

OWLSnet
Administrative Advisory Committee Meeting
Outagamie Waupaca Library System
January 20, 2006

Present: Rita Schiesser, Algoma; Kathy Beck, Terry Dawson, Vicki Lenz, Michael Nitz, Meg Shriver, Martin Swenson, Appleton; Karen Dickman, Birnamwood; Valerie Husom, Black Creek; Carol Luepke, Bonduel; Kathy Mitchell, Clintonville; Dorothy Kaminski, Coleman-Pound; Cyndie Shaffer, Crivitz; Susan O'Leary, Fremont; Carolyn Habeck, Hortonville; Kay Rankel, Gillett; Robyn Grove, Iola; Giovanna Feller, Kaukauna; Michael Wilber, Keshena; Susan Grosshuesch, Bonnie Joski, Kewaunee; Karen Vandenberg, Lori Van Dyke, Theresa Van Himbergen, Barbara Wentzel, Jane Werner, Kimberly/Little Chute; Pam Ellingson, Lakewood; Jennifer Thiele, Lena; Ellen Connor, Manawa; Tim Dirks, Cathy Menard, Marinette; Lisa Hein, Marion; Ann Hunt, New London; Bruce Darne, Niagara/Goodman; Terrie Howe, Mark Merrifield, Anne Miller, NFLS; Joan Denis, Mary Langhoff, Oconto Falls; Peg Murphy, Oconto; Kymberley Pelky, Oneida; Beth Carpenter, Patty Hankey, Judy Hocking, Rick Krumwiede, Holly Ledvina, Gerri Moeller, OWLS; Jenny Hipke, Peshtigo; Sue Vater Olsen, Scandinavia; Elizabeth Timmins, Seymour; Penny Habeck, Mike Hille, Sue Porath, Sharrie Schweitzer, Shawano; Becca Berger, Joe Clabots, Linda Streyle, Sturgeon Bay; Maggie Waggoner, Suring; Sue Abrahamson, Ruth Hoppe, Waupaca; Karen Kortbein, Wausaukee; Krisann Dailey, Lucie Erickson, Weyauwega; Alene Newcomb, Wittenburg.

1. Call to Order

The meeting came to order at 9:40 a.m.

All attendees introduced themselves.

2. Minutes of the December 16, 2005 Meeting

The minutes were accepted as distributed.

3. Announcements

- New database products
 - OWLSnet is signing a contract with ProQuest to add the Ancestry Library Edition and HeritageQuest databases to the OWLSnet services.
 - Adding these databases has been made possible in part by support from APL and Door County, continuing the OWLSnet tradition of pooling resources for the good of the network.
 - These genealogy products will be available when we go live with the new system.
 - OWLSnet is still investigating other databases including automobile databases.
- Annual reports
 - The year end reports and the compiled year end reports will be coming out the week of January 20th, or after we've received the annual report forms from the state.
- Dave Bacon has turned on additional spam blocking services.
 - Over 2000 spam emails were blocked the first day Dave implemented these changes.
 - If you believe you are not receiving emails you should be getting, please contact Dave at OWLS.

- Investigating internet scheduling software for the system has been put on hold until after the migration.
4. Old Items
- Linked Patrons Committee
 - The committee met this week and discussed linking patrons in the new system.
 - The main concern is balancing privacy concerns against convenience.
 - The committee decided it might be best to ease into the procedure gradually to better explore the policy issues involved.
 - The recommendation of the committee is a permissive policy that would allow (but not require) agencies to link the record of a child under 16 to the record of the responsible adult, i.e. the adult signing for the child on the registration card.
 - Only the home agency may link records.
 - Patrons should be unlinked when they turn 16, though the sixteen year old can request to be linked to the parent until they turn 18. The parent cannot request that the sixteen year old remain linked.
 - OWLS plans to run a monthly report listing linked patrons who have turned 16.
 - Question: can school cards, i.e. cards for several classes from the same school, be linked? At the moment, the answer is no, but this is something the Linked Patrons Committee will consider.
 - One problem with linking teachers and students is that you cannot easily tell the difference between the teacher linked to a student and a parent linked to a child.
 - P/R Committee
 - The P/R committee met and developed a plan for what OWLS can provide to help the libraries prepare their patrons for the migration.
 - The yellow OWLSnet Migration PR Committee handout detailed the plan which includes messages on NEWCat, posters, bookmarks, buttons, instructional brochures, giveaway items and media contacts.
 - There are InfoSoup items (t-shirts, mug and book bag) available for sale at Café Press at www.cafepress.com/infosoup.
 - The blue OWLSnet ILS Migration Talking Points handout detailed what to tell patrons about the upcoming migration and the new system.
 - § It was suggested that agencies look at the Talking Points document and come up with what issues will affect their patrons and what to tell them about specific changes.
 - Suggestion: a detailed summary of the money and effort that went into the migration would be helpful for presentations to library boards.
 - If agencies wish to print other handouts separate from what OWLS provides, OWLS would be happy to review document contents for accuracy.
 - § Information on the InfoSoup graphic is available on the purple Webmasters' To Do List handout.
 - § If you need a high resolution graphic for something, contact Beth at OWLS.
 - Special loan rules
 - The blue Special Loan Rules in Innovative handout contains the information on items that agencies had requested to be blocked from holds or items that needed special checkout times.

- Location codes will determine items that cannot be placed on hold.
 - § For items that cannot be placed on hold, there will be no hold box in the brief or full entry of the item in the OPAC.
- Item types (Itypes) for equipment and reference will also block holds.
- Check your records for correct Itypes
 - § Once you have gone through catalog training, you will understand more about checking Itypes.
 - § The status of individual items can be manually changed to Reference or Library Use Only.
 - § In the future, new location codes can be created that will block items from having holds placed on them.
- Items that need special checkout periods should simply have the new checkout period changed at checkout.
- InfoSoup training demos
 - There will be two three hour InfoSoup training demos at the NFLS meeting room on Friday February 3rd and two three hour InfoSoup training demos at the APL lower level meeting room on Monday February 6th.
 - Please email Beth at OWLS to let her know how many staff from your library will be attending and at which of the four sessions.
- New business email accounts—gold handout
 - All current OWLSnet business email accounts, ones that end in owlsnet.owls.lib.wi.us, will be inactive starting February 20th.
 - New business accounts, (in the form bcl@mail.owls.lib.wi.us or lak@mail.nfls.lib.wi.us) are active now and will receive patron purchase requests, ILL requests, comments and responses from email notices.
 - If you had multiple business email accounts, you will only have one now. If you need multiple accounts later, contact OWLS after migration. Later, OWLS can also instruct you how to filter messages into different folders.
 - Make sure you can access your new email account. Any email in there right now is from testing and not from real patrons.
 - Agencies can start sharing the new email address with patrons now.
 - New Thunderbird setup instructions were distributed and are available from OWLS. The document is also available online at: <http://www.owlsweb.info/secure/email/Thunderbird0106.pdf>.
- Patron blocks
 - Last requests for changes on limits on holds, checkouts and checkouts by item category were taken on a form that was passed around.
- Location codes
 - The final version of the location codes was handed out to each agency.
 - § If there are any codes missing, it is because there were no items to put in the category.
 - § It is easy to change text of the label of the code. Contact Gerri to make those changes.
 - § On the other hand, it is not easy to add or delete a code. Keep a list of any changes you would like to request at a later date.

- Other items
 - Terrie Howe said that the client installs are going well. There are a number of agencies that haven't responded that they have installed the client, but they probably are waiting until they have the circulation training.
 - § Please install the client as soon as possible so that all agencies will have successfully installed the client and tested it long before the Go Live date.
 - Menu pages
 - § Beth announced that it was the recommendation of OWLS that all agencies use InfoSoup as their homepage on their catalog workstations.
 - § Agencies can keep their present menu pages if they wish, but they will have the responsibility of updating those pages.
 - § OWLS will keep the InfoSoup homepage updated and looking good.
 - § The gold, three page handout, For Libraries Using Restricted Menu Pages on Catalog Workstations, details the three levels of access. By default, when we go live, all catalog workstations will have Proxy Level Three.
 - § Those desiring a different proxy level will be assisted in making those changes relatively soon after the Go Live date.
 - Holly handed out updated transition dates and absolute deadlines: January 25 is the last day to add serial items to Geac, February 10 is the last day to add any non-serial items to Geac. After the 10th, only add items to Millennium.

5. New Items

- Notices
 - The peach Innovative Notice Schedule handout has the new notice schedule and the texts for notices.
 - **Note: this web address is updated from the handout.** Notices are available on the notices website: [www.owls.lib.wi.us/notices/\(three letter van code\);](http://www.owls.lib.wi.us/notices/(three letter van code);) for example www.owls.lib.wi.us/notices/apl/.
 - Sign in with your agency van code and agency password.
 - Not all the notices have been added to the website yet. If it just says Parent Directory on your webpage, no notices have been generated for your library yet. You can generate notices by practicing in the circ client and making items overdue, etc.
 - The notices have been formatted and put into PDF documents. The documents, when printed and folded, will display the patron address in the envelop window. The patron barcode is below the fold.
 - The notices will be sorted by patron name.
 - All notices will be generated for all agencies and will stay on the site for a week before they are deleted. Notices can also be accessed and used as a call list without printing.
 - Hold notices will run seven days a week.
 - § The amount of time to pick up a hold starts from the time the item is trapped.
 - § Email patrons will get their notice the next day.
 - § On Monday, agencies that print notices will need to print Saturday, Sunday and Monday notices.
 - Courtesy notices are email notices that are sent the day before the item is due.

- § It was suggested that the following text be added below the website address: Some items may not be available for renewal.
 - First and Second Overdue notices run M-F or on library open days for agencies open not open M-F.
 - § Overdue notices will be generated by the owning libraries, not the lending library as in Geac. This means that patrons will receive more notices and may be confused about why they are receiving notices from libraries they haven't visited. While OWLS is investigating custom programming to change this, we have not yet received a response. Even if we were able to purchase custom programming, this would not take affect until fall of 2006 at the very earliest.
 - § For ILL, the transacting agency is considered the owning agency.
 - § It was suggested that the following be added to the notice text: Items can be returned to any (participating) InfoSoup library.
 - § Suggestion: the bookmarks printed in conjunction with the migration could have a list of all the agencies.
 - OWLS will inform agencies of any bounced email notices, except for courtesy notices.
 - Bills are not emailed to the patron, only printed.
 - In order to minimize the number of bills that will be generated in Geac and will have to be manually processed after migration, Gerri proposed a temporary Geac notice schedule to be implemented from January 23rd to Friday February 17th:
 - § 1st notice will be run 10 days after the due date.
 - § 2nd notice will be run 15 days after the due date.
 - § Bills will be run 55 days after the due date.
 - § **The Temporary Geac Notice Schedule was accepted.**
- Reports
 - Reports have not been built yet and will not be the same as the old reports.
 - Gerri requested information on what information was a priority to work on once the report building is begun.
 - § First priority—circulation statistics: circ by item type, circ by patron type, and daily circ activity—circs, renewals and checkins.
 - § Monthly lender/borrower information, including the number of items in and out.
 - § Monthly deletes and additions by item.
 - § Also important but not as vital:
 - Search shelves information for long overdue, missing, claims returned and discards.
 - Number of new patrons registered
 - Holds placed
 - Circ by time of day
 - Purchase alerts by library —coming in the summer.
 - § Weeding reports will still be done by OWLS.
- Waive Fines settings
 - Anyone wishing to have their front staff able to waive fines without a supervisor's authorization was asked to note it on the sheet that was passed around.

- Preparing for Migration
 - The buff colored Preparing for Migration handout contains suggestions of things that agencies can and probably should do before the Go Live day.
 - § Two weeks before the Go Live day, agencies will receive a list of all the items they have on short loan so they can make changes in Innovative to whatever items should still be short loan when we go live with the new system. Short loan status will not be migrated from Geac to Innovative.
 - § Items that are checked out during the migration from the old to the new system will have refreshed renewal counts and will have fines according to the owning, not the transacting, agency.
- **It was proposed and accepted that the patrons' ability to change the pickup location be turned off in Geac February 1st.**
- When will the system be unavailable?
 - The pink Migration Month calendar handout has the important dates in February marked in bold.
 - § February 15th is the last day to enter new patrons. After that, paper transactions will be necessary. You can give the patron a real card with a barcode, but any circs will have to be written down and you will need to enter the patron and circ information in the system after we go live.
 - § Please do **Not** play on Innovative starting the 15th of February!
 - § Around 5:30 on February 19th Geac, NEWCat, and Innovative will go down.
 - § Both systems will be unavailable all day on the 20th. **Please** do not even try to access the new system.
 - § When the system is ready to go live, an announcement will be sent to all OWLSnet email addresses and an announcement will be posted at www.owlsweb.info/owlsnet/. **Please** do not log into Innovative on the 20th until you have read this announcement!
 - There will be follow up circulation training in March. See the calendar to sign up.
 - Migration of Fines and bills
 - § The light yellow handout details any problems that will occur with checkouts, fine and bills during migration.
 - Bills and fines charged in Geac will migrate as manual bills and will include information about the item and the date of the transaction.
 - When an item that is billed is checked in, a message that reads “Manual bill—give to supervisor” will popup. The bill will need to be manually cleared and fines manually placed.
 - How to contact OWLS immediately after the migration
 - § The white handout, Contacting OWLS, differentiates between the urgent problems that require a call to OWLS, the important issues that should be described fully in an email, and the requests for changes that should be kept in a list to discuss at a later time.
 - § The handout also details the problems that will be caused by the migration of data from one system to another. These situations are expected and you do not need to notify OWLS when you encounter these problems.

- Spine label samples
 - § Michael from APL displayed a sample of the spine label had printed using Innovative.
 - § If agencies are using separate, homegrown spine label printing solutions (Word, typewriter, etc), those solutions will still work.
 - § Those agencies using a dot matrix printer can use Innovative to print labels.
 - § The spine label printing program that Charles developed will not work with Innovative.
 - § There is a third party printing program, Print Wizard, that works with Innovative. OWLS has not yet tested this program. Agencies can purchase this program to print their spine labels. Anyone who wants information on Print Wizard should contact Gerri.
- Format of patron names in Innovative
 - § OWLS will develop a procedure for entering multipart family names with or without spaces and add the policy to the information at advanced training.
- Collecting driver's license numbers
 - § At present collecting driver's license numbers is an agency decision.
 - § Some agencies that collect driver's license numbers do not enter the number in the electronic version of the patron record, but keep it on the written form.
 - § Agencies that collect these numbers use them to work with local authorities in dealing with patron problems.
 - § Mark of NFLS said the DPI recommended that if an agency has the drivers' license information and is giving that information to a collection agency, there must be board action to name the collection agency as an agent acting in the library's behalf.

6. Other business

- If there are manual charges for postage or rewinding videos that appear as bills (in Geac), the agency collecting the money does not need to send the collected money to the billing agency. Only bills collected for items that are owned by other agencies need to be sent to those owning agencies.
- Generic agency logins will be available to those who have completed circulation training. These logins will take the form of str/str for the login and str/str for the password. Before we go live with Innovative, OWLS will send out new final passwords. Agencies will then login with their three letter van code (strl/str) and the same initials but the final password will be new (str/new password).
- What can safely be practiced and played with in Innovative?
 - Practice as much as you like with the main circ functions but be sure not to edit any item records. Editing would include adding a message to an item at checkout or making something lost or claims returned or missing or discarded. The items present on the client now are real. Only the patrons and circ transactions will be deleted right before we migrate.
- Licenses
 - Our user licenses are limited so be sure to only have one session open on a PC

and only have necessary sessions open. A licensed session is opened by clicking on the Innovative icon on your desktop and logging in.

7. Adjournment

- The business meeting was adjourned at 3 p.m.
- There was no OWLSnet Users Group Meeting