

UHLS Automation Advisory Committee (AAC) – Meeting Minutes

2/8/17

Attending: Tim Wiles (GUIL, Chair), Mindy Fowler (SNLK), Melanie Metzger (APL), Ryan Moore (COLN), Debbie Sternklar (VOOR), Catherine Stollar Peters (BETH), Joe Thornton (UHLS), Tim Burke (UHLS).

Meeting called to order at 9:07am.

Discussion of online patron registration data fields. Should birthdate be included? What is minimum data required to create skeleton record for patron to complete when they come to the library?

Committee decided there was a limit to the amount of personally identifying data UHLS should collect from online patron registration. Any additional patron data needed can be completed when patron comes into the library to confirm card registration.

Discussion of presentation of reference item status in Encore as available.

Why does material in “Library Use Only” status show as Available on the Search Results page in Encore? Because it is available and accessible, but not available to checkout.

Discussion of Encore Customization:

Reviews in Encore:

Incomplete original quote from III was \$220-\$250 per review source. Official quote is now \$600 to \$700 per source, meaning 6 titles were quoted for a total of \$4615. UHLS will call to confirm and cost of adding Chinese language. Will discuss at next meeting.

Audience facet:

Add Audience facet including Adult, Young Adult, Juvenile in addition to Collection facet—Joe is working on this

Customize menu/catalog banner:

Joe is working on Encore banner with a standard menu including: Member Libraries, My Account, Download & Stream, Get a Library Card, Kids Online, Renew your account. Joe will send to circulation, directors, and adult services listserv for their opinions.

Reordering of libraries onsite:

IP Priority request in progress with III. Will only work with static IP address.

Integration of New York Heritage in Encore:

Deanna is working on this. Joe will coordinate if we still want to local history images to Encore.

Limit location search to one library:

Joe will investigate.

My Account:

Redirect after login to Encore to main account page. Can login menu item in banner take you directly to login?

Boopsie: Deanna is coordinating. Rollout coming soon.

Online registration:

50 people registered online this month up to 150 registrations total.

In two instances someone tried to renew online or lives outside Albany or Rensselaer counties. Text in online registration will be bolded. Addition of "Renew your account" menu option (with link to phone numbers to member libraries) may decrease patron confusion.

Discussion of address lines in online registration form:

One address input vs. four lines. Four lines causes more lines in patron record formatting but it requires users to enter all four pieces of data for more accurate data collection.

Discussion of press release:

UHLS will put together a press release to include: Flipster magazine services, Online Library card registration, Ancestry, Mango, and Boopsie app availability.

Saving Calculator for Website and Due Date Slips:

NYLA calculator can be put on website (based on the generic ALA tool.) Code in Due Slip receipts should say: "Estimated value of your library visit is:" because default item costs are used in calculation.

Ad Hoc reports patrons by home library:

Joe is working on this

Location/Branches clean up:

Location names were simplified removing public library or library proper name from most locations. Colonie and RCS are the last to change.

There is a difference between Sierra and Encore display. Collection facet in Encore changed. Rob will update branches table in Sierra to address.

Discussion of need for ad hoc reports:

Circulation by hour and items in transit over two weeks requested. Both reports are available in Decision Center now. Discussion of training options from Rob.

Full publication date: next time

Approval of January minutes: T. Wiles moved that the minutes of the January meeting be

approved. R. Moore seconds. Motion passed.

Next Meeting Wednesday March 8, 2017 at 9am.

T. Wiles moves to adjourn. M. Fowler seconds. Meeting adjourned at 10:15am.