Enterprise Update(s):

As with Symphony/Workflows, there are periodic major updates made by SirsiDynix to the software and system of the catalog; these major updates tend to fix things that we could not fix by ourselves.

One of those updates has been released and would allow for a patron’s checkout history to be sorted. However, the update also removes author information from the checkout history; to be explicit, in the update we would gain the ability to sort checkout history, but would lose checkout history author information.

The reason SirsiDynix chose to do this involves extremely gory details of the backend. From everything we’ve heard from them, removing the author information is a stop-gap, intended as an immediate fix for a problem other sites have with extremely long checkout histories, with a more permanent fix to follow.

Ideally, this would not be a one-or-the-other situation, and patrons would not only be able to see author information for their checkout history, but also sort by it. However, this is the choice:

*Update the catalog, and gain the ability to sort the checkout history while losing author information.*

*Don’t update the catalog, and still be unable to sort checkout history, but still see author information.*

The major update does fix other things, but some of these fixes either depend on other decisions by this group or can be somewhat fixed by us instead of the major update.

The most notable parts that the major update would also fix:

-Patrons editing email address online. Currently, though we have not turned it on, there is a way for patrons to self-edit their email address. The reason we have not allowed self-editing is because the form to do so is confusing and patrons likely would be frustrated.

The major update would have made it clear which fields are able to be edited, along with some other formatting fixes (email address validates against a standard format; improved error reporting in self-editing).

*Allow patrons to edit their own email address online, or wait for the update?*

-Slightly more mobile-friendly. Some changes made with the major upgrade would have helped the display of the catalog on a phone or tablet. A full mobile-friendly appearance for the catalog is still in development, with a projected release date of sometime this summer.

Without the update, are some small customizations we can do to make the catalog respond better on a phone or device, as a stop-gap measure.

There are other updates that we can do ourselves, which do not involve SirsiDynix’s major releases to the catalog.

One such custom update would be the Favorite Author Club. The idea and major development for this came from Jim Novy of Lakeshores Library System, who graciously shared the scripts.

The purpose of the Favorite Author Club is for patrons to sign up to follow specific authors through the catalog. When a new work by that author is added to the catalog, the patron will automatically have a hold placed for them on that work. The holds respect Local Hold items and Blocked patrons. Adding new works can be done centrally so that catalogers do not need to keep track of which items by which authors should be added.

The original scripts only allowed patrons to have holds automatically placed on regular print books. In customizing the scripts for our system, we added in an option to allow patrons to choose a different format to follow. So, patrons could choose to have holds placed only on new LargePrint or CD-Books by the authors they follow.

However, due to coding limitations, the format choice has to apply to all authors the patron wants to follow: a patron cannot choose to follow one author’s LargePrint books and another author’s CD-Books, but would have to follow both authors in the same format.

This could cause frustration among patrons who might want to follow most authors for regular print, but have one author they only listen to audiobooks for. While we want to offer patrons the most flexibility and options in following options, we can see where it might be simpler to limit the Favorite Author Club to only regular print books, as Lakeshores has done.

 *Is it better to have one choice of format when many choices might be desired, or to have no choice in format at all?*

A smaller update that we can do to the catalog is to allow patrons to renew their own accounts online, without library intervention. We can show a button to renew their account once their card is expiring within a month, with instructions to check their Personal Information, and if it has changed, to contact their local library instead of renewing their account.

They would be allowed to renew their account even if they were already expired, or if their card was Blocked due to fines, but not if their card is expired and BARRED.

 *Should we allow patrons to renew their accounts online*?