

**OWLSnet
Administrative Advisory Committee Meeting
Outagamie Waupaca Library System
(Online – GoToMeeting) December 18th, 2020**

Present: Cathy Kolbeck, Algoma; Owen Anderson, Michael Nitz, Tasha Saecker, Appleton; Rebecca Buchmann, Dawn Taylor, Shauwn Rosendale, Linda Streyle, Door County; Stephanie Weber, Florence; Natalie Snyder, Fremont; Kim Meyers, Gillett; Allie Krause, Hortonville; Robyn Grove, Iola; Angela Schneider, Kaukauna; Carol Petrina, Kewaunee; Steve Thiry, Kimberly-Little Chute; Nicole Lowery, Lakewood; Amy Peterson, Lena; Ellen Connor, Manawa; Jen Thiele, Marinette County; LeAnn Hopp, Marion; Ann Hunt, New London; Lori Baumgart, Tracy Vreeke, John Kronenberg, NFLS; Kristin Laufenberg, Oconto; Joan Denis, Oconto Falls; Amanda Lee, Bradley Shipp, Liz Kauth, Molly Komp, Evan Bend, Dave Bacon, Chad Glamann, OWLS; Sue Vater Olsen, Scandinavia; Elizabeth Timmins, Seymour; Kristie Hauer, Shawano County; Shay Foxenberg; Shiocton; Peg Burington, Waupaca; Kelly Kneisler, Weyauwega

1. Call to Order and Introductions

The meeting was called to order at 9:30 AM and Amanda went through roll call.

2. AAC Ground Rules & online meeting etiquette

3. Minutes of the November 20th, 2020 AAC meetings.

Amanda made a correction to include someone who was not listed. Minutes from the October meeting were approved.

4. Announcements

Emailing OWLSnet Help:

If you email OWLSnet Help with a problem about something in a patron's account or an item, PLEASE include the barcode so we can look at it. We need details in order to troubleshoot.

Annual Report:

DPI will be opening the pre-fill form on January 25th.

5. Vote on the following statement regarding patrons placing holds with expired cards:

OWLSnet should allow patrons with expired cards to place holds in the online catalog.

This measure passed so the setting will remain as it is in the system.

6. Bibliographic Utility Proposal

Amanda shared the Bib Utility Proposal prior to the meeting. OWLSnet staff took time to analyze the workflow and tools being used and discovered that OCLC is competitive and costs less now than SkyRiver. OWLSnet is proposing a switch to OCLC and cancel SkyRiver. This was brought to AAC because it was anticipated to be a costly switch; however, with WISCAT as our ILL platform, the need for multiple accounts with OCLC makes it much more affordable.

Questions:

Is there a limit on users? No, libraries will not be limited on how many people can use it at one time.

When will this happen? The rollout ETA for this would be early 2021. The contract will be signed in January and it can be implemented right away. It can take up to 3 months to set up.

7. Library Use Only status

Libraries are running into problems when they try to apply the "Library Use Only" status because it does not work like they were accustomed to in Sierra.

In CARL, assigning the Library Use Only status to items will not prevent them from being placed on hold or checked out. The status is only a message to patrons in the Catalog, and the status clears when you check the item out.

If you want items to be Library Use Only, i.e. non-holdable and non-circulating, contact OWLS to set appropriate loan rules based on the media, location, and branch.

We further recommend that you use the "Alternate PAC Status" in the item record so that "Library Use Only" displays in the catalog and persists even after checkout and return of the item.

Some situations in which libraries might apply Library Use Only loan rules would be school yearbooks, historical items, puzzles, local history items, big books, puzzles/puppets/kits, Laurie History room, reference, hotspots, STEAM kits, automotive and small engine books donated from a club, and equipment/current magazines. Please contact OWLSnet Help to set this up.

Questions:

Can a new location code be created for "does not circulate?" Amanda answered that this has been discussed and that Molly and she will come up with something and email out for libraries to look over.

Is there a difference between lib use only and local use? Amanda clarified that local use only is mainly for holds where patrons can place holds on items to be picked up only at a specific

library. Library Use Only items don't check out at all unless overridden by staff. Local use only would still allow patrons to place a hold through InfoSoup.

8. Annual Reports

Molly went over a preliminary view of the Annual Report: Section II, questions 1, 3, and 5. We have had to rewrite our annual report SQL queries because the CARL database is structured differently than the Sierra database. We are now testing the new queries. Molly asked libraries to look over the preliminary numbers and to verify whether they look accurate up to this point. If any of the numbers don't look in line for what your library expects, please let Molly know as soon as you can. She will need time to readjust the queries.

Molly will send the spreadsheet out to the AAC listserv for everyone to view it at their leisure.

9. Other CARL Priorities

Amanda wanted to know if there were any questions or any tasks needing demonstration. The questions OWLS has seen most frequently of late are the issues with Library Use Only.

Ellen wanted to know if the issues with ShoutBomb have been fixed. Amanda has been in frequent contact with George at Shoutbomb, and to the best of our knowledge, everything is now working as expected. Shoutbomb operations are automated, so we may not be able to tell when something stops working. OWLS relies on library reports to identify problems. We can spot test Shoutbomb with OWLS staff and test accounts when we know what to look for, but live examples are the most helpful for identifying new problems.

A lot of patrons are still not receiving their email notifications. This is happening mainly with those using CenturyLink and CenturyTel. CARL is sending the emails, but they are being blocked by the email provider, which OWLS cannot fix. Patrons can try adding the email address to their whitelist and see if that helps the notifications come through. Amanda also shared how staff can locate patron notices in the patron account. This is located in the patron record in CARLX under the History Tab and then under Notice History.

Amanda demonstrated the process of setting an item's Alternate PAC Status to "Library Use Only." Some examples when or why staff would use the Alternate PAC Status would be items that need to be placed elsewhere in the library that differs from their location code, items that need to be picked up at the information/reference desk, items in storage, oversized items, etc. It would be mainly used for adding some type of instruction to patrons for accessing materials.

Ellen asked about pulling up a list of bills paid in a patron record. They must submit receipts to the city in order for them to reimburse the appropriate libraries. Owen added that staff can export the fines history grid to Excel and print the necessary lines. OWLS will work on creating a general procedure for exporting billing information from CARL.

Angela added that KAU is seeing CARL generate fines on patron accounts when they should be bills. Bradley asked that if libraries have or see more examples of this happening to please send them to OWLSnet Help.

Cathy asked if cataloging tools could be explained thoroughly, maybe through a comprehensive video in the future highlighting tools in the Workstation and Discovery that will make cataloging and finding the right records easier as something that would benefit catalogers. Amanda will make a video and ask for more information to be included.

Angela asked about items being returned at KAU and checked in at the owning library with a status of "On Shelf" but the patron still being billed. Amanda said that there is currently a ticket open about that and to keep sending examples.

How can staff see what items have a status of shelving delay? Staff can use Report 17 – Items by Status to see what they have set as a shelving delay status. Owen said the lost/missing report can be used, too, to check for those items on the shelf.

Sue asked that OWLS send updates when they hear about problems. Libraries need to know these things as they come up. Bradley answered that OWLS sends updates when an issue is coming up for multiple libraries. If OWLS were to send out updates for everything libraries sent, then everyone would be getting several updates a day. OWLS will work at getting more timely information out to the libraries.

Ellen asked if anyone has figured out why some workstations can't run reports. Bradley answered that this is most likely an issue with Windows. Julie and TLC have been unable to figure out why it's happening. If you are experiencing this problem, please report it to OWLSnet Help. More examples might help narrow down the problem.

Angela asked if they can delete an item when a late fee or bill is associated with it. Amanda recommends changing the status to Withdrawn which means the item won't show up in the online catalog, but the bill will still be on the patron's account. If the item is deleted, then it will change the bill to a manual fine and the library information attached to it will be lost. Owen asked for clarification that when an item is Lost, the status can't be changed to Withdrawn without checking the item in. Rebecca replied that the status can be changed to withdrawn by using quick item maintenance in CARL-X. Items that are still suppressed in the online catalog are: Damaged, Lost Temporary, Missing, Not on Shelf, Repair, Temp Closed,

and Withdrawn. Joan asked if OWLS prefers libraries to use Withdrawn instead of deleting an item. Amanda said that if there are bills attached, yes. This makes it easier to see where the money should go. If libraries own the item and want to delete the bill in order to delete the item, then that is up to them.

Natalie asked if there was a bulk withdraw option. Amanda demonstrated this and will email out the instructions.

It was asked that more daily or weekly reports be sent out, like Should Be Short Loan or No Longer Short Loan. OWLS can look into creating more documentation or running reports, but it would be helpful to email OWLSnetHelp to let us know which reports are your highest priority. These reports may already be available to you. Sue added that if the libraries talk to each other, they can figure out what it is they need.

10. Adjourn

The meeting was adjourned at 10:52 am.