

**OWLSnet
Administrative Advisory Committee Meeting
Outagamie Waupaca Library System
(Online – GoToMeeting) October 16th, 2020**

Present: Cathy Kolbeck, Algoma; Owen Anderson, Michael Nitz, Colleen Rortvedt, Appleton; Eva Kozerski, Black Creek; Jamie Hein, Clintonville; Tina Kakuske, Rebecca Buchmann, Dawn Taylor, Shauwn Rosendale, Linda Streyle, Door County; Stephanie Weber, Florence; Natalie Snyder, Fremont; Kim Meyers, Gillett; Robyn Grove, Iola; Ashley Thiem-Menning, Kaukauna; Carol Petrina, Kewaunee; Steve Thiry, Kimberly-Little Chute; Nicole Lowery, Lakewood; Amy Peterson, Lena; Ellen Connor, Manawa; Jen Thiele, Joanne Finnell, Marinette County; LeAnn Hopp, Marion; Ann Hunt, New London; John Kronenburg, Tracy Vreeke, NFLS; Joan Denis, Oconto Falls; Amanda Lee, Bradley Shipps, Liz Kauth, Molly Komp, Evan Bend, Dave Bacon, John Wisneski, Debbie White, Chad Glamann, OWLS; Sue Vater Olsen, Scandinavia; Elizabeth Timmins, Seymour; Kristie Hauer, Shawano County; Shay Foxenberg; Shiocton; Jill Trochta, Suring; Peg Burington, Patsy Servey, 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 September 18th, 2020 AAC meetings.

Minutes from the September meeting were approved.

4. Announcements

CARL Patch

TLC successfully implemented a patch to update important features in CARL after hours on October 15th and the automatic client installer seems to be working as expected. Several key improvements were in the patch which were sent in an update October 15th.

Blocks Guidance Document

We expect to have a document outlining patron blocks in CARL and when to use them sent out later today or Monday. We will send the document out to OWLSnet Updates and post it on the OWLSnet Circulation page.

Wireless Access Points

Dave gave an update on the status of wireless access points ordered by specific libraries through the CARES grant. He is hoping to have them out to libraries in a week or so. Libraries are responsible for arranging cabling installation. Please hold onto all documentation you receive for reimbursement, and contact Dave if you have any questions.

VPN

Dave gave an update about the Sierra in the Wild VPN and how it won't be in service by the end of the year. He is working on configuring a new VPN. Laptops will need to be reconfigured and Dave can show libraries how to use the new client; it is very user friendly. Policies for SITW (Sierra in the Wild) signed by those libraries using it are still in place and valid. Laptops with the VPN client and CARL installed must be encrypted with BitLocker. Libraries can still use remote desktop to connect to their computers at the library from home as long as staff makes sure to disconnect from the remote connection anytime you move away from the computer, connect to the internet using a secure network, and use strong passwords.

5. Cataloging and CARL

Amanda sent out a supplemental document outlining how OWLSnet is currently handling cataloging requests, the challenges cataloging is facing, and where they hope to go. CARL cataloging is very different and a learning curve, so OWLS wants to hear what the pain points are and what needs to be addressed. Bradley added that the top priority from the survey she sent out was improving cataloging processes.

Adding more precision to searching was requested. At times searching with title and author works and other times it doesn't. Bradley answered that this is how the CARL searching algorithm works; it's not a cataloging issue OWLS can work on, but rather a Discovery issue. Advanced searching with format and filtering properties doesn't always work. OWLS currently has tickets open about this. OWLS has also signed the contract for BiblioCommons, and work on implementation will begin in November. The issues that pertain to searching will be resolved once we move to BiblioCommons with a new algorithm and discovery platform.

The overnight process for SkyRiver is slow. SkyRiver requests are currently being turned around in about 2 business days. We hope to have that time cut down even further as acquisitions libraries bring more bib records into the database and staff adjust to the new workflows.

A question was asked about whether libraries should keep submitting misspellings in Discovery. John advised the group to keep submitting any errors they see.

Eva wondered if some of the lead time could be resolved with acquisitions running and asked what that timeframe would be before they were back to a more normal workflow. Amanda informed the group that Door County and Appleton are up and running but are still learning the processes. They are creating workflows and in a couple of months we expect there will be more records in the database libraries can attach items against. Kelly wanted to know when staff should send better records to OWLS. She knows they can attach to vendor records but wants to know when they should attach to a vendor record and when they should request a SkyRiver record. Should they

only request a SkyRiver record when there isn't a vendor record yet? Amanda informed the group that they can keep sending updates via email, but the main goal is to have items getting out as soon as possible--that record will get updated from the library who brought it in from acquisitions, so libraries don't need to send updates or request a SkyRiver record if a vendor bib is in the database already. Other CARL libraries report waiting a few days before searching and attaching items allows them to attach most items to an existing bib.

Bradley asked if OWLS should find the money to get back to OCLC to have higher quality records available to us. It would be about \$20,000 more a year than SkyRiver. Many seemed interested in moving to OCLC. OWLS can come up with a proposal, but this wouldn't happen this year. John reminded the group that there is a handout for guiding staff in choosing better records in SkyRiver.

Peg added that some locations are incorrect. Amanda advised sending those to OWLSnetHelp so they can be changed globally—it is likely a migration mapping issue.

A few libraries wanted a better way for navigating location codes. Currently, staff can type in the first letter but then need to scroll through before finding what they need. Also, it would be nice to have a TEEN location code. Amanda will ask TLC if they can add a 2-letter search for locations and look at the media codes as well. Amanda also has an enhancement request in for libraries to see only those codes they are using. Bradley verified with annual report instructions and TEEN materials count as Adult for circulation purposes. If Teen items have been put under Children, then those numbers would be reported incorrectly to DPI.

It was asked to have media codes suppressed in Discovery, so patrons don't see it. Amanda said media codes should already be suppressed, so if staff are finding incorrect locations or media codes please report those items to OWLSnet Help.

6. Technology and Resource Sharing Plan

Bradley went over the results from the survey she sent out about the Technology and Resource Sharing Plan priorities and thanked the 27 out of 29 libraries who responded. Here is a breakdown of the top-ranking technology ideas:

- I. Cataloging process improvements
- II. Develop data dashboard for stats
- III. Increase library access to run own reports
- IV. Develop shared resource delivery hub
- V. Improve reports

Colleen added that if anyone was doing building projects or renovations, to be aware of how important CIPA compliance is. OWLS isn't needed for this piece but, yes, it is

important. Ellen wanted to know what funds CIPA is tied to, and Bradley confirmed it is tied into e-rate funds.

Some libraries indicated e-signatures were important on the survey, but we already have software to facilitate this. OWLS libraries should contact Julie Leopold and NFLS libraries should contact John Kronenburg.

7. Grace Periods

CARL has the functionality to allow a grace period when fines will not be charged for a set time after an item's due date. This applies to renewals and returns. If grace periods are desired, OWLS recommends the grace period be equal to the quarantine time recommended by DPI plus one (1) day, which would put the grace period at two (2) days. Some felt that three (3) days would be better. The three (3) days would be just three days, not three library days, not three business days. One library was concerned about lost fine revenue. Tracy noted that at the NFLS-system level, there will be a shorter quarantine time of 24 hours. Owen asked if we know for certain this won't interfere with local check-in procedures or have any unintended consequences. Amanda answered that during her testing it seemed to work as expected but there is always the possibility of unintended consequences.

After some discussion, there was no final decision. The topic has been tabled and will be talked about next month. The shorter quarantine time may make this alternative unnecessary.

8. Adjusting the Overdue Notice Schedule

When items were quarantined for 4 days, OWLS recommended moving the 1st overdue notice to 5 days from the due date and the 2nd overdue notice to 10 days from the due date. Courtesy notices, search shelves, bills, and collections would remain the same. The current overdue/billing timeline from the due date is as follows:

- 1 day: Courtesy Notice sent
- 3 days: 1st Overdue Notice sent
- 6 days: 2nd Overdue Notice sent
- 21 days: Search Shelves posted
- 28 days: Bills posted
- 45 days: Selected patrons sent to collections

OWLS would like to know if the schedule should be adjusted to allow library staff more time to handle returns in light of the recent recommendation to reduce quarantine times to 24 hours. Most believed all the changes were causing libraries to lose credibility with their patrons. The 24-hour quarantine time is expected to help relieve patron calls

and renewals that prompted the recommendation in the first place. At this time, OWLS will leave overdue notices as they are.

There was a 10-minute break at 10:51. The group reconvened at 11:00am.

9. Holds Prioritization

There was no consensus at the September meeting, so the group will need to vote today on whether to temporarily change holds prioritization from the current practice, which is compliant with OWLSnet policy, to temporarily give precedence to local holds during the pandemic.

Proposal: Change holds prioritization in the ILS from first-come-first-served to local patrons first until all counties participating in OWLSnet reach Medium or Low disease activity levels per [WI DHS](#) or until AAC votes to change it back, whichever comes first.

Most of the group doesn't like the idea of local holds because then patrons can't see their holds queue, which many of them watch. The group voted and there are some library votes missing but majority was against the proposal. Holds prioritization will stay first-come-first-served.

10. Other CARL Priorities

What other issues in CARL are causing the biggest disruptions or delays in day-to-day operations? Are there any tasks you'd like to see demonstrated?

Elizabeth wanted to know how to place multiple holds on one item for a teacher in CARLX. Amanda demonstrated this.

Patrons renewing online are not always able to if there are other holds on the item and there are items available. When patrons call to ask, staff can't renew the item either. The current workaround is to use charge-on-charge that was posted in OWLSnet Updates.

What is the easiest way to return to a patron account without having to scan the barcode again? Amanda showed in CARLX where you can use the Patron ID dropdown to select a previous patron ID. A few in the group said it would be nice if it showed the patron name instead of the ID number.

When will there be a "finished" Connect? Amanda responded that there was a meeting with TLC about patron blocks and notifications for when patrons need to be looked at before checking out in Carl Connect Staff. TLC expects they can make many of those changes by the next update. Libraries would like to see more of the functionality within CARLX for notifications/Big Red Boxes in Carl Connect. Bradley added the easy answer is

that there will never be a “finished” Carl Connect. This is because their continued development is going to Carl Connect so they’ll always be working on it and adding functionality.

Some asked about easier name searching/functionality. Others responded with their tips on searching for names. Some said searching with the initial and then an asterisk (*) helps. Ellen said she searches by last name and location.

A couple expressed frustration with the load time for patron information and when switching between screens in CARLX. There were reports of failure to bridge from Carl Connect and Discovery, where many need to log out and back in to access what they need. Amanda suggested that staff make sure they are closing unnecessary tabs and email OWLSnet Help when they experience problems.

Some staff are having issues creating new cards or verifying addresses where the boxes don’t always drop down. Staff then need to go to different computers to get the information. Updating Firefox doesn’t seem to help. Amanda suggested using Chrome and that she would report the Firefox issue to TLC.

Carl Connect seems to be freezing on staff causing them to have to restart. This happens a few times a day. Amanda suggested looking at the timeout settings in the workstation settings. Eva was using with Chrome but stopped because it was printing the receipts wrong. Bradley informed the group that there are different receipt settings for different browsers and to let OWLSnet Help know so we can better assist.

Many still seem to be having issues with having the permission to place multiple holds. Amanda said that permissions was something we knew would need tweaking over time. Send those requests to OWLSnetHelp and we can fix those permissions. OWLS will change the permission to allow circulation staff to override hold exceptions.

Since a majority of staff are using Carl Connect for checking out patrons, they wondered if the update will create a pop-up box that alerts them when patrons have items on the holdshelf. Amanda said that none of those issues were addressed in the update but something OWLS has talked to TLC about having notifications similar to CARLX in Carl Connect.

Can the patron photo block be removed in Carl Connect because it seems to be the last thing to load? Amanda will investigate this.

When an item in a collection goes Lost, it no longer shows up that the library owns it and causes frustration. In the patron facing catalog, items that go Lost are suppressed but is still visible on the staff side. Libraries feel that it’s helpful for patrons to know that they own the item, even if it isn’t available. Often libraries are going to replace the item and will use InfoSoup to locate items only to get frustrated when they can’t find it and

they know it is there. Amanda said this is a fix OWLS can do now and will change the settings to show items with a status of “Lost” in InfoSoup.

Ann asked if there would be an option to check in items but not fill a hold. Amanda answered there isn’t with this update, but TLC plans to streamline this process in the next update. There is currently a workaround.

Eva asked if there could be categories added to the “new” carousels on the homepage, such as Audiobook on CD? Amanda said we should be able to do that.

Ellen asked if there could be customization with the location and media codes that drop down. Amanda said we can put in a request but it’s something they can't do right now.

11. Adjourn

Meeting was adjourned at 11:49 AM.