

**OWLSnet**  
**Administrative Advisory Committee Meeting**  
**Outagamie Waupaca Library System**  
**April 28, 2006**

Present: Rita Schiesser, Algoma; Vicki Lenz, Michael Nitz, Karen Probst, Martin Swenson, Appleton; Carol Luepke, Bonduel; Valerie Husom, Black Creek; Kathy Mitchell, Clintonville; Susan O'Leary, Fremont; Carolyn Habeck, Hortonville; Robyn Grove, Iola; Debbie Meixensperger, Kaukauna; Susan Grosshuesch, Kewaunee; Theresa Van Himbergen, Lori VanDyke, Barbara Wentzel, Kimberly/Little Chute; Pam Ellingson, Lakewood; Jennifer Thiele, Lena; Ellen Connor, Manawa; Tim Dirks, Marinette; Lisa Hein, Marion; Ann Hunt, New London; Terrie Howe, Mark Merrifield, NFLS; Joan Denis, Oconto Falls; Peg Murphy, Oconto; Lou Williams, Oneida; Patty Hankey, Rick Krumwiede, Holly Ledvina, Gerri Moeller, OWLS; Elizabeth Timmins, Seymour; Mike Hille, Shawano; Joe Clabots, Linda Streyle, Becca Berger, Sturgeon Bay; Peggy Slicer, Tigerton; Maggie Waggoner, Suring; Peg Burington, Ruth Hoppe, Waupaca; Lucie Erickson, Weyauwega; Alene Newcomb, Wittenburg.

1. Call to Order

The meeting was called to order at 9:40 a.m. All attendees introduced themselves.

2. Minutes of the March 17, 2006 AAC meeting were approved.

3. Announcements

- Terrie from NFLS is taking minutes for this meeting since Judy Hocking resigned.
- Peg Burrington, Waupaca, brought a lot of audio books on tape to the meeting. A hand surgeon donated the audio books to the library. These are the books that Waupaca decided not to add to their collection, and are available for \$1 apiece.
- Holly had some items to show in order locate the owner and catalog them. Please be sure to barcode your items before sending them to make sure that you get them back!

4. Old Items

- BCN conversion: Dave informed Rick that all that he had to convey to the libraries was said in his email. If you receive any phone calls about pre-installation visits, staff should call Dave. About ½ libraries have had pre-installation visits.
- Installation starts next week for converting OWLS, NFLS and Marinette. The good news is that all equipment has arrived at the OWLS office and Dave will be configuring the routers.
- There has been a change to the Internet service configuration. We had originally planned to connect to Athenet (our current ISP) via the BCN, until they informed us that they wouldn't be participating in the project. However, they've provided us with an excellent price alternative, so we will continue to use them as our ISP.

Athenet was also able to provide us with more bandwidth. The Internet transmission pipe will double in size creating more bandwidth and (hopefully) eliminating the slow transmission speeds in the afternoon.

- Please remember to check your business email accounts on a daily basis. The following information goes to these accounts:
  - Responses of patrons to notices
  - Messages patrons send from InfoSoup
  - Barcode order information from OWLS
  - Cataloging information
- If you are using Thunderbird as your email client, it's easy to add your library's business account so you can see it when you're checking your personal account.

## 5. New Items

- MOVE Phase 3
  - Rick stated that business as “normal” is a long way off (reports, manuals, procedures). Although we originally talked about the migration as a two year project, we probably should have talked about it as a 3 year project. We're currently in phase 3 of the migration – which is getting back to business as usual. While we're pleased with the progress we're making, the job is not nearly finished. We anticipate that things will be pretty settled by this time next year.
- What the OWLS staff is working on
  - Beth and Evan are continuing to work on developing InfoSoup, including RSS feeds in catalog where already existing content will be easily available, and creation of topical booklists within InfoSoup.
  - Charles will be sharing the code he created for the New Materials Database with the Milwaukee County Federated Library System. They were very impressed! We hear from Innovative that the sales reps are using InfoSoup in their demos and were not quite sure how we had created the New Materials Database. Kudos Charles!
  - Holly went to Authority Control training at the Innovative headquarters. She demonstrated reviewing reports for database maintenance. Serials holdings are really starting to look nice thanks to all the hard work of OWLSnet librarians.
  - Holly explained how a few things happen in the catalog.
    - § The scopes (on the dropdown of the first search box in InfoSoup) happen when items are loaded from OCLC. This is now pretty automatic. Some of the icons are done automatically – for instance audiobooks are changed in a load table, but many of the other icons are done via reports that she runs daily or weekly to update items in the database.
    - § Cover art is dependent upon ISBN. If you see something with incorrect cover art, sometimes this can be fixed. If it's due to a duplicate ISBN, often one can be deleted. If the cover art is slightly different, this is usually because of publisher issues, and we don't have much control over it. Evan and Holly will continue to work with Syndetic Solutions on cover art issues.

- Michael Nitz agreed to demonstrate a bit about the Acquisitions system, since he knows more about it than anyone.
  - § His staff used GEAC for 20+ years and III is much easier
  - § In setting up the fund accounts, you need to know the funding agency (funder), account thing bought for, plug information in for management to know where money went was spent.
  - § Acquisitions Fund reports: All incoming funds and outgoing funds are logged as well as the funding agency, audience, material type and standing orders
  - § You can re-group the fund accounts to show appropriate hierarchies, which are very easy to develop.
  - § Reports can show what is appropriated, expended, encumbered, free balance and cash balance
  - § Go to create order, you are asked for the fund, staff will use a 5 letter code, automatically associates with hierarchy and automatically updates fund, will stop if balance is not there
  - § Gerri & Michael will help interested libraries to set up acquisitions
  - § If you wish to start using the Acquisitions system in 2007, it will need to be set up at least two months before the end of the year, in order to learn the system. Please contact Gerri or Michael if you are interested.
  - § When we purchased the system, we purchased one acquisitions unit for each library. These are set up the same as the serials units, so County libraries have one acquisitions unit for the entire county.
  - § APL uses the Acquisitions interface to send an order online to their vendors. Vendors that accept online ordering include B&T, Midwest Tape, Brodart, etc.
  - § You can choose to create a cart with the vendor, then bring it into the system, then place your order from that cart. This isn't currently the method that Appleton is using.
  - § APL is not fully utilizing the acquisitions module yet. They are taking their current process and trying to duplicate it in III first. III has the capability to be more sophisticated to generate purchase order, cost, upload, get fund accounting automatically
- Judy enjoyed working with OWLSnet and wanted everyone to know that. OWLS is working on hiring someone to replace Judy full-time. They've received over 45 resumes. They are looking for someone excited about the opportunity to learn more about Circulation than anyone else. Patty has run some of the reports and is continuing to work on running reports.
- Gerri just returned from ASAA training (Advanced System Administration) to access administrative features in the III system. III insists on training before giving you access to features in their system.
- The new addition of the street address and city state zip labels in the patron address field were done after the ASAA training. Since there appear to be a lot more patron accounts entered correctly, Gerri is hoping that this change will help. Lots of patrons have been entered missing addresses, with two

address fields, etc. This is a bit more difficult than in Geac, because the system does not prompt you to enter all of these fields like Geac did.

- We are finally able to access the bounced notice emails. A number of patrons had reported not receiving emails, but this was very difficult to troubleshoot since we couldn't see the bounced emails. Denise will be working on the bounced emails for most OWLSnet libraries. In the event that there is no account, an account is wrong or a server is busy, Denise will insert a note, initial it, set it to a notes field, notice preference to print, get rid of e after email. This is first step to determine if there is a bigger problem. A popup to check email will be used to indicate a problem. APL will be working with their own emails to see how the system works because they have so many bounced emails.
- Gerri reported questions on the MOVE listserv have changed and that's a good sign.
- Gerri is working on reports and procedures that will hopefully assist work flow, lost & paid, state annual reports, board reports, determining how often they should be run, what reports need to be developed. These reports are her biggest priority.
- On April 4th all records were loaded into WISCAT. It was much easier process than with GEAC.
- Gerri was asked about emails for questions: Are report issues being asked often? If they get same question being asked over and over they will be posted to Network News. GM says if you don't need a reply, mention that in your email to the move list.
- Kathy Mitchell would like to have a list of enhancement requests so we don't continually ask for the same enhancements. Unfortunately, the list is huge! If you're an IUG member, you can log on and see them all. OWLS didn't submit enhancement requests that had already been submitted, so there isn't a way of giving a short list of all the changes that have been requested. The Innovative Enhancement request cycle is closed: The Innovative Users Group (IUG) enhancement process closed in March; this summer libraries that are members of the IUG will be able to vote on enhancements. III will also accept enhancement requests anytime. July is next opportunity to join the IUG and be a voting member.
- Postage has increased, and it was asked if OWLSnet paid III to change the bills to coming from the loaning library. We did ask III to give us a quote on this, but haven't heard back if they are willing to do it.
- Gerri and Holly both heard that August is reportedly the month for next III release date.
- Other things that Gerri is working on:
  - § Z39.50 in and out of database
  - § Procedure for old holds
  - § Network printer problems
  - § Offline Circ
  - § Label printing
  - § Detail process managing logins

- § Closing and printing
- § Receipt printers not printing – A Network News went out with a possible fix. You can now use the F11 key to close and print the record. It's necessary to uncheck the Print Slip box, or you will receive two receipts! The Marinette library has been testing this and feels it works much better – they haven't had any problems with receipts not printing.
- § A few other macros are:
  - F1 returns you to the circulation desk
  - F2 is Check-In
  - F3 is Search/Holds
- The old NEWCat server has been taken down. The GEAC server will soon be going down, and will be re-configured as a test and training server.
- Two other Wisconsin library systems are migrating and are still choosing between SirsiDynix and Innovative. They will be visiting OWLS to learn about our experiences with Innovative.
- Holly, Charles, Gerri and Michael Nitz will be going to Denver next month for IUG annual conference.
- MARC button in InfoSoup
  - Currently, there is no option to see a MARC record in InfoSoup
  - We might want it because librarians and some patrons want to know why they've received some search results
  - Unfortunately, there is no way in the current catalog to make this button small, discreet or out of the way
  - You can get to the Marc record in InfoSoup from the client by using the staging OPAC.
  - The group agreed that it should be left as is...no Marc record button for the public unless there is a way to make it much less obvious
  - You can use the staff login to view more information in the OPAC. If you don't know how to access this, please contact the OWLS office.
- How are patrons searching InfoSoup?
  - HL showed how she's putting the things she learned in her authority control class to work.
  - Using web management reports and patron searches, she is trying to enhance how patrons search and find materials, as well as teach staff what areas might be problematic for patrons.
  - Most searches are done on keyword.
  - Many patrons are also doing author searches for first name, last name, and not getting results.
  - Need to get patrons to get to the next level since they are often lacking good author search results. Staff need to encourage patrons to search the author index
  - Holly analyzes the no result and no direct hits searches
  - She's been adding terms where she can to get people to the results they want using existing search terms

- She is also working with the keyword index to get better results--- it searches content of the record. If you do a keyword search for “Effects of smoking”, you get 31 results, which obviously can’t be total number of items on the topic. A subject search for Smoking -- Health Aspects should result in more information, but actually yields only 14 results. We could add the subject heading of Smoking – Health Aspects to appropriate titles. This would be a lot of work, but worth if it it’s helpful to your patrons. Holly needs to know if this kind of work to help with better search results is helpful for staff and patrons.
- Holly reported that Series Title search is now working: previously one of the fields wasn’t indexed: Manga and Babysitter Club series were used as examples.
- In order to access demonstrated searches by Holly, visit the Web Management Reports, Click on Patron Searches, View Current Searches
- Circulation Users Group
  - OWLS has established this user group discussion list for any OWLSnet staff who is interested in discussing circulation issues.
  - The email address is [circ@mail.owls.lib.wi.us](mailto:circ@mail.owls.lib.wi.us).
  - To subscribe, send an email to Patty Hankey.
  - This will be a forum to discuss any and all circulation issues. OWLS’ staff will not necessarily answer unless fellow librarians are not likely to have an answer.
  - A circulation meeting for circ staff to meet and discuss circ issues is scheduled for June 8 at 9:15 a.m. in Appleton until approx. 12 noon. Please send ideas to the circ list if you have suggestions for a speaker/presentation.
- Frequently Asked Questions (FAQ)
  - The FAQ for Millennium is posted at <http://www.owlsweb.info/owlsnet/millennium.asp>
  - We will continue to add to this list as things come up.
- Using Loan Rules for Billing Items
  - There is option available to bill a patron by a default price in a loan rule, rather than by using the specific price of the item in the item record.
  - Other libraries have used this technique, and it eliminates a lot of staff work in keeping the price in the item record up to date before billing.
  - Our loan rule system is divided by books, CDs’, videos, etc., so we could have specific prices for each of these categories.
  - The price could be updated annually if necessary.
  - We’d have to agree to prices by the types of item, and we’d all have to agree to charge this price rather than the price in the item record.
  - The group was not interested in implementing this option at this time, although some libraries would like this to be brought up again in the future.
- View Holds

- As of the date of the AAC meeting, there were 26,803 outstanding holds placed at least one day before the meeting.
- The view holds system is updated once a day, so it will not reflect changes until the next day.
- In order to view a manageable amount of holds, we recommend you choose your 2 letter location code, and view holds for pickup only at that location.
- Start by sorting by Date Placed. Some of these are very old. They may need to be cancelled and restarted, or there may be some sort of obvious problem with them. In some cases, these are items the library may wish to purchase.
- You can sort and limit. If there are two different labels, right-clicking on the label name will switch it to the alternate view.
- Holds status is the status of hold or status of the item
- When there is a bib hold there will not be a location
- By default, patron placed holds expire after one year.
- Patrons can put an item hold on volume record.
- Item holds are a problem. Staff can place holds on item records, even when it isn't appropriate.

#### 6. Other Business

- Notices were a problem earlier in the week. Some overdues notices and bills were not generating. This has been fixed. If you see something happening that doesn't seem right with notices, please let us know. Library staff will probably see the problem before system staff do.
- If you are having problems viewing things in the Millennium client, try changing the resolution of your monitor. Flat panel monitors have an ideal resolution that should be used. For CRTs, try increasing the resolution until you can view all of the Millennium screen.
- Rick – It is time to think about 2007 membership fees for OWLSnet to have time for library budgeting. OWLS and NFLS are looking at a 1% or 1.5% increase. People generally agreed this would be an acceptable increase. OWLS will keep the increase as small as possible.
- OWLSnet membership agreements run through 2006 with automatic extension through the end of 2007. Language needs to be revised to get agreements back by the end of 2006. People should get any concerns about agreement language back to Rick.
- Rick asked how National Library Week went and if InfoSoup press releases were run in local presses. Press releases were run in Manawa and Scandanavia. Some people thought they had to get new library cards. Oconto County ran an article and got good press. Oconto Falls had food donated to food drive. Clintonville had good press on InfoSoup and the Campaign for WI libraries. It would be useful according to Mark to know how much food was collected and distributed to food pantries. Rick asked if any publicity is done in your communities to please send copies or let system office know.
- Mark and Rick have been working on the promised Volunteer Policy. It's clear that a library is responsible for their employees and volunteers. However, it was recommended that a sign-off form be developed to make it clear that volunteers

- are held to the same standards as library staff, especially in regards to privacy and confidentiality. Several libraries stated that they would find such a form helpful.
- On Wednesday afternoon the firewall went down for a few seconds, throwing everyone out of Millennium. It happened again about 5 minutes later. Dave has worked with Cisco to enable more detailed monitoring on the firewall so that we can determine the problem should it happen again.
  - Question was asked: Where is OWLSnet on Time Management Software for Internet workstations? Libraries would like budget information for time management software, wireless connection and OWLSnet fees for libraries.
  - Book Club Holds: There is an existing problem with patrons having multiple title holds on one record. The problem is that the hold pickup popup keeps getting triggered even though the patron has already picked up all of the available copies. OWLS is aware of this and is working with Innovative on it.
  - Book club holds do seem to be working well, albeit slowly. If you need a bunch of copies quickly, the group agreed that it was fine to send out an email asking people to check in their copies.
  - A reminder was made that items for pickup at another library be set to “in transit” rather than on the hold shelf. Patrons are getting notices that their items are on the hold shelf, when actually they’re in transit to the requesting library.
  - Marion PL was ranked #7 for all libraries in state according to the HAPLR Index. Tom Hennen looks at statistics and weights things subjectively to determine best libraries.
  - There is a new Teen space at Waupaca Library. People are invited to stop by.

## 7. Adjournment

- The meeting was adjourned at 1:00 p.m.