

**OWLSnet  
Administrative Advisory Committee Meeting  
Outagamie Waupaca Library System  
March 15, 2013**

**Present:** Michael Nitz, Paula Wright, Appleton; Rebecca Buchmann, Black Creek; Jamie Hein, Kathy Mitchell; Clintonville; Stephanie Weber, Florence; Carolyn Habeck, Hortonville; Lisa Bauer, Robyn Grove, Iola; Beth Carpenter, Kimberly/Little Chute; Tony Wieczorek, Kaukauna; Pam Ellingson, Lakewood; Becky Bartell, Lena; Ellen Connor, Manawa; Jennifer Thiele, Marinette; Trinitie Wilke, Marion; Ann Hunt, New London; Kristin Backhaus, Oconto; Joan Denis, Oconto Falls; Wanda Boivin, Oneida; Evan Bend, Patty Hankey, Laura Jandacek, Rick Krumwiede, Gerri Moeller, Anne Paterson, OWLS; Elizabeth Timmins, Seymour; Kristie Hauer, Shawano; Melanie Waldron, Shiocton; Becca Berger, Linda Streyle, Tracy Vreeke, Sturgeon Bay; Leslie Hill, Wittenberg; 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 January 18, 2013 meeting](#)

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

- Bradley discussed upcoming CE opportunities of interest to OWLSnet librarians. These opportunities are listed on the [OWLSWeb Continuing Education page](#).
- Hortonville's referendum passed, so Hortonville will be getting a new library! Hortonville will be building a new municipal building that will house the new library. The new library will more than double in size, and include a meeting space and offer plenty of parking. Congrats!
- The OWLS libraries presented Kathy Mitchell with a card, flowers and a slide show to honor her 40 years of service at Clintonville. Kathy will be retiring as Clintonville's director on July 1, 2013.

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

- Sierra transition
  - The update to R65 was scheduled to occur earlier this week, on Tuesday. Innovative experienced some problems with this release, so they postponed the update. We have rescheduled the update for Tuesday, March 19 at 7:00am. We expect it to take about an hour. There will be no downtime – libraries will still be able to use Sierra during that time. If libraries are logged in before the update is applied, they will have to restart after the update is completed. Gerri is cautiously optimistic that the update will bring some fixes, including restoring the wild card (\*) searching function in InfoSoup. We may find some issues in Create Lists, Cataloging, and Acquisitions fixed as well. While we discussed the possibility of delaying the update further, we agreed to continue with March 19. Rick noted

that Innovative canceling the update when they thought it might cause problems for us indicates they are listening to our concerns. Many libraries already have this update, so we'll be toward the end of the update cycle.

- Gerri has scheduled a conference call with Innovative for next Monday afternoon. They will be discussing many of the issues we have been experiencing since the move to Sierra. The current issues list is long, but here are some of the more pressing issues that will be discussed:
  - The \*remember me\* option that displays when logging in cannot be turned off.
  - Innovative assured us another column would display in the patron record before we went live.
  - The offline circ program isn't working properly.
  - Wildcard searching has been a problem.
  - The reading history display has changed and doesn't export nicely.
  - Some libraries are experiencing location issues.
  - When staff place holds in the patron's record, sometimes the hold won't display in the record until the patron's record is closed and then reopened.
  - The discard item field is editable in some places where it shouldn't be.
  - Staff are unable to place a bib hold sometimes. Restarting the Sierra session usually fixes this.
  - Some libraries are still experiencing the client freezing up randomly.

Now that the most urgent issues have been resolved, we'd like to ask libraries to start reporting Sierra problems once again. Are there any outstanding issues that haven't been mentioned, that Gerri should know about? Someone commented that sometimes when F1 and F2 keys are depressed at the same time, the Count Use-Discard Item function opens. It seems likely that this is a keyboard issue, rather than a Sierra problem. Staff have also noticed that searching for an exact phrase in InfoSoup doesn't always give expected results. Other libraries are having problems with the hovering patron information display box in the patron's record. The digital signature field doesn't display or the display doesn't go away or it is just a blank transparent box. Gerri will share the group's concerns regarding the issues and design of this feature. Some staff expressed concern about secondary windows and columns not displaying properly. Maximizing the display doesn't always seem to help.

- There has been a small change to the [Titles and Items held by library](#) report. It's actually a somewhat complicated report to run. Previously, we counted bib records to determine the title count and item records to determine the item count. In January, we ran our usual process to create this report and ran into a snag, where our usual process gave misleading results. Sierra has more options for data access, so we've changed this report and are now using the item agency field to count both the titles and items. The report is more accurate now, as it no longer counts titles with only orders attached or titles that have had the last item recently deleted.
- Earlier this week on Tuesday, Innovative turned on the data validation feature for patron records. We have a growing number of patron accounts with missing or invalid information. Innovative made the change that required all patron records to contain a barcode, and name field, and require specific characters (@ and .) in the email field, if it exists. Unfortunately, when this originally turned on, Innovative accidentally required email

addresses, which caused a big problem when staff were updating existing patron accounts without emails. They were able to fix this within a few hours.

We've not received any complaints at the OWLS office about requiring a name and barcode, but we have received complaints about email validation. The biggest problem appears to be that in addition to requiring the @ and ., it's also requiring that there be no spaces. Trailing spaces can be hard to spot, and there are a lot of them in our current email addresses. They also don't cause the email address to fail. Should we continue to have the validation feature enabled? No one had objections to using the validation feature to require patron name and barcode. While there are quite a few bad email addresses, the majority of the group preferred that email validation be turned off. Gerri will contact Innovative and have the email validation turned off. Libraries can contact the OWLS office to receive a list of bad email addresses.

- In Millennium, multiple messages on the patron record displayed in a single window on opening the record. However, only the first message displayed in Sierra. This has been fixed and now all patron messages display at once.
- The material type icons in Sierra have been updated. The icons and wording are now correct and should be a lot more useful. (While it would be possible to use the InfoSoup icons, the colors are very different, and would be very unattractive.)
- There is a new Too Long in Transit feature in Sierra. If we enable this, it would automatically update items that are too long in transit with a new Too Long in Transit status and move the holds back to the top of the title hold queue (for holds that were originally title holds.) We could continue to use 14 days as the time frame, or set it to a different time. Currently, OWLS runs the Too Long in Transit report on items that have been in transit 14 days or longer and sends the report to libraries. We would still send out the report as usual, and items would still be set to missing and eventually discarded if they don't show up. This would help staff identify these items, because the status is very prominent. Are there any concerns about enabling this feature? The group agreed to have the automatic update for too long in transit items turned on. If we find it doesn't work for us, we can fix it. The current criteria we use to identify items as too long in transit is 14 days old. Should we use the same time frame or use something different? The group decided to keep the time frame at 14 days. OWLS should have this feature implemented in a couple of weeks.
- With Sierra's design, we have access to more and different data than with Millennium. Millennium's data was stored in a proprietary database that we were unable to access, but much of Sierra's data is stored in a PostgreSQL database that can be accessed with a variety of report-writing tools. We are able to access data that was inaccessible before, such as fines and hold data. Other data is simply easier to access. If there are any reports you would like to have, please let us know. In Millennium it may not have been possible, but with Sierra we may be able to create them. For example, what is the average age of a hold in our system? The answer is 24 days! If you have asked for a report in the past and we couldn't produce it, there is a good chance we can create it now.
- Circulation
  - The notice change was made on Monday, March 11. Anything checked out after March 11, will have a new loan and be on the new notice schedule. First overdue notices will go out at

3 days after due date, second overdue notices will go out at 2 weeks, the item will appear on the Search Shelves report at 3 weeks, and, finally, the item will bill at 4 weeks. Please let OWLS know if you notice any items not checking out properly.

- We will be removing the last of the remaining Keshena items and bib records shortly. The College of Menominee Nation library has kept some of the more unique items. If patrons would like to borrow these items, please submit a request through ILL. Removing Keshena has made it necessary to rewrite a number of reports, which has caused a few delays. We will work to minimize future delays as we remove Keshena from the system entirely. By summer, all of the items and residual issues should be gone. Any remaining Keshena billed items have had the owning location changed to OWLS. If you collect payment for one of these, please forward payment to the Menominee College Library. If an item is returned to your library, please send the item to the OWLS office.
- Shoutbomb Update  
There are currently 595 patrons signed up to receive Shoutbomb texts. They will be receiving their texts more reliably now that the Shoutbomb scripts have been moved over to SQL. The new scripts are stable, and run much faster than running the script against the Sierra client.

It takes about 3 minutes for the SQL script to run (compared with about an hour using the old method.) Currently, all text notices start running around 6 AM and hold pickups texts at 4 PM every day (the morning texts are delayed until about 8:30 AM.) We could run the script more frequently, perhaps every hour, to make it a more real time process. Shoutbomb texts would be sent out as items were received at the pick-up library. One drawback may be that the patron might receive a text before the items were actually processed and ready for pick-up. It would be unlikely that libraries would be checking things in when they weren't open so the texts would coordinate with each library's open hours and days, cutting off text messaging after 6 pm. The question was asked if patrons would receive a duplicate message every time the script was run. No, Shoutbomb already prevents that from happening. Seymour thought that sending texts twice a day is plenty. If patrons are texted every time an item comes in, it might be too much. We could possibly change the times of the text by changing when we run the script, however, it's difficult to coordinate a time after all libraries have received their van delivery. We have scheduled the last text after most libraries have received their van delivery. We can't run different times for different libraries – we're all on the same schedule. Many suggested we error on the side of not sending too many texts. It may be irritating to patrons. Melanie from Shiocton stated that patrons using text messaging are generally plugged in and check InfoSoup and emails regularly. Not many in the group would like to have more texts sent or the timing of the text to be changed. We will keep it the same for now.

- RDA  
On March 31, 2013 RDA becomes the official cataloging standard. Katie and Anne presented how this will impact the OWLSnet libraries and reviewed the paper, Getting to know RDA records. New items will most likely have RDA bib records so staff may see new bib records with the RDA format. The old AACR2 records will not be retroactively fixed so our system will contain both formats. RDA records contain the addition of new fields, such as 336, 337 and 338. The 264 field will now contain publication and copyright information. There will be no Latin and no abbreviations used in RDA bib records. Staff may see relationship designators, such as translator or editor appearing behind a person's name. If staff notice a record that looks like a mix of the new RDA and old AACR2 style, please contact the cataloging department or send an

email to the OWLSnet help list. Cataloging will work on straightening out the record. At the present time, they don't anticipate mixed up records being a huge problem.

- InfoSoup Update
    - The subscription for One Click digital was renewed in March. Some libraries have decided to buy single use titles to be added to the collection, so all titles will no longer be always available. Appleton plans on buying back titles for the next couple of years. If libraries buy both a physical copy and a digital copy from Recorded Books, they can receive a discount on both. OWLSnet has set aside money for buying titles and will be monitoring titles with holds. We plan on purchasing titles based on system holds. There is a retroactive discount on any title a library has purchased in the past. Evan will send out contact information if any libraries are interested in adding digital titles.
    - Overdrive has redesigned their website. While they have taken some of our suggestions, others haven't been used. Since they no longer offer custom website designs for each customer, it's unlikely that we'll be able to push through a lot of changes, but if you have concerns, please pass them on to Evan.
    - The Year of Reading Dangerously is continuing. There are 230 people registered, and 3-5 reviews being added to the blog every day.
  - OWLSnet planning

Last May we began a new process for OWLSnet planning. The process involved OWLS staff developing background papers on topics of interest to OWLSnet librarians and discussing the topics at AAC meetings. It was an attempt to get everyone involved in the planning process. However, the process is moving too slowly and staff have encountered too many distractions, such as Sierra and state-wide planning issues. Rick would like to move the process to a smaller group and is looking for volunteers to participate in a planning committee. He would like the committee to contain some new participants and represent both systems, including larger and smaller libraries. Those that volunteered to be on the committee were: Kristie from Shawano, Rebecca from Black Creek, Jen from Marinette, Tasha from Appleton, and Melanie from Shiocton.
  - Video embargos

Unfortunately, we were mistaken at the last AAC meeting. Video embargos have not gone away.
6. Decision – consensus or vote
- None
7. Ideas submitted for discussion
- None

## 8. Discussion

- Scanning barcodes for discard – is there a better way?

The Count Use-Discard Item function is easy to accidentally open, and hard to distinguish from the normal checkin screen. This has caused a lot of items to be accidentally deleted. We were hoping to password protect this function, but it is not possible. One library has already asked that the function be turned off in their login because staff were scanning items and accidentally discarding them.

While we can remove the function, it's currently the only method of discarding by scanning. If we just remove the function, staff would have to go into each item record and make edits to two fields for each item in order to discard. And because libraries are just as likely to accidentally discard items belonging to other libraries as they are to discard their own items, it doesn't make sense to leave the function for some libraries and not others.

So the OWLS staff propose that we turn off the function, but experiment with having staff send lists of barcodes to the OWLS office for discarding. The barcodes can be scanned into an email or notepad file and sent to the OWLSnethelp list. With minimal editing, OWLS staff will be able to mark them for discard. Staff member are asked to send the email from their individual OWLSnet email account, rather than the generic email account, so OWLS staff will know who to contact with questions. Please note in the email subject line that these are items for discarding. OWLS staff will acknowledge the email requests, and process them quickly, taking no longer than a week. For libraries with large weeding projects, we can also turn the function back on temporarily.

## 9. Adjournment

- Meeting adjourned at 12:20pm.