PAS Advisory Group Minutes

Thursday, August 16, 2018
9:30 am at CCS

Attendees:
Marcia Beach, Highland Park
Choosri Goebel, Lake Forest
Beth Klein, Prospect Heights
Alicia Parmele, Algonquin
Mona Reynolds, Cary
Paula Shapiro, Evanston
Natalie Ziarnik, Ela

Also present:
Debra Wischmeyer, CCS (Facilitator)
Rebecca Malinowski, CCS
Cyndi Rademacher, Niles (PAS Chair)

Default PowerPAC sort setting

Debra Wischmeyer introduced the differences between sorting by relevance and sorting by popularity.

- Relevance depends entirely on matching the search terms to terms in the record, based on the Polaris relevancy algorithm.
- Most Popular depends partially on the relevancy algorithm and partly on usage. The balance can be modified in system configuration. Usage includes:
    - number of hold requests plus the number of check-outs in the last 120 days
    - number of check-outs in the last 120 days
    - lifetime circulation count
    - in-house use count
    - record creation date

The group was asked to test the order of results in the CCS production pac and training pac comparing Most Popular and Relevancy, as well as the order of results in other libraries' pacs prior to the meeting

Group members shared their results, including sample searches. All group members found that sorting by Most Popular produced better results in most cases. The group members did not agree on which other libraries' pacs yielded better results.

ACTION: Should the default PowerPAC sorting be changed from "Relevance" to "Most Popular?" Yes, by consensus.

CCS will change the default sort to Most Popular. Relevancy sort will continue to be available as a sort option in the results list.

The group was not unanimous regarding the quality of Most Popular sorting from other Polaris customers. Black Gold, Dayton, Mohawk, and Fountaindale were all preferred by at least one group member. CCS will reach out to these libraries to see what their balance is.

CCS will set up additional tests on the test database and all staff will be invited to test different options for the balance between relevance and usage in Most Popular. CCS will also confirm whether usage is by library or system-wide, or if it depends on the search type.

PAC Icons

Debra introduced the topic of Type of Material (TOM), which is set at the bibliographic level, depending on MARC data. The TOM values are not customizable by Polaris customers. TOMs drive the format icons in the PAC. The icon images are customizable.

The group discussed the existing icons, considering whether to add text to the icons, add format information to the brief display, and/or redesign some or all icons.

The group looked at the Orland Park Public Library pac, which includes format information in the brief display, and found it helpful. CCS will research configuration options to display format.

The group identified some icons that are challenging, including:
- Large print
- eBooks
- eAudiobooks
- 3D Object/Realia

The Blu-Ray and DVD icons were considered helpful.

The group also noted that Playaways are challenging to identify in the hitlist. CCS will research available options to distinguish these from other formats, including using the format in the hit list, adding a custom cover image via Sydentics, and submitting an enhancement request to add a TOM.

ACTION: Should CCS customize the TOM icons that appear next to a title in PowerPAC?

Redesign large print, ebooks, eaudiobooks, 3D objects. Modify vinyl, CD, and Blu-Ray/DVD combo to follow the same style as Blu-Ray and DVD icons.

Travel Guides

SCRAP discussed cataloging of travel guides and test preparation books at their July meeting, and would like PAS feedback. Debra summarized the issue, which is that neither patrons nor staff can place holds by volume on serial records that are not under serial control. This means holds must be placed on specific items, which can lead to longer fill times or unfilled holds.

We can change the serial records to monograph records and continue to list multiple editions on the same record, or we can add new monograph records for new editions.

ACTION: Should the consortium consider cataloging these books on monograph records?

The group was unanimous. Travel guides, test preparation books, tax preparation books, and similar materials should be on monograph records, with each edition on a separate record.

Additionally, language in the PAC regarding serial holds should be modified from:
You cannot request all the issues of a journal or magazine. Select and request individual issues below.
to
Please select and request individual issues below.

Cancelled Holds

The Circulation technical group has recommended reducing the number of days a cancelled hold remains in a patron's account from 90 days to 30 days. Debra explained that holds become cancelled when staff or patrons manually cancel a hold or when a held hold moves to unclaimed and is then checked in by staff.

The group noted that the ability to reactivate cancelled holds is helpful and often used when patrons miss their hold pickup window. They discussed how long after a hold is cancelled those interactions take place, and considered the patron privacy implications of leaving hold information on the patron record.

ACTION: Should the consortium reduce the number of days a cancelled hold remains in a patron's account?

Yes. The group unanimously agreed with the circulation technical group recommendation.

The group also recommended discussing hold statuses at the next meeting.

Adjournment

The facilitator adjourned at 11:25 AM

Summary of Next Steps

Configuration changes listed below will be outlined in the 8/17 CCS News

Who	What	When
CCS	Confirm Most Popular scope	ASAP
CCS	Setup Most Popular testing	Review results at 9/19 PAS technical group meeting
CCS	Change PAC sort default	8/27/2018
CCS	Research options for Playaways in PAC	Before next PAS advisory meeting
CCS	Redesign PAC icons noted above and send to PAC Tech Group	9/12/2018
CCS	Update PAC language regarding serial holds	8/27/2018
CCS	Update SCRAP with PAS Advisory group feedback	8/17/2018
CCS	Modify length cancelled holds stay on account to 30 days	8/27/2018