

**OWLSnet
Administrative Advisory Committee Meeting
Outagamie Waupaca Library System
January 20, 2012**

Present: Rita Schiesser, Algoma; Tasha Saecker, Paula Wright, Appleton; Rebecca Buchmann, Black Creek; Jamie Hein, Kathy Mitchell, Clintonville; Stephanie Weber, Florence; Susan O'Leary Frick, Diane Pound, Fremont; Kay Rankel, Gillett; Carolyn Habeck, Hortonville; Maggie Waggoner, Kaukauna; Kathy Decker, Sue Grosshuesch, Kewaunee; Beth Carpenter, Kimberly/Little Chute; Pam Ellingson, Lakewood; Becky DeCloux, Lena; Trinitie Wilke, Marion; Ann Hunt, New London; Cherie Bartha, Joan Denis, Oconto Falls; Evan Bend, Patty Hankey, Laura Jandacek, Rick Krumwiede, Gerri Moeller, Anne Paterson, OWLS; Elizabeth Timmons, Seymour; Kristie Wilson, Shawano; Melanie Waldron, Shiocton; Becca Berger, Linda Streyle, Tracy Vreeke, Sturgeon Bay; Peg Burington, Waupaca; Kristi Pennebecker, Weyauwega

1. Call to order

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

2. [Minutes of the November 11, 2011](#)

The minutes of the meeting were accepted as distributed.

3. AAC ground rules

Rick 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

4. Announcements

- Libraries should have received emails from the state and from Gerri regarding state annual reports. It is pretty much the same as before; however, new for this year, OWLS has pre-filled sections 2, 3 and 11. Instructions for OWLSnet libraries are once again posted on the [stats page](#), and all of the data that we've supplied is also posted there. Please send us your feedback regarding the pre-filled part; if you like it, we'll do it again in the future. The deadline to submit annual reports to DPI (Wisconsin Department of Instruction) is March 1. While the report is very similar to previous years, Rick encouraged everyone to read through DPI's instructions for current definitions of the data, as there are slight changes from year to year.
- The Kimberly library will host the May 2012 AAC meeting.
- Other announcements
 - NFLS and OWLS have signed a new automation services agreement, and new OWLSnet membership agreements are in the process of being signed with member libraries.
 - Digital signature units have arrived and are in labeled boxes in the back of the room. Gerri has [posted instructions in the online manual](#) for installing these. It will require installing a driver and a dll file. This is the first step in implementing the Online Patron Registration product. Please note that you will not see the patron signature field in Millennium until it has been turned on for your logins. Since it takes up quite a bit of room, and will display for

everyone in your library, we suggest waiting until the online patron registration project is complete.

- OWLS requested bandwidth upgrades for 35 OWLSnet libraries from the TEACH (Technology for Educational Achievement) Wisconsin program. TEACH granted upgrades for 24 locations. OWLS will also have to upgrade its equipment and bandwidth to handle more library traffic, and the 2012 OWLSnet budget has been increased accordingly.
- Rick will send out a survey to measure interest in ordering more InfoSoup bags. If there is enough interest, we will order more bags.
- Bradley delivered a baby girl, Hollyn on January 18! Mom and baby are doing fine.
- The Stories of Oconto County has generated public interest and a community group has formed to preserve the history of the Oconto Falls area.

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

Overdrive

- Evan worked with Bradd to redesign the WPLC Overdrive website, and a WPLC committee has recommended adoption of the new design. The functionality won't change but the site will be easier for patrons to use. The new site allows patrons to navigate easier, customizing their search by applying limits to media type and genre. The site has a clean interface and better branding. Its new name will be the Wisconsin Digital Library. The mobile interface will be redesigned in the future. Evan will try to get the libraries a sneak peek of the new site.
- WPLC has spent \$100,000 already on the statewide Overdrive collection and will be making another purchase sometime in February. WPLC will also use holds data to determine what to buy. OWLS will be sending bills out to the OWLS libraries for their contribution to the digital media buying pool next week.
- Purchasing for the OWLSnet subscription to the Overdrive Advantage program has started. The OWLS libraries have two buyers, Anne Paterson and Diana Sandberg. The NFLS libraries have Kristie Wilson and a buyer from the Brown County library. We have about a \$40,000 budget for Overdrive Advantage titles. We intend to spend 60% of the budget quickly and then wait a bit to see what the WPLC purchases. After that, we can balance out our collection and fill in the gaps. Selection will be based on meeting hold needs as well as purchasing some local interest titles, such as Fox Cities Book Festival titles. For the first year, Appleton and Brown County have put in the majority of the money, with OWLSnet also contributing some funds.
- In order to see Advantage materials, patrons and staff will need to log in. We recommend that you encourage patrons to log in first, before starting to browse through the collection.
- Can we count Overdrive checkouts as circ numbers? Unfortunately, at this time, we cannot. State and federal guidelines determine what counts as a circulation and what doesn't. Determining resident and non-resident circulation numbers further complicates the process. The state knows the issues with Overdrive circ numbers and needs to lobby at the federal level for resolution. Door County reported that it adds Overdrive numbers to its board report.
- Overdrive Kindle and mobile device use have both increased within the state. Mobile device usage has doubled since November. 15% of all statewide checkouts were done on a mobile device, of that percentage, 13% were to OWLSnet patrons. As the Kindle Fire becomes more popular, our usage may change because of the direct downloading it offers. If you are curious about the marketplace and what titles are available, please let Evan know, he can get additional logins. This may be helpful if you would like to make suggestions to our buyers.

Recorded Books

- Once we get the contract with Recorded Books, we will be ready to go. We have decided to sign a one-year contract using LSTA grant money. We will have a static list of audiobook titles that

are always available for checkout. Patrons will not need to place holds, and the content will not duplicate anything in Overdrive.

OWLS was initially a bit disappointed with the Recorded Books product. There were some issues with functionality, and some of the book summaries were missing due to faulty coding. Staff noted slow response times while browsing, and the statistics they provide don't offer much detail. Recorded Books has assured us they will fix these bugs. The password for Recorded books requires a number/letter password with seven characters unlike the InfoSoup login; therefore our patrons will have to create a separate account to use Recorded Books. To further complicate matters, recently publishers Penguin and Brilliance announced they will be suspending the release of new titles to Overdrive; so, Recorded Books may end up being a major player in the digital media arena.

On the positive side, Recorded Books is the vendor for their own content, unlike Overdrive. Overdrive doesn't guarantee the content they provide, but Recorded Books is providing access to their own content. This may be the start of a trend by publishers.

Evan will send out more information about Recorded Books, including a link to the test website. Use the extranet login to gain access. In February or March, we'll also post an announcement in InfoSoup explaining the new service. Recorded books will be available for iPad, iPod and most major devices that accept WMA files. It should work on Macs but installation instructions are difficult to find in the documentation.

- Circulation update
 - Overdrive/Shoutbomb circulation issues
 - When a barcode is changed in Millennium, the change does not transfer to the patron's Overdrive account. This means that the patron will lose access to their Overdrive account. To deal with this, we first recommend minimizing barcode changes. When it's necessary to change the patron's barcode, ask the patron if they are using Overdrive. If the patron uses Overdrive, send an email to the [owlsnethelp list](#) with the patron name, and the old and the new barcode. Don't delete the old barcode; instead, follow the changes in the patron registration procedures by marking the old barcode as lost. Note: If the patron has no holds or checkouts, it is OK for the patron to create a new account in Overdrive.
 - Please remember that if a patron misses the pickup date in Overdrive, their place in the queue cannot be restored. The queue is entirely outside of our control. Overdrive checkouts are not available when a patron's account has expired. The time frame is relatively short, as holds are available for checkout for 72 hours before the hold moves to the next patron. We know of one instance where the patron lost their hold because their account had expired when the library was closed.

Can we create a message in Millennium to warn patrons of an upcoming expiration date on their account? When the patron is logged in, their expiration date does display. Some member libraries have implemented processes to let their patrons know when cards are about to expire. It would be a labor intensive project for OWLS to conduct systemwide. It's been an enhancement request for years, so it could potentially make it into Sierra. For libraries that have a 1-year expiration period instead of 3 years – there isn't enough data to suggest that the expiration date should be set back to 3 years. For now, please monitor the situation to see if your patrons experience any problems.

- Shoutbomb is not affected by patron barcode changes. Barcodes are automatically updated in Shoutbomb.
- Libraries may want to think about setting up PINS for their patrons at the time of registration. There is a long list of features in InfoSoup that require a PIN, including Shoutbomb and Overdrive. If patron privacy is an issue, you could pass the keyboard to the patron for them to enter the PIN. Also, it's easier to change a PIN in InfoSoup than to create the initial one there, so if staff created the first PIN in Millennium, patrons could go into InfoSoup and change it later. Per library request, Gerri will create a bookmark of the many InfoSoup features that require a PIN.
- A small update was made to the [Payment for Lost and Billed Materials Procedures](#). The first line of the form should be filled out with the library's city and not the three letter van code. Just a reminder, cash should never be sent in van delivery, but checks are OK to send.
- Project updates
 - Yesterday, there were 81 registered users for Shoutbomb. We send out notices twice a day – hold pickup notices are sent around 4:30PM, and then all of the notices are sent around 8:30 AM. The system is smart enough to not send duplicate notices. We've received very little feedback (and no complaints!), so it's safe to say that the system is working and can be promoted in your libraries. We'll put together a bookmark for this. The trickiest part can be sending text to an email account, but it can be done. It's simpler on some phones than others. Instructions to do this are listed further down in the directions posted on InfoSoup. If this is a barrier for potential users, please let OWLS know. We could design a form to sign up for Shoutbomb. This would take extra staff time, so we're waiting to see if it's necessary.
 - The group viewed the new digital signature field in Millennium. The patron signature field appears prominently in the brief record display. It also displays in the full patron record and lists the date when the signature was saved. The signature cannot be easily printed. The only way to print the signature would be to use screen capture software.

Before we go live, the units will have to be installed and the digital signature feature will have to be turned on in Millennium. A preliminary online patron registration form has been created in staging. Much of the code was borrowed from MCLS, but we have control over the text and look of the form. There are separate fields for the name field which should help libraries obtain better, more complete information. The form assigns a "barcode" which is actually the patron record number, minus the check digit. When the patron brings in this number, staff will need to look up the account and complete the registration process.

We are leaning towards not having patrons choose a home agency because there is no easy way to incorporate the home agency or library location into the form. It would require creating a template for each location, which would take a lot of work to create and make it difficult to make changes to the templates. There are a lot of fields that aren't available via the online form, including the fields for municipality assignments or adult/juvenile designations. Currently, the form runs only a very minimal duplicate check. The committee will be exploring whether that duplicate check is useful. Either way, staff will have to check and verify that there isn't an existing account for the patron.

While no decisions have been made, we currently envision placing a copy of the borrower's statement in the patron's record. This would be automatically created as part of the template. It would be the same text that the patron agreed to online, and the same text that

is displayed when the patron signs their digital signature. When we agree to change that text online, we'll also change the text that's inserted into the template and recommend that libraries change the text they display when the patron signs their digital signature. This would enable libraries to confidently say exactly what patrons agreed to when they signed for their cards.

The online patron registration form will allow juveniles to place holds but will not allow Overdrive holds to be placed. To maintain the system maintained, we would delete inactive temporary accounts on a regular basis. We hope to be able to implement the online patron registration product in the summer of 2012.

- Ereaders in the catalog; a first look
 - The cataloging team has been working with Ann from New London on cataloging New London's ereaders. The catalogers recommend that we display the device name as the title, adding the content information (title and author) into the bib record. The catalogers will need to create a new record for each individual reader (unless you have readers with completely identical titles), and will make sure that the authors and book titles are indexed. The new ltype is 237 for E-readers. OWLS is working on creating an icon for InfoSoup.

If you are thinking of adding ereaders to your collection, the first step is to decide what type of device and what type of content to load. Let Gerri know so we can set up the loan rules. Ereaders will have a 2 week checkout, and we recommend fines similar to equipment. After you have purchased the device and loaded its contents, send the device to OWLS. An original record with the current content on the device will be created. As you add more titles to the device, notify the catalogers, so they can update the bib record. Each library who owns an ereader should have a policy in place for checking them out. Elsewhere, some libraries require a deposit and/or a specific sign out to check out.

As we decided at a previous AAC meeting, ereaders are limited to local checkouts, so should be set to Library Use Only. While OWLS staff has researched a local holds queue, we haven't been able to enforce the pickup location. (This may be related to our loan rules determined by checkout location. We have an open call with Innovative on this issue.) Because ereaders must be checked out at the owning library and are not holdable, Millennium cannot manage the hold queue. Libraries will have to manage holds on these devices off the system. The checkout can be done in Millennium.

Ann (New London) reported that the library can deregister the Kindle account so patrons cannot manipulate the content on the device. There was interest in more information on ereaders. OWLS will create a white paper on this topic for the next AAC meeting.

6. Decision – consensus decision or vote

- At the last AAC meeting, we discussed the procedure of charging a \$3.00 replacement fee for a lost or damaged OWLSnet card. We agreed to vote on this topic at the next meeting.

This is a long-standing policy, which started when OWLS began providing OWLSnet library cards at no additional cost. At that time, we felt that the small fee might encourage patrons to go looking for a lost card, instead of getting a card when they didn't have their original card handy. That's still a concern for OWLS, and Rick supported keeping the existing fee.

Some libraries feel that charging for a replacement card is viewed as unfriendly and discouraging. Others felt that the fee works and patrons are more careful with the card when they know replacement isn't free. The procedure allows for the first replacement charge to be waived, and many libraries take advantage of this provision. As a compromise, it was suggested that we lower the cost of the replacement card. Does the policy require that a patron re-registering after a long absence have to pay for a replacement card? Most libraries felt it did not. Many libraries interpret *one free replacement card* to not mean over a patron's lifetime. Is this a frequent enough occurrence to warrant a vote or consensus? Because the current policy allows enough flexibility to interpret charging for replacement cards in different ways, libraries agreed to table the discussion and keep the current policy.

7. Ideas submitted for discussion

- No ideas submitted for discussion.

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

- What are the consequences of forgiving old bills from Geac? The old bills from before Innovative can't be deleted, because there are still a large number of patrons who owe money from that time. The bills that migrated from Geac are labeled as manual bills with no owning library information. When a patron pays for an item, there is no way to know which library is owed the reimbursement without contacting OWLS. To make it easier for libraries, OWLS staff recommends that libraries be given the permission to negotiate with patrons who have old Geac bills, as if the items were their own. **The group agreed to allow libraries to treat any pre-2006 bills (manual bills) as their own bills.**

9. Other Business

- Some libraries would like patrons to be able to display their library barcode on their smartphones so they may be scanned by libraries. While there are businesses that have apps like these, the apps seem problematic and have received a lot of criticism for failing to protect the customer's information. The field is changing rapidly, and we will continue to monitor it for possible solutions.
- Patrons have been coming into OWLSnet member libraries with mobile devices (like the Nook Simple Touch) that do not have browsers, and they are unable to display the wireless policy acceptance screen. This results in some patrons not being able to use their devices in the library. Can we do something to allow browser-less devices to work in the library? The OWLSnet acceptance policy is in place to protect the libraries if patrons do inappropriate things on their devices. It was modeled after standard agreements that other libraries and businesses use. Is it necessary to provide protection for our libraries? If it doesn't provide much protection, can we remove it and post a policy statement in the library, instead? OWLS understands the problem this causes for some libraries and will investigate the issue further.
- Currently, Ecommerce does not allow patrons to use debit cards to pay fees online. Some patrons find this frustrating. There isn't any way to have the patron pay their bill online through another service and have it interact with the Millennium system. It's unclear exactly *why* debit cards are not accepted – Gerri will do more research on this and find out why.

10. Adjournment

- Meeting adjourned at 2:15pm.