



## Director's Report July 2024

### **Innovative Migration Status:**

*Enterprise MyLists* – These have been moved over to Vega Discover as Bookmarked Lists. Innovative had some difficulty in processing the extraction file from SirsiDynix at first, but all lists have now been imported. Some may notice the number of items is fewer in a list than it was in Enterprise - this is because of rolled up records. If the patron had two items in a list (large print and regular book for example), they now are a single list item pointing to a rolled up record.

*SmartPay Deposits* – Shortly after migration we discovered that SmartPay was placing “Deposits” on patron accounts instead of properly applying payments towards fines on patrons’ accounts. Comprise believes this has been resolved and we’re keeping an eye on reports to make sure it doesn’t resume.

*Library Kiosk Sites* – I’ve created PAC/Kiosk sites for each member library building that limits the search to physical materials at that location and prominently displays the call number in the search results. They also have a 5 minute default timeout which can be customized per kiosk site. The URLs for these sites have been shared with all member libraries.

*Progress with Lockers* – A glitch was fixed that made it cumbersome for members that had lockers to place holds on behalf of their patrons within Leap. This has been resolved. We’re still waiting for Vega Discover to have pickup areas as an option when patrons are placing requests – this is scheduled to be completed this quarter and we volunteered to beta test once the capability is available.

*LibraryIQ Analytics* – Our analytics platform has been connected to Polaris and they are starting to map Material Types, Collections, Shelf Locations and Item Stat Classes to filterable and reportable variables.

*Vega Program Early Adopters* – Jonathan has been in touch with 9 libraries and has submitted information for provisioning. Our early adopters for Events and Room Bookings are Cranbury, Cranford, East Brunswick, Jamesburg, Long Branch, Monroe, Old Bridge, South Amboy and Union. New features were just released in Vega Program including: A setting for the maximum number of bookings per user per day for each room and piece of equipment, and a setting for the maximum number of future room bookings per user.

*Circulation Training Manual* – We've released a printable circulation training manual for staff that may prefer learning from a printed document or having it for reference. This manual will be revised if any functionality changes.

*Duplicate Bib Records* – We've heard from some new libraries that bib records did not fully dedupe as part of the migration and implementation. Spot checking, we were able to confirm that the dedupe did occur but it wasn't as complete as we'd hoped since variations in titles between two bib records that have the same ISBN resulted in two bib records in the system. We've run some initial reports on the number of duplicate bibs and are working on determining next steps.

*Hoopla Limits on Main Collection Site* – The central catalog ([search.stellanj.org](https://search.stellanj.org)) currently has the full collection of Hoopla material which can be confusing for patrons who's libraries only allow checkouts of Hoopla material less than \$1.99 for example. We've been working with Innovative to scope this down so that patrons will only see material that is available to everyone - with the option to have additional content shown at each library's collection site if your library allows more. Each library will be reached with a list of options to determine how they want their collection sites configured, including the option to suppress hoopla records entirely.

*Self Check Incompatibility* – We spent quite a bit of time trying to get Old Bridge's Tech Logic brand CircIT self-check software to function with Polaris, but it unfortunately does not have the ability to limit the item types that it allows to circulate. This is a common capability on most self-check systems. Instead, this software relies on the ILS to limit what can be checked out. Polaris only has a single table that controls all self-check restrictions for the system, which means blocking the circulation of media would also block it for all other libraries using self check machines. I've reached out to the product manager for Polaris and explained the scenario and she confirmed that it's only a single setting for the

entire system and that custom settings per branch hadn't been requested before.

**STELLA App:** SOLUS and Innovative have been working to add consortia templates for each member library, and we anticipate this being complete by the end of this week. Each library will be provided with access to customize their patron's view of the app, and we'll also be offering to help set up the initial layout and options. Members will also have the ability to keep the default STELLA view. There is still a known glitch with filtering by library that only displays about 20 locations. I've escalated this issue with their Director of operations.

**New Member Library Check-Ins:** Christy and I had check-in calls with each new member library. Things are going well for all four, and they asked questions about how holds are processed by the ILS, spine printing, and Hoopla budgeting options. We received a recommendation to create an online repository of settings for the ILS – for example, information about the timing of notices going out at 7AM, 11AM, 3PM, and 7PM, or holds remaining on the holds shelf for 7 days. We've started brainstorming, and have come up with a way for this table of settings to be searchable and clearly indicate which settings are system-wide settings and which can be configured per library.

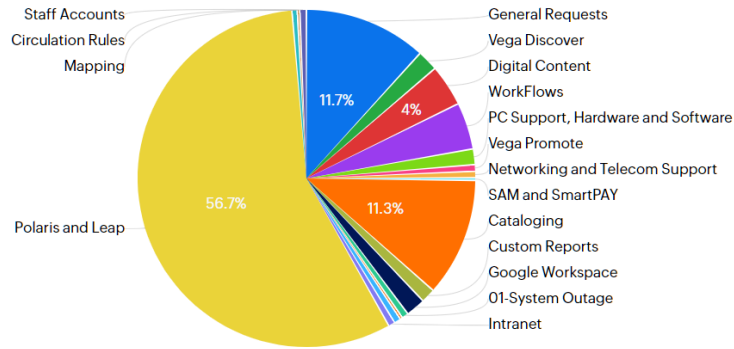
**Name Change:** Elisa has been hard at work changing our name with various vendors, NJ departments, bank, and charities registration filing. We've notified Federal Business Centers and will start working with their team to change out the front signage.

**Firewall VPN Licenses:** We've had an increased number of libraries reaching out to set up VPN access for connecting to Leap from mobile devices or non-library networks. This required us purchasing additional SSL VPN licenses – we were able to save some money by purchasing a 50-pack of simultaneous connections and will re-assess should we reach that number.

**Zoho Helpdesk Changes:** We've created new departments (ticket categories) within our Helpdesk so that we can efficiently work through tickets and triage problems. I've also gone through and assigned Libraries to each contact so that we can run reports such as "Number of Ticket Requests Per Library", "Number of Unresolved Tickets Per Library", etc.

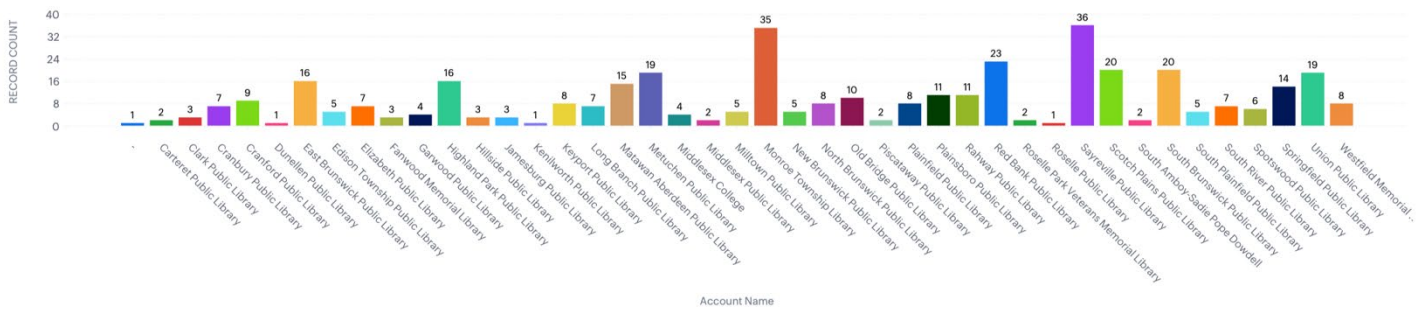
## June Help Desk Statistics:

Monthly Ticket Report (802)



- General Requests (94)
- Vega Discover (16)
- Digital Content (32)
- WorkFlows (36)
- PC Support, Hardware and Software (12)
- Vega Promote (5)
- Networking and Telecom Support (5)
- SAM and SmartPAY (2)
- Cataloging (91)
- Custom Reports (11)
- Google Workspace (15)
- O1-System Outage (5)
- App Support (2)
- Administration, Billing and Purchases (5)
- Intranet (5)
- Polaris and Leap (455)
- Mapping (4)
- Circulation Rules (2)

### Open Tickets by Library (394)



## Statistical Summary Data (June 13<sup>th</sup> – July 13<sup>th</sup>):

Total Bib Records	1,009,255
Total Items	3,509,483
Check Outs	481,420
Unique Borrowers	49,957
Holds Placed	46,174
New Bibs Added	4,203
New Items Added	10,135
New Patrons Added	5,547

Respectfully Submitted,

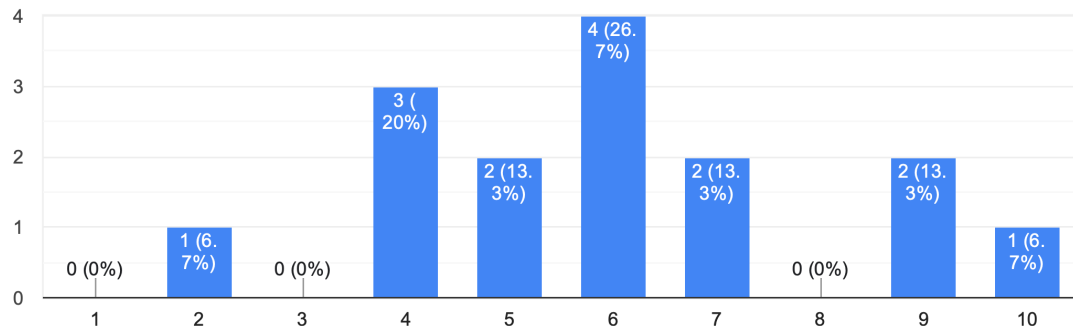
Eric P. Lozauskas  
Executive Director

## ILS Migration Survey:

15 libraries responded to the survey

### What is your overall rating of the ILS Migration

15 responses



Average score is 6.

### General Feedback:

The amount of training provided was very helpful to my staff, who I encouraged to attend. If they had not attended the trainings, they would be way behind the learning curve. The system for submitting tickets has worked well; we usually get a response within a day or two.

The rules for our materials were not migrated. New books are being put on hold for other libraries. Check out times are incorrect, etc. If you could send out a copy of the materials mapping, then we could send it back corrected and have it implemented, rather than putting in tickets for each issue.

Jonathan and staff have been very responsive and helpful, Eric's regular email updates have kept us in the loop, there were many trainings and helpful tips sent out throughout the process. Communication of the migration was excellent. CPL anticipated hiccups and the hiccups we experienced were less than anticipated. Both myself, and all my staff, were very pleased and impressed with the handling of the migration.

It seems like the cataloging side of Leap was not as thought out as the circulation side of things and there has been a lack of communication about how and why certain decisions were made. I will say that I'm new to the consortia, so I didn't understand the catalog mapping in WorkFlows either which is probably not helping.

I am reticent to complain too much because I have been unable to attend meetings over the course of the past 6+ months so I'm certain that I've missed important updates and explanations. I'm sure I missed opportunities to raise concerns as well. I do feel that the timing of the migration was rushed, and could have benefitted from slowing down and taking the time to survey individual libraries about their customization needs. Also, the fact that we went live only 9 days before summer reading kicked-off was really frustrating. Late June and July are our most busy times and the migration created additional stress and work for all of our staff. That said, I know that this kind of undertaking is not without its glitches and difficulties - your efforts to fix the problems are appreciated.

Overall I don't think the migration has gone badly here at Metuchen. All staff received training on the circulation functions, and those who need to (myself included) are slowly catching up on the cataloging side of things. Staff are struggling with some of the search functions, but this is to be expected with a new system. It will take time. That being said, there are several things that were/are unsatisfactory. Primarily, I would like to have seen and reviewed the mapping well in advance, and have had plenty of time to review it thoroughly. I feel like I saw the mapping briefly at a Circulation Protocol meeting, which I happen to be a part of- but I wouldn't even have been informed of it otherwise. There was not an opportunity for myself and Metuchen librarians to look at it before the migration, which resulted in many wrongly migrated items. For example, we have a large collection of Chinese books that were a 2-week loan period. Because of this, they all got classified as "Book-New" -- but new books have a limit of 10. So now when people are trying to check out more than 10 Chinese books, or Chinese books in combination with other New books, they are getting blocked- even though there is no limit on Chinese books. Had we known this was going to happen, we just would have changed them to "Book" and changed the loan period to 3 weeks like every other non-new book -- but we were never asked. Also, all of our nonfiction items- juvenile, YA, and adult- migrated as nonfiction, and many of the loan periods and renewals were wrong. (Recently the loan periods and renewals were fixed, I think- I haven't had time to test them.) Something I find particularly annoying about Polaris- which you may relay to your contacts there- is that it cannot just have a "7 day" or "14 day" or "21 day" loan period -- instead, each loan period has to be tied to a material type, and these material types are limited (which is understandable). So, besides the aforementioned case of Chinese books, in the case of multi-disc DVDs (such as TV shows), which have a 3-week loan period (regular DVDs have 1-week loan

period), we now have to catalog them as Type DVD and Loan Period "Book" because "Book" is a 21 day loan period. This seems really silly for a system that's otherwise so robust. A couple of other things: -- I have found at least one patron whose 'claimed returned' item in WorkFlows was charged to them in Polaris. I hope this was an outlier, or more people are going to be unhappy. Maybe we should pull a list of claims returned in WorkFlows and compare the records. -- More than one patron has been charged some kind of Processing Charge "from the Consortium Office" when paying with a credit card via SmartAlec. I put in a ticket about this but haven't heard. I hope I hear soon. Generally speaking, it's bad when patrons get extra charges put on their account for no apparent reason and it's nothing our library's staff has done.

If we had the circ map that shows what the collection was and what it was being changed to, it would've been manageable to point out ALL the needed fixes. Instead, we are working in chaos - submitting tickets for every single problem, being told they are fixed, and oftentimes finding out they aren't fixed.

Staff permissions not allowing common user functions grinds circ desk to a half - permissions need to be adjusted, still waiting; app as part of migration - patrons not aware that STELLA app was upgraded, some unified instructions for patrons would have been useful; small fines appeared on accounts, but patrons were blocked - since solved but cause a lot of ill will and upset patron phone calls; additionally we were told that we could not add a floor as a shelf location; we have 3 floors and previously used that info in the catalog to guide patrons. With Polaris live, we see Middlesex College able to use Upper Level and Lower Level as a shelf location. We would respectfully like to follow that approach, which we were denied for unknown reasons.

More in-person training would have been useful. In some instances, perhaps some consortium staff could have gone out to various libraries, particularly larger ones, so that more staff could absorb the information. Information provided in smaller 'bites.' More easily absorbed and retained. Library feedback on classifications, etc.

Confusion of how existing policies were correct in the spreadsheet from STELLA but incorrect when migrated. No communication (or very little) about the auto-renewal implementation for all libraries going forward. Limits on holds is high because of East Brunswick (?) and checkouts limits were only adjusted upon request.

The ability to see tickets placed by other libraries would alleviate the need for our library to enter a ticket for the same general issue.

We did plenty of training prior to the migration which gave us a very little learning curve. Leap is very intuitive and easy to learn.

More streamlined record change out to new and back again. Easier way to migrate two records.

The timing on this was difficult for us specifically - several members went to NJLA, so that took a whole week out of prep/planning/training for us. In addition, we get our most foot traffic in June-July-August, due to summer reading programming, so my full time staff (the ones who I wanted to be the trainers) is usually swamped with that and wouldn't be able to adequately support staff.

We definitely needed more training. It was a burden having to teach such a large staff. Especially where some are not computer savvy.

**Top Issues and Progress:**

The list of mapping rules will be extremely useful	Provided
Polaris would be better with a "check out" button or a "search patron record" button.	
NY Times and WSJ library card authentication	In progress
Correct circulation periods and renewals	In progress
Wrong loan periods and circ rules	In progress
All of the classifications fixed	
Circ map with workflows vs. Polaris changes	Provided
Staff permissions so we can function without a supervisor logged in	Option provided
Most of our adult nonfiction collection ended up as ADFIC. Can't be easily adjusted because some are correct. Same with JUV.	Will contact
Understanding the pick list algorithm	Provided
Having items not due on Sunday	Resolved
Ability to scan items into new materials easier	Contacted Innovative
Understanding the hold process	Will contact
Notice when an item isn't able to circulate – a unique sound would be useful	
It would be nice to scan the ISBN number in Search/Find in Leap	Contacted



**Document 24-49**

	Innovative
Understanding the catalog mapping	Will contact
Can't see deleted items with fines associated or details about lost items	
A clear chart of loan periods, renewals, holds, fines in Polaris	Provided
Ability to generate reports	Training coming soon
Waiving fines on lost items removes item from account – we can't mark missing or reorder	Training coming soon
I thought the catalog items were to roll down on one continuous page so browsers don't have to click from page to page to see results.	Misunderstanding of functionality
We know Polaris is great with reporting, but no training has been done yet and we're reliant on an already stretched STELLA staff for them.	Training coming soon
Cleaning up Bib records. They are still messy	In progress
Hoopla and Libby do not require a pin number	In progress
Less lockdown on circ module, or ways I can set my own permissions for circulation staff.	Provided option to have all circ permissions for all staff
Quick cheat sheets would be great, but I've made them for my staff as needed – willing to share.	
Once an item is marked lost, there's no way to put a claim on it until the fine is waived.	Will contact
We do copy cataloging. Typing in the title of each book we want to catalog is time consuming. We don't load MARC records on our own. Polaris would be better with a cataloging page.	Will contact
Correct item templates	Training coming soon
Vega is showing that items are sometimes available in certain libraries but when you click through, it shows checked out.	Contacted Innovative
Cataloging problems – more training needed	Training coming soon
Problems with patron notifications and not knowing what messages are going out to patrons.	Will contact
Ability to utilize our locker system on both patron and staff end	Contacted Innovative
Item searching through Leap difficult – showing all libraries even after filtering.	Will contact
Still missing My List!	Provided

**Document 24-49**

Clear (maybe a spreadsheet) communication of who will transit what. We don't know anything about the policies of the newest libraries.	
Duplicate cards and records is a huge issue.	In progress
It would be helpful if lost items still appeared in the list of checked out items until they're paid for/resolved.	Training coming soon