

OWLSnet Administrative Advisory Committee Meeting

Door County Library, Sturgeon Bay

July 20, 2001

Present: Rita Schiesser, Algoma; Terry Dawson, Vicki Lenz, Michael Nitz, Karen Probst, Appleton; Karen Dickman, Birnamwood; Carol Luepke, Bonduel; Gale Hoffmann, Clintonville; Mary Seggelink, Florence; Carolyn Habeck, Hortonville; Craig Lahm, Kaukauna; Sue Kling, Lori Van Dyke, Barbara Wentzel, Kimberly/Little Chute; Pam Ellingson, Lakewood; Lea Ann Pillath, Lena; Ellen Connor, Manawa; Nancy Krei, Marinette; Lisa Hein, Marion; Ann Hunt, New London; Mark Merrifield, Anne Miller, NFLS; Jeanne Waschbisch, Oconto Falls; Karen Kuhn, Oneida; Mike Hille, Shawano; Becca Berger, Joe Clabots, Judy Ellenbecker, Cheryl Wilson, Sturgeon Bay; Lucie Erickson, Weyauwega; Alene Newcomb, Wittenberg; Patty Hankey, Kathy Houlihan, Rick Krumwiede, Holly Otts, OWLS.

1. Call to order and introductions

The meeting came to order at 9:30 a.m.

2. Minutes of May 18, 2001 meeting

The minutes were accepted as distributed.

3. Brief reports

o a. Implementation update: MAT

Installation of equipment at MAT was completed on July 17. Patron registration has been scheduled for July 23. Hold messaging will be started soon.

o b. List of periodical holdings sent to each library

All of the libraries received a list of their periodical holdings. The list may be used for deleting items that you are discarding or no longer own.

o c. List of items in transit, going home, awaiting pickup - Report

All libraries received a systemwide report to search for items with overdue "going home," "in transit," or "awaiting pickup" status. There were 102 items on the report. Five were deleted, 12 were set to "missing," and 31 are back "on shelf" giving us a total of 48 resolved, leaving a balance of 54 unresolved items. 40 of the 54 unresolved items have been overdue for more than one year (some as far back as 1995) and these items could be deleted or set to "missing."

o d. A proposal for purge of old, expired patron records

Several Patron Purge **test** runs were made for Appleton. A report of the **test** run was distributed. The report indicated the criteria used and how many records would have been deleted using those criteria. All the libraries present felt a patron purge using an expiration date of 01/01/1998 with the exception listed below would be acceptable:

Exceptions Processing:

Patrons deleted with lost cards? **Yes**

Patrons deleted who were stopped? **No**

Patrons deleted with circulated items? **No**

Patrons deleted with claims returned items? **No**

Patrons deleted with open or trapped holds? **Yes**

Patrons deleted with outstanding fines and fees? **No**

Except for Appleton and Sturgeon Bay, the libraries felt a full agency report of all patrons deleted would be necessary for weeding the registration forms. A couple of libraries delete patron records as they expire and would need to use the current expiration date. Contact Barbara Strauss if you want to do a patron purge.

o e. Other

- **WISCAT:** Changes in WISCAT will be seen late this fall.
- **Gale Databases:** Any libraries that haven't already removed their direct links to Contemporary Authors should do so immediately. Contemporary Authors is no longer available because its contents are contained in Literature Resource Center and Biography Resource Center.
- **State Budget:** Nothing new to report - still haggling. Doesn't look good.
- **Fee Structure:** The OWLS board accepted the new fee structure. There will be 5% increase in the fee for next year.
- **Firewall:** A firewall will be installed Sunday morning. If a particular service doesn't work on Monday, let OWLS know.
- **NT Server shutdown:** There was a problem with the NT server shutting down certain services. A patch was applied that has fixed the problem.

4. **New OWLSnet borrowers cards - results of survey**

The key tag survey showed considerable interest and generated a lot of questions. Vicki Lenz reported on the standard card or key tag option they offer their patrons. After discussion, it was decided that it would be better to offer either the standard card or key tag as Appleton does. OWLS will investigate this option.

5. **Deleting the bibliographic records from the database; should we continue to keep records in the database for four months with no holdings attached; or, should the time frame be shortened to two or three months?**

In order to reduce the troubleshooting on the Old Holds Report, the possibility of shortening the time frame for deleting records with no holdings attached was discussed. Records with no holdings are also causing p.r. problems with patrons. However, even with the four-month time frame, some records are being deleted before libraries are getting their holdings added. Holly Otts remembered continuing to leave the records for four months to reduce the number of records that have to be added a second time and paid for again. There was a consensus to continue to use four months.

6. **New Geac products and "add ons"**

Self-check

Waupaca and Appleton are interested in self-check. Appleton is seeking a grant to purchase the self-check unit. The self-check unit will work for books only, and the unit desensitizes the books as they are checked out. The Geac self-check interface will be acquired before the end of the year.

E-mail notification

OWLS will proceed with e-mail notification. Scripts will be added to PLUS. If a patron record has an e-mail address and the proper flag has been set, notification will be by e-mail and no paper notice will generate. E-mail notification will be enabled before the end of this year.

Direct access to NEWCat from an outside web page

An add-on piece of software allows a link on a web page to bring up a specific record in NEWCat, bypassing the login and search processes. Because of budget constraints, this feature won't be added until after the beginning of next year.

Patron Authentication

Patron validation for netLibrary from a remote site will be implemented. A patron authentication box (like NEWCat) will pop-up requiring the patron barcode and first four

letters of the last name. Because of budget constraints, this feature won't be added until after the beginning of next year.

Windows Circulation Client

Libraries that saw the Circulation Client at ALA were impressed. At this time there is no money for OWLSnet to purchase clients. It is possible that individual libraries could purchase clients, but Rick felt that we should decide if it should be a network project.

Windows Holdings Client

Michael and Holly reported that the Holdings Client is not ready. Items can be added, but it can't add serials and volumes.

Geac National Users Group

Apollo may be ready for the users group meeting in September. No action should be taken on purchasing clients until we can see how they relate to Apollo.

Upgrade

Barbara has been notified that Geac is beginning to schedule the PLUS upgrade. Barbara will check to see if the mid August time frame will work.

NEWCat revisions

There will be minor revisions to NEWCat sometime this summer. Toward the end of the year a 5.0 Geac upgrade will improve handling volume records. Most were in favor of children's subject headings in color, but not in red. The color green will be used.

7. NEWCat Review: What about NEWCat would you like to see reviewed or reconsidered?

The committee to review NEWCat will meet soon. In addition to those who have volunteered, others may be recruited to assure that the committee is comprised of a representative cross section of the entire group.

Wish list for changed in functionality:

- Make browse the default search
- Want to be able to place multiple holds without putting in patron id each time
- The *mark* button is confusing - patrons think it is the button to place holds
- Include interactive tutorial in addition to help screen
- *Show individual holdings* instead of *full record* button (full record means nothing to patrons)
- Can there be a "system busy icon" (similar to hourglass) so patrons know something is happening and do not push buttons twice?
- Show local holding first
- Display search screen first - not the multiple databases screen or choose library screen
- Emphasize result list - have button say "return to results list" not just *results*, or include "back" button
- "Hold title" would be better understood than "commit hold"
- When you choose a specific library you lose the browse function - want browse option from all screens - will the browse option be available from all screens if it is the default?
- Can renew function be changed when item is 1 day overdue? Can it be changed so overdue items can be renewed? Also, computer locks up when there are fines.

- Can new email notification include URL to click and renew?
- Want to be able to logon as staff and not get timed out
- Can we include online registration for next day processing of new card?
- Include note on screen that holds takes 24 hours to process (patrons place holds and come in 30 minutes later expecting items to be ready), and include the cost of placing the hold - postage for mail notification
- Want ability to search 2 libraries at once
- Add option to search only children's headings

Good things about NEWCat

- Like county, regional city choices, but not on first screen
- Like children's subject headings in green
- Like media database selection choice

8. **Other business**

Collection development

A report on collection measures for 2000 was distributed

Special reports

Contact OWLS for special reports if there is information you want that is not included in the regular reports that you receive.

Periodical questions

Contact Holly Otts if you have any problems or questions with periodicals.

Book bags

OWLS has distributed 25th anniversary book bags to all the OWLS libraries to handout to patrons.

NFLS 25th anniversary

On September 25, NFLS is having a dinner at the Pack Hall of Fame. More information to follow.

Another party

Mark Merrifield suggested having a join OWLSnet party to celebrate getting everyone online.

OWLS 25th anniversary picnic

OWLS is having an anniversary picnic on September 22. More information will be provided.

9. **Next meeting:** The next meeting will be on September 21, 2001 at 9:30 a.m. at the Stephenson Public Library in Marinette.

The business meeting adjourned at 12:10 p.m.

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OWLSnet Users Group Meeting

July 20, 2001

Daily Circulation Stats

Interpreting the daily circulation statistics report was discussed. Each library has a copy of "PLUS Statistical Gathering." This document describes how statistics are gathered and how they should be interpreted. If you need another copy, please contact Kathy Houlihan.

Are OWLSnet cards required for Checkout?

Some libraries require patrons to present their OWLSnet cards at Checkout. Many of the libraries will look-up patrons that are not carrying their cards. Presenting a card at Checkout protects both the library and the patron.

Hold Messaging

Clintonville reported an unusual experience in Hold Messaging. One title/barcode appeared in Messages Outstanding. After pulling that item from the shelf and trapping it, another hold appeared for the same title/different barcode. After pulling that item from the shelf and trapping it, another hold appeared for the same title/different barcode. Why didn't all three holds appear at once (there were six copies on shelf)? Note: Some open holds drop out of Hold Messaging and have to be placed again.

Resource Sharing

There was discussion at the meeting as well as email discussion before the meeting on the "browsing shelf" or "new shelf" concept. Those in attendance felt that all libraries have had to adjust to the lack of browsing materials. It's not just an issue for small libraries. Some of the new libraries coming online had tried the "browsing shelf" concept, using only their items, but they have since discontinued. It takes time to educate patrons on how to use the network most effectively, and libraries can make this process easier. Some are displaying book jackets, lists, etc. of high demand items, letting patrons know holds can be placed. Appleton and OWLS are purchasing more high demand items to help meet demand.

Those present at the AAC meeting were in favor of following group resource sharing rules. They did not believe it appropriate to place material owned by other libraries on a browsing shelf. They believed that no copy of a title should be sitting on a shelf if any patron had placed a hold on the title and that if any library is interested in changing the rules, it should make a proposal to the group.