

ILS Features Ad Hoc Committee

Charge

Explore policy adjustments to ILS features as listed by SCPL

Goals

- Assess items from SCPL whitepaper
- Determine ILS features that could be considered for possible implementation
- Identify any JA policies that could be considered for review

Items from JA reply to SCPL Withdrawal from JA whitepaper

- 1) Ability to implement autorenewal - instead of items going overdue at their original due date and us billing for their replacement costs at 3 weeks overdue, the system can automatically renew them if no one is waiting
 - *When this feature was first offered by Polaris, the options available would have been confusing for patrons and staff in a consortial environment. At that time, the MVLS/SALS Operations Committee determined that it was best to not implement. The implementation of this feature could be revisited.*
- 2) 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
 - *Ability to filter by items currently on the shelf is available. For SCPL it has been set up as on shelf at any SCPL branch. This could be revised.*
 - *The other features mentioned were addressed by the PAC Steering Committee and were previously determined to be excluded or do not make sense in a consortial catalog.*
- 3) Ability for us to manage and set appropriate ILS permissions for each library employee according to their job titles, functions and assigned responsibilities
 - *Per the MVLS/SALS JA User Account Policy:*
 - *All Polaris account requests (new users, change of Polaris permissions) will go through the system trainers.*
 - ◆ *Polaris permissions are based on job function, not job title.*
 - ◆ *Users must be trained for Polaris access (either by the system trainers or library staff as approved by the system trainers).*
 - ◆ *For complex Polaris functions, only staff who will be performing those functions regularly will be given access.*
- 4) Ability to implement SCPL Board of Trustee policies relating to circulation, such as our fine block threshold
 - *Per the JA Council, trainers and JA staff have been tasked to develop guidelines for Polaris ILS settings and possible standardization in order to best support a consortial environment.*
- 5) Ability to automate replacement cost bills via digital communications instead of printing and manually mailing them
 - *This requirement is per the MVLS/SALS JA Fines and Fees Policy, approved 1/9/2019. At that time, this was deemed the best practice for billing patrons for library materials.*

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- 6) Ability to discontinue collecting unnecessary personally identifiable information such as driver license numbers and reduce library liability and impact in the event of a cybersecurity breach (which in itself would be much less likely with the enhanced cybersecurity measures we'll implement under County IT)
 - *This requirement is per the MVLS/SALS JA Identification information in Patron Registration policy, approved 1/9/2019. As a unique identifier, Patron ID information helps to reduce duplicate patron accounts. JA staff continually monitor and update security practices. All library personnel are required annually to sign and follow JA policies, including the Confidential Library Patron Data policy.*
- 7) Ability to do our own cataloging
 - *This service is provided as part of the JA fees and system contributions by four catalogers for all member libraries who participate in JA.*
- 8) Ability to edit bib records
 - *This service is provided as part of the JA fees and system contributions by four catalogers for all member libraries who participate in JA. Having limited, dedicated staff with the ability to edit bib records ensures a cleaner, consistent database.*
- 9) Ability to run custom reports
 - *JA and system trainers are happy to respond to library requests for custom queries, reports and record sets. JA and system trainers work with library staff to develop the questions and parameters necessary to provide correct and accurate information.*
- 10) Ability to utilize functionality such as bulk record changes
 - *See the MVLS/SALS JA User Account Policy.*