

OWLSnet
Administrative Advisory Committee Meeting
Outagamie Waupaca Library System
January 18, 2013

Present: Rita Schiesser, Algoma; Michael Nitz, Tasha Saecker, Paula Wright, Appleton; Rebecca Buchmann, Black Creek; Jamie Hein, Clintonville; Stephanie Weber, Florence; Susan O'Leary Frick, Fremont; Kay Rankel, Gillett; Carolyn Habeck, Hortonville; Beth Carpenter, Kimberly/Little Chute; Tony Wieczorek, Kaukauna; Susan Grosshuesch, Kewaunee; Pam Ellingson, Lakewood; Jennifer Thiele, Marinette; Trinitie Wilke, Marion; Ann Hunt, New London; Peg Murphy, Oconto; Joan Denis, Oconto Falls; Wanda Boivin, Oneida; Evan Bend, Patty Hankey, Laura Jandacek, Rick Krumwiede, Gerri Moeller, Anne Paterson, Bradley Shipps, OWLS; Elizabeth Timmins, Seymour; Kristie Hauer, Shawano; Melanie Waldron, Shiocton; Becca Berger, Sturgeon Bay; Amanda Burns, Suring; 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 November 9, 2012 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

- There are 98 registered users for the Year of Reading Dangerously adult program and 67 reviews have been posted. Patrons who are interested in participating can go to the [Reading Dangerously webpage](#) to get more information and to register. After a patron registers, Bradley and Evan will verify that they are eligible, and then the patron will receive a confirmation email. Evan will redo the Books R Us blog and dedicate it to the reading challenge. By clicking on the username in any review you can pull up all of the reviews by a specific user. If you click on the library name, you can pull up all of the reviews posted by patrons at a specific library. Staff can still post reviews as well. Staff usernames are the first name or first name/first initial of last name. The password is your staff email password. Contact Evan if you would like to post a review but need additional help in doing so.
- There are several upcoming CE workshops. On February 8, OWLS and APL will offer Books Build Better Brains. Also on February 8, there will be a SLP workshop; both OWLS and NFLS library staff are welcome. On March 27, there will be a CCBC presentation offered by the OWLS, NFLS and Winnefox library systems. On April 2, a bus tour of Madison Area libraries is scheduled. Flyers are available on the back table for your review. If you want to take a copy, ask Bradley and she will print one for you to take.
- Jamie Hein announced Clintonville director, Kathy Mitchell will be retiring on July 1, 2013. Congratulations, Kathy!

- Anne Paterson received a book in cataloging without any identifying information. It is titled “Just a wish away” by Barbara Freethy. If this is your book, please contact Anne.
- Summer Reading Library promotional materials for OWLS libraries are in the OWLS office. Please stop by the office and pick yours up before you leave the building today.
- Linda from Sturgeon Bay announced that their copy of Plutocrats may be on a holdshelf at another library. If anyone finds it, please send it on.

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

- SAM Update

Dave is working with Comprise to troubleshoot SAM issues that libraries have been experiencing during the latter half of 2012. We are currently using Version 9 of the SAM software. It has generally been stable and reliable, but lately there have been a couple of instances where patrons couldn't sign in. This has been a difficult bug to fix. The last two times we went down was due to Comprise testing and trying to fix the bug. Comprise will be testing and working on this issue more next week. Comprise is a small company and they are very busy; however, they do want to provide the best customer service for us. If you find that patrons are not moving along in the activity manager or sign up station, rebooting these programs may help. Please call OWLS if you have additional questions.

- Shoutbomb Update

At the end of December, there were approximately 513 patrons using Shoutbomb. We continue to add new patrons every month. As usage is increasing every month, Gerri recommends that we continue our subscription for this service. There have been some delays in Shoutbomb texts recently. These weren't caused by the company, but are related to a Sierra update. The most recent Sierra update broke the script that initiates the Shoutbomb texts. Since this update, we have been manually running the scripts, which has its own problems. Sierra does offer the ability to script directly against the database, and we're working as quickly as we can to move to this new method to make the texts more reliable.

- Sierra Update

Overall, the transition to Sierra has not gone well. Innovative knows that we are not happy. However, our experience isn't representative of the experience of most Innovative customers. We're hearing that the transition went quite well for many Sierra libraries, and even those who've had more difficulties haven't experienced the extent of problems that we've had. Rick thanked the OWLS staff for their hard work and the libraries for their patience and understanding during this time.

While we've had difficulties with Sierra, it had been working relatively smoothly until the most recent update. Release 60 was applied to our system on Monday night, Jan 14. When the clients were restarted on Tuesday the problems started appearing. Tuesday, staff couldn't check in or check out items that they didn't own. It looked like holds couldn't be placed either because newly placed holds were not appearing in patron records. Because there were no error messages when placing holds, OWLS staff weren't sure if the holds would eventually show up, or if they'd be lost, so we turned off the ability to place holds. We were concerned that patrons would think they'd placed holds and find out that the holds weren't actually there. During our testing, it appeared that any transactions libraries had completed were working successfully, so there wasn't a big risk in using the system. However, there were so many functions unavailable that OWLS staff encouraged libraries to move to offline circ. Some libraries used offline circ on Tuesday until the problems were fixed. Other libraries that opened in later in the day logged

into Sierra and used it successfully. Libraries that opened later didn't see the original NetSupport Notify messages posted Tuesday morning, so some weren't aware of the update problems. (Because NetSupport Notify doesn't send messages to computers that are off, we'll work on finding alternative ways to communicate, should this type of problem occur in the future.) It wasn't until quite late in the day that Innovative was able to fix the source of the problem, and all libraries were able to log back in.

While the immediate problems have been fixed, there are still issues. Create Lists was not working properly before the update, and this release broke it further. After our most recent update, Ecommerce stopped working properly. As a result, patron fines paid through Ecommerce were not being removed from the patron's record. Gerri has waived the fines from all patron records affected except two, which are being investigated. Innovative has fixed Ecommerce so it is now working properly.

The problems with Sierra (especially Create Lists) have negatively affected the ability of OWLS staff to support the system. Some reports have not been as timely as before. OWLS staff have been unable to delete bib records with no items attached and have been unable to discard billed items. Staff have created elaborate workarounds just to maintain daily, weekly and monthly processes.

Gerri had a long conversation with our Innovative representative who was very concerned about the extent of our problems. Certainly, we feel that Innovative is not keeping their part of the bargain. They have made commitments that haven't been met. We were told that the patron display would be fixed before the product went live, an assurance that we repeated at an earlier AAC meeting. The display is still not fixed, 4 months after Sierra went live. Innovative is listening and is very responsive now. Innovative is surprised that things are going so poorly. If any libraries have comments or suggestions for the Innovative team, OWLS would be happy to pass these along. We do feel that Innovative is becoming more responsive. Our calls are being escalated more quickly, and the company is very aware of our concerns.

Because of the severity of our problems, some librarians thought that perhaps our system set-up is too complex. Innovative doesn't believe that this is the cause. We believe that the system isn't optimized to use the Sun server, and it looks like Innovative might be thinking that way as well. We do know of at least one other consortium with a similar hardware setup that is also experiencing many problems with Sierra, which would tend to support the hardware problem theory. We would like to get another two years from our present server before purchasing a new one. Servers are expensive and when we moved to Sierra, Innovative assured us that Sierra would work with the current server.

Gerri will have a meeting with Innovative representatives at IUG and is expecting to get a full account of their actions to fix our problems. To try to prevent future problems with updates, since we can choose the time and day to apply Sierra updates, Gerri will also be pushing us further back in the update process.

- **Brown County Update**

The new procedures for registering Brown County residents have been posted in the OWLSnet manual. We have added new loan rules for Brown County residents that prevent holds and checkouts at the five Outagamie County locations. If a Brown County resident tries to place a hold on an item owned *only* by these libraries, the hold request will be blocked in InfoSoup. If

staff try to place similar holds, an override message will appear. Please don't override the message, as items will not trap and the hold won't get filled.

If you find that any patron records with a Brown County Ptype (10 or 11) are not working properly, please let us know. All existing Brown County patrons have been assigned the new Ptype (10 or 11), but if any new Brown County resident registers for a card, they will need the new Ptype assigned to their account. Also, if an existing patron has moved into Brown County, the new Ptype should be assigned. While we've tried to make this as seamless as possible, we understand that this makes the job of library staff harder, so we'll monitor the Ptypes regularly and fix them as necessary.

For more information, there is a Network News announcement that points to the page in the OWLSnet online manual (wiki). The only patron records affected are those with adult and juvenile Ptypes. A list of Brown County municipalities and their codes are included on the manual page.

Currently, neither DPI nor WLA are working on a legislative solution to the billing problem. The WLA Library Development & Legislation Committee voted unanimously to ask the WLA Board to appoint a task force to study the issue, but the WLA Board declined. Becca from Door County noted that the recent surveys libraries were asked to fill out which asked about legal roadblocks may be used as an opportunity to add your input about the legal processes and their effectiveness. Melanie from Shiocton commented that some of her patrons were upset and wanted to know how they could help. Brown County residents can contact the Brown County Library or the County Board, but there isn't much that can be done by non-residents. If new legislation is proposed, there may be an opportunity for non-residents to speak up. The OWLS Board has directed Rick to contact the Brown County Library to inquire about its interest in working on a long-term agreement. Rick was asked if he was aware of a petition being circulated about this issue. He hasn't heard anything about a petition.

- Other updates

At the last meeting, we discussed putting in an override to use the Count Use/Discard Item function, but unfortunately, we weren't able to implement this. We'd still like a longer term solution, but in the meantime, Count Use/Discard items has been moved to the bottom of the staff functions display list in Sierra. Black Creek staff commented that this has been helpful in preventing accidental discarding. If your library doesn't use the Count Use/Discard Item function regularly, we can remove it. It can be easily put back if you have a heavy weeding project and need to use it. Let OWLS know if you are interested in removing this function from your display.

Has anyone heard that video embargos have been dropped? Some vendors may have dropped embargos on purchasing videos and no longer offer an option to choose rental or retail copies when making a purchase. Since no one has heard anything, OWLS will research this topic and provide more information.

After discussions with the Shawano library, all of the Keshena home agency patron records have been changed to Shawano home agency. OWLS still has to export item records from Sierra and plans on removing these records by the next AAC meeting. While the items are still in the system, they are suppressed and holds can't be placed on them. If patrons are looking for items from Keshena, OWLS recommends libraries go through the ILL process and place holds for

Keshena items through the College of Menominee Nation.

- Annual Report discussion – information distributed
OWLS has finished compiling the annual report numbers and met DPI's deadline of January 14. All library directors should have received an email from DPI. Information for the report has been pre-filled, but the annual report numbers are also posted on the OWLSnet statistics page. Also, we've posted the Annual Report instructions which describe any major changes to the report from previous years. This year there are a couple of changes and some new sections/questions. Section II has been streamlined, and there are fewer collection categories to report. If you want a detailed list of these "other" items (7.), let Gerri know. In the new technology Section XII, there is a question about internet connection speed. We did prefill in the answer, but it's just a suggestion. We wanted you to know what we think from looking at the numbers. However, if you disagree with our assessment, please put in your own response. The difficulty is for county libraries, because there is only one answer, and you might have some branches that have great bandwidth and others with unacceptable bandwidth. We'd suggest answering it for the worst case. The wireless usage numbers we have provided are for April – December of 2012. We started using a different method to collect these statistics mid-year so we don't have a full year yet. As always, if you can print the report in color, do so, as it makes it easier to read. (We can print it for you here if that helps.) For Section XI, each library's report is 3 pages long, so be sure to only print out the report for your own library. Many libraries report these nonresident numbers to their boards. The numbers should match the total of your monthly numbers, so please contact Gerri if anything doesn't look right. If you need assistance with filing out your annual report, please contact Rick at OWLS or Mark at NFLS.

Gerri shared some trends from the last five years of annual reports. The charts show there has been a decline in circs. However, when e-circs are included the chart is flat. E-resources also make a dramatic difference in collection size and annual additions. There is an upward trend in e-resource circulations. The chart also shows a slight decrease in ILL in 2012. Overall, circulation is trending downward for 2012. The charts have been posted on the [2012 OWLSnet statistics page](#) for libraries to share with their boards.

- WPLC restructure
A subcommittee of WPLC was formed to make recommendations all libraries investing in the statewide digital buying pool are represented at WPLC. The WPLC Board has accepted the committee's recommendations, and they will be revising the bylaws. Becca from Door County is part of the process. While our libraries are currently represented in the selection committee, a new Steering Committee will oversee the operation of the Digital Library, oversee the Selection Committee, and will make recommendations to the WPLC board.
- Overdrive contract and out of state patrons
The WPLC Overdrive contract does not allow for out of state patrons to use Overdrive services. This data is stored in our system and is supplied to Overdrive. However, currently, our authentication process is not blocking them because Overdrive isn't using this patron data. WPLC is concerned that we could lose our service or that certain publishers may be less likely to work with Overdrive if this issue isn't resolved. WILS is investigating this further and collecting information to work with Overdrive. Evan will keep us posted.

- Other Overdrive discussion
Originally, Overdrive was not downloadable in the library. The only way to get an ebook required a PC and the public PCs are locked down. Now, Overdrive will work within the library. There are very few devices that cannot use wireless so most patrons can download materials onto their own devices within the library.

There will be a change on Monday to the Overdrive website. Patrons will be able to recommend titles to be purchased that are not owned. Patrons will be able to see all available Overdrive titles and can recommend up to three titles a month. The selection committee will receive this information, purchase the selection and place a hold on the title for the patron. The selection committee will place orders on a monthly basis, and patrons will be notified when the item is purchased. There will be a new way for users to access books that may bypass Adobe download; it is called "See it, read it." Improvements to the help page are coming soon also.

When using a mobile device, the Overdrive site does not retain the patron's library information; only the patron information is retained. Oconto Falls suggested it would be helpful if the library information was retained also. Evan will pass this suggestion on.

- OneClickDigital Update
Evan reviewed the OneClickdigital handout with the group. While user numbers are increasing, the monthly circulation is not increasing much. Approximately 100 new users signed up last month, and there are now almost 1000 patron accounts. We are averaging 220 checkouts per month. Patrons don't check out as many titles at a time with this product. We will be getting a new quote in spring and will have some decisions to make. We won't discontinue our subscription but have options to consider. OneClickdigital is meeting a patron need, and we don't think canceling it would be a good idea. One of the big advantages to OneClick is that the audio titles aren't carried elsewhere – so Overdrive doesn't have them.

One possibility would be to switch to a smaller core collection, the top 200 titles with classics, and have member libraries purchase new titles. This option would be less expensive than what we currently have. There is a combo purchase deal where libraries purchase the audiobook on CD and can add a digital copy to the collection for a small additional cost. Is there enough interest in this service to make it worthwhile to review the options? Appleton is interested in extending their purchases, buying CD audiobooks and digital copies. New London is interested also. Evan will get more information about the cost, and libraries can decide whether to add titles to this collection. We won't lose access to the titles we purchase if we decide to trim back the current collection.

Nook, Kindle Fire and other android devices don't work well with OneClickdigital, but iPads, iPods, and iPhones work well.

6. OWLSnet planning update

- There has been no further progress with the planning process. A couple of papers were presented at previous meetings, does anyone have additional comments? Becca from Door County commented that discussions similar to the OneClickdigital discussion we just had is helpful to get more information about topics. No formal committees may be needed. It may be helpful to know OWLS expectations in regards to OWLSnet competencies. Some felt it is the director's responsibility not necessarily OWLS responsibility in regards to staff meeting

competencies. New employees go through OWLSnet training which is beneficial.

- Rick will work more on OWLSnet planning in the near future. System technology and resource sharing plans are due mid-year. A three or five year plan is difficult because of technology and other things changing so quickly. Perhaps planning a set of guiding principles, maybe a three year goal with objectives makes more sense. Rick thanked everyone for their patience.

7. Decision – consensus decision or vote

- OWLS staff proposed changing the notices so notices for all items are generated on the same schedule. Currently, the schedule for 1st and 2nd overdue, Search Shelves report and bills is different for DVDs than for all other items. This causes problems generating reports and makes it difficult for all OWLSnet staff to reliably predict when notices will go out.

With the proposed schedule, the first overdue for all materials would be generated 3 days after the due date, the second overdue would be at 2 weeks, the item would appear on the Search Shelves report at 3 weeks and the item would bill at 4 weeks after the due date. If the group does not agree on the proposal we can continue the current schedule and/or we can look at a different schedule. Some people thought sending out the first overdue at 3 days may be too soon and 5 days might be better. On the current schedule, first overdues for DVDs are generated at 3 days. Some patrons might be upset getting the first notice so soon, but others may be happy to get notices before a fine becomes too large. We can always put this in place but make changes if it doesn't seem to be working. However, once we have items on the same schedule, we'll want to keep them on the same schedule. **The group agreed to implement the proposed notice schedule.** OWLS will give libraries one week notice before the notice schedule is changed. Libraries should know sometime in January when it will happen.

8. Ideas submitted for discussion

- None.

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

- None.

10. Adjournment

- Meeting adjourned at 12:20pm.