**Consortia Forum**

4/5/17, 1:30pm

Miss the consortia category for enhancements – the category was removed and it is missed

IUG enhancement process is changing – another session was offered on this. The general idea is to open this up so that everyone can submit ideas, comment on the ideas, bump ideas up/down, etc. so that the best, most popular ideas rise to the top. Then, experts can weigh in on which would be good ideas, which can then cause iii to (potentially) add features to their roadmap.

Iii/supportal login will be required for enhancement process. There are questions on how to set up permissions for staffers – in some consortia, not everyone has iii/supportal logins.

The idea is that iii will get the information on potential enhancements more quickly – this should pair well with iii’s new release train model

When submitting enhancement requests, keep in mind that you should think broadly to ideas that are broadly applicable (rather than very specific) so that they would have broader reach/impact to more users/customers.

Include stories/use cases with enhancements so that iii will have a better idea of what folks want/need and what problem the enhancement would solve.

When commenting on enhancement requests, comment on what it means to you, how you would use it, etc. This will give iii more insight into what’s needed/wanted, and whether folks are talking about the same thing in a given enhancement request, or if multiple enhancement requests are secretly embedded within one.

Include WHY you want an enhancement. For example, functionality vs. aesthetic changes. Give the enhancement context!

This will also help iii assess how much time it would take to develop a given enhancement.

Should the enhancement request include a field for staffers to enter a use case example?

The new enhancement process will include a section that will list similar requests – hopefully, this will help reduce duplication.

The new enhancement process should be more friendly toward moving consortia-specific enhancements forward.

If your member libraries become members, they would be able to vote, and that could give your consortium more power to push forward enhancements.

You can get notifications/updates from posts to the new enhancements product/page.

PPOR – Product Plan of Record

We want to get more enhancements worked into iii’s PPOR!

Do tickets get attached to enhancements during the process? (If a library had a ticket related to an enhancement they’d like to see.)

It’s difficult to write a good enhancement request because the people who know what iii needs are the product people already working for iii.

When you’re talking about something that doesn’t exist yet, there are much broader, existential questions that are raised – use cases are key to help the developers figure things out.

They’re still figuring out how to best gather the information they need for enhancements – still under discussion.

Bug reports vs. enhancements – one library reports that their bug reports were moved to be enhancements. That can be frustrating, because the library doesn’t know that they’re submitting an enhancement request (so they don’t necessarily flesh out the idea and their needs), and the library doesn’t like spending enhancement votes to fix bugs.

Iii will consider that use case when fleshing out the new enhancement system.

One library suggested that if iii has questions on an enhancement request, iii should reach out to the library and ask for clarification.

Iii has been talking with staffers, holding focus groups, etc. and they recognize the importance of customer feedback. Time constraints can play a factor if iii doesn’t reach out with questions, but iii does try to!

Several consortia mentioned they wouldn’t allow member library staff to submit tickets. Some are hesitant to create iii/supportal accounts for member library staff, because the member library staff may not be focused on the broader picture – there may be too large a focus on minutiae.

Would it be possible to have a supportal login with no supportal access?

IUG will send out a message once the enhancement system is ready to be played with, probably some time in the summer.

Importance of identifying patrons as living in certain municipalities for keeping statistics, to advocate for funding, etc. Would it be possible to automate updates to patron codes/municipal codes? Or for patron database clean-up.

A library asked if patron templates could help

Unique Management offers a service to take patron database, do a match for folks who left town, address checks, etc.

The Quipu Group offers self-registration and validation. This includes address validation, which helps to make sure that the patron is within service area, data is formatted correctly, etc.

Multi-site configuration – for text messaging notifications, it can be difficult for patrons to track which library branch an item is ready at.

The text messages can be very generic – it’s up to the patron to keep track of where items should be picked up.

Philosophical idea – make your patron responsible for themselves, but help them along the way.

Some consortia have issues where different libraries use different ebook platforms, purchase digital content that is not available to everyone – this can be very confusing for patrons.

Several libraries said they have this issue.

Some consortia avoid this issue by not allowing member libraries to have separate ebook/digital content accounts.

More libraries are demanding that they be able to directly purchase digital content, and that those items be visible in the catalog. But this has caused confusion for patrons, where they don’t know what they can and can’t borrow.

The integration with CloudLibraryLink was mentioned as an option that would allow member libraries to purchase content.

How many libraries are putting URLs in the 856 field of the Marc record? Is anyone considering putting the URL on the item record?

Some libraries are or are considering including the URL on the item record. The URL label specifically says “X library cardholders, click here” – adding that has become part of their cataloging process.

Scoped sites – it would be nice to have an option to search most (print) materials unscoped, but only search digital content scoped, so that patrons would only see what was available to them.

Idea of patron identities – that patrons can have different identities

Would it be possible for digital content to not show up unless the patron is logged in?

Iii representative mentioned that maybe this was something that could be worked on with OverDrive as part of ebook integration.

Something similar to this will be happening with INN-Reach – a lot of folks upload resources, but not everyone has access to all of those resources. Part of the development that has been discussed is to limit what patrons can see when they login.

At Marmot, they quit waiting for these types of developments, so they worked with 3rd party vendors

Are metered titles being added to the catalog? And if so, how are they being removed?

One library said that they’re removing the records after patrons complain.

WPLC selection group gets notification messages – something for a library’s selection committee to consider, perhaps? From Overdrive, notifications come through that materials are going to expire, if items are not re-purchased, the records are removed.

Hoopla also sends a monthly list of titles to remove.

For hoopla deletes, one library found a way to “reload” the record and mark the bib record for deletion, so they can handle those records by batch.

How do you handle book club requests? Item-level requests? Can it be confusing?

One library always puts item-level requests, but prefers that patrons put their own requests through. When staffers place the holds, they use item-level requests to make sure that the items come in at the same time (they select which libraries to send the requests to).

Paging priorities can slow things down, depending on how customized the lists are. If configured sub-optimally, it could cause slow-downs. This may be an area to explore for tweaks.

The issue the library was describing may or may not still be an issue – may have been fixed by later developments.