

Environmental Scan Task Force Interview Questions

Questions for Polaris ILS customers

1. Responses to the survey indicate the Polaris SQL database can be used for obtaining information typically needed by libraries for usage statistics. Do you have a reporting interface used by library staff without needing access or knowledge of SQL?
2. Does having SQL access to the ILS database allow libraries to take steps like a bulk change to MARC fields or patron data fields? Does this create performance issues that ripple out to other staff such as circulation?
3. Is the LEAP interface used by all levels of library staff? For which staff is this web-based interface most effective and where is it not as developed as the Polaris staff client?
4. Do you have opinions on the Innovative vendor support for Polaris? Are you experiencing any delays with reported issues?
5. Can you describe the process for adding new libraries to your consortium? What support does Innovative provide during these projects?
6. How has your group implemented the “demand management” or holds matrix within Polaris?
7. Does ILL Polaris have a module or interface for managing homebound patrons? Within SWAN there are 15 libraries using a Symphony WorkFlows module called Outreach.
8. Are there methods used for adding brief cataloging records? Are there customizable templates with required MARC bib fields? Many libraries in SWAN add brief bibliographic records which are then upgraded to full MARC records.
9. How is Polaris integrated with OCLC Worldcat for bibliographic record import?

10. How are vendor integrations handled with Polaris? Examples include scheduled exports of data, use of file transfers using SFTP, API access, and SIP2 connections.
11. Can you describe how consortia level staff manage access, password security, and user administration within Polaris?

Questions based on points of concern raised by SWAN membership within Platform survey

Staff interface

1. How easy or difficult is it to see a patron's spot in a hold queue?
2. How easy or difficult is it to place holds for multiple copies of the same title?
3. How forgiving is the search function of misspellings and typos?
4. How well do filters or dropdowns work for limiting searches?
5. How relevant are results of searches by topic/subject?
6. To what extent is the user interface "intuitive"?
7. Can patron profile information, holds, and checkouts be viewed from one screen?
8. How easy or difficult is it to view recent previous users?
9. When a patron is referred to a recovery service for a non-returned item, is title information on the billed item retained?

Reports Interface

1. How steep is the learning curve for creating reports with this product?
2. For pre-created report templates, how easy or difficult is it to identify the right report template to use?

Staff Mobile Interface

1. How robust is this interface in comparison to the non-mobile staff interface, i.e., how comparable are the features of the mobile to those of the desktop version?
2. How easy or difficult is it to create new library card records using this interface?
3. How accurate are records in the staff mobile interface versus desktop?

Patron Interface

1. How forgiving is the search function of misspellings and typos?
2. How relevant are results of searches by topic/subject?
3. How effective are the filters?
4. How easy or difficult is it to re-set the filters between searches?
5. How effectively are records of the same title in different formats grouped?
6. Do all items in the record match—e.g., does the cover art and the description match the item?

7. Can staff “masquerade” as a patron to place holds for the patron?
8. How easy or difficult is it to upload cover art?
9. How accurately and clearly do the search results indicate whether an item is owned by or available at a specific library?
10. How easy or difficult is it to create and sort lists?

Messaging interface

1. Does it offer two-way messaging? Can two-way messaging be turned off?
2. Can users opt out of receiving messages? Is the library informed of this if they do?
3. Do you use this product to notify users of auto-renewals? If not, why not?
4. How customizable is the interface for individual-library branding and featured announcements?
5. Is there an extension of this product available by which libraries can use the product for their own e-newsletters?