# **Circulation/ILL Advisory Group Minutes**

December 15, 2023

**Attendees:**  Jazmin Bravo (PRK); Danny Burdett (GCK); Athena Crouse (NIK); Kim Hegelund (NBK); Matthew Hoffman (WLK); Belinda Husak (ALK)

**Absent:** Bob Bigden-Russell (ZIK)

**Also Present:** Mieko Fujiura-Landers (CCS); Liz Steffensen (HUK); Debra Wischmeyer (CCS); Fern (DPK)

The December 15, 2023 meeting of the Circulation/ILL Advisory Group was called to order at 9:32am. The meeting was held via Zoom.

M. Fujiura-Landers shared a corrected draft of the September 15, 2023 minutes ahead of the meeting. There were no additional revisions. Minutes accepted as submitted.

There were no additions to the agenda.

## 1. Waiver Workflow

M. Fujiura-Landers gave a demonstration of the Leap waiver workflow, which is a new feature available with Polaris 7.5. CCS is interested in input on if we should pursue and investigate this feature further. The committee agreed that the waiver workflow would not enhance the staff or patron experience, and that the workflow would take away staffs’ existing freedom to make decisions related to fees. It would also take time to follow-up with the patron and require them to wait during the decision period. CCS will not do further research into the Leap waiver workflow.

## 2. ILL Library Name Convention

The committee discussed possible name convention for ILL library records to be used if the ILL Technical Group votes to approve single name entry at their February meeting. The group shared the different ways they and their colleagues search for ILL records. Currently, the library’s code is entered into the first name field and visually appears first when the name is displayed. A committee member asked about the virtue of entering code first? The group agreed the code is an important detail to include in the name field but does not necessarily need to be in the first position

A committee member asked about updating existing ILL library accounts. CCS will be responsible for updating records to single name only. Do we need to adopt single name field for ILL libraries or should we continue splitting names? The committee feels neutral about functionality, but the feedback is that a single name field is cleaner.

The committee agreed that the recommendations should be presented to the ILL group with an emphasis on the committee’s neutrality and allow the Technical Group to discuss in full. After further discussion, the committee agreed to present a possible name convention option of *Library Name – University Name – (Code)* to the ILL Technical Group as a starting point in their discussion.

M. Hoffman (WLK) moved and B. Husak (ALK) seconded to recommend ILL library name entry convention of Library Name-University-(Code).

**Ayes:** Jazmin Bravo (PRK); Danny Burdett (GCK); Athena Crouse (NIK); Kim Hegelund (NBK); Matthew Hoffman (WLK); Belinda Husak (ALK)
**Nays:** None

The motion passed. M. Fujiura-Landers (CCS) will take the name entry convention recommendation to the February ILL Technical Group meeting.

## 3.Tool for Reciprocal CCS Patron Lookup

CCS is exploring the idea of collaborating with another Polaris site to develop a patron lookup tool, similar to Chicago Public Library. With this tool, non-CCS libraries could check the status of a CCS patron without needing to call. Before moving ahead, CCS needs to gauge if this would be an effective use of CCS staff time and resources.

Feedback was that a patron lookup tool would have minimal impact on CCS member library staff time but would be a goodwill gesture towards neighboring non-CCS libraries. CCS will explore a lookup tool further when there is space in project schedules.

## 4. Declaring Damaged Workflow

M. Fujiura-Landers gave a demonstration of new Leap damaged item functionality, available with the Polaris 7.5 upgrade. If adopted, current damaged item procedures would be updated to reflect the new methods for how to mark an item as damaged. Additionally, using this functionality would allow CCS to re-appropriate the current “Damaged” circulation status.

Committee members discussed their approach and philosophies towards damaged items. Some libraries do use current circulation damaged status, some libraries do not. Libraries also vary on when they apply the fee. One committee member commented on a detail in the meeting packet about checking damaged items in. Damaged items will have system block automatically assigned; a library’s sorter will sort damaged items like it does other items with blocks. In most cases, damaged items will not go back into circulation.

A committee member asked about permissions. Declaring an item damaged from the check in workform is tied to a unique permission, but all staff will have the ability to declare an item damaged from patron’s record. If this option is enabled would libraries be required to use this or would libraries be able to continue to follow local procedure, like manually marking an item as Lost? The intent is for libraries to continue to follow local procedure; the new functionality would replace how a library changed an item’s circulation status to damaged. A committee member asked about reports. If approved, the next step would be to look at revisions to reports that include the current “Damaged” circ status. The new workflow status is also a circulation status, so updates will most likely involve updating status ID numbers in the report configuration.

If the group votes to recommend adopting this workflow, CCS will draft revised documentation and take the recommendation and drafted revisions to Circulation Technical Group for approval. The updated functionality would not be available until the production upgrade to 7.5.

D. Burdett (GCK) moved and A. Crouse (NIK) seconded to recommend adopting the 7.5 Leap Declare Damaged workflows

**Ayes:** Danny Burdett (GCK); Athena Crouse (NIK); Kim Hegelund (NBK); Matthew Hoffman (WLK); Belinda Husak (ALK)
**Nays:** Jazmin Bravo (PRK)

The motion passed. M. Fujiura-Landers (CCS) will take the recommendation to the January Circulation Technical Group.

D. Burdett (GCK) moved and K. Hegelund (NBK) seconded to adjourn the meeting. The meeting was adjourned at 11:16 am.

## **Summary of Next Steps**

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| **Who** | **What** | **When** |
| CCS, Circ/ILL Advisory Group | Draft revised damaged procedures, declaring damaged how-to documentation. Review and provide feedback via email | December 2023 |
| CCS | Bring committee recommendation for adopting damaged item workflow to January Circulation Technical Group meeting | January 2023 |
| CCS | Bring committee recommendation to enable single name setting for the ILL for Cooperative Computer Services branch to the February ILL Tech Group meeting | February 2024 |
| CCS | Bring committee recommendation for ILL library name entry convention to the February ILL Tech Group meeting | February 2024 |