

Encore Forum

Tuesday, April 4, 2017

9:00 a.m.

Moderators:

Stephanie Kaceli, Assistant Director, Technical Services/Systems Librarian

Cairn University, Masland Library

Pam Childers, System and Web Librarian, Jackson Library, Indiana Wesleyan University

Innovative Attendees:

Analisa Ornelas, Product Manager

Samantha Cuning, Manager of Discovery Group

Pam Childers introduced the forum as an opportunity for attendees to raise questions, problems and issues and learn about new things related to Encore and turned things over to Analisa Ornelas, from Ill, who introduced Samantha Cuning, Manager of the Discovery Group, since September 2016.

Analisa then gave a quick review of what Ill introduced in Encore over the course of the last year, including the notification of patrons whose accounts were about to expire, the removal of the 'Cancel All' button, and changes to improve responsiveness and accessibility (darkening fonts, improving tabs, etc.). They also improved how Encore handles elements of its searches, including leading articles (i.e. searches for Revenant and The Revenant will have the same results set). Another significant development was facet enhancements, which included checkboxes allowing for the selection of multiple facets, giving searchers more control. Ill found that, in terms of UI, because there weren't any checkboxes, users didn't understand they could manipulate the results set, because it looked like a line of text. While the level of control still isn't quite where many of us in the room want it, Analisa noted that for developers, "it's not about perfection, it's about iteration."

She alluded to Ill's new problem report process, hoping that problem reports move a bit more quickly through their development cycle, but also have them categorized in a way that they're all very clear on what the priority is. What is the balance for Ill, the impact on customers overall and that the individual customers see what they need to see in terms of support? These are all questions that Ill hopes to see answered with their new approach.

Focus then shifted to questions, the first of which was how to determine which version of Encore you are running, about which a number of people had expressed interest. Users of Encore 3.0 and above can find this information using the Sierra Admin app, while others can locate it in the page source of their catalog.

Other questions covered:

Issue with available font colors in 4.6 is resolved in next service pack (SP1), which is expected any day now. There is an INN-Reach issue that they would like to see resolved before this service pack is released.

Discussion then turned to author sort, a feature Ill worked on for their latest service pack, but it requires that corresponding changes be in Sierra, in order for it to be seen in Encore, which will happen in Sierra 3.2.

More control over EDS facets for Duet libraries has a bug that has required a number of libraries to turn off this feature. It was noted that in this enhancement, which becomes available in Sierra 3.0, you still need to put in a ticket with Ill to have them make any changes for you. What the control *should* amount to is the

order in which the facets (e.g. publication date) are displayed, which previously had been managed by the EDS Admin, which didn't allow for rearrangement.

In WebPac, if you have a musical artist who acts as producer, arranger, composer, performer, such as a jazz musician, if you were to search for a recording where they served as just a performer, you'd qualify his name with a relator code (e.g. Gillespie, Dizzy prf). If it's disabled in WebPac, it's disabled in Encore. But if it's enabled in WebPac, it doesn't work in Encore. This issue was fixed in a more recent version than the attendee had, though there was still a question of indexing.

This discussion also led to a point made by Analisa that there is a single code stream for Encore. Anything about display or patron account, etc. is really the same base code. The only thing that makes Duet different is that results are also coming from the EDS API, which impacts what the facets look like and the ways content is delivered to users.

Analisa also described a bit of the process of how ILL approaches their development work around Encore. Instilled in them by Chris Fields and Leif Pederson, they look at things that are at the top of their list. Anything they're looking at beyond that, is sort of a wasted effort in some ways, because the software will have changed, requirements will have changed, etc. So they don't begin looking at UI work or usability until they actually have something in their sights.

This led to a discussion of the new enhancement process and how ILL would like to see a larger discussion with the entire customer base, where customers make suggestions for enhancements, phrasing them as "here's a problem I'm trying to solve" rather than "make this button do this," so ILL understands what users can or cannot do because of the issue and they are voted on. Conversations can happen between customers and product managers. Then, those interested have the best chance to articulate what they're interested in might work best. This should allow everyone to feel like they're part of the process. New process will be rolled out in a few months.

An attendee raised the point that it might be beneficial to have a means for consortial members to have more of a voice, given that their concerns would be different from individual Encore users and Analisa discussed how the priority might map across different categories. There was also the feeling expressed by customers in European and other regions that their requests/likes were not likely to rise to the top. Prioritization is something they're still struggling with. Whatever the end result, they are really pushing for a transparency in the enhancement process, so that everyone feels a part of it and has ample space and presence to say that a given issue is important to their library and its user community.

Another attendee, representing a multi-type consortium, made the point that he would like things enabled on one scope, but not on another, because it has very specific ramifications, but it's very difficult to suss out in the Encore documentation, which is geared to be very global – one setting for every feature. If they could delineate which scope it could go to, it would allow for some of the control that the larger consortiums (and libraries) are interested in.

It was at this point that Analisa alluded to what was probably the biggest spoiler of the forum, when she mentioned the huge new development surrounding "Encore Suites," to tie to scoping, which is due in the fall (allowing for customization and separate EDS, 3M, Overdrive accounts) and they are looking for beta partners to put it through its paces. They also envision it as having the potential to create specific interfaces for kids and teens, which they feel should be doable through Encore.

Another attendee requested a reference manager that is not proprietary, directly linked from Encore Duet to allow for the export of citations and also asked that she be able to change the label and where it links to, so they're not limited to RefWorks. Someone brought up the Zotero plugin as a possible solution.

Someone asked about the future of Encore Synergy. It's a short-term future for many reasons. Chiefly, the connector architecture breaks a lot and III believes that the best user experience is delivered through a unified discovery, such as their EDS. Asking users who won't even go to a second page of Google results to go to a separate tab and go to separate databases in order to find what they're looking for doesn't gel with their research into modern searching and their work in unified discovery.

Someone committed to Synergy noted that they were in the situation they were because of a sales commitment and unfortunately could not choose otherwise, despite the appeal of the newer, unified discovery solution. Another user mentioned that she had made the switch a few years prior and it was not as financially damaging as one might expect and their servers are on-site.

Someone asked whether there is a true end of life for Synergy, as he felt it has already happened, noting that when he tried to get any support for it, he had to go the escalation route. Analisa noted that they have been introducing fixes and that they are working as they can.

An attendee from Massachusetts noted that we didn't choose Synergy *or* Duet and that we would like Innovative to give us *one* product that we won't have to present to our board which one we're going to buy. Analisa noted that they would like that too, but in terms of discovery, especially in terms of Encore, there are things that III will say legitimately do not work.

III is trying to figure out what its next system is. Currently referred to as the "Convergence," and has been having conversations over the last few years about Encore and its architectural limits, and they have been actively working with 3rd party consultants to figure out how they can give users access to all the content they want. But right now, the best user experience for digital content is Duet. As far as timeline for the "Convergence," III should be able to have something in mind by the end of the year.

Submitted by,

Shawn Farrell
4/10/17