

## ILS Features Ad Hoc Committee Meeting Notes – 6/27/24

Meeting minutes are being posted on the JA website. We can approve the notes from this meeting via email.

### **Follow up from last meeting:**

Unique Collection Agency doesn't require driver's license or physical billing for collections. Does that change how we feel about sending bills via text or email? CPH staff like the idea of not sending physical bills; Deb Flint from Galway agrees.

Gwen Weldy likes the idea of not collecting driver's license numbers but rather creating a unique identifier. Or, perhaps we would want to get the last 5 digits of the driver's license to keep it more consistent with current practice. We need to keep it simple for staff to avoid errors. Jennifer Boyer did not recall having issues with duplicates when using alternate identifiers at her previous system.

Maria Cancro has a meeting with Onondaga July 1 to discuss lock out mechanisms and staff permissions and will report back to the Committee.

### **Ability to edit bib records:**

Important to integrity of the database to limit access.

A smaller group is better to keep things consistent.

Is there a process to update outdated subject terms? -- Yes, we have a weekly subject heading update that gets loaded into the database by system staff. Library staff can also submit cataloging corrections forms if they see any outdated terminology.

### **Ability to run custom reports:**

It would be good if senior staff had this as a tool even though system staff are very helpful in running these reports.

Training on reports is always appreciated as there is the fear of running a report that could bog down the Polaris system. That is less of a concern now that Polaris is hosted.

Michele Largeteau asked: What piece is missing? What reports are you looking for?

- Example: Wanted to figure out the use of the children's collections – ran the Collection and Material Type Analysis report by month to then put into an Excel spreadsheet to compile what was needed. This was very time consuming. Better collection development reports would be helpful.
- Example: Report of which patrons are using which material types.
- Example: Report on rates of renewal by patrons.

Some reporting is so nuanced that even Simply Reports can't get the desired information and SQL searching must be used. SQL is specialized query searching that few people know well.

**Ability to utilize functionality such as bulk record changes:**

You need to be precise when making bulk changes to avoid errors. CPH has 2 staff with bulk change permissions and still ask system staff to do some bigger/less routine changes.

Libraries without staff with this permission are informed to send bulk change requests to system staff to do and those bulk changes usually happen same day. Training for bulk change permissions is available to senior staff who are very familiar with item records and would use it regularly enough to not make mistakes. If system staff make the error, we own it and have to spend the time fixing the errors.

Patron bulk change is harder than regular bulk change and needs to be done even more thoughtfully/carefully.

**Other ILS Features:**

Is there anyway to automate phone calls for holds? -- Most ILS's have a telephony product add on that may cost extra. Past information about it indicated it didn't work great. JA has not investigated it in many years. Back then, libraries were moving to email and text message notification and were not wanting to spend the money of telephony. JA can investigate it again to see about the cost.

Consensus was not reached on all topics and the group recommends further discussion and assessment by JA.