

ILL Technical Group

Action Items – February 22, 2024

Single Name Only for ILL Library Records

Background

By default, Polaris requires both a first name and a last name to save a patron record. Patron records are required to have both a first and last name on file, even if the record is for an institution, like a library registered to ILL for Cooperative Computer Services branch. These library records have their name divided between the first name field, middle name field (for university libraries), and the last name field.

Single Name Only Setting

A new setting in Polaris allows the option to only require a last name field. If enabled, staff will be able to save a patron record without entering a first name.

The screenshot shows the Polaris 'leap' interface for adding a new patron. The 'Last Name' field contains '(XGV) Naperville Public Library'. The 'First Name' field is empty and highlighted with a red box and an arrow. Other fields include 'Date of Registration' (6/26/2001), 'Expiration Date' (3/21/2117), and 'Birth Date'.

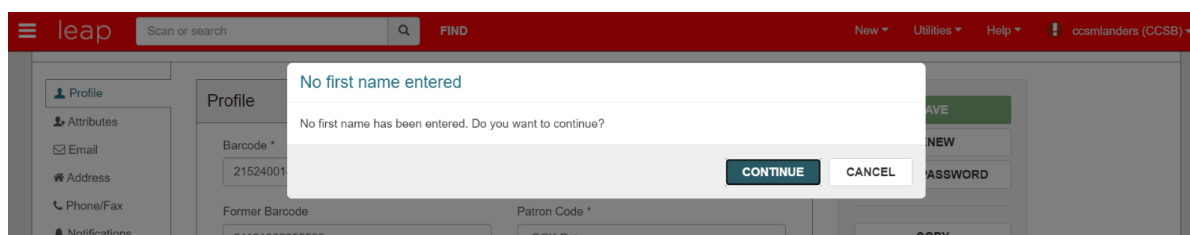
First name not required

When registering a library, staff would select a “Use Single Name Field” checkbox in the patron registration workflow. When selected, Leap will disable the first name and middle name fields. This serves as an indicator that using a last name only was an intentional decision.

The first screenshot shows the 'Use Single Name Field' checkbox selected. The second screenshot shows the 'First Name' and 'Middle Name' fields disabled (grayed out) after the checkbox is selected. The 'Last Name' field still contains '(XGV) Naperville Public Library'.

Use Single Name Field checkbox

If “Use Single Name Field” is not checked and staff only enter a last name, a “No first name entered” pop-up alert will appear when the record is saved



No first name entered alert

As of Polaris 7.4, the patron Last Name Field can now hold up to 100 characters in order to support longer names, such as an institutional name.

Searching

The Leap Quick Search Box will search for first name, middle name, last name, first-middle-last name, or last-first-middle name. Staff will be able to search for patrons that use a single name only.

If searching using the Leap Find Tool, staff can choose to search All keyword fields, Name (Last, first middle), or Name (First middle last) to locate patrons that use a single name only.

Reports

When generating a Simply Report, Web Report, or Staff Client report, patron last name data will appear in patron last name or patron full name output. Staff will not see data in first name only output if a patron only uses a last name.

Bulk Updates on Existing Patrons

Because existing ILL for CCS records follows a convention, CCS will bulk update existing library accounts registered to ILL for Cooperative Computer Services if use of Single Name Only is approved.

Circulation/ILL Advisory Group Recommendation

The Circulation/ILL Advisory Group discussed use of this setting with ILL for CCS records at their September 2023 meeting. They are neutral on activating this setting and are deferring to the preference of the ILL Technical Group.

POSSIBLE ACTION

Motion to enable single name only for ILL for Cooperative Computer Services records.

ILL Library Record Name Entry Convention

Background

If the ILL Technical Group votes to use the patron record Single Name Only field for ILL library records, the group will also need to consider revised naming conventions for ILL library records. The [ILL Library Accounts](#) how-to website page details the current convention for entering an ILL library name.

For public libraries, the current convention is to enter the library's delivery code into the first name field and the institution name into the last name field.

For academic libraries, the current convention is to enter the library's delivery code into the first name field, the library's name into the middle name field, and the university's name into the last name field.

Proposed ILL Library Name Entry Convention Option

While using a single-name field allows staff to enter ILL library information in one field instead of splitting it up into two or three, CCS recommends maintaining a name entry convention to facilitate searching.

If adopting Single Name Only for ILL for Cooperative Computer Services records, the proposed name convention is: *Library Name – University Name – (Code)*.

Examples:

- Naperville Public Library (XGV)
- Booth Library Eastern Illinois University (EIU)

This text would be entered into the Last Name field in a patron record. Entering the library name first will allow for easy sorting alphabetically by library name.

Searching ILL Libraries

The Leap Quick Search box performs a Phrase search. This means the search terms need to appear together and in the same order in a record. For example, when searching for name "Naperville Public Library (XGV)," the Quick Search Box will locate the record when searching:

- Naperville Public Library
- XGV
- Naperville Public Library XGV or Naperville Public Library (XGV)

The Leap Find Tool allows staff to do a Keyword (All) name search. This means all the search terms must appear in the patron record, but they do not have to appear in order as typed. For example, when searching for name "Naperville Public Library (XGV)," the Find Tool will locate the record when searching:

- Naperville Public Library

- XGV
- Naperville XGV or Naperville (XGV)
- Naperville Public Library XGV or Naperville Public Library (XGV)
- XGV Naperville Public Library or (XGV) Naperville Public Library
- Etc.

Bulk Updates on Existing Patrons

Again, because existing ILL for CCS records follow a convention, CCS can bulk update existing library accounts registered to ILL for Cooperative Computer Services to follow the agreed upon name entry convention.

Circulation/ILL Advisory Group Recommendation

The Circulation/ILL Advisory Group discussed ILL for CCS name entry convention at their December 2023 meeting. They are neutral on name entry conventions and are deferring to the preference of the ILL Technical Group.

POSSIBLE ACTION

Motion to use proposed ILL Library name entry convention of *Library Name – University Name – (Code)*.