

ILS Features Ad Hoc Committee Meeting Notes – 6/12/24

Feedback from library: Is there are list of possible enhancements to Polaris that could be shared. When there is an upgrade, new features are reviewed by the Operations committee. Redesign of the PAC is beyond the scope of this committee and is the responsibility of the Operations Committee.

Continuation of discussion of Ability to manage and assign ILS permissions:

What is the history of system admin access and errors that caused problems? -- Library staff have only ever had access to the dates closed table. Errors have happened with that access.

Are there lower levels of Admin access? Access beyond the dates closed table is all or nothing in Polaris. We don't want to give this level of access to library staff.

Only JA staff and system trainers have access to setting library staff permissions in Polaris. Directors may request permissions for their staff. The intent has always been to give staff the permissions needed to do their jobs.

Is there a way for directors to see what permissions there are and get training on different things to have a more complete understanding of the system? -- Michele and Sharon are working to update the permission levels and descriptions. This should help with this.

Maria will reach out to her contacts in Onondaga to see what their best practices are in terms of job titles and lock out mechanisms to give us a better understanding of what other systems are doing.

Ability to implement SCPL Board of Trustee polices relating to circulation:

From the MVLS Director's meeting, SCPL wanted to set their fine threshold much higher than some of the other libraries. SCPL wanted to set their threshold to \$100. Many other member libraries were not comfortable with that threshold and preferred to keep the threshold under \$50.

JAC has set a goal for JA staff and system trainers to come up with guidelines for fine thresholds. Similar thresholds were set for billing to have all libraries billing at 30 days or less.

Maria proposed a \$20 to \$50 range stating that \$5 to \$10 is too low given that most lost items would be in the \$20 to \$50 range. With many libraries being fine free, most fees are for lost items.

Sharing of Libby items threshold brought down to \$10 when we partnered with UHLS and MHLS. A common threshold for all platforms, libraries, etc. would be less confusing to patrons.

Having guidelines would be helpful and should be shared with the JAC. JA staff and system trainers have been tasked with looking at policies and guidelines and will look for input from the membership as that process gets underway.

Ability to automate replacement cost bills via digital communications:

Physical bills seem more official and can't get lost in a spam folder.

One reason for this policy may have been that Unique Management may have required that libraries send a physical bill in order to use their collection agency. Library perspectives have changed on collections and they are using collection agencies less. *(Update after meeting: Unique does not require libraries to send print bills.)*

Could libraries not using collections set up email billing? Unfortunately, bills would be sent by patron notification preference and that means that some would get bills via text message. Text bills are not ideal.

Michele suggested that JA staff explore the possibilities to see if we can automate bills via email and not text for those libraries who would like the option. Perhaps open a ticket with Polaris about the ability to choose which notification options bills are sent by.

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:

Driver's license is required by Unique Management collection agency, but Mid-Hudson created an alternate ID using a combination of letters from the first/last name and date of birth. *(Update after meeting: Unique does not require libraries to include driver ID.)*

Could we use just the last 4 or 5 digits with the state abbreviation? – Would we encounter duplicates that aren't duplicates this way?

Brooklyn PL gathers very little information from their patrons and issues many limited cards to homeless patrons and illegal immigrants.

Gloversville uses the Core patron code cards that allow limited borrowing privileges for patrons without ID or address. Plan to start using this with the schools for student's whose parents won't come into the library with them.

Could libraries using Unique stop collecting driver's license numbers? -- Libraries need to get updated information from Unique to have a more informed discussion. *(Update after meeting: Unique does not require libraries to include driver ID.)*

Ability to do our own cataloging:

Best left to professionals due to the potential for chaos. Maybe could offer to larger libraries with a cataloging librarian and special collections with a need for this.