



## **ILS Request for Change of Standard Operating Procedures**

*Last Update: September 2, 2016*

### **Introduction**

The ILS Committee works with the MAIN central office to provide a cost-efficient and reliable integrated library system for the entire consortium. A set of standard operating procedures (SOP) has been adopted by the committee in order to address requests for change (RFC) which are received from the membership. All changes must be approved by the ILS Committee unless otherwise stated below.

### **Public Access Catalog (PAC) RFC SOP**

- Changes should be requested by a director or a committee by opening a support ticket and should generally be for the greater benefit of patrons, rather than staff.
- The MAIN central office will perform a feasibility study and impact review of the requested change.
- If deemed feasible, the requested change will be sent to the ILS Committee.
- The ILS Committee can then choose from the following actions:
  - Approve the request
  - Seek feedback from the relevant committee(s) (e.g. Circulation Committee, Digital Services Committee)
  - Reject the request
- If seeking feedback from one or more committees, the ILS Committee will decide to approve or reject a request after taking into consideration the committees' feedback.
- In order to maintain a consistent interface for patrons regardless of library, PAC specifications should not be customized for individual libraries.
- The frequency and number of changes made to the PAC will be taken into consideration by the ILS Committee when making decisions.
- Decisions may be referred to the MAIN Board of Directors at the discretion of the ILS Committee.



### **ILS Client RFC SOP**

- Changes should be requested by a director or a committee by opening a support ticket.
- The MAIN central office will perform a feasibility study and impact review of the requested change.
- Changes that only affect the processing and/or view for a specific library, with no impact to the patrons' use of the library or another library's use of the system, can be implemented without further review. Popular examples of these sorts of changes include but are not limited to:
  - client display font size;
  - number of days an item is kept on the hold shelf;
  - addition of permission for ILL or Associations.
- More wide-reaching changes that will affect patrons' use of the library or another library's use of the system and are deemed feasible by the MAIN central office, will be reviewed by the ILS Committee. Popular examples of these sorts of changes include but are not limited to:
  - change in text of patron notification messages;
  - a new Collection or Shelf Location type.
- The ILS Committee can then choose from the following actions:
  - Approve the request
  - Seek feedback from the relevant committee(s) (e.g. Circulation Committee, Digital Services Committee)
  - Reject the request
- If seeking feedback from one or more committees, the ILS Committee will decide to approve or reject a request after taking into consideration the committees' feedback.
- The frequency and number of changes made to the ILS client will be taken into consideration by the ILS Committee when making decisions.
- Decisions may be referred to the MAIN Board of Directors at the discretion of the ILS Committee.

### **Reports RFC SOP**

- Changes or additions should be requested by a director or a committee by opening a support ticket.
- The MAIN central office will perform a feasibility study and impact review of the requested change.
  - If the MAIN central office's study and review of the RFC determines that there is no impact on the rest of MAIN, the ILS Committee will not need to review the RFC.
  - The ILS Coordinator will notify the ILS Committee at the next meeting when such a change is made in an effort to provide transparency and ideas for other libraries.
- The MAIN central office will provide instructions on how to produce the report in Simply Reports, create an SQL Report, and/or how to access the report.