

OWLSnet
Administrative Advisory Committee Meeting
Outagamie Waupaca Library System
September 19, 2008

Present: Rita Schiesser, Algoma; Kathy Beck, Terry Dawson, Barb Kelly, Kris Kipping, Brian Kopetsky, Vicki Lenz, Michael Nitz, Katie Scullion, Appleton; Kathy Mitchell, Clintonville; Donna Pound, Fremont; Kay Rankel, Gillett; Carolyn Habeck, Hortonville; Maggie Waggoner, Kaukauna; Kathy Decker, Susan Grosshuesch, Kewaunee; Sheryl Pendleton, Karen Vandenberg, Barbara Wentzel, Kimberly/Little Chute; Pam Ellingson, Lakewood; Lyn Hokenstad, Manawa; Trinitie Wilke, Marion; Sandra Hipke, Jennifer Thiele, Marinette; Mark Merrifield, Nicolet Federated Library System; Ann Hunt, New London; Cherie Bartha, Joan Denis, Oconto Falls; Peg Murphy, Oconto; Beth Carpenter, Patty Hankey, Laura Jandacek, Rick Krumwiede, Gerri Moeller, OWLS; Sue Vater Olsen, Scandinavia; Elizabeth Timmons, Seymour; Cassie Cummings, Sharrie Schweitzer, Shawano; Becky Rickel, Shiocton; Becca Berger, Joe Clabots, Linda Streyle, Sturgeon Bay; Ann Ammerman, Suring; Peg Burington, Dominic Frandrup, Waupaca; Sharon Koenigs, Weyauwega

1. Call to order

The meeting came to order at 9:30am at the Appleton Public Library. All attendees introduced themselves.

2. Minutes of the March 14, 2008

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

- The OWLS online calendars have moved from WebEvent to Google as of today. We will be terminating our contract with WebEvent when it expires in May of 2009, so we recommend all libraries currently using WebEvent move their calendars to Google by April of next year. OWLS staff will be contacting each library over the coming months to lend a hand with this process.
- Patty gave away scrap printer paper to any and all interested libraries.
- NFLS has hired a Technology Services Coordinator, Wheelie Colon. He will start October 6.

5. Information from OWLS and OWLSnet staff

- Committee and user group updates

- Patron Registration Committee

The patron registration has finished their work on a new patron registration document. Gerri is working on this and will get the final document out soon.

- Circ Works/Tech Talks

The next meeting is scheduled for Sept 30. However, we've had complaints that the last meeting was very short and didn't seem worth it for the travel time. Others have noted that they are unable to send staff. The group agreed to cancel this meeting. Many members felt the last CircWorks/TechTalks meeting wasn't very productive and was too time-consuming.

OWLS was asked to investigate other options for the CircWorks/TechTalks meetings, possibly an online format, to encourage member libraries to participate, and allow them to save on travel time and expenses.

There was positive feedback regarding the circ tips from APL, OWLS screencasts and OWLSnet help list. OWLS will continue to use these tools to get important information out.

- The InfoSoup PR Committee

The committee has just wrapped up a poster campaign promoting library card sign-up month. Currently serving on the committee are: Beth Carpenter, OWLS, Penny Habeck, SHA, Michael Kenney, APL, Rick Krumwiede, OWLS, Jamie Matzcak, NFLS, Colleen Rortvedt, APL and Elizabeth Timmins, SEY. While some libraries placed the posters around their communities, many did not. Libraries did not have data on whether the posters had increased library use or patron registration. The Waupaca library asked Bradd to adapt the poster design and create table tents to place around the community. They were awarded the most creative use prize (Amazon gift cards).

- Circulation update

- If you find yourself typing to an OWLSnet staff member "I'm not sure if you are the right person to ask...", this is a good indication that you have a question to post to the OWLSnetHelp mailing list. OWLSnet help list is a great way to communicate quickly with a number of OWLS staffers. It's usually faster than emailing an individual, and more likely to reach the right person.

- It's time to finish removing pop-up messages. We have made great progress in this area, so only a handful of libraries still need to delete their messages. Please use the "check for ___ items" label or your spine label to indicate the number of items in a DVD case, CD case, book, etc. Some libraries have learned that their patrons also like the labels, which helps them know if they're returning all of the items in a set. If you have remaining pop-up messages on your items, you received a list of messages at this meeting.

- Short loan sticker item messages should be removed after you have added or removed the sticker. Kathy from Clintonville gave us a tip about removing these messages. If you don't have time to remove the item message when checking an item in, print out the message and remove the message later when you have

time.

- Clearing the holdshelf update. The good news is that libraries have been clearing the holdshelf. Yeah! Please remember to clear the holdshelf every day, and read the clear holdshelf summary. For instance, a patron record may be busy and the system may notify you that the holdshelf needs to be cleared again. When all libraries do not clear the holdshelf daily, the system gets confused and items may not be on the holdshelf where Millennium thinks they are.
- The [Payment for Lost and Billed Materials Procedures](#) has been updated to reflect the changes agreed on at AAC at the January 2008 meeting.
- Linda from Sturgeon Bay reminded the group not to claim return or mark as lost any items that are not owned by your library. If a patron claims to have returned an item that your library checked out, feel free to call the owning library to discuss the matter. Also, if a patron wants to pay for a lost item, the owning library will have to verify the price. Member libraries are encouraged to communicate with each other regarding damaged items, claims returned items and missing/lost items owned by other libraries and before merging patrons with different home agencies.
- Sharrie from Shawano brought up an issue with items arriving at SHA, wet and damaged. Libraries should follow the damaged item procedure when encountering damaged items. Waltco has said they will pay for items they have damaged in transit, but this can be difficult to document, so be sure to communicate with the library that is returning your items. If you receive a damaged item from the van, notify OWLS or NFLS immediately.
- Notices can now be sent to multiple email addresses. When entering email addresses in the email field, separate addresses with a comma only. Do not include a space.
Example: patron@gmail.com,patron@yahoo.com
- Previously, setting the notice preference field in the patron record to "None" would generate print notices even if there was an email address in the email field. However, there has been a change in functionality. Now, if there is an email address in the email field and the patron notice preference is set to "None" or "Email", the patron will receive a notice via email. The notice preference should be set to "Print" if a patron prefers to receive printed notices.
- One way to keep up to date on what's happening with OWLSnet and InfoSoup is to use an RSS reader and sign up someone from your library to receive the InfoSoup Development and Network News blogs. If you'd prefer to also receive this information via email, just ask Patty or Beth to add you to the InfoSoup development email list. (Network News updates are sent to all OWLSnet email addresses on an irregular schedule.) Beth hosted a demonstration on how to set up a RSS reader during the lunch break at the meeting.
- InfoSoup Development Update.
 - Evan presented information about InfoSoup web statistics. New with release 2007 is a log of InfoSoup statistics, which allows OWLS to capture all InfoSoup

catalog activity by day, by hour, and/or by day of month. We will be able to note web trends and track information to help us design and promote the catalog. The data Evan has compiled confirms that Mondays and Wednesdays are currently the heaviest catalog traffic days. Web stats will also help us capture scope usage trends. Currently the "All Collection" and "DVD " scopes are the most popular.

- The Syndetics contract is coming up for renewal in March. Syndetics is the company that provides our cover arts and additional content. Evan is looking into similar services and /or vendors to provide book covers, reviews, summaries etc. for our catalog. We've been concerned with the Syndetics service for a while, in particular the slow service, and are looking for a possible replacement service. Much of the additional content of Syndetics does not seem to be heavily used, so we'll be focusing primarily on the cover art. Options include Baker and Taylor's Content Café, and Bookletters' new service, which is still in very early testing, but claims to offer a less expensive, faster service. Library thing is another product that offers free images, although we may be limited by the number of images we could load per day. We'll be looking into trials to compare services and speed. Becca from Door County suggested we may want to also look at NoveList (a reader's advisory product) as a supplementary resource. Gale also has a product we may be interested in. Evan is looking for feedback and opinions regarding this topic.
- In July, there was a change in scopes which people may have missed. After posting to the InfoSoup development blog, scopes were changed to include online resources when limiting to an individual library's collection. However, some libraries have commented it makes it more difficult to find items for patrons that are physically in their libraries.

This could be changed, but there would be a cost involved. It's possible that the behavior of limit to available will change with the next small upgrade. Until then, here's a quick way to limit to books physically located in your library: run your search, scoping to your library by using the drop-down list. Click on Modify Search. Choose Material Type: Book, and click Submit.

The following scope changes were agreed on at the meeting:

- Audiobooks changed to Audiobooks (all formats)
 - Audiobooks MP3 changed to Audiobooks on CD MP3
 - Audiobooks overdrive changed to Audiobooks Overdrive WMA
 - Music on CD & cassette changed to Music (all formats)
 - Music overdrive changed to Music Overdrive WMA
 - Videogames and software added
- Reading history is now exportable from InfoSoup. It can be exported in a few different formats and sent to email if desired. Unfortunately, this exported file is not sortable. The best way to export as a sortable document is to copy your reading history, and then paste it into Excel, using the Paste Special command. Contact OWLS for more information on this process.
 - My Lists and PIN retrieval are 2007 enhancements that have been taking much time and effort to configure properly. The current display of the PIN retrieval was

demonstrated, and after some discussion the group agreed this enhancement is important to us and our patrons, so we should implement it regardless of the problems that exist with it (mainly with display problems).

My Lists was originally not working (the user was logged out when they tried to save an item to the list), but now has been fixed. It's a bit difficult to figure out. The group was asked if we want to release My Lists with a screen cast for our patrons? The feature can be viewed in the staging directory. Please post comments and feedback on the development blog in the next week.

A new feature is also available to limit searches. When you perform a new search while logged into your account, InfoSoup can offer to limit to titles that aren't in your reading history. Again, this is turned on in the staging directory. Please post comments and feedback on the development blog.

- Network update
 - The next project is finding a way to capture and create statistics about the use of wireless in libraries. OWLS will keep you updated.
- Upgrade to release 2007
 - There were a few circulation changes that came with the upgrade to R2007.

When checking in an item with a hold on it, it's possible that you may get the option to not check in the item. (It will only happen under certain circumstances.) If you do get this option, and have a damaged item, you can choose this option and avoid having to re-set the holds queue.

In Circ Desk mode, if you uncheck the print slip box (to avoid printing a checkout receipt) the box will stay unchecked until you re-check the box.

When searching in the client for an item, your library's items will now display first in the list.

The title paging list now includes title subfields, which should make it easier to find items on hold. Libraries have been asking for a sortable paging list, but nothing is in the works so far as we know.

We're working on the ability to print customized transit and hold slips and spine labels using templates and Jasper I-reports. These templates should work with Laser printers and Dymo labeler.

- 2009 AAC schedule
 - We agreed to the following 2009 AAC schedule: Jan 16, Mar 20, May 15, July 24, Sep 18 and Nov 13. All meetings will be held in the meeting room of the Appleton Public Library

6. Decision - consensus decision or vote

- OWLSnet member libraries were in agreement on most areas of the SAM implementation. The main area of disagreement was the amount at which patrons who owe money are blocked from using the Internet. A small majority of OWLSnet libraries

approved of the \$5 block – others proposed no block or a higher block. Rick presented our discussion to the OWLS board, who approved the implementation of a \$5 block, but strongly encouraged libraries to come to a consensus on the fine blocking amount. Rick responded to the OWLS board concern by placing this issue on the AAC agenda.

- The software only allows for one amount at which patrons can be blocked. In order to accommodate multiple blocking amounts, additional links would need to be purchased. While these links are not prohibitively expensive, the OWLS board has some issues with providing 2 links with different blocking fine amounts. Inconsistent limits may be confusing to our patrons and library staff may encounter pressure from patrons to lower or raise the blocks they have in place. We are a mobile society and patrons may choose to go to those libraries that won't block them from using a computer.
- The software does allow staff to override blocks.
- All libraries have the option to implement the SAM software, but libraries are not required to implement it.
- The SAM software cannot block only on bills, it blocks on the total amount owed by a patron.
- Although there was vigorous discussion, libraries could not come to a consensus on the blocking amount. **A vote was taken to decide if OWLSnet should purchase an additional link that would be configured with a higher blocking amount. The vote did not pass.**

7. Discussion

- Discussion on the Brown County .
OWLS has given a draft proposal to the Brown County library director, and is waiting to hear from them. However, it's apparent from discussion with OWLSnet member library staff that the scope of the activity may be misunderstood by some. If Brown County were to join OWLSnet, it would have a major impact on OWLSnet libraries. Brown County is the 2nd or 3rd largest library in WI (depending on the figures you use). They have a high volume of circulation. OWLSnet activity is likely to increase by 50% if Brown County were to join.

There are three primary areas of concern if Brown County joins. The first area of concern is policies and procedures. OWLSnet and Brown County staff both feel that our differences in policies and procedures can be resolved. The second area of concern is the cost to migrate and the annual membership fee. These were covered in the proposal shared with the Brown County library. The area of most concern to OWLSnet is resource sharing. In 2007 Brown County borrowed 9000 items and loaned 8000 items. This is equivalent to the lending and borrowing volume of the Lakewood library (clearly a *much* smaller library.) OWLSnet libraries shared 650,000 items last year. If Brown County joined OWLSnet, their patrons would have access to InfoSoup which would open up new resources to them and significantly increase resource sharing within OWLSnet. Brown County has the potential to be a huge net borrower.

Some libraries are already feeling crushed by the high volume of interlibrary loan. Our delivery system is being strained. It's very important that we enact agreements and

policies that allow us to handle the likely increase in delivery volume that Brown County would add. While Brown County may own fewer copies of books (it's hard to be sure), it's clear that they do own far fewer copies of popular videos. They currently have a rental collection, and only offer one freely available copy of each title – the rest are rentals. We would need to figure out how to handle this issue before Brown County joins – or their patrons would have full access to OWLSnet video copies, while OWLSnet patrons would not have the same access to their rental copies. Our first priority is that we maintain our current service quality. However, our current growth rate is not sustainable and we will need to slow it down. Perhaps we'll need to set more limits on holds? Maybe limits on specific material types? It is imperative that any necessary changes be made within OWLSnet before Brown County joins.

Why is OWLSnet pursuing this? Since Brown County is an NFLS library, they are entitled to join OWLSnet. Also, the addition of Brown County will improve our development as a consortium. It makes sense for us to be providing these services to all of the residents of Northeast Wisconsin. While initially it's likely that their patrons will benefit, ideally Brown County contribute greatly to the OWLSnet consortium. Brown County also has unique materials to offer including local history items.

If this happens, will OWLS and NFLS merge? There are no plans for a merger at this time.

When will this happen? The proposal included a potential Go Live date of December 2009, but it could take longer.

- Video games discussion
Oconto Falls has begun acquiring video games, as a pilot project. They've been popular, and Oconto Falls is interested in purchasing more. However, the current loan period is four weeks, and the library would also prefer not to lend them to other libraries.

AAC agreed that loan rules for videogames should be changed to a one week checkout. AAC agreed that videogames should not be added to the exceptions to resource sharing list.

A new scope will be added to InfoSoup to make these items easier to find. Some libraries are concerned other libraries will feel pressure to add these items. Joan at Oconto Falls recommended purchasing used games, as they are much less expensive. Currently, Oconto Falls is only purchasing videogames that are rated E for Everyone.

- Discarded items
Items that have been Lost and Paid for over one year will be discarded on an annual basis. They will be included on the list of discarded. If your library does not currently receive this list, you can contact Patty to start receiving this report.
- Policy Committee
Establishing a policy committee is a goal in the 2007-2010 OWLSnet Plan. However, since this meeting has run so late, we agreed to discuss this at the next AAC meeting.
- Transit slips
Customizable transit slips are available in the current release of the Millennium software.

Mocked up slips were passed around so libraries could see what these would look like. The new transit slips should save staff time and eliminate the printing costs of pink and green slips but increase receipt paper use. Since currently OWLS and NFLS pay for the pink and green transit slips, this could amount to an increase in fees. OWLS will check on a way to offset this cost increase. Member libraries were excited about implementing this as soon as possible.

AAC agreed that we should implement the new custom transit slips in Millennium.

OWLS will present a proposal at the next AAC meeting.

- OWLS has a couple of different possibilities for enhancing InfoSoup. These were presented to the group.
 - Library thing enhances the catalog by adding patrons rating and reviews, as well as access to high-quality reviews from LibraryThing. It also offers book recommendations and tag browsing.
 - E-commerce is a way for patrons to pay fines using a credit card in InfoSoup. It is an easier and less embarrassing way for patrons to pay their bills. Many other libraries are using this payment system. Not sure if the system will accept a debit card.
 - Online patron registration offers an online form that populates the Millennium patron record. We will still want to require an ID and a paper signature to issue the card. This is a customizable program.
 - Encore is an enhanced version of the catalog, a layer on top of the OPAC that is in real time. It offers tag clouds created from the subject headings and faceted searching. While it's clearly a beautiful product, OWLS staff have concerns about the development cycle of this enhancement. It is very expensive, not customizable and we would lose our branding.
 - Program registration allows libraries to put program information in the OPAC and offer patrons the ability to sign up for programs online.
 - While all ideas were appealing, the group was unanimously in support of implementing Ecommerce in Millennium.
- OWLS will present a proposal for implementing Ecommerce at the next AAC meeting.

8. Other Business

- LSTA grants in the works: OWLS has submitted grant requests to fund "Tell Me More", and OWLS and NFLS have submitted a joint proposal for Innovative's AirPAC. AirPAC optimizes the OPAC for mobile devices. NFLS has also requested grant money for wireless, accessibility and gaming systems.
- OWLS is thinking about switching the OWLSnet Manual to an online format, a wiki. The group was in favor of the idea. Discussion will be continued at the next AAC meeting.

9. Adjournment

- Meeting adjourned at 3:40pm.