

2020-02-19 User Management Meeting Notes

Meeting URL

<https://zoom.us/j/488543197>

Date

19 Feb 2020

Attendees

- [Maura Byrne](#)
- [Patty Wanninger](#)
- [Catherine Smith](#)
- [Edward Merkel](#)
- [Brooks Travis](#)
- [Jana Freytag](#)
- [Uschi](#)

Agenda items

- Patty will discuss Bulk Loading Requirements
- Discussion of the post-Card Sorting exercise with the Users display

Discussion items

Time	Item	Who	Notes
5 min	Bulk loading requirements	Patty W.	<ul style="list-style-type: none">• Patty is working with Ian Walls to be sure the proper tickets are written and all the interested parties have their requirements covers.

45 min

Results of card-sorting exercise of the Users display

Patty W.

Proposed User Record - Accordion Display based on user survey		Current User Record - Accordion Display	
1	Users	1	Users
2	Loans	2	Patron blocks
3	Requests	3	Extended Information
4	Contact Information	4	Contact Information
5	Patron blocks	5	Proxy / Sponsor
6	Fees/Fines	6	Fees / Fines
7	Extended information	7	Loans
8	Notes	8	Requests
9	Proxy/Sponsor	9	User permissions
10	Custom Fields	10	Service points
11	Service Points	11	Notes
12	User Permissions	12	Custom fields

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- After looking at the card sort layout (above) we decided we prefer the order of User record parts to list like this:
 1. User information
 2. Custom fields
 3. Loans
 4. Requests
 5. Fees/fines
 6. Blocks
 7. Notes
 8. Proxy/Sponsors
 9. Contact information
 10. Extended information
 11. Service points
 12. User permissions
- There was some interest in mapping actions to hotkeys (or, at least, some way to navigate and update the record using just a keyboard). It's the sort of thing we should bring up to Khalilah.
 - Actions in the user screen should also show up in a menu under the "Actions" button at the top of the screen.
 - If there's an Action, it should have a hotkey.
- Notes: Should they come up for the Checkout screen?
 - Should holds appear in a note? Both are questions for RA-SIG.
- How should the information display? Should each section be collapsed if it has no data, and be open if it has data? Should we be able to customize this display? There is a JIRA ticket, UIIN-680, connected to UXPROD-1662, that implies work to be done on a template for customizing displays.

Action items

- Patty will send out the ordered list of how we want the pieces of the User Record to display.
- Maura will put up a flowchart of how she thinks UC needs to process user records in bulk loads
- PDW create a feature on user customizable views
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