

## OWLSnet Administrative Advisory Committee Meeting

Appleton Public Library

November 12, 1999

Present: Ann Schmitz, Algoma; Kathy Beck, Terry Dawson, Vicki Lenz, Michael Nitz, Mary Van Lieshout, Appleton; Kathy Mitchell, Clintonville; Kathy Coppock, Mary Seggelink, Florence; Carol Toepke, Fremont; Carolyn Habeck, Hortonville; Robyn Grove, Iola; Debbie Meixensperger, Kaukauna; Sue Kling, Barbara Wentzel, Kimberly/Little Chute; Pam Ellingson, Lakewood; Lea Ann Pillath, Lena; Ellen Connor, Manawa; Ellen Rineck, Marion; Nancy Krei, Marinette; Ann Hunt, New London; Mark Merrifield, Jody Parworth, NFLS; Peg Murphy, Oconto; Jeanne Waschbisch, Oconto Falls; Karen Kuhn, Oneida; Jenny Hipke, Peshtigo; Mike Hille, Shawano; Becca Berger, Joe Clabots, Judy Ellenbecker, Sturgeon Bay; Korrin Moede, Suring; Peggy Slicer, Tigerton; Kristen Anderson, Waupaca; Lucie Erickson, Linda Streyle, Weyauwega; Alene Newcomb, Wittenberg; Dave Bacon, Patty Hankey, Kathy Houlihan, Rick Krumwiede, Holly Otts, Barbara Strauss, OWLS.

### 1. Call to order

The meeting came to order at 9:30 a.m. Rick Krumwiede thanked Dave Bacon and the OWLS automation staff for their effort with the upgrade/migration. Vicki Lenz and Carolyn Lemke, Appleton, were also thanked for meeting arrangements. The cooperation and patience from all of the OWLSnet libraries was greatly appreciated.

### 2. Minutes

The minutes of the September 17, 1999 meeting were accepted as distributed.

### 3. Brief reports

- *a. Implementation update:* Birnamwood's collection is ready and they are ready to start training. Another Shawano Co. library, Mattoon, is not ready to join OWLSnet. Gillett started holds/picklist on October 18 and began circulating on December 2nd. Lena is planning to start circulation in January. Coleman-Pound, Crivitz, Wausaukee and Niagara will join OWLSnet in 2000. Scandinavia is ready for training, but is awaiting their telecommunication line.

Wisconsin libraries, including OWLS and NFLS libraries, are waiting to hear about the fate of a bill submitted to the Joint Finance Committee that would make branch libraries eligible for TEACH lines. That change would enable branch libraries to get inexpensive T1 lines. Contact your legislators to support this bill.

- *b. Collection statistics:* Rick distributed an updated version.
- *c. Other*

*Update Agreements:* OWLS libraries will soon receive updated OWLSnet agreements. Mark Merrifield and Rick Krumwiede will work on the Nicolet agreements for OWLSnet.

*Calendars:* Patty Hankey is working on library calendars. Patty has not received calendar information from some of the libraries. If you have any questions, please contact Patty.

### 4. Upgrade Report

The upgrade/migration to the new SUN computer and PLUS 2.6 went well and was completed ahead of schedule. Dave Bacon still has email and report issues to work on. Dave is working on the automated reports. Let Patty Hankey know if you are missing any reports.

*OCIRC*: OCIRC exceptions are basically informational -- indicating items not on file, items eligible to be trapped, patron expired, etc. Staff really can't do much with the reports, since they lack author, title and call number. OCIRC transactions for Friday and Saturday were combined on the date OCIRC was transmitted to OWLS; daily statistics will be combined.

OCIRC will no longer work after 1999. Geac is releasing an offline circulation client, which OWLS staff will test and recommend to larger libraries.

*D-CIRC*: The libraries that used D-Circ, a program written by Dave Bacon, said it was great and easy to use. Windows software (and knowledge to use it) is required to use D-Circ.

#### 5. New Features in LIBS 2.6 (upgrade notes distributed earlier)

A Review of PLUS 2.6 with screen examples was distributed along with an online demo.

1. *Pay options in circulation*: The Pay Options screen is agency specific and can be turned on/off in Checkin, Checkout, Renewal and Holds Processing.
2. *Removing a patron from the trapped hold queue*: Previously at Checkin, staff selected the patron to remove from the trapped hold queue. Only one patron is associated with a trapped hold, therefore, the step of selecting the patron to remove is not necessary and has been removed.
3. *Change in patron screens in Patron Accounting*: When a patron is paying a partial amount, you need to modify both the Pay Amount and the Cash field or the system assumes the patron needs change back. The payment screen includes the ability to Waive or Cancel a portion of the debt in the same step as paying part in cash. **Note: If a patron is making a partial payment on fines or miscellaneous charges, do not choose Pay total amount (excluding bills) because you will not be able to edit the Pay Amount field. Choosing Pay/waive/cancel partial amount and then System Selects will allow you to change the Pay Amount and the Cash field when a patron wants to pay a partial amount of fines/miscellaneous charges.**
4. The Circulation Summary screen is accessible in Patron Inquiry, Patron Maintenance, Holds Processing, and Patron Accounting, but the functionality is not the same in all cases.
5. Changes in Patron Inquiry - Circulation Summary:

By selecting *List Holds*, you can now display holds detail information. Viewing position in queue, editing, and canceling holds can now be done in Patron Inquiry.

Selecting the *List Checked Out Items* option from the Circulation Summary allows viewing up to six items per page. You can select one, some, or all items and display full details by pressing [F7] for the Full Record and [F8] and [F9] for the Next Record and Previous Record.

Selecting the *List Problems* option from the Circulation Summary allows you to view up to eight problems per page. To view full charge details, select a charge

and press [F7]. The charge then displays in the old style. You can select one, some, or all of the charges and page forward and back with [F5] and [F6]. **Note: There is a bug with the page forward and back. Sometimes it works and sometimes it doesn't. If you have a problem, use Patron Accounting for full account details.**

6. *Entering dates:* When entering a date in Holds Processing, you must enter a four-digit year. To change the due date in Checkout and Renewal, you can enter the date as mm/dd or mm/dd/yyyy.
7. *Patron Maintenance:* There has been a slight change in the patron Full Record screen.

The new *Total Cards Assigned* field is maintained by the system. A patron's original barcode is assigned 0. The system keeps a count of the number of additional barcodes a patron receives.

The *Category* field will not allow an "Invalid Patron Category Id".

The *Language* field is now on the second page. This field will contain "American" (older records) or "User Lang" (new records). When adding a new patron the *Language* field will be blank. When you press [F10] to store, the system will insert "User Lang".

8. Additional notes to use in circulation

*Patron notes in Checkin:* The Notes and Delinquency Notes from a patron's record can be displayed at the top of the Checkin screen. **Note: This is a system-level parameter, and it was decided at the AAC meeting to turn this feature off.**

*Transaction notes in Checkout and Checkin:* An item transaction note can be added at Checkout. You can, for example, note the physical condition of an item so that the patron will not be charged for it on return. To add a transaction note at Checkout, press [sF9] after checking the item out. Select the appropriate item from the transaction list; press [sF9] to access the Add Note box; type your note, and press [F10] to store. The note will appear when the item is checked in. The note is automatically deleted at Checkin when you press any key to continue.

*Attachment note:* A new pop-up note can alert staff at Checkout and Checkin to check an item for special accompanying material or to note damage/missing parts. The attachment note is created in Item Maintenance with a [F12] and will appear automatically at Checkout and Checkin. The attachment note remains until it is removed by staff with a [F15]. Kathy Beck prepared a handout and explained this feature.

9. *Placing holds on items with no available holdings in CL-CAT:* The patron is given a warning when there are no copies available. The patron has the option to proceed or cancel.

## **Problems**

DO NOT cancel holds from the Brief Title List--this will cancel ALL holds on the title.

To cancel a hold in Holds Processing:

- Find the patron
- Select List/Edit Holds ([F10]) from the Inquire menu
- Select the item you want to cancel
- Select Cancel ([F12]) from the Holds menu (holds can also be canceled from the Full Record ([F7]) screen

To cancel a hold in Patron Inquiry:

- Find the patron
- Select Circulation Summary ([F13]) from the Inquire menu
- Select *List Holds*
- Select the item you want to cancel
- Select Full Record ([F7]) from the Inquire menu
- Select Cancel ([F12]) from the Holds menu

### **Opportunities with new Geac products**

#### 20. Online picklist (hold messaging) (handouts)

Barbara demonstrated the new online picklist, which is called holds messaging in PLUS. The best feature is that open holds can be requested from geographically close libraries and works dynamically online. There are a few problems that make the product unusable at this time. Geac indicates that the problems will be fixed in the next upgrade. Generally, OWLSnet librarians liked the concept.

#### 21. Web catalog

Barbara demonstrated Geac's test web catalog. OWLSnet staff are encouraged to try the test web catalog. Here is the site: <http://geoweb.geac.com/> (Use the test patron that is provided.)

OWLS purchased the web catalog, which is scheduled to be up by mid-February. OWLSnet web catalog will look a little different than the Geac test web catalog, but will have many of the same features.

One significant implications for OWLSnet libraries is that the web catalog is not available through dumb terminals. The web catalog will be accessed through a PC with Windows and a web browser. Many OWLSnet libraries are replacing dumb terminals with new PCs.

#### 22. Printing patron notices at your library

Barbara indicated that we have successfully figured out how to print reports at local sites. Currently, this process is done at Sturgeon Bay for the Door County libraries. Contact Dave if you are interested in finding out more about this feature.

### 6. Other business

Kristen Anderson's last day at Waupaca Public Library is November 24th. Kristen has accepted the position of Programming and Continuing Education Coordinator at the Winding River Library System.

Barbara Strauss is working on finding locations for the AAC meetings in 2000. If you can host an AAC meeting, please contact Barbara.

### 7. The next meeting will be January 21, 2000 at 9:30 a.m.

The meeting adjourned at 12:15 p.m.

---

**OWLSnet Users Group Meeting  
November 12, 1999**

Barbara Strauss demonstrated GeoWeb. A PC with Windows is required for GeoWeb.

OWLS is replacing the Motorola with a Sun Ultra 10S that will be used for GeoWeb and email. OWLS is planning to have the Web catalog available by the end of January.

The meeting adjourned at 2:15 p.m.

---

**OWLSnet  
Dates for AAC in 2000**

DATE and PLACE

- January 21, 2000 - Green Bay (NFLS)
- March 17, 2000 - Little Chute
- May 19, 2000 - Waupaca
- July 21, 2000 - Sturgeon Bay
- September 15, 2000 - Marinette
- November 10, 2000 - Appleton