

# UHLS Automation Advisory Committee (AAC) – Meeting Minutes

12/14/16

**Attending:** Tim Wiles (GUIL, Chair), Jill Dugas-Hughes (EGRN), Mindy Fowler (SNLK), Ryan Moore (COLN), Debbie Sternklar (VOOR), Catherine Stollar Peters (BETH), Melissa Tacke (CAST), Joe Thornton (UHLS).

**Guest:** Tim Burke (UHLS)

**Call to order:** The meeting was called to order by Chair T. Wiles at 9:09 am.

**At-Large Member Vacancy:** T. Wiles reported that Melanie Metzger (APL) has volunteered to join the committee to fill the at-large member seat vacated by Katie Kimball. She will join AAC starting at the January meeting. T. Wiles noted that Metzger has some ongoing schedule conflicts that may preclude her participation in the meeting after 10:00 am.

**Approval of November minutes:** C. Stollar Peters moved that the minutes of the 11/9/16 meeting be approved. R. Moore seconded. Approved unanimously.

**Boopsie Mobile App:** T. Burke reported that funding of Boopsie was approved by the Central Library Committee. Deanna DiCarlo (UHLS) and J. Thornton are point people for the rollout. J. Thornton added that UHLS will solicit information (i.e. hours, contacts, banners) from UHLS libraries for the app. T. Burke indicated that the app should go live 4-6 weeks after all information has been received from member libraries, with February 2017 as a tentative go-live window.

**Online Patron Registration:** J. Thornton has reformatted the online patron registration form in response to member library suggestions. Online patron registration is set to go live on 1/1/17. UHLS will formulate a set of recommended procedures, which will be sent to member libraries before the go-live date. Temporary registrations will have a UHLS Adult patron type. Temporary registrations will not automatically expire; UHLS will be responsible for running an internal report to cull temporary registrations that have not been updated to become permanent patron records within a 14-day timespan. T. Burke reported that the Directors' Association had voted to approve a 14-day window for the validity of temporary registrations at the DA's 12/4/16 meeting.

Discussion of paper registration cards. T. Burke reported that there is not consensus among member libraries regarding the use of paper registration cards; whether to use the cards will be at the discretion of each library. J. Thornton reported that at this time, UHLS will continue to make paper registration cards available.

Discussion of methods for checking online patron registration data. J. Thornton reported that the recommended procedures to be distributed by UHLS will include how to handle a patron who registers online, then comes to a library to obtain a card which is not a library that represents that patron's geographic area (i.e. a patron who comes to BETH for a card who lives in the APL service area). Staff creating the card will enter a note in the patron record. UHLS will run a report on this note and send a daily email to the "home" library's circulation contact person to update/check the patron data. C. Stollar Peters described a procedure outlined at BETH for workflow for online patron registration, which she will share with the committee. J. Thornton will create an ad hoc report, generated by patron type, to identify all new patron registrations at a library (online or paper) to allow for data checking and cleanup. Libraries will be able to choose a patron creation date span in the report's search parameters.

Discussion of promotion of online patron registration. D. Sternklar requested that, in addition to promotion generated by member libraries, UHLS issue a press release to promote online registration.

**Sierra:** Summary recap of minor Sierra issues discussed at 11/9/16 meeting. No further discussion or action steps.

**Encore Customization:** Discussion of possibilities for Encore customization, including a review of example sites:

**Book reviews:** Options include Novelist or Content Café. T. Burke reported that the Central Library Committee had discussed Novelist for 2017 funding, but it was not chosen to be funded. Pricing for the Novelist database is approximately \$24,000. T. Burke will find out whether UHLS can pursue a version of Novelist solely for integration with Encore, and at what cost. Discussion favored the look/recommendations of Novelist but Content Café was also explored. J. Thornton indicated that Content Café charges \$250 for each review source. The committee

identified the following 6 review sources to pursue: Booklist, Kirkus, LJ, PW, SLJ, VOYA.

**Search screen:** Sacramento Public Library website features widget that includes drop-down menu indicating type of search (i.e. keyword, author), search bar, and drop-down menu to choose specific library. Widget works for initial search but does not limit to specific library in follow-up searches in Encore. J. Thornton will create similar widget that member libraries can feature on their websites, and will look into whether facet limitations can be “remembered” in subsequent searches in Encore.

**Search facets:** J. Thornton will pursue adding the following facets to Encore search results: Genre, Subject, Audience (juvenile, YA, adult). J. Thornton will remove the Place facet currently on the site.

**Navigation bar:** Feature on Naperville Public Library site that attracted interest. J. Thornton will look into; no menu choices determined.

**Integration with New York Heritage:** J. Thornton will explore possibilities, including whether results can be limited to regional data.

**Addition of additional language options:** Chinese was mentioned as a possible addition to current language options. J. Thornton will find out whether additional language options can be added, and at what cost.

**“Get a library card” link:** J. Thornton will add link to online patron registration form in Encore adjacent to “My Cart / Login.”

**Library calculator info on checkout receipts:** J. Thornton reported that a template for using library calculator values on a receipt cannot pull data from specific item records. An estimate based on each item type can be used. J. Thornton will create a template for patron receipts using the following wording: “You saved an estimated \$[amount] by using your library today. Thank you!” Libraries can also customize wording for their library.

**Ecommerce:** C. Stollar Peters reiterated the desirability of ability to pay fines online, possibly via Paypal. T. Wiles expressed interest in ability to sell items (i.e. fundraiser tickets) online. T. Burke suggested Eventbrite for online registration payments. J. Dugas-Hughes suggested that the Friends of EGRN use Qgiv for accepting donations online.

**Next Meeting: Wednesday, January 11, 2016 9:00 am at UHLS (in the green conference room)**

**Adjournment:** J. Thornton moved to adjourn meeting. T. Wiles seconded. Approved unanimously. Meeting adjourned at 10:57 am.

Respectfully submitted,

M. Tacke