**Minutes**

**CCS Circulation Technical Group**

**Live via Zoom**

**Friday, July 14, 2023**

**9:31 a.m. - 10:35 a.m.**

**Chair Crouse (NIK) called the meeting to order at 9:31 a.m.**

**Attendees**

Apisara Houltram (ALK), Belinda Husk (ALK), Dana Jenkins (DPK), John Lavalie (DPK), Fernando Martin (DPK), Michelle Meyer-Edley (DPK), Gabriela Mansera (EVK), Ben Heet (EVK), Keri Carroll (DUK), Karen Bolton (MUK), Karen Kee (GVK), Liz Steffensen (HUK), Donna Klehr (HUK), Denise Wahl (HUK), Tori Sergel (LFK), Stephanie Haugan (LNK), Jeffrey Ray (MGK), Athena Crouse (NIK), Donna Beach (NBK), Kim Hegelund (NBK), Karen Bollman (PAK), Anastasia Rachmaciej (PRK), Ann M. Thomas (PHK), Alisha Smaby (RLK), Jian Rao (RLK), Matthew Hoffman (WLK), Courtney Volny (WNK), Paula Pavelski (ZIK), Mieko Fujiura-Landers (CCS), Kathleen Weiss (CCS), Rachel Martin (Mt. Prospect)

**Approval of minutes (minute 0:20)**

Thomas (PHK) made a

**Motion:** to approve the minutes of the April 14, 2023 CCS Circulation Technical Group Meeting

Bolton (MUK) seconded the motion

**Motion passed**

**Additions to agenda (minute 0:45)**

Mieko added discussion item regarding patron renewals to discuss at the end of the meeting

**Officer reports (minute 1:00)**

Chair: Athena Crouse (NIK)-none

Vice Chair: Dana Jenkins (DPK)-none

Secretary: Anastasia Rachmaciej (PRK)-none

**CCS staff reports**

**Updates from M. Fujiura-Landers (minute 1:10)**

1. Reminders for the group regarding fees/payments. All available in the governing board documents regarding payments can be found on the website. Payments can be made at any CCS library and any payment made at your library stays at your library. Member libraries have the flexibility to apply their best practices and local policies when determined accepting reduced payments or waiving charges.
2. Reminder regarding missing items. If an item is missing, change the circulation status to missing. Do not check out to an in-house use card. The reason is because changing the circ status to missing will make item unavailable for holds and suppress from the catalog.
3. Damaged items: if you come across a damaged item in rails delivery. Use the in-transit damaged and missing procedures.

**Old Business**

None

**New Business**

**Bounce text notice procedure** **(minute 4:30)**

K. Weiss covered why this is happening, what is CCS doing and when will this issue be resolved. SMS notifications at CCS currently rely on a gateway sending an email to send a text to a patron.

The issue is that cellphones and text have gotten a lot smarter at detecting spam. A lot of times when a gateway is used, the text is marked as spam and the patron does not receive the test. The issue is that the Library is not sending spam so the best solution is to move to a vendor that does not use a gateway to send notices.

CCS has reached out to vendors and have decided to use MessageBee – Unique Management. CCS is awaiting final approval from Governing Board and plan to implement SMS with MessageBee prior to Warren-Newport migration.

Email/phone notices will still be sent out through CCS, wireless carrier will still be required and libraries will still receive bounced text notices.

7**.4 setting change: cancelling holds in held status (minute 16:10)**

M. Fujiura-Landers shared background that the CCS Circulation and ILL Advisory Group reviewed settings for upcoming Polaris 7.4 update (August 2023). They are bringing their recommendation to the Technical Group to change the setting to allow the ability to cancel holds in held status. Currently, staff and patrons can only cancel holds if they are still pending (requested, paused, locating or shipped). A new setting would allow patrons and staff the ability to cancel holds with the status of ready for pickup in the PowerPac or through LEAP. A warning would be shown to the patron. Any cancelled hold will be added to the picklist tab- holds that were cancelled. Only applies to intra-ccs holds not out of system ILL’s. Will appear under “cancelled” tabs.

Default: Patrons and staff are not able to cancel a ready-for-pickup hold. The held item must be checked in to be removed from the patron’s record.

New: Patrons and staff can cancel a ready-for-pickup hold. The hold will be added to a picklist tab to be pulled.

Rachmaciej (PRK) made a

**Motion:** to approve the setting change of cancelling holds in held status

Hegelund (NBK) seconded the motion

**Motion passed**

**7.4 setting change: combined picklist (minute 24:50)**

M. Fujiura-Landers discussed the second setting option to combine the picklist view. A new picklist setting would combine the view into a holds to action tab (unclaimed, cancelled and holds to transfer) this setting does not include unclaimed ILL holds. Anything out of system will remain separate. The picklist will display the hold condition (cancelled, to transfer or unclaimed).

Default: Leap picklist has separate tabs for unclaimed, holds to transfer and cancelled holds

New: Leap picklist has a combined tab for unclaimed, holds to transfer and cancelled holds.

Rachmaciej (PRK) made a

**Motion:** to approve the setting change of combined picklist tab

Bolton (MUK) seconded the motion

**Motion passed**

**Warren-Newport migration update (minute 29:06)**

M. Fujiura-Landers updated the group regarding the Warren-Newport migration which is to take place over Memorial Day weekend. CCS is working on a page

August 31: Warren-Newport offline

September 1-4: All CCS libraries offline

September 5: CCS libraries online

September 6: Warren-Newport online

Offline Circulation Review

M. Fujiura-Landers shared there will be an offline circulation webinar August 16 @ 10 a.m. The webinar will be talking about remote offline.

During the meeting, M. Fujiura-Landers gave a review of local offline:

Remote Offline= used when can connect Polaris remote serve (library migration)

* Use staff client
* Files stored on Polaris remote desktop
* CCS can access and upload files

Local Offline= used when cannot connect to Polaris remote server (library loses internet)

* Download local offline client on computer
* Files stored locally on that computer
* Staff need to upload files

M. Fujiura-Landers gave a demo uploading local offline transactions

* Make sure hidden folders are visible on any computer that uses local offline otherwise transaction files will be hidden. Work in file explorer and make sure hidden items are visible
* While using local offline, close out every 1-2 hours to create smaller files to upload

**Circulation Distribution emails (minute 47:10)**

M. Fujiura-Landers let the group know that the I.T. department is still putting together. Once the list is ready, CCS will post on their website under the “how to section”. Mieko will notify the group when ready

**In-house check-in (minute 47:55)**

Hegelund (NBK) asked the group if other libraries use in-house check in and if so, how do you use the data?

* LFK uses it in the Childrens department to keep track of books read in the library but not checked out.
* MUK also did so but have stopped on regular basis as is time consuming
* NBK went from that process and now feeds through AMH to update item record’s last activity date
* DPK uses it to track usage for board report as well
* NIK used it for board report statistics to show work pages are doing but now run through sorter

**Library card renewals and last activity date (minute 53:35)**

M. Fujiura-Landers asked how many libraries have experienced patrons that renew their card but then are purged because they are using their cards in ways that do not update the last activity date.

Some libraries mentioned that it happens sporadically and they register the patron again as a new patron. Other libraries are considering reaching out to patrons that are about to expire.

**Adjournment (hour 1:03:35)**

Sergel (LFK) made a

**Motion:** to adjourn the meeting

Thomas (PHK) seconded the motion

**Motion passed**

Meeting adjourned at 10: 35 a.m.