

UHLS Automation Advisory Committee (AAC) – Meeting Minutes

5/10/17

Attending: Jill Dugas-Hughes (EGRN), Mindy Fowler (SNLK), Catherine Stollar Peters (BETH), Melissa Tacke (CAST), Joe Thornton (UHLS).

Absent: Tim Wiles (GUIL, Chair), Melanie Metzger (APLM), Ryan Moore (COLN), Debbie Sternklar (VOOR).

Guest: Tim Burke (UHLS)

Call to order: The meeting was called to order by J. Thornton at 9:09 am.

Approval of April minutes: C. Stollar Peters moved that the minutes of the 4/12/17 meeting be approved. J. Dugas-Hughes seconded. Motion approved.

Encore customization: Discussion of old business regarding Encore customization:

Book reviews: T. Burke reported that although book reviews are not yet live, UHLS is closer to getting there. UHLS has received some information from iii, but is waiting on an actionable quote.

Search facet changes: J. Thornton heard back from iii that facet changes can be made, but that UHLS must request a quote to make the changes. J. Thornton will inquire about a quote that enables the creation of an “Audience” facet that shows Adult, Young Adult, and Juvenile. The member libraries currently listed under the “Collection” facet will also be moved under the “Locations” facet if possible.

Youth audience facets: J. Dugas-Hughes inquired about changing the terminology used in the facets for youth collections (from Juvenile and Young Adult to Children and Teen, respectively). The committee agreed that a discussion of whether to change the terminology used for the youth audience facets should take place at YSAC. The committee will await feedback from YSAC before proposing any changes in the audience facet terminology.

Integration with New York Heritage (NYH): J. Thornton reported that integration is live; however, he also reported repeatedly receiving error messages (“daily harvest failed”), and will inquire with iii about why this is happening. C. Stollar Peters pointed out that results from NYH are appearing in the “Catalog” search results tab as well as under the “Images” tab. The committee is not in agreement at this time as to whether to remove NYH results from the “Catalog” search results tab. The status quo will be maintained for now.

NYH search facet: The committee discussed a new search facet that has appeared under the “Collections” facet since the integration of NYH into Encore. J. Thornton will change the label for the facet used, “Digital Collection,” to “Digital Image” to avoid confusion with other digital formats. It is unclear whether this search facet must stay under “Collection” or can be moved to “Format.” J. Thornton will inquire with iii.

Navigation bar: The committee commended J. Thornton for the improvements he made to the Encore navigation bar.

Search widget: J. Thornton reported that the search widget is now ready. It includes a drop-down menu for type of search (Keyword, Title, etc.), a search bar, and drop-down menu of libraries (“All Libraries” is set as default). The initial search using the widget returns results for a specific library if that option is selected; however, it does not maintain that filter for subsequent searches in Encore. J. Thornton will send the code to member libraries.

Boopsie mobile app: T. Burke reported that UHLS is still waiting to hear from Boopsie as to when the app is live, and will let member libraries know once UHLS receives word. UHLS plans to wait a few weeks after the go-live date before making a larger announcement and actively marketing the app; this gives member library staff time to familiarize themselves with the app and identify any initial issues with its use.

Automatic renewal of items: C. Stollar Peters reported that, although iii is aware of users' request for this function in Encore, it is not a top enhancement request and iii has not committed to including it in an update release. Other Sierra users outside of UHLS have customized on their end as a work-around to allow for automatic renewals. The committee decided to continue to table discussion of implementing automatic renewals.

Standardized loan periods and fines: Discussion of possibility of standardizing loan periods and fines system-wide. Committee will discuss tasks and process for exploring this change at the June meeting.

New Business:

Item types: Discussion of scaling down the number of item types used by member libraries in order to better reflect the intended function of item types in Sierra – to assign a loan rule to an item. J. Thornton will send a message to all member libraries to encourage them to identify any item types used for generating reports, and to define which item types might be used to streamline choices.

Next Meeting: Wednesday, June 14, 2017 9:00 am at UHLS (in the green conference room)

Adjournment: M. Tacke moved to adjourn meeting. J. Thornton seconded. Approved unanimously. Meeting adjourned at 10:35 am.

Respectfully submitted,

M. Tacke