

**OWLSnet  
Administrative Advisory Committee Meeting  
Outagamie Waupaca Library System  
November 8, 2013**

**Present:** Michael Nitz, Tasha Saecker, Paula Wright, Appleton; Rebecca Buchmann, Black Creek; Jamie Hein, Clintonville; Susan O’Leary Frick, Fremont; Kay Rankel, Gillett; Carolyn Habeck, Hortonville; Beth Carpenter, Kimberly/Little Chute; Tony Wieczorek, Kaukauna; Nicole Lowery, Lakewood; Becky Bartell, Lena; Ellen Connor, Manawa; Jennifer Thiele, Marinette; Trinitie Wilke, Marion; Ann Hunt, New London; Anne Miller, NFLS; Kristin Stoeger, Oconto; Joan Denis, Kim Meyers, Oconto Falls; Wanda Boivin, Oneida; Evan Bend, Patty Hankey, Laura Jandacek, Gerri Moeller, Anne Paterson, Bradley Shipps, Walter Burkhalter, OWLS; Sue Vater Olsen, Scandinavia; Elizabeth Timmons, Seymour; Kristie Hauer, Shawano; Melanie Waldron, Shiocton; Becca Berger, Linda Streyle, 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 September 20, 2013](#)

The minutes of the meeting were accepted as distributed.

3. 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

4. Announcements

- OWLS welcomes new director, Walter Burkhalter! Walter shared details about his career life before joining OWLS.
- Missy Sawicki, OWLS’ cataloging assistant has accepted a new position with the Appleton Public Library. OWLS is in the process of filling her position.
- OWLS and NFLS (and several other library systems) will charter a bus to the PLA conference in Indianapolis next March.

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

- Sierra/Circulation
  - The installation method we used when we originally went live with Sierra has been problematic. It’s caused multiple conflicts with Java, both in the Sierra client and in the Web Management reports. So we’re reinstalling Sierra on all of the staff PCs using the newer NoWebStart installation method. Technical staff at OWLS, NFLS and Appleton are continuing to work on the reinstallation project. If your PC has been updated with the new Sierra install, it is okay to update your Java program. If you are not sure if the Sierra client and you’d like to update Java, please ask Gerri. If you do update Java and

you're still using the older installation of Sierra, Sierra won't open. (Just contact OWLSnethelp in that case, and we'll work with you to get it fixed as soon as possible.) The project to reinstall Sierra clients is proceeding well and many PCs have already been updated.

- Sierra Release 1.1.3 is coming soon and should contain some important, behind the scenes fixes. OWLS plans on waiting a bit since no other large systems have updated yet. Cuyahoga Public Library has recently updated so we will wait and see how it goes for them. We will probably upgrade in the next few weeks and hopefully it will fix the current broken things and not break anything new. The upgrade will be done before open hours and there will be no downtime. The first time you login after the upgrade may result in a slower login times while the system downloads new jar files. Gerri will notify the libraries before the upgrade.
- QuickClick Ordering is still in testing. Beth from Kimberly/ Little Chute has been helping to test this product. It is taking longer than we thought but progress is being made. If your library is already using acquisitions, you may want to think about using this feature. If your library does not currently use acquisitions, you may want to rethink using acquisitions. QuickClick Ordering may make the acquisitions process easier for you. Records don't have to be built in Sierra. Libraries build their cart at the vendor site and then ftp records to the system. Beth has been using Midwest Tapes to test the product. Presently, the product works with a lot of vendors, but Amazon is not one of them. (We've investigated, but it doesn't look like Amazon works with any of the acquisitions products.) If you have a question about a specific vendor, just let Gerri know.
- Currently, Manawa and Oconto are testing the new title paging list format. It is working well. Manawa and Oconto commented that they like the new format. Many libraries volunteered to test it. Gerri will be making a few minor adjustments to the current format and may be contacting more libraries to test it. There should be more progress by the next AAC meeting. A library asked if they could opt out of implementing the new format. OWLS ask that all of the libraries give it a try. The new format is a big improvement. While we don't want any libraries to be left out, if staff really dislike the improvement to title paging lists, we can set it back.
- Appleton has been working on a new pilot project for temporary displays. They are using Sierra's Course Reserves feature to process and keep track of their new books. Appleton staff put new materials into a "reserve room" which is actually their new display shelves. Staff then run reports to determine what needs to be removed and moved to a permanent location. Staff can also run circulation numbers to determine how well items have circulated while on their new display shelves. Course Reserves are intended for academic libraries but the concept seems to transfer pretty well to the temporary display that public libraries use. One big problem is the amount of time it takes to add a book to display. We're hoping that this will be fixed in the next Sierra update. The setup is not easy but could possibly work for other libraries. We should have a better idea of how well it works at the next meeting.
- What do you do when your Friends group wants access to patron information? OWLS staff are asked this fairly frequently. The answer is available from the DPI website, which has a [FAQ on Public Library Administration and Governance](#) that gently addresses

this issue. (It was written by Walter! Check it out!) The answer is that libraries cannot give patron information to a Friends group – it's a violation of patron privacy.

- Recalls in Sierra occur when staff place an item hold on an item that is checked out and overdue in Sierra. The system will ask if staff wish to recall the item. If staff answer yes, then the item is recalled. We don't wish to use recalls, but they can't be completely turned off. To avoid this, staff should always choose "no" when asked if they wish to recall. While we have designed our recall notices to look like an overdue notice, a patron will see the recall item status in their record. For more information, please see the [page in the online manual](#) that describes this procedure in greater detail. The [online manual](#) can be found on the main OWLSnet page. If staff forget how to access the online manual, the lock symbol can be used to find the username and password to various documents on the OWLSnet site. For more information on using the lock symbol to gain access to documents, please contact OWLS.
- Cataloging
  - OCLC Worldshare is a new metadata manager that will replace Bib Note. This product will help us bring better records into our catalog and allow us to customize our records by choosing which marc record fields we want brought into the system. The first batch of records from OCLC Worldshare should be brought in soon. We may have to manipulate records before they are brought into Sierra so if you see any odd looking older records in the system, please let Anne know.
  - Dave has been working on moving the cataloging tool and the new materials database to a new server. Anne's been helping with the cataloging tool. OWLS staff will make an announcement when the work is complete.
  - As a result of staffing shortages, cataloging is behind in processing requests for records from the cataloging tool. If there are any records you need quickly, please let Anne know and she will expedite these records for you.
- InfoSoup/Overdrive update
  - OneClick digital audiobooks hit the highest circulation since we purchased it. There were 477 circulations in October. Every month, 50 to 60 new users sign up to use OneClick digital. In addition to the OWLSnet subscription, there are 95 purchased titles. Our goal is to double our title numbers.
  - At the last WPLC meeting, there was discussion about the digital library collection steering committee. The committee will determine how money is spent and what materials are purchased for Overdrive. The overall goal to help libraries have a greater say in how they spend their money. The committee will be comprised of 24 members from library systems across the state and 1 WPLA board member. OWLS will have one representative and NFLS will have two. The steering committee will guide and make recommendations to the selection committee. They will look at practices such as increasing title availability by purchasing multiple copies of a single title and whether or not to support vendors such as Penguin who only offer one year licenses on popular titles.

- WILS currently offers support for Overdrive and will be discontinuing this service in the near future. They are considering transitioning this service to the system level or even individual library support for online patron questions. While WILS doesn't receive a lot of questions, they currently monitor questions on weekends and holidays. Each system will have a discussion on this topic.
- Evan thanked Appleton and Algoma for purchasing advantage titles for Overdrive. (Advantage titles are additional titles only available to InfoSoup patrons.) Learning Express 3.0 is coming soon. The software is being updated and all patrons with existing accounts will have to sign up again. Libraries may want to post this information at workstations or other places will patrons will see it. There are approximately 100-200 people who use Learning Express. It is difficult to get an accurate user count because the program uses IP addresses to identify users. Any user accessing this program from home is not counted. Evan will look into obtaining a better user count. Information about the change will be posted in InfoSoup for patrons. Evan will also post information for staff to the AAC list.
- OWLSnet planning update
  - Gerri thanked the group for responding to the ILL survey. It was really useful information to have in preparing for the discussion on moving ILL to WISCAT.

Of those who responded to the survey, fifteen libraries were not concerned about switching to WISCAT, five libraries were slightly concerned and there were no libraries that had strong concerns about changing.

Some libraries were concerned that changing to WISCAT might increase staff time to process ILLs. WISCAT can be configured to send emails with updates so libraries who have low ILL volume don't have to regularly log in to WISCAT. Walter commented that he is familiar with WISCAT and that it is a simple process. Some libraries allow patrons to place their own requests. While it worked for some, Walter didn't recommend doing this. Will libraries be able to resubmit requests in WISCAT, if items that are too new for ILL are requested? Yes, you can resubmit, but we should still be following the ILL guidelines on the DPI website. Because WISCAT offers flexibility, county libraries can use a different model to handle branch library requests.

If items are not available through WISCAT libraries, the state reference and loan department will go out to free libraries in OCLC to obtain items. Libraries can also use the ALA form to request difficult to get items.

OWLS and NFLS system staff recommend that libraries start using WISCAT in early 2014. The actual start date is unknown; a timeline has not been confirmed with WISCAT yet. While we could wait until the next version of the software is available, the sooner we move the sooner we start to see cost savings. Ideally, we would start training in December and January. WISCAT will help us set-up and train. We last used WISCAT in 2006 and the service has improved greatly since then. WISCAT now offers better access, lower costs and better transparency, and allows each library more control over the process. If an item is checked out, it will not be available for a library to request for a loan. In the 1st quarter of 2014, WISCAT software is changing. The look and feel is changing for staff and also patrons. We probably don't want to wait until the software

change, just in case it is delayed. We have a contract with OCLC until June 2014 and will have to coordinate the phasing out of OCLC. A few years ago, some state organizations were trying to dismantle WISCAT. It is much better now and that initiative no longer exists. While there aren't more records in WISCAT than OCLC, it better fits our needs and switching to WISCAT will reduce our ILL costs by approximately \$3000 - \$4000. Is there a time period to stop requesting items from OCLC? We are still in the planning stage so there are no definite dates yet. **There was a group consensus to transition to WISCAT.**

- A discovery layer workshop is being held on December 18. We encourage all directors and staff to attend. The workshop will cover the basics of discovery layers, including the what, the why and the many options we need to consider. This information should help all staff become better informed and make better decisions as we explore discovery layers. Discovery layers provide a better interface and utilize post search limiting features, similar to Amazon. Patrons are familiar with searching for things in this way. Discovery layers can also include ebook availability and checkouts, reviews and social media features. We currently have an OPAC that cannot grow. We are limited to making minimal changes and are unable to add new features in our current system. We also need to start talking about how to pay for a new discovery layer. The purchase of a discovery layer is likely to require additional funding from the libraries that is not in the OWLSnet budget; however, without seeing researching the options, we won't know how much it will cost. We are in the exploring stage now and probably won't ask for additional resources from libraries until 2014 or 2015. In spring, we will either commit to Sierra or start looking at other ILS options and then we will start looking at discovery layer options in summer. Licensing issues and amount of staff time involved vary greatly within the variety of discovery layer models. Peg from Waupaca commented that when we implemented InfoSoup, there was a huge jump in the way patrons used our catalog and its many resources. Please register for this workshop. If you are not sure if you have registered, feel free to sign up anyway. Bradley is monitoring the list and she will make sure you aren't signed up more than once.
- Please let Walter know if you like to be on the OWLSnet planning committee. Becca from Door County commented that she believes the OWLSnet planning document was presented but not adopted. Beth from Kimberly/Little Chute commented that she believes there was a group consensus to adopt the planning document. The minutes from the last meeting reflect that the OWLSnet planning document was accepted. Members of the planning committee can discuss the planning document and bring feedback to AAC for further discussion, if necessary. OWLS will put OWLSnet planning on the next AAC meeting agenda.

#### 6. Decision – consensus decision or vote

- None

#### 7. Ideas submitted for discussion

- Have libraries had lots of patrons coming in to sign up for insurance through the Affordable Care Act? Despite the problems with the federal website, Appleton staff commented that patrons are coming in. They have a navigator on site to help people find health insurance

information. Sturgeon Bay and Kimberly/ Little Chute are utilizing navigators also. APL has filters on some of their computers that only go to the related health insurance links. They loosen up the filters a bit when the navigators are working. Libraries and navigators have created a good partnership, making it possible for patrons to bypass sharing personal information with library staff. Staff can go out to the federal website to find navigators in their area. Evan created an Affordable Care Act page for OWLS libraries to use on their library websites. Because much of the information is local, he didn't want to put it on the InfoSoup site. Evan will post a template containing links to the AAC listserve. NFLS libraries can also post this on their library websites.

- Would the group like OWLS to create a policy statement or a recommended practice for libraries concerning issuing cards to children of divided families? The signing parent is responsible for the money owed on a child's card even if the items are checked out when the child is with the other parent. Library staff can often find themselves stuck in a custody battle. Shawano staff commented that they find this situation becomes a problem when replacement costs and fines are assessed on the child's card. Some libraries end up forgiving the bill for unreturned materials. Gerri looked at other libraries to see what they were doing and didn't find any other good solutions. Does the group have any ideas? Someone suggested photocopying the child's card to make sure both parents have a copy. Another person suggested issuing two cards to the child, one with the mother's signature and the other with the father's signature. However, we don't currently allow any patrons to have more than one card. It is against our current policy and gives extra privileges to a certain group of individuals. If this solution was recommended for divorced couples, how would it translate to unmarried parents, grandparents or others who are not the legal guardians of the child? Are we penalizing the next generation of library users because of their divided family? We will keep talking about this. Please let Gerri know if you have any suggestions. Gerri will contact Manitowoc for more information on their practices and investigate further for examples of other library policies.
- Who is interested in joining a RFID Working Group? Several people volunteered. The group will talk and determine if it is feasible for other libraries to implement RFID. It may be easier to implement RFID as a group.
- Should OWLS remove billed items? It would be nice to remove old billed items from the database. Older billed items attached to bib records force the bib record to remain in system, even when there are no available items. Patrons place holds on these bib records thinking an available item exists. Currently, libraries can delete their own billed items, and some already do this. Appleton has implemented a process to remove billed items after 6 months. If the patron returns the item after it has been removed, they tell patrons they can donate the item. They don't issue a refund. While there were some concerns when they first started this process, it has worked very smoothly and they've had very few complaints. Ann from New London wants to give patrons credit for returning an item. When we remove billed items, the bill is retained on the patron's record; however, because the item record no longer exists, there isn't any way to check in the item and see who had it billed. In order for a patron to receive a credit under these circumstances, the patron would need to identify themselves as returning a billed item. OWLS currently sends a report of discarded items to each library. If the library would like to repurchase the item, the report contains replacement information. Would libraries like to remove billed items after one year or maybe six months? Sue at Scandinavia proposed a six month time period. Joan at Oconto

Falls suggested one year might be a better amount of time. OWLS will write a proposal that we remove billed items after one year, to be on the agenda for a decision at the next AAC meeting.

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

- None

9. Adjournment

- Meeting adjourned at 12:15pm.