

**OWLSnet
Administrative Advisory Committee Meeting
Outagamie Waupaca Library System
May 16, 2014**

Present: Tasha Saecker, Paula Wright, Appleton; Rebecca Buchmann, Black Creek; Jamie Hein, Clintonville; Stephanie Weber, Florence; Ann Stearns, Fremont; Carolyn Habeck, Hortonville; Beth Carpenter, Kimberly/Little Chute; Tony Wieczorek Kaukauna; Susan Grosshuesch, Kewaunee; Nicole Lowery, Lakewood; Becky Bartell, Lena; Lyn Hokenstad, Manawa; Trinitie Wilke, Marion; Ann Hunt, New London; Kristin Stoeger, Oconto; Joan Denis, Oconto Falls; Wanda Boivin, Kymberley Pelky, Oneida; Evan Bend, Walter Burkhalter, Patty Hankey, Laura Jandacek, Gerri Moeller, Anne Paterson, OWLS; Sue Vater Olsen, Scandinavia; Elizabeth Timmins, Seymour; Melanie Waldron, Shiocton; Becca Berger, Linda Streyle, Tracy Vreeke, Sturgeon Bay; Amanda Burns, Suring; Peg Burington, Waupaca; Kristi Pennebecker, Weyauwega; Leslie Hill, Wittenberg

1. Call to order

The meeting came to order at 9:30am at the Appleton Public Library.

1. [Minutes of the March 28, 2014](#)

The minutes of the meeting were accepted as distributed.

2. AAC ground rules

Walter reminded everyone that with such a large group it can be difficult to hear and follow the discussion. He asked everyone to help the meeting function more effectively by remembering the AAC ground rules:

- Only one person speaks at a time
- Please wait until you are recognized to speak
- If you've spoken to the issue already, please let others speak

3. Announcements

- Borderline books are on the table in the back. The boxes are marked with the library name. There are some loose left over books for other libraries to take if they would like.
- Fox Cities Reads author, R.J. Palacio will be speaking in Appleton next Tuesday, May 20. The Julian Chapter, a Wonder story novella written by Palacio is out in e-book format.
- Joan Denis reported good news regarding Oconto county and a declining bill from Brown county for interlibrary loans.

4. Information – to be presented by OWLS and OWLSnet member library staff

- Sierra/Circulation
 - Gerri attended IUG in Detroit in April. At the conference, Innovative announced Release 2014 is coming soon. Gerri shared some of the enhancements coming in Release 2014. In Acquisitions, there will be a confirmation message after fiscal close is completed. In Circulation, libraries will have the ability to mark damaged materials as damaged instead of lost. This should make for a better workflow involving damaged materials. Staff will be alerted when a patron's account will soon expire. While our preference is for the patron to be notified, Innovative is working on it but still not sure when it will be

completed. Sierra will provide a running total count of items checked in. This will be especially helpful when there are a large number of items to be checked in. Print templates will be expanded allowing for more fields and more data to be added to spine labels and title paging lists. Also, print templates will be available for due date slips. This will make our due slips customizable. There is a new print template to create a financial payment receipt. Staff will have the ability to enter an explanation when they make a fine adjustment. We will have the ability to disable the auto-fill for birthdate in the patron record. In InfoSoup, patrons will be able to renew their items as long as there are enough available copies to fill existing holds. This should circumvent some of the issues with frozen holds. We are not planning to upgrade over summer, but possibly at the end of summer, after SLP is done. We plan on moving to Release 2014 but will wait and be cautious before upgrading.

- The draft procedures for checkout outside of the library also known as 'Sierra in the Wild' were distributed at the last meeting and library staff should have had a chance to look them over. Are there any concerns about this document? Gerri talked to Dave regarding VPN (Virtual Private Network) issues. OWLS would supply it but our current VPN is approximately 10-12 years old. OWLS will meet with a consultant to help analyze our network and possibly make upgrades. There may be some expense involved. Innovative announced at IUG that they are working on a web client. Innovative recently purchased Polaris who uses a web client version that Innovative plans on retaining. A web client may eliminate the need for using a VPN. OWLS will investigate further and update the libraries as we know more.
- The short loan report that OWLS generates has previously been offered as an optional report. It consists of items coded as short loan that are no longer in high demand (there are no holds on the title.) Many of the items on this report should be changed from a short loan ltype to a regular ltype. The report has been growing for some time and contains many older items that should be changed. To help libraries see these items on a more consistent basis, we will be sending it to all libraries in the future. Gerri has some copies of this report if any library would like to see it.
- **Cataloging**

Because of our change from OCLC to SkyRiver, the cataloging tool is going away. One of the issues with it is that it's not a database just an enormous text file. Evan is working on creating a new form. The new form provides instructions and is to be used when library staff are attaching items in Sierra and cannot find a matching bib record. The new form offers a few options; staff will select the one that best describes their scenario. Since it will be in database format, we believe we'll eventually be able to use the data to optimize the workflow.

A trainer from SkyRiver will be flying in to help us with the transition. Next week, we will be overlaying our order records in Skyriver. During the transition, our catalog will be a mix of records from OCLC, Skyriver and Baker & Taylor. Innovative still needs to configure some things on their end and then there will be a final transfer of our records into Skyriver. Two other larger consortia libraries will be moving to Sky River at the

same time. This will be helpful for training and also increase the number of records available in Skyriver.

The cataloging process is being revamped. We hope that one of the results will be a shorter wait time for adding records. Staff may not see an immediate change but we are working toward a better process. Cataloging has been backed up more than normal lately.

- WPLC/Overdrive update

Next week streaming movies will be added to Overdrive. The checkout time for streaming movies is seven days. However, once a patron has started to watch a movie, they have 48 hours to use it until the checkout expires. There are some good yoga videos and some good children videos. In the future, all movies on Overdrive should be streaming and no more downloadable movies should be available.

Libraries may be contacted by a steering committee representative in the near future regarding the Overdrive buying pool. And if you're interested in keeping up to date, please sign up for the WPLC listserv to get the latest updates and not miss important information.

The kids' page is still in the process of being developed.

- OWLSnet website update

- No updates with the new OWLSnet website. It will be completed soon.

- OWLSnet planning

- An [updated draft of the OWLSnet Plan](#) has been distributed. If you have any questions or comments please contact Walter.
- Thank you to all who responded to the training survey. Bradley sorted the responses and compiled them into the document titled OWLSnet Competencies. Are there any glaring omissions from this list of responses? Does anyone have any thoughts about setting priorities for each topic?

OWLS staff would like to pilot pieces of training and then evaluate and assess how well they work and where to go next. The group was asked what topics they would like to see covered first. The group responded with damaged items, digital signature units, system policy/procedures and bills/fines. We will send out an email to the AAC list after the meeting asking staff to weigh in on these topics. We'll then choose a topic and develop a piece of graphical training, a bite size piece of training like a video or something that directors can share with staff. We will post the training pieces on the website and plan on maintaining and evaluating these on a continual basis. If you have any additional thoughts on how to deliver training, please let Gerri or Bradley know.

6. Decision – consensus decision or vote

- Should OWLSnet move forward with a Discovery Layer and increase OWLSnet fees in 2015? Gerri reviewed the paper [To Boldly Go...InfoSoup: the Next Generation](#). The OWLSnet Discovery Committee recommends that we move to a new Discovery Layer, choosing either Encore or BiblioCommons. Encore is an Innovative product that works natively with our current data in Sierra. BiblioCommons is a third-party provider that uses screen scraping technology. Screen scraping pulls information off the screen (also known as near time data) which can result in possible delays for patrons when using the catalog. Screen scraping technology is an older technology and the vendor intends to switch to a better technology in the future. Many larger Sierra libraries use BiblioCommons such as Chicago Public Library. Encore and BiblioCommons have a lot in common and offer great post search limiting features and a modern interface. Both products provide allow patrons to view Overdrive availability and check out materials inside of the Discovery Layer, without having to go to an outside site.

Bibliocommons specializes in social aspects like reviews from a different number of libraries resulting in useful patron reviews from all over the world. While tags are not customizable with this product, tag names are comprised from the shared review information. BiblioCommons offers searching that may be more like how our patrons would search, such as “movies for kids.” It has a mobile website application. It also requires that users create an additional username and password. This provides security when patrons use social features such as posting reviews inside the discovery Layer. BiblioCommons offers shareable lists however there is no series information at this time. We are unsure if the vendor plans on working on a series feature at this time. Ebscohost databases and other databases are not integrated into BiblioCommons. It is not OAI compliant and cannot search digital content so collections such as the Memory Collection are not integrated either. Most of their customers are large libraries and not small customers like us.

Encore is used by Milwaukee Public Library and is a full featured Discovery layer. It works natively with Sierra. It offers seamless Ebscohost database searching. While it doesn't offer common search strings such as “movies for kids”, it does offer the ability to search OAI compliant indexes, like our InfoSoup Memory Project. There's a small additional cost for this (which isn't in the current proposal) but it's not a particularly expensive add-on. Our catalog would be much like Milwaukee's County Cat. We know Innovative works with NoveList now and they said they would work with BookLetters to get our book covers into the catalog. Encore can also implement series information. While Encore has a mobile application, many libraries implement Boopsie, a full-featured mobile application. Boopsie is expensive so it isn't a feature we would consider for 2015. Ebook integration is similar in both products. Access 360 (Baker and Taylor's ebook product) is smooth and works well in both products. In the current release there are no patron reviews and Encore doesn't offer shareable lists but Innovative says they are coming soon.

The products do have entirely different pricing structures. BiblioCommons has a higher up front and implementation cost. Encore is not so expensive to implement but the annual costs are higher. The five year cost comparison is very close between the two products.

Tony from Kaukauna commented that he would like to see the everyday technology that libraries use, like SAM and email upgraded before we invest in a Discovery Layer. We have had many issues with SAM and OWLS will be getting a quote for Envisionware's PC management product in the near future. Joan from Oconto Falls asked if we had decided to stick with Sierra and what is the life expectancy of Sierra? We have decided to stay with Sierra and are not

concerned with its life expectancy. Sierra is a very new ILS, and has already had a phenomenal adoption rate, so we don't expect it to go away any time soon. While we weren't using Millennium for very long compared to GEAC, Millennium was an older ILS when we moved to it. Innovative continues to do interesting things. They've recently recently acquired Polaris and they intend on retaining both Polaris and Sierra platforms for now.

OWLSnet recommends that we agree to move to a Discovery Layer in 2015 and increase the OWLSnet fees by 4-1/2% to cover both the Discovery Layer cost, and an incremental increase to the overall OWLSnet budget. While it's possible that prices may change by the time we purchase a Discovery Layer, we feel the recommended increase should cover either product. Is this doable by September for implementation in 2015? Peg from Waupaca mentioned that the OWLSnet planning committee will be looking at OWLSnet fee structures next and asked whether the cost of a Discovery Layer product would impact fee structure planning. Walter commented that no matter what is changed within membership fees, it will not be significant. He added that the committee will be looking at different scenarios and formulas needed to maintain our current status. Hopefully, a new fee structure will make more sense and be more consistent. Is there a consensus to move forward and choose a Discovery Layer by September to implement in 2015? Does anyone want to modify the proposal? There were no modifications to the proposal. **The group unanimously agreed to recommend that the OWLS board increase OWLSnet fees by 4-1/2% in 2015 in order to implement a Discovery Layer (either BiblioCommons or Encore) in 2015.** The Discovery Layer committee will work on creating informational materials to get out to staff, so we can make a decision on the product in September. Please give us your feedback so we know what libraries may need to help them make good decisions and share with their boards.

7. Ideas submitted for discussion

- Should OWLSnet work on implementing a patron emailed courtesy notice for patron whose accounts are about to expire? Does the group feel this is an important project for OWLS staff to work on? Getting the information out of Sierra won't be a problem; because the notices are not being generated directly from Sierra, the most difficult part may be educating patrons to not blacklist the emails. This project will fall below the Discovery Layer priority. Gerri will investigate the possibility of working with Shoutbomb on this project.

8. Discussion – discussion of issues that may be up for decision at future meetings

- None

9. Adjournment

- Meeting adjourned at 11:25 am.