

# UHLS Automation Advisory Committee (AAC) – Meeting Minutes

1/11/17

**Attending:** Tim Wiles (GUIL, Chair), Jill Dugas-Hughes (EGRN), Mindy Fowler (SNLK), Melanie Metzger (APL), 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 J. Thornton at 9:08 am.

**Report of action on items from December meeting:** J. Thornton reported on the status of action items from the December meeting:

**Integration of reviews in Encore:** J. Thornton has contacted III for a quote for the 6 review sources discussed at the 12/14 meeting. No response has been received.

**Boopsie:** J. Thornton is working in collaboration with Deanna DiCarlo on the Boopsie rollout. February is the estimated go-live window. UHLS will contact member libraries soon about information needed to customize the member library versions of the app.

**Encore customization:** J. Thornton removed the Place facet, added Genre facet. Attempted to move up position of audience classifications (Adult, Juvenile, Young Adult) but was unable to do so. C. Stollar Peters suggested creating Collection facet using only these three audiences. J. Thornton will pursue. J. Thornton has not yet explored possibilities in creating a navigation bar in Encore, or integration of New York Heritage into Encore. UHLS has submitted a request for a quote to III to add Chinese as a third language option; no reply received.

**Online patron registration:** “Get a Library Card” link published and went live on 1/1/17. Since that date, 50 temporary online registrations have been created.

**“You Saved” checkout receipts:** Rawdon Cheng is working on a template to add a “what you saved” transaction-based statement on checkout receipts. J. Thornton reminded the committee that the information will be estimates based on type of item being checked out, and will not pull the actual cost from item record.

**Electronic library cards:** General discussion of interest/concerns re: electronic-only library cards. No action at this time.

**Press release – online patron registration:** T. Burke confirmed that UHLS will issue a press release.

**Ad hoc reports – patron by home library:** J. Dugas-Hughes expressed interest in an ad hoc report that retrieves patrons by home library, with same exported fields as current ad hoc report that retrieves patrons by patron agency. J. Thornton will create the report.

**Encore customization – discussion of suggestions from member libraries:**

**Location/Branches cleanup:** J. Thornton will clean up the Location facet by simplifying member library/branch names and removing collection-specific locations (i.e. “Sand Lake Town Library – Juvenile”)

**“Only show available” in “see all” record view:** Current Encore default has “only show available” box selected when clicking “see all” link for an item after executing search. BETH staff suggested defaulting to showing all items. In discussion, some saw the current default option as more desirable than the suggested change.

**Limiting search to specific library:** Committee discussed desirability of option to limit search to specific library, particularly on opening search page and/or from library websites. J. Thornton had noted at 12/14/16 meeting that he would explore creating widget that member libraries can feature on their websites, and look into whether facet limitations can be “remembered” in subsequent searches in Encore. Will follow up with J. Thornton at next meeting.

**Reordering of libraries in search results:** Suggest reordering search results in Encore based on IP address – i.e., searches in Encore at COLN show COLN results first, followed by other libraries listed alphabetically. Question

raised as to whether reordering results is also possible when patron is logged in to their Encore account, based on patron's home library. J. Thornton will explore.

**View full publication date on search results screen:** Currently, Encore lists publication year, not full publication date. Sorting by date does not take into account when, during a year, an item is published. Discussion of usefulness of this function for prolific authors who publish several books in one year.

**Prominence of reviews in item record:** Discussion of desirability of having reviews or review link in view on first screen of item record, without having to scroll down. Committee acknowledges that this may not be possible in Encore, but asks that J. Thornton pursue possibilities.

**Audiophile as review source:** BETH staff suggested adding Audiophile as a review source. Committee asks that J. Thornton ask III for quote for cost of adding, in addition to other 6 sources previously identified.

**ContentDM/Encore harvesting:** J. Thornton already exploring (New York Heritage).

**"My Account" link/redirection:** Current default brings patron to search screen after logging in to Encore, and patrons must click on their name at top of screen to go to account. Questions for J. Thornton: If a patron logs into Encore, can the patron then be redirected to their account page rather than to search screen? If so, if a patron logs into Encore while in the process of a transaction (i.e. searching for an item, then logging in to place a hold), can Encore continue with the transaction (as it currently does) rather than redirecting to "My Account" screen? If no redirection is possible, suggestion to create a link in red beneath "My Cart"/Account Name links that reads "Click on your name to view your account."

**Novelist Plus integration:** Member libraries suggest integrating Novelist Plus rather than Novelist, as the former includes non-fiction content.

**CLCD integration:** Member libraries suggest integrating Children's Literature Comprehensive Database into Encore.

**UHLS header in Encore:** Discussion of UHLS logo link at top of Encore screen. Currently, link redirects to uhls.org. Possibility discussed of changing image link to specify "catalog" and linking to catalog.uhls.org. No decision/action specified.

**Kids' Catalog:** Committee explored Kids' Catalog as part of Encore customization discussion. Confirmed that selecting an owning library at beginning screen retained limits in subsequent searches, including searches using "find" search bar at top right. Error noted for UHLS follow-up: "another search" link was broken.

**Approval of December minutes:** J. Thornton moved that the minutes of the December 14, 2016 meeting be approved. J. Dugas-Huges seconded. M. Metzger abstained. Motion passed.

**Next Meeting: Wednesday, February 8, 2017 9:00 am at UHLS (in the green conference room)**

**Adjournment:** M. Fowler moved to adjourn meeting. R. Moore seconded. Approved unanimously. Meeting adjourned at 10:12 am.

Respectfully submitted,

M. Tacke