

**OWLSnet
Administrative Advisory Committee Meeting
Outagamie Waupaca Library System
July 21st, 2017 – Amended**

Present: Michael Nitz, Tasha Saecker, Beth Carpenter, Appleton; Eva Kozerski, Black Creek; Jamie Hein, Clintonville; Tina Kakuske, Tracy Vreeke, Door County; Stephanie Weber, Florence; Susan O’Leary-Frick, Fremont; Rachel Honzik, Hortonville; Tony Wieczorek, Kaukauna; Carol Pertrina, Kewaunee; Steve Thiry, Kim/Lit; Nicole Lowery, Lakewood; Ellen Connor, Manawa; Jennifer Thiele, Marinette; Le Ann Hopp, Marion; Ann Hunt, New London; John Kronenburg, Jamie Matczak, NFLS; Kristin Laufenberg, Oconto; Joan Denis, Oconto Falls; Dave Bacon, Evan Bend, Patty Hankey, Molly Lawlor, Bradley Shipps, Amanda Lee, John Luke, OWLS; Sue Vater Olsen, Scandinavia; Elizabeth Timmins, Seymour; Kristie Hauer, Shawano; Angie Jandourek, Shiocton; Jill Trochta, Suring; Peg Burington, Waupaca; Kristi Pennebecker, Weyauwega

1. Call to Order and Introductions

The meeting came to order at 9:33am at the Appleton Public Library.

2. Minutes of the May 19th, 2017 Meeting were approved.

3. AAC ground rules were reviewed.

4. Announcements

- Bradley announced upcoming CE events at OWLS and NFLS
- Patty Hankey will be retiring; her last day is August 1st
- Cathy Kolbeck is the new director at Algoma
- Dominic Frandrup is leaving Waupaca in August
- John Luke is the new ILS Technology Coordinator for OWLS

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

Sierra/Circulation

- Sierra 3.1

The recent upgrade went well with a few minor printer issues that have been corrected. The upgrade included mostly bug fixes, including the use of Java 8, which has sped processes up. Web Management no longer requires the use of Java in order to access it and the hold architecture has been reconfigured to solve the issue of items falling off the holdshelf. New London has started using the web based Sierra client and Ann says it’s “okay.” She would like to use it for scanning barcodes with an iPad or camera. She would ultimately like to use it as a checkout computer but that would require a different printer setup. Evan will look into blue tooth scanner options.

- Using PINS at self-checks

Libraries wanted to use PIN verification at the self-checkouts as an extra layer of security. Innovative can do this with our current set-up. Appleton, Kaukauna, and Shawano will be the first to start this, with Appleton looking to begin during the week of August 14-18. Evan will be in touch with Innovative and will pass along any information he hears.

- Scanning drivers licenses

Appleton is exploring purchasing scanners that can be programmed to read the barcode on a driver's license and populate fields in the patron record. Beth went over the online demo they received for how this process would work. But the scanner can only be programmed to work with one template, leaving them to decide if they would want all templates to have this capability or just adult templates. The quote APL received was \$230 per scanner. Bradley informed the group that OWLS did some testing and the addition of a full middle name and the zip+4 to the patron record did not create any problems with reports or notices.

The Boopsie app was brought up and the route of the discussion went into questions about the app. Ann asked if OWLS has looked into a system wide quote for the app. Jamie (NFLS) and Evan both agreed that when the app was discussed last year, the quote was too high, roughly \$30,000. Jamie did participate in a demo last year and if there is interest, she can request a webinar demo from the company. Kristin from Oconto asked what factors play in the price. Tasha was not entirely sure but that they said what they were looking for and were given a price. Rachel was curious if others have looked into other products such as DEMCO, Sign-up, and WADU(?) readers. Appleton has but found that a few features were lacking.

- Shoutbomb and notice preferences

Evan has received a few requests for patrons to stop receiving email notices because they get Shoutbomb notifications. Evan explained how the system uses delivery preferences to send notices. The system is going to do something with any setting. There are options available for libraries such as setting up a "dummy" email to collect those emails that patrons don't want. But it is still advised that patrons receive email notices in case Shoutbomb doesn't run. Libraries can notify Evan if they are interested in exploring the "dummy" email option.

- Removing gender field update

Innovative has turned off the gender field for OWLSnet. OWLS has been informed that the data still exists, but we would have to turn the field back on in order to retrieve it. Patron templates have also been updated. Beth asked if next time we make this type of change, OWLS notifies the libraries when the change is made.

- Patty's OWLSnet tasks

Many of Patty's core duties were regularly scheduled tasks. OWLS is cross-training to have at least two people proficient in each task. Patty has been training staff all summer in preparation for her retirement. Please send all requests to OWLSnet Help, even if you know who usually responds. By emailing OWLSnethelp, someone will see the request and will respond even if the usual staff member is out of the office. Ann asked if libraries could have access to Create Lists. Bradley informed the group that with Sierra's limitations, there are only a small number of lists available. Ellen suggested that it become procedure for libraries to delete their reports after they have generated and saved them. Steve mentioned that reports are easy to run and learn. But staff shouldn't occupy a list for more than a day. If others have ideas for ways you might use Create Lists access, please contact Bradley.

- Collection agency procedure review

Bradley reminded the group of how collections work. A weekly report is run, either manually or automatically, of patrons who meet the requirements. A C-block is automatically added to these accounts when the report is sent. This should NOT be added or removed by staff. If it is, it can corrupt the underlying data in the Collections table. OWLS has updated the "Bills Paid Elsewhere" report to include the collection fee. Eva asked if libraries could opt out due to a lack of return. Bradley informed the group that she believes libraries can quit using the collection agency at any time as long as they have fulfilled their contract with Unique. Peg added that Waupaca has recovered quite a bit and that the process works better if all libraries are using it. A few libraries have shared their positive results using Unique, but that Unique may continue to contact patrons even after materials have been returned. Bradley suggests if patrons return materials but still have fines to pay, either to waive these remaining fines or to contact Unique to not contact the patron. If patrons come into your library to pay the collection fee for another library, this should be sent to the patron's home agency. Joan added that they are a smaller library using Unique but have a lot of mobile patrons. It causes difficulty in tracking, leaving Oconto with roughly 15 patrons who owe a substantial amount of money not being collected. Bradley suggests if libraries have concerns regarding this, to contact Unique asking for numbers for how size of libraries/communities may affect collection.

- Municipalities data audit and best practices

Bradley began with explaining how this process originated with last summer's news about a director creating fake library cards to influence funding. This led us to wonder what would happen if someone questioned our patron data. OWLS started a process of spot-checking municipality codes against patron addresses. Earlier this year, SRLAAW produced a list of Best Practices for libraries that bill for cross-county use, which also includes a recommendation that the consortium conducts an audit of cardholder records every five or fewer years and that library staff be trained on the importance of accurate records and how to do address verification. We have already begun this process.

Molly discussed the process OWLS has been using in verifying records. Molly runs a random list of 10% of active patrons for each library. By checking current patron municipality codes against county websites and other resources, Molly has calculated a percent error rate for each library. Rates fall within a wide range and OWLS recommends libraries aiming towards an error rate

below 5%. OWLS has asked libraries with rates below 5% what best practices they already have in place. Multiple libraries assign registration verification to staff during their shifts. Others make it habit to verify addresses with plat books, directories, myvote.wi.gov, American Fact Finder, maps, etc. OWLS understands that this can be difficult for smaller libraries to configure “teams” but we highly recommend that all libraries adopt a procedure for verifying addresses and municipality codes. After initial audited lists have been sent out, libraries can request additional lists from Molly, BUT, libraries will be responsible for verifying municipalities of these lists. If libraries are interested in county website training, OWLS can schedule a webinar or on site training. Please notify Molly if your library would be interested.

Encore/InfoSoup Update

- Final year of Encore contract

Evan informed the group that OWLS is 2 years into its 3-year Encore contract. Evan asked if libraries are happy with Encore enough to keep it or interested in moving on to other options. A few in the room showed interest in looking for new options. Others agree that although it is a lot of work to change the discovery layer, it is key to stay on top of new trends and technologies. Steve thinks we should research other products, their costs and how the market changes. Tracy thinks we should stay with Encore until we see something better or until our system is “broken.” Others agree with Tracy that our current system is stable and that we should wait another year. Tasha informed the group that PLSR has ideas for a state wide discovery layer, and we will know more next year. It might make sense to stay with Encore one more year, and then see what evolves throughout the year at the state level. Evan will take comments into consideration and will email an overview of options before the next meeting. This won’t include exact costs but estimated amounts.

Cataloging Pilot Project

- Amanda informed the group that they have a few libraries currently creating brief records. Hortonville, New London, and Waupaca volunteered to work on the pilot project.

WPLC/Overdrive Update

- Evan asked for a show of hands of those who seem pleased with the Overdrive update. Quite a few hands went up. Peg commented that the update is what overdrive should have been from the beginning.

Technology Update

- BCN update

The Badgernet upgrade at OWLS is complete, and Dave has a schedule for when each OWLSnet library will receive the upgrade to the Badgernet system. A few libraries have been delayed until 2018. Joan informed the group that AT&T came out with plenty of notification, but Century gave

no warning. John said that if you are told you need electrical work done, such as a grounding bar, notify an electrician. Dave included that if work is done, to please send an itemized bill to OWLS, so that he can work on reimbursements.

- Routers

All libraries will be upgraded to 20MG bandwidth at no cost to the libraries. Ellen has received no contact or site visits for this upgrade. Dave will look into it.

- Email Project Update

The new email switch to Outlook is in the works. With using Microsoft 365, storage would increase by 51,000% and users will have access to many of the features Microsoft 365 has to offer, such as OneDrive. There have been only a few minor bumps, mainly getting used to the new display. But also loading can be slow at times depending on bandwidth. Evan will need to set up new domains for the libraries and then set up for libraries will begin in August. Evan plans on setting up 4-6 libraries a week and will offer training after Labor Day.

Reminder to clean up email folders; local folders must be moved to server to be migrated but local contacts cannot be moved. OWLS will continue to forward emails for at least 6 months. Evan demonstrated how to use the new email interface and for \$2 a month (for 5 computers), libraries can purchase the E3 plan to have access to the entire Microsoft Office download. The cost will be billed to libraries.

PSLR Update

- Beth went over the 2-day Steering Committee retreat held in Oshkosh this month. The currently adopted timeline is now posted on the PLSR website. Members of the committee reviewed their process and focused on the main mission of the project. Regular, brief, and relevant communication is a key goal. Ellen asked if DPI would act on the final recommendations given by PLSR? Beth and Kristie both believe that they would take PLSR recommendations seriously.

6. Decisions – consensus decision or vote

7. Ideas submitted for discussion

- Shorter holdshelf and loan periods for new high demand DVD – WAU

A patron asked at Waupaca if there could be shorter holdshelf periods for high demand DVDs. Bradley explained how the “Time to Pickup” field in the individual loan rules works; this determines how long an item sits on the holdshelf. Ann was curious as to if there was an average holdshelf time. This could be something that OWLS researches in the future. Steve wondered if this was more of a collection development concern more than holdshelf. Ann added that she has noticed that not all libraries are purchasing even one copy of new DVDs while other

libraries are purchasing multiple copies. Rachel mentioned in regards to collection development, how some libraries don't have the budget to purchase new items, let alone multiple copies of them.

8. Discussion

- Collecting parent/guardian phone numbers for juveniles

Ellen believes that this should be part of OWLSnet procedures for new patron registration; part of the new employee Sierra training. There were many nods in agreement for this to become part of OWLSnet procedure.

9. Adjournment

- Meeting adjourned at 12:29 pm