

**OWLSnet**  
**Administrative Advisory Committee Meeting**  
**Outagamie Waupaca Library System**  
**September 23, 2005**

Present: Rita Schiesser, Algoma; Kathy Beck, Vicki Lenz, Michael Nitz, Meg Shriver, Martin Swenson, Appleton; Valerie Husom, Black Creek; Carol Luepke, Bonduel; Kathy Mitchell, Clintonville; Susan O'Leary, Fremont; Carolyn Habeck, Hortonville; Robyn Grove, Iola; Debbie Meixensperger, Kaukauna; Susan Grosshuesch, Kewaunee; Karen Vandenberg, Theresa Van Himbergen, Barbara Wentzel, Jane Werner, Kimberly/Little Chute; Ellen Connor, Lyn Hokenstad, Manawa; Tim Dirks, Sandra Hipke, Marinette; Lisa Hein, Marion; Ann Hunt, New London; Terrie Howe, Mark Merrifield, Anne Miller, NFLS; Jeanne Waschbisch, Oconto Falls; Peg Murphy, Oconto; Kymberley Pelky, Oneida; Evan Bend, Beth Carpenter, Patty Hankey, Judy Hocking, Rick Krumwiede, Holly Ledvina, Gerri Moeller, OWLS; Sue Vater Olsen, Scandinavia; Elizabeth Timmins, Seymour; Mike Hille, Michelle Moesch, Sharrie Schweitzer, Shawano; Becca Berger, Joe Clabots, Linda Streyle, Sturgeon Bay; Peggy Slicer, Tigerton; Peg Burington, Ruth Hoppe, Waupaca; Lucie Erickson, Weyauwega; Alene Newcomb, Wittenburg.

1. Call to Order

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

Introductions

All attendees introduced themselves.

2. Minutes of the March 18, 2005 Meeting

The minutes were accepted as distributed with one correction: Alene Newcomb was removed from the attendees list, since she didn't actually attend.

3. Announcements

- Reminder from Dave Bacon: Badgernet upgrade pre-installation calls should be directed to Dave to schedule because he will be assisting in the pre-installation evaluation. As discussed at the last AAC meeting, the issues with the upgrade are the new, more stringent environmental requirements. If an agency's connections need to be moved, the connections will need to be recabled. There is a possibility that OWLSnet may be able to help with wiring costs through the hardware budget.
- Wisconsin awarded itself a LSTA grant to get information about library systems and the costs of those systems. There is a survey going out to each shared automation system and there will be a focus group of system directors at LSTA.
- The new OWLS website will probably go live the week of September 27 at [owlsweb.info](http://owlsweb.info). The old homepage will stay up for awhile and then go away.

4. Old Items

- OWLSnet policies
  - There was nothing new to report.
- Lending conformity survey results
  - There was a good response to the survey with 27 of the 30 legal library entities surveyed responding.
  - The majority of respondents indicated that they were interested in standardization

of lending rules, willing to work for standardization and thought their boards likely to go along with the changes.

- Barcode placement vote
  - At the last AAC meeting, the barcode placement discussion included whether to require barcodes to be placed on the top half of the back cover and whether to require this for media as well. We agreed that all books should be barcoded on the back cover, with placement on the top half preferred. Several libraries have requested a vote on this issue, requiring the barcode to be placed on the top half of the back cover of all circulating items.
  - A vote was taken with one vote per participating library entity. Rick used his cool computer program to tally the votes and figure the two thirds majority (two thirds of participating library entities and two thirds representation of money spent) needed to pass. Two libraries submitted votes in abstentia.
  - The vote passed. **From this day forward, barcodes are to be placed on the top half of the back cover of all circulating items.**
- Revamping the registration cards
  - Nothing has been done on this yet, but it has not been forgotten.
- Sending dollars on the van part 2
  - Agencies were reminded not to send money on the van.
  - A discussion followed:
    - § OWLS has signed a contract indicating that they will send no money or valuables on the van.
    - § NIC does send money and valuables on the van.
    - § Waltco is bonded and is liable for the value of materials sent.
    - § Can checks and money orders be sent? Probably not.
    - § Rick recognized that the preference is to be able to send cash and checks on the van and will follow up on this issue.

## 5. New Items

- MOVE
  - OWLSnet is entering the next phase of our move to the new system—the implementation phase. OWLS staff and others who have been assisting have found implementation to be exciting, challenging and very tiring. Entering this new phase, OWLSnet will be faced with a multitude of options and will need to make choices and changes concerning those new options.
  - Test the new OPAC
    - § The out of the box OPAC is online at <http://owlsils.owls.lib.wi.us>.
    - § The design, appearance and just about everything about this OPAC will change before we go live.
    - § There is only a test database of 100,000 records.
    - § Please go to the site to play and do test searches. Let Holly know about any weird data or strange search results.
    - § Please don't share this site with patrons.
  - Migration of hold pickup locations
    - § Hold pickup locations will not migrate.
    - § Any hold outstanding at the time of migration will go to the patron's home library.

- § Pickup locations on holds placed after the go live date will work.
- § After migration, patrons and staff will most likely be able to change pickup locations on holds placed before migration.
- § The hold availability notice will have the pickup location.
- § Some options for avoiding confusion in holds pickup were discussed:
  - Begin notifying patrons prior to migration. Target those patrons who do pick their items up at an agency different from their home agency.
  - Holds could be turned off for a time prior to migration.
  - The setting in Geac that allows pickup locations to be changed could be turned off for a period prior to migration. Informative text could be added to the Holds placement webpage.
- President's Day 2006
  - § Circulation data will be migrated to the new system on Monday, February 20<sup>th</sup>, President's Day.
  - § Geac will go down Sunday evening after the last library closes (5 p.m.?) and the new Innovative client should be ready to go at 8 a.m. Tuesday February 21<sup>st</sup>.
  - § Any transactions on Monday will have to be handwritten and entered later.
  - § OWLS recommends that all libraries consider closing on President's Day.
  - § It was requested that OWLS provide patron education suggestions for the new system and the OPAC. A committee may be formed to solicit content for patron education.
- Codes, codes, and more codes – we're drowning in codes!
  - § Cleaning up call numbers
    - Agency reports were handed out listing problems in the call number field.
    - If the call number does not have the "space dash space" sequence entered correctly, with the call number then space dash space and then location, the information will not translate properly to the new system.
      - If there is no "space dash space," all the information will go to the call number field and no shelving location information will be transferred. The shelving location will contain the agency name only. These problems are not serious and can be fixed now or after migration.
      - If there are multiple "space dash space" entries in the call number field, information will be lost.
      - If the information is swapped, location first and call# after the "space dash space," the call number will be lost. These problems, in particular, need to be fixed.
    - Any questions concerning call number cleanup should be directed to the cataloger assigned to the agency county as detailed in the handout with the list of problems.
    - It would be best if this cleanup project was finished by the end of November because the full database load is in early December.

- Holly detailed the procedure for the call number cleanup:
    - First, examine the data and the item records to see what is wrong. There may be double spaces instead of single; words may be misspelled, etc.
    - Second, identify items that can be changed as a group. Charles can do any changes that have over 50 items with similar problems. For example, he can replace the Shelved Under in “Grisham – Shelved Under” with Fiction. If periodicals have the information switched, as in “Periodicals – Oct 05,” he can switch the information to the proper sequence.
    - And third, either manually fix the problems that have fewer than 50 entries or contact the cataloger assigned to your agency by email to make the batch changes.
- § Location codes and shelving locations in the new system
- The old three digit codes for agencies will be going away.
  - Each agency was given a handout with the new Millennium location codes. The new codes are constructed so that the first digit indicates the county, the second digit indicates the agency, and the last digits indicate shelving location. For example, **mcaf** would be **Marinette Coleman Adult Fiction**.
  - The summary handout has the number of times a location code occurs in the current system. Entries that occur more than ten times are critical to examine. Entries that occur ten or fewer times are most likely mistakes that need manual fixing.
  - Each agency should look at the proposed location codes. Please submit any changes by Friday October 7<sup>th</sup>.
  - The descriptive labels for the codes can be changed easily later but the codes themselves are linked throughout the system and would be difficult to change.
  - Any collections that are combined at present, such as fiction and nonfiction videos, that you want separated need to be separated now before the migration. Please tell the cataloger assigned to your agency if you need any collections separated that are showing up combined on the list.
  - It is especially important to notify the catalogers if the categories are incorrect or if they don’t reflect current practices.
  - The prefixes like +, J, Q, R will cause problems with call number searches. Charles can make batch changes to those prefixes.
  - Please formulate the requests for the changes and email the cataloger assigned to your agency. The catalogers will compare the requested changes with the data and may call if there are any questions.
  - To improve the OPAC display, please avoid labels longer than 35 characters or over four words.
- § Item Scat information now contained in I-Type codes

- A handout with the new Item-Type codes was distributed.
- The I-Type codes will replace the Item Scat codes in the current system.
- The I-Type codes are used in both loan rules and in circulation statistics.
- Every time an item is added to the system, these codes need to be used.
- **The list of I-Types was approved.**
- Group decisions—some basic decisions regarding the setup of the lending parameters, choices we can agree on:
  - § Limit fine to price—**yes**.
  - § Courtesy notices—**yes, email one day before due**.
  - § Time to pickup from Holdshelf—preference for 7 days, maybe 10.
  - § Patron blocks
    - The primary thresholds that will block patrons are number of checkouts, amount owed, and the number of holds.
    - The maximum number of checkouts and holds are set by individual libraries.
    - If patrons are blocked, they cannot place holds.
    - There are five categories that can be limited for the number of checkouts. The first category is total number of checkouts. The other four were agreed to be **videos & DVD's, music CD's, audiobooks, and software**.
    - The number of checkouts limits of the home agency goes with the patrons when they use other agencies.
  - § Reading List—turn it **on** and set at **patrons opt in**.
  - § PINS—**yes** and use **four character PINS**.
  - § Linked patrons—**yes**, turn on but there needs to be a policy discussion by a committee. Volunteers' names for the committee were taken.
- Individual library decisions
  - § **Time to re-shelve** and **Time to shelve new items** are automatic status changes set by agencies.
    - Agencies should decide if they want separate messages for items returned and for new items in processing.
    - County libraries that do central processing of new items should include the estimated shipping time in the status change decision.
    - A form will be sent out for agencies to fill in the times they would like those statuses to change.
    - **Recently Returned** and **Coming Soon** were chosen as the terminology to appear in the OPAC for these statuses.
- The new purchase alert report
  - § The old purchase alert report will be going away and a new one from Innovative is in the programming stages and should be ready by June.
- Patron History
  - § Only the current patron and the previous patron information will be saved on the item records in the new system.

- § For items that need repair, the status can be changed to an **In Repair** status and the patron history will be saved.
    - Training
      - § OWLS is in the process of interviewing for a trainer for the migration.
      - § Tutorials for the new system are available online. Contact Gerri or Judy if you want to do a tutorial.
      - § Before we go live with the new system, everyone in the system will be provided a six hour training session. A three hour advanced training session will be offered for supervisors and at least one person per agency.
      - § Cataloging training will be scheduled later.
      - § APL has volunteered the use of their computer lab for training.
      - § Door County's computer lab is being upgraded and may be available for training
      - § OWLS has applied for an SBC grant for a mobile training lab which would consist of laptops and cables. If the grant is not awarded, the OWLS board has approved the purchase of the lab.
    - Installing the Millennium client
      - § Terrie Howe will be doing the installation of the circulation client and the offline circulation client for all the agencies.
      - § There are a limited number of licenses so agencies are encouraged to have the client installed only on machines that do circulation and cataloging activities, not on pc's that use the web or the web OPAC.
  - Muehl Public Library's plan for an efficient migration is available at <http://www.owlsweb.info/owlsnet/move/MPLMigrationPlan.ppt>
  - Don't change those policies now!
    - Because of all of the changes that are on our migration horizon, try not to make any policy changes now.
  - Loan rules
    - A brief discussion of loan rules took place and it was agreed that the entire system could share the same notice schedule, the same number of notices, and can have the same text on all notices.
    - Getting agreement on fines seems to be the most problematic issue.
    - Gerri proposed that she take the recommendations of the loan conformity committee on loan durations, keep or stay very close to each agency's fine rates, consolidate maximum fines and then create and send out a list of recommended options.
    - All fines, loan durations and other elements of the loan rules will be applied by the circulating agency and are not connected to the patron's home agency.
  - Schedule AAC meetings
    - The next scheduled meeting is November 11 at APL.
    - December 16, January 20 and March 10, all at APL, were approved as AAC meeting dates.
    - A proposed schedule for the rest of next year's meetings will be sent out.
6. Other Business
- Time management software for internet stations
    - Due to increased interest in time management software for internet stations,

- OWLSnet is investigating options for offering a system-wide service.
- Terrie Howe has started investigating vendor options.
  - Because we are migrating to a new system, there are now options for vendors. Previously, only Envisionware could work with our system.
  - The benefits of internet time management software were discussed:
    - § Patrons often pay fines so as to use the internet.
    - § Staff time for monitoring computer use will be saved.
    - § Agencies can track usage statistics.
    - § Agencies can count the number of uses of electronic resources more accurately.
  - It is much more economical to have a network-wide service than for individual buildings to have their own service.
  - The startup cost for the time management software will be in the range of \$30,000-50,000. Once financing for the startup cost is arranged, the maintenance costs should not be a problem.
  - Since most agencies indicated that they would use the time management software if it was available, OWLSnet will continue investigating costs and services.

#### 7. Adjournment

- The business meeting was adjourned at 2:45 p.m.
- There was no OWLSnet Users Group Meeting