUSSION) 40 min

**Adjournment**

**Next meeting: Friday, March 17, 2023 (9:30am), Zoom**

All matters on the agenda may be discussed, amended, and acted upon

# **5a. CCS-Hosted Department Distribution Email**

**DISCUSSION**

**Would staff benefit from Circulation and ILL department distribution emails?**

Background  
CCS currently hosts technical services department distribution emails (ex/ [prktech@ccslib.org](mailto:prktech@ccslib.org)). Tech services staff will send questions about cataloging or verifying item information to a specific library using the department email. The email is then sent to staff signed up to that distribution list.

CCS currently does not host department distribution emails for Circulation or Interlibrary Loan departments.

Use of Department Distribution Email  
If a staff member needed to get in touch with a library on a non-urgent circulation or interlibrary loan matter, they could email the distribution list in place of specific staff members. For example, if a library wanted to ask Lake Villa to check their shelves for a claimed intra-CCS loan item, they could email the department distribution list for Lake Villa, [lvkcirc@ccslib.org](mailto:lvkcirc@ccslib.org), and the email would be sent to all staff who are part of the list.

Expectations and MaintenanceDepartment distribution lists would require some maintenance from both libraries and CCS.

Libraries:

* Would respond to inquiries to their library’s distribution list in a timely manner
* Would inform CCS of staff email additions or removals to the distribution lists

CCS:

* Would add and remove staff emails from the lists as needed

## Questions for Discussion

1. What would pros be for Circulation and ILL email distribution lists?
2. What would cons be for Circulation and ILL email distribution lists?
3. Would reporting staffing changes to lists be manageable for managers?
4. Would there be situations staff should email directly instead of use a distribution list?

# **5b. Polaris Phone Verification Settings**

**DISCUSSION**

**Would staff and patrons benefit from activating the phone format verification setting?**

## Background

Over the past few months, libraries have reported intermittent issues with text notice delivery. During these periods, notices to specific carriers are blocked for a short period of time. The increase in undeliverable messages is an ongoing issue as email and text providers tighten security and spam filters. One recommendation from Innovative to address this issue is to remove invalid numbers (such as mis-formatted phone numbers) as this downgrades the sending reputation, which then may lead to carriers blocking the notices.

Polaris has a setting that will verify phone number format. The phone verification setting checks phone numbers against a pre-set format. CCS does not currently use this setting. If enabled and a staff member saves a patron record, Polaris will check if the patron’s phone number(s) have an invalid format. This includes numbers that have too many or too few characters, or letters instead of numbers. If a staff member tries to save a record with an invalid phone number, they will see an error message.

Graphical user interface, text, application

Description automatically generated

Staff will need to re-enter the phone number in a valid format in order to save the record. To make a call through the Polaris telephony system or send a text notice, a phone number must have 10 digits. Verification settings allow the following formats:

* 9999999999
* 999-999-9999
* (999)9999999
* (999)-999-9999
* (999)999-9999

Users with other data or types of numbers in their phone fields, such as extensions, international numbers, or Do Not Call note, would be flagged by the verification setting and prevent staff from saving the patron’s record.

In testing, we found phone verification will *not* apply in these situations:

* If the patron does not have a phone number on file AND only receive email or print notices, they will not be flagged
* Patrons will still be able to modify or add a phone number with an invalid format in the PowerPAC

Polaris has options to activate the setting where it looks at all phone numbers *or* just numbers used with text notifications. The verification setting can only be activated at the system level.

Other Polaris customers are thinking about using this setting to help mitigate notice issues. CCS would like input on if this verification feature would be helpful for our library staff. If so, would it be more effective for verification to consider all phone numbers or just numbers used with text notifications.

Verification is currently off in our production environment but has been enabled for testing in our training environment. Verification is currently set to look at all phone numbers. Advisory Group members will first test verification on all phone numbers and discuss at the December meeting. After the meeting, we will adjust settings to apply verification just to text numbers. The Advisory Group will test adjusted settings and discuss via email.

## Pre-Meeting Testing

Ahead of the December meeting, Advisory Group members should test interacting with patron records in training Leap.

1. Log into training Leap (<https://ccs-training.polarislibrary.com/LeapWebApp>)
2. Open a patron record with invalid data in the phone field
   1. Use the “Patrons with Invalid Phone and/or Email Address” [Web Report](https://reports.ccslib.org/) to identify patrons
   2. Use a test patron record (listed below)
3. Open the user’s Registration workform
4. Test scenarios where you need to modify the user’s registration information (renewing the card, changing notice preferences, activating the eReceipt option)
5. Consider the following discussion questions through the lens of this patron interaction

## Test Patron Accounts

|  |  |
| --- | --- |
| **Patron Barcode** | **Invalid Number Reason** |
| 20123 | “DO NOT CALL” in Phone 1 |
| 20456 | Extra digit in Phone 1 |
| 20789 | International phone number in Phone 1 |
| 20135 | Extension listed in Phone 2 |
| 20246 | No phone number on file |

## Questions for Discussion

1. How would this change affect the staff experience?
2. Would you be able to complete the interaction if the patron is unable or unwilling to give their phone number?
3. How would this change affect the patron experience?
4. How could phone verification settings impact special patron types (in-house cards, ILL cards, business/school cards, outreach cards)
5. The Web Report, “Patrons with Invalid Phone and/or Email Address” lists patrons with an invalid phone number (more or less than 10 digits).
   1. What are the benefits of using the report over the verification setting?
   2. What are the drawbacks?

# **5c. Circulation Report Guidelines**

**DISCUSSION**

**What reports should be included in Circulation report guidelines? How frequently should libraries be expected to use these reports?**

## Background

In between the Staff Client and Web Reports, library staff have access to an overwhelming amount of reports. There are 89 reports (not including custom reports) in Web Reports alone! A number of these reports can be applied to circulation data and functions.

Aside from processing the picklist and unclaimed holds ([*CCS Governing Board Policies, p.41*](https://www.ccslib.org/sites/default/files/2022-04/2022%20March%20CCS%20Governing%20Board%20Policies%20APPROVED.pdf)) CCS does not have set guidelines on reports or report-adjacent activity Circulation staff are required to use, recommended they use, or the frequency of their use. However, questions around report use come up regularly.

CCS is interested in creating guidelines around report use. Guidelines would include which reports Circulation staff are expected to use and how often (monthly, weekly, daily). Additionally, we are considering if use of any reports should be codified into policy, like with the picklist and unclaimed holds.

To get discussion started, the Advisory Group will discuss reports their department uses and their frequency of use. [A curated list of reports is available to start the discussion](https://ccsliborg.sharepoint.com/:x:/s/CCSTraining/EeWwK7tHXc5KpS_APYYm4HkBr-Txo_pmMbTbp2LnpxPdWA?e=mAZ6Y1), but group members are welcome to discuss any report they use on a regular basis.

## Discussion

1. Which reports does your department use?
2. How often do you use these reports? (Daily, weekly, monthly, less than monthly, do not use)
3. What level of impact do these reports have on patrons and patron data? (Major, moderate, minor)
4. Are there reports you or your department use regularly that are not on the curated list? If so, which ones?
5. At this time, are there reports you could see codified into policy? This would require libraries to use the reports on a set frequency, like pulling the picklist or unclaimed holds.