ILS Features Ad Hoc Committee Meeting Notes – 5/30/24

SCPL is not going to reconsider their decision to leave; so, we are not looking at these things to fix them in response to SCPL but rather to see if any of these features could benefit member libraries and be reconsidered, as it has been some time since they were reviewed.

The next JA Council meeting will be July 10th to allow for ad hoc committees to meet. Our findings will be presented at that meeting.

Ability to implement autorenewal:

Maria Cancro strongly recommended reconsidering this feature as it is up to library staff to explain any confusion to patrons and it would help to eliminate unnecessary billing.

Jennifer Boyer respectfully disagreed as autorenewal would prevent browsing of materials that would otherwise be on the shelf.

Background the way the settings worked: Originally, autorenewal used the owning library's renewal period rather than the transacting branch's renewal period. So, autorenewed items would then end up with varying loan periods; many libraries still charged fines then causing confusion for staff and patrons. Since that time, we think it now uses the transacting branch renewal period, but JA needs to test it.

There was also a concern over JA fees at the time as there was a charge per item for renewals. The fees would still be a concern to investigate now. If turned on system wide, perhaps the cost would be evenly distributed across all libraries' JA fees.

Autorenewal can be turned on by branch, but that could allow other libraries items to autorenew if checked out from a branch that has autorenew turned on. Patrons with email notification get an autorenwal notice with number of renewals left.

Mid-Hudson employs autorenew, and it is a welcome feature for patrons. Patrons get a notification prior to the autorenewal.

Can items be recalled? There is no function to do this in Polaris. Items are only returned at end of renewals or if a hold is placed on the item.

Local policy changes may be necessary so that a patron would not get 99 renewals on an item.

There are concerns about browsability with more items being out and patrons not knowing how to place holds. Counterpoint - Patrons tend toward browsing front facing display titles rather than items in the stacks.

Libraries are seeing more bills going out and autorenewal would help mitigate that. Autorenewal may help to prevent fines for those libraries that still charge overdue fines.

Group felt that this should be implemented system wide to avoid confusion and JA should reconsider this feature. JA should also investigate setting a system wide renewal limit in terms of a max number of renewals allowed.

Improved public catalog features including the ability to filter by items currently on the shelf, display of locations on the main search results page, display of how many holds are currently on a title and your place in line:

In a consortial environment, place in the holds line gets confusing due to local borrowing rules. A patron could see that they are 300 in line, but then get the item much sooner due to being eligible for a local copy. Seeing a long holds line may dissuade patrons from placing holds. Note in comparison to Mid-Hudson which shows hold place – Mid-Hudson requires all libraries to share 1 copy of each title with all other libraries, this makes a big difference in terms of how number in line works.

Filtering by currently on the shelf: Could the Find It button be moved over on the PAC screen so that it is more prominent to patrons searching in the PAC? Answer -- It could be bolded. This can be brought to JA Operations Committee.

Mid-Hudson library catalog search screen shows you up front who has it and whether it is in or not. They are using Vega overtop of their Sierra PAC. Vega comes at an added cost, but could be investigated by JA.

The pin number default is hard for patrons to remember. Answer -- Patrons can reset their pin/password in the PAC using the forgot your password link.

Discussion of revisiting library policies on loaning New and Popular materials, and increased sharing amongst all libraries.

Ability to manage and assign ILS permissions:

Maria finds the permissions limiting in terms of what she can do as a director. Would like to see permissions expanded to include creating a collection/shelf location and bulk changes.

Collections and shelf locations are controlled via system admin access in Polaris and JA has standards for managing those.

Permissions are determined on a case-by-case basis versus by job title as there are many permissions that a director at one library may not need that a director at another library does need as part of their job functions.

Access to system administration settings needs to be controlled to prevent unintentional errors.

Michele and Sharon have been looking at changing the structure of the permissions levels/groups. That may help to address some of the questions and concerns about permissions.

Directors are requesting permissions and those requests go through the system trainers for approval; JA is reluctant to give some "dangerous" functions out freely to all staff. Maybe there needs to be an appeals process if people don't feel like they are getting what they need.