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HELIN ILS Task Force Final Report

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HELIN Consortium. ILS Task Force

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HELIN ILS Task Force Report
Charge

“Review the current model for ILS”

Board Initiative

“Be the library of the future in both storing and accessing knowledge; blend the best of library traditions with the use of new technology tools”.

Members

Bonnie Buzzell (Brown), Pat Crawford (Bryant), Rosalyn Metz (Wheaton) Co-Chair, Dr. Rosie Hopper (J&W), Chris Peterson (CCRI), Olga Verbeek (Salve) Co-Chair, Bob Aspri (HELIN) Ex-officio, Martha Rice-Sanders (HELIN) Ex-officio, Ruth Souto (HELIN) Ex-officio.

Synopsis

The ILS Task Force created a survey to measure the usage and satisfaction of the current ILS, which is a turnkey Innovative Interfaces Inc. Release 2009B 1.1 system. The survey focused on the major modules, functions, and interfaces of the system.
Introduction

In the first few meetings the task force discussed how to interpret the charge. Eventually the group settled on the idea of evaluating the current ILS. They felt that this would be something that could:

1) help the consortium discover the strengths of the ILS
2) give the consortium an idea of what the weaknesses of the ILS are
3) provide the consortium with potential criteria for purchasing a new ILS
4) outline further research that may need to be done with regards to the ILS

Based on these conversations, the task force chose to create a survey that evaluated the use of the ILS and the satisfaction of its users.

First, the task force clearly defined what was meant by the term ILS. They chose to exclude outside systems like Serials Solutions, since these were essentially standalone products that could be easily replaced. Instead, the task force chose to focus its efforts on the individual modules, features, and interfaces that come from Millennium’s vendor, Innovative Interfaces.

Next, the task force decided to survey the use and satisfaction of the modules, functions, and interfaces. They felt that this would give them a better understanding of the advantages and disadvantages these modules, functions, and interfaces provide the consortium. They also agreed that this might help inform any future work that may need to be done based on the survey’s findings.

Finally, the task force chose to collect basic demographic information about each of the survey’s respondents. This would allow them to look at satisfaction and use based on a variety of different factors including, HELIN affiliation, years of use, and primary job function.
Demographics

Prior to surveying the participants, the task force asked the Executive director for a “census” of employees that work for each of the HELIN institutions. Based on the best information the executive director had, the consortium contains 416 employees. 120 of those work at Brown, 24 at affiliate institutions, and the remaining 272 at HELIN Full membership institutions.

The survey had 181 respondents. The breakdown of these respondents is as follows:

Employees from HELIN full membership institutions had the highest response rate at 45.2% (123/272 employees), this was followed by Brown at a response rate of 42.5% (51/120 employees), with HELIN affiliate membership institutions reporting in at 29.1% (7/24 employees).
The majority of respondents to the survey self identified as working in reference (47/181 respondents), followed closely by access services (45/181 respondents) and then by cataloging (22/181 respondents). The task force did consider asking users whether or not they were librarians or staff, but eventually felt that this distinction may not be necessary for the purposes of the survey.

51% of the respondents have used the ILS for over 10 years, with 31% with 4-10 years experience and 18% with 3 years or less experience.
116 (64%) of the 181 respondents do not use the acquisitions module (66% from HELIN full members, 28% from Brown, 6% HELIN affiliate).

65 (36%) of the 181 respondents use the Acquisitions module. Of the total users, 32.5% use it daily, 23% weekly, 12% monthly, and 32.5% occasionally.

Of the 65 acquisitions users, 66% are very satisfied (7) or satisfied (36), 28% are neutral (18), and 6% are unsatisfied (3) or very unsatisfied (1).

Of the 47 HELIN users, 66% are very satisfied (6) or satisfied (25), 30% are neutral (14), and 4% are unsatisfied (1) and very unsatisfied (1).
Of the 18 Brown users, 67% are very satisfied (1) or satisfied (11), 22% are neutral (4), and 11% are unsatisfied (2).

None of the HELIN affiliates use this module.

It’s important to note that some users reported, “do not use” for satisfaction even though they indicated that they use the module. This usually happened when users reported using the module occasionally or monthly.

The following is a breakdown of individuals’ job functions and how satisfied they are with the module:

- Access Services (10) – 6 neutral, 3 satisfied, 1 very satisfied
- Acquisitions (12) – 9 satisfied, 1 each (very satisfied, neutral, unsatisfied)
- Administration (7) – 4 satisfied, 2 very satisfied, 1 neutral
- Cataloging (10) – 6 satisfied, 3 neutral, 1 very satisfied
- Digital Services (5) – 4 satisfied, 1 very satisfied
- Other (8) – 6 satisfied, 1 each (neutral, unsatisfied)
- Reference (6) – 5 neutral, 1 unsatisfied
- Serials (7) – 4 satisfied, 1 each (very satisfied, neutral, very unsatisfied)

In terms of years using the system and satisfaction, the most satisfied are those users who have used the ILS for under 4 years (100% are satisfied); while the least satisfied are those who have used the ILS for 4-10 years (7% are unsatisfied).
Cataloging Module

In every category by which survey participants were asked to rate their satisfaction with either the Millennium or Telnet cataloging module, more than half rated themselves as “satisfied” or “very satisfied.” This suggests that the HELIN ILS cataloging module is adequate to better than adequate.

One of the most notable characteristics of this data was the fact that, of the 181 participants who responded to questions about their satisfaction with the cataloging module, generally less than 10% rated themselves as “unsatisfied” and none (0%) rated themselves as “very unsatisfied.”

Of the 181 respondents, 54.7% (99 respondents) do not use the cataloging module within Millennium. Of those that do, 40% use it daily, 34% use it occasionally and the remainder uses it on a monthly or weekly basis.
Of the 181 respondents, 83.4% (151 respondents) do not use the cataloging module in Telnet. Of those that do 60% (18 respondents) use it occasionally, 17% (5 respondents) weekly or monthly, with only 6% (2 respondents) using it on a daily basis.

Among the 13 participants from HELIN full-membership libraries and identifying their primary function as cataloging, 12 (91%) were “satisfied” or “very satisfied” with the Millennium cataloging module, and 1 (9%) was unsatisfied.
The 1 (100%) participant from a HELIN affiliate-membership library and identifying their primary function as cataloging, was “very satisfied” with the Millennium cataloging module.

Among the 8 participants from Brown libraries and identifying their primary function as cataloging, 7 (87.5%) were “satisfied” with the Millennium cataloging module and 1 (12.5%) was “neutral.”

Among the 21 participants from HELIN full-membership libraries and use the Telnet cataloging module, 12 (57.13%) were “satisfied” or “very satisfied,” 1 (4.76%) was “unsatisfied” while 8 (38.09%) were “neutral.”

Among the 2 participants from HELIN affiliate-membership libraries that use the Telnet cataloging module, both (100%) were “satisfied” or “very satisfied.”

Among the 11 participants from Brown libraries and use the Telnet cataloging module, 6 (54.54%) were “satisfied” or “very satisfied,” 1 (9.09%) was “unsatisfied” and 4 (36.36%) were “neutral.”
Among the 54 participants from HELIN full-membership libraries and use the Millennium cataloging module regardless of their primary function, 31 (57%) were “satisfied” or “very satisfied,” 4 (7.4%) were “unsatisfied” and 19 (15.44%) were “neutral.”

Among the 4 participants from HELIN affiliate-membership libraries and use the Millennium cataloging module regardless of their primary function, 4 (100%) were “satisfied” or “very satisfied” with the module.

Among the 25 participants from Brown libraries and use the Millennium cataloging module regardless of their primary function, 18 (72%) were “satisfied” or “very satisfied,” 5 (20%) were neutral, and 2 (8%) were unsatisfied.
The majority of users do not use the telnet version of the cataloging module. Of those that do, the overwhelming majority is satisfied, neutral, or very satisfied.
Circulation Module

Based on a total of 45 respondents who identified their primary role as Access Services, the overwhelming majority (including and excluding Brown respondents) is satisfied or very satisfied with both Millennium and Telnet for Circulation. Generating high levels of satisfaction with a workhorse module such as Circulation of any ILS is a good sign indeed.

Of the 181 respondents 25.4% do not use the circulation module. Of those that do, 49% use it daily, 25% occasionally and 24% weekly.
Of the 181 respondents, 72.4% do not use the telnet version of the circulation module. Of those that do, 42% use it occasionally, 30% use it weekly, and 22% use it daily.

Above are the values for both Brown and HELIN institutions where persons self-identified with the primary role of access services. For HELIN institutions, 23 respondents identified themselves with the primary role of Access Services. The breakdown of these respondents is as follows:

- Satisfied/Very Satisfied: 83%
- Neutral: 13%
Above is a breakdown of all users (both Brown and HELIN) that self-identified with the primary role of Access Services and their satisfaction with the Telnet version of the circulation module.

Of the 23 users from HELIN that self identified as Access Services, only 13 used the Telnet version of the circulation module. The break down of these is as follows:

- Satisfied/Very Satisfied: 62%
- Neutral: 31%
- Unsatisfied/Very Unsatisfied: 8%
Course Reserves Module

Based on a total of 45 respondents who identified their primary role as Access Services, the overwhelming majority (including and excluding Brown respondents) is satisfied/very satisfied with both Millennium and Telnet for Course Reserves functionalities. Interestingly, enough the course reserves satisfaction levels are nearly identical to the circulation satisfaction levels.

Of the 181 respondents, 60.8% do not use the course reserves module. Of those that do, 35% use it occasionally, 34% use it daily, and 20% use it weekly.
Of the 181 respondents, 86.1% never use the telnet version of the course reserves module. Of those that do, 58% use it occasionally, 23% use it weekly, and 19% use it daily.

Above are results of satisfaction with the Millennium course reserves module for those respondents that self identified as Access Services. These numbers include both Brown and HELIN institutions.

22 respondents indicated that they worked for a HELIN institution, self identified as Access Services and used the Millennium Course Reserves module. The breakdown of satisfaction for these respondents is as follows:

- Satisfied/Very Satisfied: 64%
- Neutral: 27%
- Unsatisfied/Very Unsatisfied: 9%
Above are the results for both HELIN and Brown users that identified their primary role as access services.

Of the 22 HELIN access services respondents, only 10 indicated that they used the Telnet module. The satisfaction of those users is as follows:

- Satisfied/Very Satisfied: 60%
- Neutral: 40%
- Unsatisfied/Very Unsatisfied: 0%
Of the 181 respondents, 64% do not use the serials module. Of those that do, 45% only use it occasionally (29 respondents), 37% (24 respondents) use it daily, and 17% (11 respondents) use it weekly.

The overwhelming majority of users who self-identified as having the primary role of serials, were satisfied/very satisfied (73%), the remainder were neutral (18%), and unsatisfied (9%).
Of all respondents, the majority that used the module was satisfied/very satisfied (21%), neutral (13%), or unsatisfied (1%).
Interlibrary Loan Module

Very few respondents indicated that they even use Innovative’s Millennium ILL module, which in and of itself would seem to indicate that the Millennium ILL module does not fit their needs. This seems to indicate that Innovative has a lot of work to do if this module is to ever be successfully adopted.

Of the 181 respondents, 70.7% (128 respondents) do not use the interlibrary loan module. Of the remaining, 43% (23 respondents) use it occasionally, 26% (14 respondents) use it weekly, 23% (12 respondents) use it daily.

ILL - Millennium (Primary Role = Access Services)
Above is the breakdown of satisfaction for the Millennium ILL module for respondents from both Brown and HELIN that self-identified with the primary role of access services.

The following is a breakdown of the same data but for HELIN institutions only.

Millennium (13 of 23 users)
- Satisfied/Very Satisfied := 31%
- Neutral == 46%
- Unsatisfied/Very Unsatisfied == 23%

![Pie chart showing Millennium ILL module satisfaction]

Above is the breakdown of satisfaction for the Telnet ILL module for respondents from both Brown and HELIN that self-identified with the primary role of access services.

The following is a breakdown of the same data but for HELIN institutions only.

Telnet (4 of 23 users)
- Satisfied/Very Satisfied = 50%
- Neutral = 25%
- Unsatisfied/Very Unsatisfied = 25%
ERM Module

The ERM Module is one of the least used modules in the suite of Innovative products. Of those that do use it, few use it on a regular basis or have much of an opinion at all about the module.

Of the 181 respondents, 82.3% (149 respondents) do not use the module. Of those that do, the majority use it occasionally (50%), weekly (22%), or monthly (19%).
The majority of users are overwhelmingly neutral in their opinion of the ERM module (47%). The remainder is satisfied/very satisfied (33%) or unsatisfied/very unsatisfied (20%).

For those persons that identified their primary role as serials, the majority do not use the module (64%). The remainder is unsatisfied/very unsatisfied (27%) or neutral (9%). None of the respondents indicated that they were satisfied with the module.
Of the 181 respondents 73% do not use web management reports. Of those that do 57% use it occasionally (28 respondents), 33% use it monthly (16 respondents), and 8% use it weekly (4 respondents).

When one considers respondents primary role, then the following groups in order that use WMR are: administration (46.15%), acquisitions (44.44%), digital services (43.75%), access services (35.56%), and reference (21.28%). All other roles use WMR less than 20%.
40.22% respondents who have worked with the ILS for more than 10 years use WMR. Only 23.47% of respondents that have worked in the ILS for less than 10 years use WMR.

Antidotal: At Salve, WMR is mainly used for circulation statistics and by the selectors to track their funds. Other uses include the age of the collection. One important statistic that cannot be obtained here, but is available in telnet, is intra HELIN loan statistics.
Create Lists Module

Of the 181 respondents 43% (78 respondents) do not use the create lists functionality. Of the remaining 47% use it occasionally, 25% use it monthly, and 24% use it weekly.

Of the 181 respondents 82.9% (150 respondents) do not use the Telnet version of statistics. Of those that do, 74% use it occasionally, 16% use it monthly, and 10% use it weekly.
Statistics Module

Of the 181 respondents 62.4% (113 respondents) do not use the statistics module. Of those that do, 53% use it occasionally, 30% use it monthly, and 10% use it weekly.

Of the 181 respondents 88.4% (160 respondents) do not use the statistics module. Of those that do, 67% use it occasionally, 14% use it weekly, and 14% use it monthly.
Of the 181 respondents, 17% are either satisfied/very satisfied, 14% are neutral, and 8% are unsatisfied/very unsatisfied. Overall, users seem to be generally ok with this particular module.

Of the 181 respondents, the majority are neutral in their satisfaction of the telnet statistics module (8%), followed by satisfied/very satisfied (5%) and then unsatisfied (1%).
153 (85%) of the 181 respondents use the HELIN Classic Catalog. Of the total users, 63.5% use it daily, 14.5% weekly, 6% monthly, and 15% occasionally. (ANOMALY: 1% of users who reported they do not use the Classic Catalog indicated their satisfaction level; they are included in the count of users).

28 (15%) of the 181 respondents do not use the HELIN Classic Catalog (78.5% from Brown, 18% HELIN full members, 3.5% HELIN affiliate).
Overall, the majority (72.5%) of users are very satisfied (49) or satisfied (62).  17.5% of users are neutral (27), with 10% unsatisfied (12) or very unsatisfied (3).

Of the 29 Brown users, 41% are very satisfied (4) or satisfied (8).  45% are neutral (13), with 14% unsatisfied (3) or very unsatisfied (1).

Of the 6 HELIN affiliate users, 100% are very satisfied (4) or satisfied (2).

Of the 118 HELIN full member users, the majority (79%) are very satisfied (41) or satisfied (52).  14 (12%) are neutral, with 9% unsatisfied (9) or very unsatisfied (2).

The majority (82.5%) of the 97 daily users are very satisfied (41) or satisfied (39), with 8% neutral (8), and 9.5% unsatisfied (7) or very unsatisfied (2).  Frequency of use is not as relevant here, since those who are unsatisfied with the HELIN Classic Catalog have the option of using Encore instead (although Encore does not have all of the Classic Catalog features).

The following is satisfaction based on respondents self-identified job function.

- Access Services (39) – 16 satisfied, 13 very satisfied, 10 neutral
- Acquisitions (8) – 4 satisfied, 2 neutral, 1 each (very satisfied, unsatisfied)
- Administration (10) – 6 satisfied, 2 unsatisfied, 1 each (very satisfied, neutral)
- Cataloging (16) – 7 satisfied, 5 very satisfied, 4 neutral
- Digital Services (16) – 7 satisfied, 6 very satisfied, 2 neutral, 1 very unsatisfied
- Other (9) – 4 very satisfied, 2 each (satisfied, neutral), 1 unsatisfied
- Reference (46) – 18 very satisfied, 12 satisfied, 8 unsatisfied, 6 neutral, 2 very unsatisfied
- Serials (9) – 8 satisfied, 1 very satisfied
Encore Discovery Platform

112 (62%) of the 181 respondents use Encore. Of the total users, 53% use it daily, 18% weekly, 2% monthly, and 22% occasionally. (ANOMALY: 5% of users who reported they do not use Encore indicated their satisfaction level; they are included in the count of users).

69 (38%) of the 181 respondents do not use Encore (71% from Brown, 28% HELIN full members, 1% HELIN affiliate).
Satisfaction/dissatisfaction is about evenly divided amongst the 112 users. 44% are very satisfied (22) or satisfied (27), 13% of users are neutral (15), and 43% are unsatisfied (26) or very unsatisfied (22).

Of the 2 Brown users, 100% are neutral about Encore.

Of the 6 HELIN affiliate users, 83% are very satisfied (3) or satisfied (2) and 17% are neutral (1).

Of the 104 HELIN full member users, 42% are very satisfied (19) or satisfied (25), 12% are neutral (12), and 46% are unsatisfied (26) or very unsatisfied (22).

The majority (58%) of the 59 daily users are very satisfied (16) or satisfied (18), 10% are neutral (6), and 32% are unsatisfied (14) or very unsatisfied (5). Frequency of use is not all that relevant here, since those who are unsatisfied with Encore currently have the option of using the HELIN Classic Catalog as an alternative and thus may not use it daily.

The following is a break down of satisfaction according to job function:

- Access Services (21) – 6 unsatisfied, 5 very satisfied, 4 neutral, 3 each (satisfied, very unsatisfied)
- Acquisitions (8) – 4 satisfied, 2 each (neutral, very unsatisfied)
- Administration (10) – 6 very satisfied, 3 satisfied, 1 neutral
- Cataloging (11) – 4 neutral, 3 very satisfied, 2 unsatisfied, 1 each (satisfied, very unsatisfied)
- Digital Services (10) – 5 satisfied, 2 very unsatisfied, 1 each (very satisfied, neutral, unsatisfied)
- Other (7) – 3 each (unsatisfied, very unsatisfied), 1 very satisfied
- Reference (40) – 12 unsatisfied, 11 satisfied, 9 very unsatisfied, 5 very satisfied, 3 neutral
- Serials (5) – 2 each (unsatisfied, very unsatisfied), 1 very satisfied
136 (75%) of the 181 respondents use the Brown catalog, Josiah. Of those who use it, 35% use it daily, 18% use it weekly, 16% use it monthly, and 31% use it occasionally.

45 (25%) never use the Brown’s catalog Josiah; 42 are HELIN full members (34% of HELIN responders), and 3 are HELIN affiliate members (43% of affiliates).

Overall responders were fairly positive about Josiah, with 72% very satisfied (31) or satisfied (67), 18% neutral (25), and 10% unsatisfied (11) or very unsatisfied (2).
The 51 Brown respondents were less satisfied. In this group, 68% were very satisfied (14) or satisfied (21), 10% (5) neutral, and 22% -- nearly one quarter – unsatisfied (11) or very unsatisfied (2).

Among the 81 HELIN full member users, 73% were very satisfied (15) or satisfied (44), 25% were neutral (20), and 2% were unsatisfied (2) or very unsatisfied (0).

Of the 4 affiliate users, half each were very satisfied or satisfied.

Of the 50 daily users, 72% were very satisfied (13) or satisfied (23), 12% were neutral (6), and 16% were unsatisfied (6) or very unsatisfied (2).

The following is a break down of satisfaction based on self-identified primary job functions:

- Access Services (39) – 10 very satisfied, 17 satisfied, 9 neutral, 3 unsatisfied
- Acquisitions (5) – all 5 satisfied
- Administration (9) – 2 very satisfied, 6 satisfied, 1 neutral
- Cataloging (14) – 2 very satisfied, 7 satisfied, 3 neutral, 2 unsatisfied
- Digital Services (14) – 5 very satisfied, 7 satisfied, 1 neutral, 1 very unsatisfied
- Other (12) – 2 very satisfied, 5 satisfied, 1 neutral, 3 unsatisfied, 1 very unsatisfied
- Reference/Instruction (39) – 17 satisfied, 10 very satisfied, 9 neutral, 3 unsatisfied
- Serials (4) – 3 satisfied, 1 neutral
133 (73%) of the 181 respondents use the InRhode Catalog. Of those who use it, 20% use it daily, 30% use it weekly, 10% use it monthly, and 44% use it occasionally.

48 (27% of all respondents) do not use the InRhode catalog, 18 from Brown (29% of Brown responders), 28 HELIN full members (22% of HELIN responders), and 2 HELIN affiliate members (29% of affiliate responders.)
Overall, 53% were very satisfied (15) or satisfied (56), 30% were neutral (40), and 17% were unsatisfied (17) or very unsatisfied (5).

Of the 33 Brown staff who reported using the InRhode catalog, 58% were very satisfied (2) or satisfied (17), 30% were neutral (10), and 12% were unsatisfied (3) or very unsatisfied (1).

The 95 HELIN full members who reported using the InRhode catalog were less satisfied. Of these, 49% were very satisfied (11) or satisfied (36), 38% were neutral, and 19% were unsatisfied (14) or very unsatisfied (4).

5 HELIN affiliate members reported using the InRhode catalog, all of them very satisfied (2) or satisfied (3).

26 individual reported using the InRhode catalog daily. Of these 54% were very satisfied (4) or satisfied (10), 15% were neutral (4), and 31% were unsatisfied (6) or very unsatisfied (2).

The following is a breakdown of satisfaction based on self-identified primary job function:

- **Access Services (37)** – 6 very satisfied, 15 satisfied, 9 neutral, 7 unsatisfied, 6 very unsatisfied
- **Acquisitions (4)** – 3 satisfied, 1 neutral
- **Administration (10)** – 1 very satisfied, 5 satisfied, 2 neutral, 2 unsatisfied
- **Cataloging (10)** – 7 satisfied, 3 neutral
- **Digital Services (16)** – 1 very satisfied, 9 satisfied, 4 neutral, 1 unsatisfied, 1 very unsatisfied
- **Other (10)** – 1 very satisfied, 4 satisfied, 2 neutral, 2 unsatisfied, 1 very unsatisfied
- **Reference/Instruction (42)** – 6 very satisfied, 12 satisfied, 17 neutral, 4 unsatisfied, 3 very unsatisfied
- **Serials (4)** – 1 satisfied, 2 neutral, 1 unsatisfied
36 (20%) of the 181 respondents use the HELIN Mobile Catalog. Two-thirds (24) use it occasionally, 22% weekly, 14% monthly, and 8% daily. No HELIN affiliate users reported using the HELIN mobile catalog.

Two Brown users reported using it, of which 1 each was satisfied and very satisfied. 34 HELIN full members report using it, of which 54% are very satisfied (7) or satisfied (11), 41% are neutral (14), and 5% unsatisfied (2).
Only 11% of survey respondents use Brown’s mobile catalog, moBUL. Of the 20 who do so, 70% use it occasionally. The remaining 30% are just about evenly split among daily, weekly and monthly users.

No HELIN affiliate users reported using the Brown mobile catalog.

As expected, 70% of the users (14) are from Brown. This is just over one-fourth of Brown survey respondents. Half of them report that they are “very satisfied”, with 3 satisfied and 4 neutral.

The 6 HELIN users are very satisfied (1), satisfied (2), and neutral (3).