

# UHLS Automation Advisory Committee (AAC) – Meeting Minutes

3/8/17

**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).

**Absent:** Melanie Metzger (APLM)

**Guest:** Tim Burke (UHLS)

**Call to order:** The meeting was called to order by Chair T. Wiles at 9:05 am.

**Approval of February minutes:** R. Moore moved that the minutes of the 2/8/17 meeting be approved. C. Stollar Peters seconded. M. Tacke abstained. Motion approved.

**Encore Customization:** Discussion of old business regarding Encore customization:

**Book reviews:** T. Burke reported that UHLS has not yet received an itemized list of the cost of integrating reviews into Encore from iii. Once the paperwork is ready from iii's end, all UHLS will need to do is sign off on the update. The cost of the book reviews for this year can be paid for under UHLS's budget for system ILS.

**Search facet changes:** Committee expressed interest in changing the name of the "Collections" facet in Encore to "Locations," and removing audience facets (i.e. "Adult") from those results. Committee also expressed interest in adding a separate facet named "Audience" that would contain Adult, Young Adult, and Juvenile. C. Stollar Peters pointed to Alameda County Library's site as a possible model in that regard. J. Thornton will look into the possibility of making these changes, as well as suppressing the "[Library Name]-Juvenile" results from the "Collections" facet; these results currently appear at the bottom of the facet.

**Integration with New York Heritage:** J. Thornton has submitted information to iii and is awaiting response.

**Navigation bar:** J. Thornton will look into; no menu choices determined.

**Limiting search results to specific library:** Committee expressed interest in ability to limit search to specific library in Encore on initial search screen, at top of page in results screen, and to have a widget that can be used on member libraries' webpages. J. Thornton will pursue.

**Redirect to patron's account screen after patron login:** J. Thornton heard back from iii that this change is not possible.

**Boopsie Mobile App:** T. Burke reported that all work on UHLS and member libraries' end is finished, and we are now waiting on Boopsie.

**Online Patron Registration:** The committee reviewed changes to the online patron registration form. J. Thornton will remove the language "your card is waiting for you" from a heading in the confirmation screen that patrons see after sign-up. Committee also suggested that language should be tweaked to indicate that the code generated is a temporary code only. J. Thornton had added a birthdate field per a member library request; after the committee expressed concern about this field being part of online registration, J. Thornton will remove it.

**Press release:** T. Wiles suggested that promotion of online registration may be more effective at member library level. T. Burke sees launch of Boopsie as a better opportunity for a system-wide press release. D. Sternklar suggested including other aspects of libraries' digital services as part of the Boopsie press release (Flipster, OverDrive, online registration).

**Library calculator info on checkout receipts:** J. Thornton indicated that this function is up and running. Libraries with issues with the calculator should put in a support ticket.

**Ad hoc reports:** Committee reviewed "Patrons by Home Library" ad hoc report; J. Thornton pointed out recently added fields.

**New Business:**

**Online registrants and holds of physical items:** Member libraries have reported that when a patron registers online, requests items, then never follows up on completing registration, the items on the hold shelf do not appear on the “Clear Expired Holds” function and sit on the shelf. J. Thornton let the committee know that this has already been changed so that temporary patrons with items on hold are not purged from the system. That way, holds can expire and appear on “Clear Expired Holds” reports.

**Automated emails to patrons:** D. Sternklar expressed concern with lack of standardization in emails to patrons, including courtesy notices, overdue notices, hold notices, etc. J. Thornton asked for any examples to be sent to support desk. Committee discussed issues of possible concern; no action suggested at this time.

**Next Meeting: Wednesday, April 12, 2017 9:00 am at UHLS (in the green conference room)**

**Adjournment:** T. Wiles moved to adjourn meeting. M. Tacke seconded. Approved unanimously. Meeting adjourned at 10:15 am.

Respectfully submitted,

M. Tacke