

OWLSnet Administrative Advisory Committee Meeting Online via GoToMeeting - January 20, 2023

Present: Cathy Kolbeck, Algoma; Nicole Casner, Tasha Saecker, Appleton; Rachel Hitt, Black Creek; Jamie Hein, Clintonville; Rebecca Buchmann, Dominic Frandrup, Morgan Mann, Dawn Taylor, Door County; Steph Weber, Florence; Melissa Krause, Fremont; Shannon Stoner, Gillett; Allie Krause, Hortonville; Robyn Grove, Iola; Ashley Thiem-Menning, Kaukauna; Carol Petrina, Kewaunee; Tracy Haack, Kimberly; Katie Essermann, Lakewood; Michelle Best, Little Chute; April De La Ruelle, LEN; Ellen Connor, Manawa; Amy Commers, Marinette; Le Ann Hopp, Marion; Ann Hunt, New London; John Kronenburg, Tracy Vreeke, NFLS; Amy Peterson, Oconto; Rachel Pascoe, Oconto Falls; Amanda Lee, Bradley Shipps, Molly Komp, John Wisneski, Debbie White, Joe Lawton, Kristin Laufenberg, OWLS; Sue Vater Olsen, Scandinavia; Elizabeth Timmins, Seymour; Kristie Hauer, Mikki Moesch, Shawano County; Shay Foxenberg; Shiocton; Jill Trochta, Suring; Eric Bailey, 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 18, 2022, AAC meeting were approved.

4. Announcements

- a. Patron Purge in March: Molly will be doing the patron purge in March. If anyone is interested in a list prior to being purged, we can get a name and barcode ourselves; however, if anyone wants email addresses, we need to ask TLC for this information and give them enough time to get that information for us. Libraries showed interest in a list prior to the purge and should email OWLSnetHelp so we can keep a record of it. Ellen asked if there was a way to purge patrons with fines and not bills? Amanda answered that we can, but it would be a special project. Molly will look at MAN and NLP patrons who are expired with fines, not bills and delete them. Molly will get a list of patrons and their email address from TLC prior to purging and send those out to those libraries who want them. Michelle asked what was the idea behind the three (3) years for the purge? Bradley answered that it comes from the annual report requirements and their definition of an "active user."
- b. Withdrawn item deletion: Molly will be deleting withdrawn items soon. Most of you have indicated you are interested in deleting withdrawn items from the database. If you haven't let her know and would like your withdrawn items deleted, there is still time to do so. Nicole asked if a library doesn't want them deleted, what would the default be? Amanda answered the default is to not delete them. Ellen asked if Appleton could explain again why they want to keep their items. Withdrawn items

show up as suppressed in the catalog. Nicole said Appleton doesn't want to get into a situation where they replace things they had decided to withdraw and to retain the last circ information. Many have expressed that it is frustrating when they come across suppressed items. Especially magazines! Patrons shouldn't be able to place holds on suppressed items, but staff can unless they dig into a record to see that it is suppressed. Tasha is willing to explore ways to keep their data but not get in the way of everyone's workflow. Bradley said OWLS will ask TLC if they can get suppressed items out of the workflow and maybe not show Appleton's suppressed items and we can go from there.

- c. TLC training March 13-16: TLC will be here March 13-16 for CARL training and then attend the AAC meeting on the 17th. Amanda shared the survey results with TLC and they suggested and agreed to come and do some training for everyone. This would mostly be circ training within CARL-X and Connect Staff. There is a limit of 12 people per session, so we hope to have one person from each library represented in the training sessions. Amanda is working on scheduling the trainings and hopes to have them in areas that will allow for less travel for people, possibly Sturgeon Bay, Gillett, Waupaca and the Fox Cities. Amanda will send out the times and locations as soon as she schedules them along with a registration form, hopefully by next week. We're hoping everyone in the sessions will have a laptop for hands-on training. The trainings will be live, in-person and will not be recorded. Bradley added that if you really dislike CARL, please try and come to one of the sessions and talk with TLC staff. TLC wants to make a good product and hearing it firsthand from you all would be very powerful. They know the software inside and out and could probably solve problems for you on the spot.
- d. Annual Reports: The annual report prefill data has been submitted. There are several new fields, particularly in Section XII Technology. Thanks to Dave for getting that information for us. In Section III, Question 2, there is a Total ILL option and a Categorized option, which breaks ILL down by ILL within the ILS, through WISCAT, and other means. This year we have entered the data into the Total ILL columns, so please do not add your WISCAT data or break ILL down. We anticipate we will use the categorized data next year, which is why we have a new ILL Procedure.
- e. Tracy added that the new director at Lena is April and the new director at Oneida is Eliza. Welcome!

5. Review New ILL Procedure

DPI is asking for categorized ILL transactions that break down the data into ILL through the ILS, WISCAT, and other means. The ILL through the ILS is what OWLS posts on the stats page every month, but WISCAT and other means have always been processed the same way in CARL—through a patron type for lending items and through a media type

for borrowing items. DPI would prefer for 2023, libraries submit the categorized ILL data, and anticipate they will require only categorized ILL for 2024. As a result of this change, we have created a new ILL Procedure that breaks down ILL through WISCAT and ILL through other means. Many of you only use WISCAT, so this may seem unnecessary, but others get ILL requests through email or other means, so we need to be able to account for that. For the most part, the process for doing ILL has not changed, you'll just need to make sure the patron record has the correct patron type, and the item record has the correct media type. Molly has been working with Holly and the ILL staff at libraries to implement this new procedure, which is already in place. Amanda wanted to bring it to AAC to make sure everyone is on the same page and explain why OWLS made these changes. Katie asked if libraries will still need to add this data into their totals for annual reporting. Amanda clarified that no; libraries don't need to add or change any of the ILL data in the prefill. OWLS has already added that for you. Ellen asked if they need to change the media code for sending out ILL items. Amanda clarified that no, if you are loaning an item out, you don't need to change the media code, just make sure the patron card type is correct. Tracy asked if they receive an ILL request from a patron via email, and then staff create a request through WISCAT, if that is a WISCAT request or an Other request? Amanda answered it would be a WISCAT request. She added that an example for Other, would be Appleton getting an email request from Neenah or Menasha who don't use WISCAT; in that case, they are looking for something directly from Appleton and they will fill the request directly from that email, so it would be an Other request. Not everyone subscribes to WISCAT so they have to request materials other ways. If anyone is lost, please reach out to Molly at OWLS or Holly at NFLS. Molly sent out lists to the libraries with their ILL patrons and asked them to go through and change the patron card type as needed. She will double check those lists and send out as needed.

6. Discuss Updated Damaged Items Procedure

At the July 2022 AAC meeting, the group decided that OWLS needed to organize a committee to review and update the Damaged Items Procedure. Two of the main discussion points and areas of disagreement or confusion were defining damage and when to use the yellow problem slips. Molly sent out the committee summary outlining the process the committee took, along with the updated procedure and yellow problem slips. The committee dedicated a lot of time to making sure this was a procedure that could work for everyone—many thanks to them!

Key changes in the procedure include criteria for circable vs noncircable materials, and how to use the yellow problem slips, which would only be used for those materials that fall into the noncircable category.

There was one suggestion for rewording where to put the physical note; on the title page instead of inside the cover. Aside from that, the group seemed very happy with the changes, especially not having yellow problem slips always falling out of items. For items that arrive damaged, it can be difficult to know if it was due to delivery or done by a patron. That's why it is important to note damage as much as possible and to be in contact with each other when you do receive an item with damage. Michelle wanted the group to know that Little Chute has been putting their damaged notes inside the back cover so libraries may need to keep looking here for older items.

It was asked if libraries can replace another library's cracked DVD cases. The group was fine with libraries replacing cracked cases, but this can't be required in the procedure. Resurfacing also came up in this discussion and it was determined staff should be contacting the owning library for permission to resurface.

It was asked if the Charge/Discharge note could be left on circable items in addition to the physical note as it could be helpful for those items with damage that could be viewed by others as noncircable. Some said they would prefer the notes be removed as it would interrupt the workflow too much, while others said they would like the note to remain.

A question was raised whether the section about contacting the patron on the Yellow Problem slips was needed. Morgan liked the idea of keeping it for billed items, so staff can keep track in-house if the patron was contacted. Some said to remove it but then others said they could see the benefit of keeping it. It was decided to keep it.

The group didn't feel the need to vote on adopting the new procedure at the March meeting but prefer to put it in practice and adjust it later as needed. Molly will make those changes about where to put physical notes and giving the option to keep the Charge/Discharge note and will then post to the website and share with the group.

7. Vote on a Resource Sharing Policy exception for APL's Opening Day Collection

This was discussed at this last meeting, but because it is a policy exception, we need to vote on it. Amanda shared a more detailed exception statement over email. Are there any questions before we vote?

Should Appleton be granted an exception from the OWLSnet Resource Sharing Policy for 6 months for an Opening Day Collection when their new library opens?

Dominic asked if this exception is made for Appleton, if the group will be able to make exceptions for other libraries in the future as they go through building processes.

Amanda said, yes, this would serve as a precedent for other libraries in the future as needed. Amanda then read through the exception for those newer directors who may not have seen it.

April asked if Amanda could explain what an “Opening Day collection” and “Lucky Day collection” are. A Lucky Day collection are items that are purchased in addition to already owned items that would only be for those who physically walk into the building—no holds are allowed on Lucky Day items. These items can be added and taken off Lucky Day at any time the library sees fit. An Opening Day collection are items that are purchased as a supplemental collection to accommodate for increased foot traffic. Appleton plans on handling their regular collection and Lucky Day collection separate from their Opening Day collection; the Opening Day collection would operate out of a different budget from their regular collection. There are a couple different models for ordering an Opening Day collection and Tasha isn’t sure yet which model they will go with; however, they will do their best to have matching copies in circulation for the system but can’t guarantee it. Patrons who have holds on items but then find their item in Appleton, will not have that item fill their hold. The hold will remain until filled or removed. Appleton plans on treating this collection similarly to the Lucky Day collection: loan periods will be the same as Lucky Day and holds will not be allowed. The goal is to have materials on the shelves so not to suck holds out from the system.

Bradley noted that new buildings draw a ton of foot traffic, and after this we may need to refine the process or requesting an exception. It may not be the exact same policy for other libraries, but we needed a starting place to work with to make sure everyone has items on their shelves.

The vote passed. Bradley will bring to the board for officially adding to the resource sharing policy.

8. Review OWLSnet Patron Home Agency Policy

When looking at the OWLSnet Patron Home Agency Policy, OWLS noticed that the background information was outdated and completely wrong now. Patron blocks are not assigned by home agency, nor are renewals. Home agency is used to authenticate third party services, such as Hoopla, send patrons to collections, and determine a patron’s library in various reports run by OWLSnet

Amanda thought it would be a good time to go over some best practices for patrons changing home agency since we’re talking about it. Staff should only change the home agency to their library. If the patron wants to change their home agency to your library, they should re-register at your library, and you should check their ID and verify their address. Do not change the home agency of an account that has been sent to collections. Staff should notify the previous library if a patron has changed home agency by using the “blue” update form so they can update their records.

It's been suggested that we might not always need the blue update form and perhaps the process can be simplified.

Amanda asked if anyone had any questions or concerns or thoughts about home agency and the policy in particular?

Amanda clarified that in CARL, there is a Home Agency field that is a UDF (user defined field) which the library assigns at registration. We also have a Preferred Branch that patrons can change, which is usually where they prefer to pick up their holds.

The "blue" form is necessary for when a patron is changing home agency, updating their address so that the municipality can be updated correctly and/or the original home agency can shred their registration card for that patron.

Some expressed they have never received a form. Bradley said it could depend on where a library is in proximity to other libraries. If you're not around others, you may not get many or any. If you're closer to a cluster of libraries, then you may see more of them.

Amy asked if someone renews an item online, who would get the circ for it? Amanda said it would be the circulating branch. Wherever the item was initially checked out, that is where the renewal would go.

For those using paper registration forms, many say they update the information they need to so the CARL info matches the card and then shred the original registration card, if needed.

No one had issues with the updated Home Agency Background information or the policy. Amanda will post the new version for the background information.

9. Adjourn at 11:15AM