**PAS Advisory Group Meeting**

**11/15/2018**

**CCS Office**

**Attended by**:

* Mona Reynolds (Cary)
* Michelle Bourgeois (Ela)
* Marcia Beach (Highland Park)
* Choosri Goebel (Lake Forest)
* Alicia Parmele (Algonquin)
* Paula Schapiro (Evanston)
* Debra Wischmeyer (CCS)

**PowerPAC Most Popular Sort Settings**

The PAS advisory group tested different “Most Popular” sort settings during the week leading up to the meeting:

* 50% popularity, 50% relevance
* 80% popularity, 20% relevance
* 70% popularity, 30% relevance
* 60% popularity, 40 % relevance

While the group did not see drastics changes to the Most Popular sort settings when it was adjusted from 5/50, it seemed that 60/40 gave slightly improved results. The group recommended to adjust the setting to be 60% popularity and 40% relevance. The change has been made.

**Summary Notes in brief display**

The PAS Advisory group discussed the pros and cons of having the item summary appear in the brief display (hit list) in PAC. While the summary notes can be very long for some items, overall, the group thought the notes were helpful, particularly for adults searching for children’s materials.

A few suggestions for improving:

* Could we display notes only for books, and not other materials?
* Can only display x characters and then use a “more” option to expand?

CCS investigated, and neither of the above is possible at this time. There are two options:

* Keep the summary notes in the brief display. When staff come across a particularly lengthy summary, they can request that CCS or a cataloger shorten the summary
* Remove the summary from the brief display entirely

The Advisory group recommends keeping the notes in the brief display.

**User Testing Ideas**

CCS plans to introduce small-scale user testing in 2019. The group brainstormed ideas, including:

* Do we want to include the title of the item ready for pickup in a phone notice?
* Patron suggestions for better hold terminology (active, shipped)
* Identifying the correct format in the catalog (PAC icons)
* Notes in hit list/brief display
* Automatic renewal - phrasing of the notices
* Password - last 4 digits of the phone number
* What do you like/don’t like about PAC?
* Ways to improve?
* Do you use the facets in PAC?
* Online user feedback?

**Video Game Genres**

OLAC (Online Audiovisual Catalogers) has announced the OLAC Video Game Genre Vocabulary: https://www.olacinc.org/alphabetical-list-genre-terms-olac-video-game-genre-vocabulary

SCRAP asked the PAS ADvisory group to review the usefulness of these genre terms. Overall, the group thought that the genres would be very helpful to parents who are unsure of video game content. They would also help library staff provide better RA for video games. One concern brought up by the group was how the terms will be applied. Many libraries have smaller video game collections, and there are many new genre terms. Would it be possible to use a subset?

**PAS PowerPAC Feedback**

**The advisory group reviewed the list of PowerPAC negatives put together by PAS.**

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| **Feedback** |  |
| All-caps password | Most passwords were stored in Sirsi in all CAPS. Sirsi was not case sensitive. Polaris is case sensitive, which is why patrons had to enter their passwords in all caps. Patrons can change their passwords or staff can change their password for them |
| Cannot limit by material type, as it isn’t a facet | We do not have the option to add additional facets at this time. Library staff and patrons can limit by material type in the advanced search. Or, libraries can additional "Limit By" filters to allow patrons to limit searches by material type. |
| Change is hard | :( |
| Choosing record for and/or placing hold on incorrect format | We added format text to the brief display. CCS staff will work to redesign PAC icons. |
| Desire for analytics for Feature It (staff request) | Idea Lab |
| Desire to limit fiction vs. nonfiction at the beginning of search process | Staff can use the Literary Form Facet to limit print materials to fiction/nonfiction. This facet does not apply to AV materials. |
| Holds message is confusing | CCS and Advisory group can review hold language. |
| Icons for different formats are unclear / need larger icons |  |
| Interfacing with Overdrive isn’t seamless | We have been working with Overdrive over the past months to resolve performance issues. |
| Interpreting item availability (e.g., 0/1) is confusing | The Advisory group reviewed a few different options for modifying this in the hit list. The group thought the way it is currently configured was easiest for patrons to understand |
| Item description is too long, making hit list cumbersome | We can keep the summaries in the hit list or remove completely. The Advisory Group recommends keeping. |
| Lack of customizable facets | See above. |
| Not wanting to see canceled holds on user account | CCS reduced the amount of time a cancelled hold was held in a patron account to 30 days. They recommend reducing even further to 14. |
| Not wanting to see items “in process” | Libraries can choose to suppress in-process items from PAC. However, if we suppress in process items, the bib record may not appear in search results for patrons to place holds on. |
| Search result is not always what was desired |  |
| Slow load times | Performance issue; CCS is working with innovative to resolve. We are now rebooting the PAC server every other day. |

**Cancelled holds**

Currently, cancelled holds stay in a patron’s account for 30 days.

**Pro**:

Cancelled holds in the patron’s account allow better service at multiple desks (ie, circ staff can reactivate, rather than send the patron to reference to have the hold replaced)

**Con:**

* Cancelled holds could prevent withdrawn items from being deleted
* Patrons cannot delete cancelled holds from PAC - only staff can from the client or Leap

After discussion, the PAS Advisory Group recommend decreasing the time a cancelled hold remains in a patron's account to 14 days. Staff can look in a patron’s notice history to see if they were received a first or second hold notice.