

Minutes
PAS Technical Group
Zoom
June 20, 2024
9:30 AM

Meeting Recording Link:

<https://www.youtube.com/watch?v=1MLzdyXfLeA&t=93s>

1. Call to order

S. Bunte called the June 20, 2024 meeting of the PAS Technical Group to order at 9:31 AM.

2. Additions to the agenda

There were no additions to the agenda.

3. Approval of minutes from last meeting

The minutes from the March 28, 2024 meeting were approved by unanimous consent as distributed.

4. Officer reports

There were no officer reports.

5. CCS staff reports

- i. D. Wischmeyer (CCS) introduced and welcomed Gayatri Shah, new User Experience Specialist at CCS.
- ii. Mount Prospect and Waukegan Migration
 1. Mount Prospect and Waukegan libraries will go live in CCS on October 1, 2024. The offline period will cover the last weekend of September. Watch CCS News for more news about this project as we get closer to the go live date.
- iii. Find More Illinois Update
 1. CCS joined FMI as a full consortium at the end of 2023. Currently eight libraries have gone live and most of the remaining libraries will be launching July-August 2024. Additional trainings will be held on June 20 and August 6. Previous recordings of trainings can also be watched on Youtube.
- iv. Statewide Database
 1. Statewide Database Ebsco Package does include Novelist at a base level. Currently, CCS supplies Novelist Plus, Select and Library Aware to the group. CCS is planning to maintain their subscriptions for the coming year and to get adjusted pricing.

6. Old Business

a. Officer Elections

S. Bunte shared that we are still looking for volunteers to serve as secretary and vice-chair for the next fiscal year of PAS. H. Sadowski will serve as the group's chair for 2024-2025. S. Bunte described the roles.

The Vice Chair/Chair Elect will fill in for the Chair by facilitating a PAS meeting if the Chair is unable to attend. They will also become Chair the following year.

The Secretary takes notes during the meeting, compiles the minutes, and sends drafted minutes out to the listserv with the support of CCs and the other officers.

S. Bunte asked if we had any volunteers who would like to serve in either of these positions, and encouraged anyone who was interested to reach out to current officers or CCS. E. Fardoux (Park Ridge) volunteered for secretary. D. Wischmeyer thanked M. Golembiewski and S. Bunte for their service this past fiscal year in their officer positions.

7. New Business

a. Polaris 7.6 Features

- i. D. Wischmeyer (CCS) shared that August- Sept. we will be upgrading to 7.6 prior to the Waukegan and Mt Prospect launch. She reviewed and demonstrated new features in Polaris 7.6, including importing ISBN lists to Record Sets, and new Find Tool settings, including the ability display ISBN information in Find Tool search results and searching in the Find Tool by a list of ISBNs, and making ad hoc changes to bulk item changes from a bib record without needing to make a record set.

b. Idea Exchange and MEEP Enhancement Process

- i. D. Wischmeyer (CCS) provided an overview of the Idea Exchange. The Idea Exchange replaced the previous Idea Lab. The Idea Exchange is Innovative's platform to crowdsource and prioritize development ideas from staff who use Polaris. Staff can create a profile and participate in this process. The Idea Exchange is also going to replace the current prioritization process with a new MEEP (Member Exclusive Enhancement Process). In this new process, there will be a new working group that will go through the IDEA Exchange and select the ideas that are most important to develop based on comments and votes and rankings. These ideas are then sent on to the Innovative Team and ranks them and once or twice a year. Innovative Members will be asked to vote on what to implement. Previously, anyone with an account could vote, but now it will be limited to members who are a member of IUG. So CCS will have one vote as they are IUG Members. Some individual libraries have also purchased individual IUG memberships so that they can vote. Winning Ideas will be developed within twelve months.
- ii. D. Wischmeyer shared details about the recent winning ideas that will be added to Polaris 7.7, which will come out in Quarter 4 2024. The winning ideas are creating a record set from saved and scheduled searches in Simply Reports, and the record sets will then automatically update. There will also be accessibility shortcuts added to Polaris in LEAP for common workflow actions. Other updates include the ability to select multiple items in the LEAP Find tool, Viewing recent search history and making non-blocking circulation blocks optional and disabling these messages (e.g. patron has held items).

8. New circulation report prototype: Demonstration and Activity

- a. D. Wischmeyer introduced the initial report prototype tool to review circulation statistics, built in Tableau (the same platform as the CCS Diversity Audit Tool). This is the first iteration of the tool and it will hopefully be completed in the next six months to one year. M. Fujiura-Landers gave a demonstration of the new report, including how to use the dimensions to manipulate what data is displayed, and how the data can be viewed and organized, including in visual representations like graphs. The Filters and Fields tab also allows you to further refine data, e.g. including renewals in checkout data or branch locations. Members were asked to make notes about the tool during the demonstration and then organize their answers through a form, and note items that they liked (I like), things that they wish could be improved (I wish) and questions about capability of the tool (I wonder). Discussion ensued amongst members about some of the questions they initially had based on the demonstration. There were questions about if there's a way to filter if checked out items were holds or an item that was browsed. There were also questions about how far back you can look back at data, so far feedback has suggested at least a year would be helpful. Bob said we could possibly go back to 2018 with data. Discussion ensued that it might be useful to look back 3-5 years or at pre-pandemic numbers as well.

9. Adjournment

S. Bunte adjourned the meeting 10:46 AM.

Next Meeting: September 19, 2024 at 9:30 am (in person at CCS office)

All matters on the agenda may be discussed, amended, and acted upon

Attendance:

Debra Wischmeyer- CCS
Pam McLaughlin -Fremont
Henry Sadowski - Algonquin
Anna Pauls - Round Lake
Michele Whisenhunt- Huntley
Mieko Fujiura-Landers CCS
Sam Bunte- Fox River Valley
Becky Oberhauser- Cary Area Public Library
Melissa Mayberry- Morton Grove
Alie Stansbury - McHenry Public Library
Emily Fardoux - Park Ridge
Nancy Weber - Crystal Lake
John Lavalie – Des Plaines
Ann Finstad - Glencoe
Liz Steffensen- Huntley
Courtney Schroeder- Morton Grove
Gayatri Shah- CCS
Nancy Weber - Crystal Lake
Arianne Carey- Niles Maine
David Whittingham - Des Plaines
Anne B- Mount Prospect

Robert Barth - CCS
Meg Golembiewski- Prospect Hts
Sally Baylaender -Glenview
Mieko Fujiura-Landers -CCS
Tracy Gossage -Northbrook