

**OWLSnet**  
**Administrative Advisory Committee Meeting**  
**Nicolet Federated Library System**  
**March 17, 2006**

Present: Rita Schiesser, Algoma; Vicki Lenz, Michael Nitz, Colleen Rortvedt, Martin Swenson, Appleton; Karen Dickman, Birnamwood; Valerie Husom, Black Creek; Kathy Mitchell, Clintonville; Cyndie Shaffer, Crivitz; Mary Seggelink, Florence; Kathy Coppock, Florence Elementary; Susan O'Leary, Fremont; Carolyn Habeck, Hortonville; Kay Rankel, Gillett; Giovanna Feller, Kaukauna; Michael Wilber, Keshena; Susan Grosshuesch, Bonnie Joski, Kewaunee; Karen Vandenberg, Theresa Van Himbergen, Barbara Wentzel, Kimberly/Little Chute; Pam Ellingson, Lakewood; Tim Dirks, Sandra Hipke, Marinette; Lisa Hein, Marion; Ann Hunt, New London; Bruce Darne, Niagara/Goodman; Terrie Howe, Mark Merrifield, Anne Miller, NFLS; Joan Denis, Oconto Falls; Peg Murphy, Oconto; Evan Bend, Patty Hankey, Judy Hocking, Rick Krumwiede, Holly Ledvina, Gerri Moeller, OWLS; Jenny Hipke, Peshtigo; Elizabeth Timmins, Seymour; Michelle Moesch, Sue Porath, Shawano; Becky Rickel, Shiocton; Joe Clabots, Linda Streyle, Sturgeon Bay; Maggie Waggoner, Suring; Peg Burington, Waupaca; Krisann Dailey, Lucie Erickson, Weyauwega; Alene Newcomb, Wittenburg.

1. Call to Order

The meeting came to order at 9:35 a.m.

Thanks were given to the libraries for all of their hard work and patience during the migration. Appreciation was also given to the OWLS staff for their fine work in migrating the system.

2. Minutes of the January 20, 2006 Meeting

The minutes were accepted as distributed.

3. Announcements

- Year end statistics
  - In 2005, OWLSnet exceeded 4 million circs for the first time, a 4% increase network wide.
  - The system ended the year with 253,000 patrons.
  - ILL shared items within the system numbered over 413,000, up 42,000 from 2004, an 11% increase.

4. Old Items

- BCN Conversion—Badgernet Converged Network
  - Rick, Mark, Dave Bacon and Terrie Howe had the first conference call with the BCN officials this week. The conversions calendar is set with the conversions beginning May 1<sup>st</sup> and ending August 1<sup>st</sup>.
  - The work is being done with advanced level network support from Inacom consultant Paul Goska.
  - We had been lead to believe that vendor managed conversions would not require any new equipment, but it turns out that new equipment and new routers will have to be purchased. OWLS and NIC will pay the \$35,000 necessary to replace all of

the routers in the system. However, many libraries will need new isolated electrical circuits and OWLSnet does not have the funds to cover those expenses.

- New routers will allow the use of GRE tunnels which will allow OWLS to manage all of the routers and to have VLANS (virtual local area networks) that will enable us to have separate networks for staff, library public computers, and patron computers.
  - § This setup will allow libraries to implement wireless networks.
  - § Wireless use will increase the demand on the bandwidth.
- Reminder: if you get a call for an inspection, be sure to call Dave so he can be there to assist.

## 5. New Items

### • PR Committee Report

- InfoSoup bookbags and bookmarks have been sent out to all the agencies.
  - § There are no more bookbags but ask your system office for more bookmarks if you need them.
- The new patron library cards with the InfoSoup design were displayed.
  - § 60,000 new cards have been purchased
  - § Libraries should begin using the new cards during National Library Week, April 2-8.
  - § The committee recommended not purchasing key cards due to complaints and lack of popularity of the smaller cards.
  - § Though cards have not been purchased with system wide replacement in mind, agencies may issue cards as they wish.
- The new InfoSoup brochure, created with a lot of help from APL, is available online.
  - § Most agencies have downloaded and printed their own copies of the brochure and do not need additional copies.
  - § It was suggested that money set aside for printing the brochures could be used for the purchase of additional library cards.
- National Library Week
  - § Agencies are encouraged to get press releases in their local papers for National Library Week.
  - § The committee will provide a generic press release for National Library Week that can be individualized for each agency.
  - § The committee is also trying to get TV coverage; perhaps a spot with soup recipes on WLUK's Cooking with Amy show in honor of InfoSoup.
  - § This year's theme for National Library Week is Change Your World @ Your Library.
    - The committee has proposed a system wide food collection, with food to be donated to local food pantries. The food collection in conjunction with National Library Week can be promoted in the press release.
    - Women's Day magazine is collecting How Has the Library Changed Your Life stories during April. The winners will be published in the March 2007 issue.
- Request—handout materials, like bookmarks, that highlight databases and other

additional resources.

- The Desperate Librarians will be giving the money they collected from the sale of the calendars to their libraries on National Library Week. The money raised is approximately \$3000 per Desperate Librarian library. Press notices will be sent out concerning the donation.
  - § The Desperate Librarians have also donated \$800 to the Wisconsin Library Foundation and \$600 to the Katrina relief fund for Harrison County (Pas Christian and Biloxi, Mississippi).
- Migration Issues
  - Move listserv: [move@mail.owls.lib.wi.us](mailto:move@mail.owls.lib.wi.us)
    - § Gerri said her Move resolved issues email folder had 914 emails.
    - § The Move list has been very helpful and worked well as a centralized location for the OWLS migration team to answer questions from the agencies.
    - § The Move list is still the best place to write concerning any issues with the Millennium staff client or InfoSoup.
  - Marinette is now typing spine labels and is hoping for a solution to the label printing issue with Millennium.
  - Please send any examples of items being checked in but not clearing off of the patron record.
  - If a patron has asked an agency to cancel a hold that is in transit or on the hold shelf, please cancel the hold before returning the item. If you do not cancel the hold, it will trap again for the patron. If there are other holds on the title, canceling the hold and checking it in will enable the item to be trapped for the next hold.
  - Request—would like the patron barcode on holds receipts and the patron name larger and towards the top of the receipt.
    - § This is in the list of enhancement requests.
  - Request—Repair status so agencies can know what is happening with an item and where it might be.
    - § OWLS will add this status.
  - Instead of having loan rules with longer due dates for internal cards, it is better to simply change the due date manually when using these cards.
  - Problems printing checkout receipts were discussed.
    - § After printing the paging list, most agencies need to go in and reset the receipt printer.
    - § If items have only been renewed at checkout, click the Print icon in order to print the receipt (renewals don't currently print on the receipt.)
    - § OWLS is continuing to look into the receipt printer situation.
  - If something really strange happens, try to leave the items on the patron's record and send the Move list as much information, especially patron and item barcodes, as possible.
  - Book club holds
    - § If you own any of the copies of the title you are requesting for the book club, be sure to check out your copy before you place the holds.
    - § If someone has real book club holds to place, please keep track of how

- long it takes to get the items and let Gerri know.
- The Too Long in Transit report is coming soon.
- Paging list
  - § Weyauwega reports that their paging list is not showing up regularly during the day.
  - § Giving an item Missing status does not move it on to the next agency any faster—this is an enhancement request.
  - § Marion has noticed an increase in holds.
  - § The new system gives us reports on the number of holds but we don't have anything to compare to from Geac. As time passes we will be able to compare holds volume numbers.
- Deleting by barcode
  - § OWLS, with help from Michael Nitz at APL, is developing a process for this.
- Items set to discard (in the status and collection field) will have statistical reports run on them and be deleted automatically later.
- Lost and Paid is the status Millennium gives an item that has been billed and the bill collected in the system.
- Reducing the number of popups when checking in an item from another agency is an enhancement request.
- Transit slips are being enhanced in the new release.
- The new release is scheduled for sometime between May and September of 2006.
- Location codes cannot be changed back to the van codes.
- The popup for a hold needs to have the agency name and not the location code. This is an enhancement request.
- The system has been readjusted now so items that were billed in Geac are now getting fines. If there was a loan rule error when the item was migrated, there will be no automatic fine.
- Request for more than one item on a bill.
  - § Setting the notices so that there is more than one item per bill removes the call number from the bill which could make using the bills as a Search Shelves report difficult.
  - § The proposal to have more bills per page was accepted.
- Door County has an issue with needing authorization to add local records.
- Questions about the threshold for fines were asked.
  - § If agencies see a problem with the fines threshold, send the information to the Move list and include patron and item barcodes. The problem is often caused by a missing item loan rule.
- To get rid of items on the Paging list, trap the items for holds.
- Request—it would be nice to have the “patron has a hold ready for pickup” popup include the location of the pickup.
- Questions about the limit on number of items to check out—everyone is set to 75 or less and with limits of 25 or less on videos and CDs.
  - § Patron blocks are easier to change than loan rules so contact the Move list if you have any requests concerning patron blocks.
  - § Patron blocks are set by home agency.

- § These blocks/limits cause problems with patrons who use several agencies.
  - § There was a general discussion of patron blocks on videos and CDs and why various agencies have different limits.
- When checking out an item that is on hold for someone somewhere, the popup informs you that the item is on hold.
  - § The default is set to Yes, checkout the item.
    - Go ahead and check out the item to the patron who has it in hand.
    - Removing this popup is an enhancement request.
- Van delivery discussion
  - § Several agencies report getting many more tubs than they used to, many of which are not very full.
  - § Some agencies have gotten moldy bags.
  - § The paging list priority is based on a combination of van route and location.
- Volumes of Holds
  - § Holds at 3p.m. Thursday the 16<sup>th</sup> numbered 27,000, with almost 4000 items on the Hold Shelf.
  - § Over 2000 hold were placed Wednesday with 400 requested for Appleton pickup location.
- InfoSoup
  - § Can you renew overdue items in InfoSoup? Yes as long as the patron has no other blocks.
  - § How long after a patron is added to the system can they place holds? OWLS will test.
    - Be sure that patron record is closed in the staff client.
    - OWLS tests show that patrons added at the OWLS office can access their account and place holds immediately.
    - Contact the Move list if you have information on how long before your patrons are able to place holds.
- Paging List Tips
  - § Right click on the top of the Call Number column to view the barcode.
  - § Right click the title in the paging list to go to the item record.
- Let OWLS know if you have a lot of locked records. It may be a sign of a larger problem.
  - § If the Edit icon is grayed out on a patron record, the record is locked.
- Close the Checkin screen regularly when checking in items from the book drop to reduce the risk of locked records.
- Broken Holds
  - § If you are checking in an item and the system says a patron has a hold on it but it won't trap, contact OWLS or wait until the next day and the overnight process that repairs broken holds should fix the problem.
  - § **Note:** if you are working the paging list and an item won't trap, check the item record. The hold may have been canceled or may have trapped at another agency at check in.
- At present, clicking the Back button in InfoSoup on a public catalog computer can

allow someone to go back and view other patron records and searches. OWLS is working on a solution. In some instances, clicking Home will clear the old records.

- § OWLS asks that everyone test clicking the Back button on their public machines and let Beth or Evan know what happens and whether or not you can go back and view the screens of previous patrons. Please also let them know what type of computer it is.
- Question: how can we set patrons, such as board member and folks who regularly give large donations to the library, to be charged no fines? The easiest way at this point is to give them Employee status.
- Policies and procedures
  - It is an OWLS policy not to place item holds except where necessary for serials or multivolume holds. **Always** choose Hold Copy Returned Soonest.
    - § Only staff can place holds on items other than multi-volumes or serials.
    - § When you do need to place an item hold, select item and click the Hold Selected Item button.
      - **Note:** If the item is checked out, you will get the option to recall the item. Please do not recall the item. We are not set up for recalls and it only creates an error in the system.
    - § OWLS is working on the list of old holds and may be contacting agencies about item holds or other problem holds.
  - Deleting patron barcodes
    - § When replacing patron cards, don't delete the barcodes unless you have physically destroyed the old card. If you are not destroying the card, invalidate the old barcode by typing the lost or replaced information after the old barcode (manual page 8).
      - Please don't delete barcodes unless it is your agency's patron.
      - APL keeps their old records by barcode and asks that no one else delete old APL patron barcodes, just invalidate the numbers.
  - Claims Returned
    - § The recommended procedure for making items claims returned has been to select the third option: Leave items checked out (send overdue notices) and change status to Claims Returned.
    - § A general discussion of claims returned issues resulted in OWLS offering to propose a system wide claims returned procedure at the next AAC meeting.
    - § Geac items that had been claimed returned came over with Billed status and the "Billed item – Give to supervisor" message. Those items now have Claims Returned status and the popup message has been removed.
    - § Geac patrons with two or more items claims returned now have a manual note added to their record.
  - Children's cards must have a birth date.
    - § Many records migrated from Geac did not have a birth date.
    - § Patrons must have birthdates before being linked
  - Please remember to clear the hold shelf everyday.
  - The patron purge was done before the migration.

- § The annual patron purge was done for patrons who had an expiration date of 1/1/2003 or earlier and no stops or fines.
    - 10560 patrons were purged.
  - § The AAC approved additional purge of patrons who had a last activity date prior to 1/1/2000 and fines less than \$15 was also done.
    - 11388 patrons were purged
  - § Please contact Judy at OWLS if you would like the report of the patrons purged from your agency.
- Registration card revamp
  - § The new registration cards will be done in the next month or so.
- The old teacher card policy is still in effect:
  - § Teacher cards are to be used only at the issuing library and are to be kept at that library. The word Teacher should be entered as the first name, the teacher's given name as the middle name, the teacher's last name as the last name, and the address of the school in the address field: JONES, TEACHER MARY.
- Reports
  - § Daily circulation reports can be found at the the web management website <http://www.infosoup.org/manage> (See page 27 of the OWLSnet Manual.) Use your director login and password for Millennium to access reports.
  - § OWLS is working on the Too Long in Transit report
  - § Next on the list for report development are the Search Shelves reports.
- Time to Reshelve
  - § This function does not work for our consortium and is turned off for now.
  - § This is also an enhancement request.
- Daily Statistics now seem to be legitimate
  - § Statistics for February are not reliable but, in April, agencies will be able to look at statistics for the entire month of March
  - § Elements of the non-owned report, accessible through the web management site, were changed in early March so those numbers might be a bit off.
  - § Daily fines report
    - Information on the daily circulation money collected is only available in the character based system.
    - Enhanced functionality for this is coming in the next release.
- For patrons with hyphenated last names, enter their names with the hyphens.
- Joining the Innovative Users Group
  - § There is a link to the IUG on the Millennium page in OWLSnet with instructions on joining.
  - § The site code is **owls**.
- Offline Circulation
  - § Our first experience with offline circ did not go very well.
    - Most libraries did not put the correct statistical category in and those circulation functions had to be entered manually by OWLS staff.
  - § Do not use the offline circ client for checkin, renewal or entering new

- patrons. Items that need to be routed or trapped for holds will not be processed correctly.
- § OWLS recommends that everyone check the statistical category before every use of the offline circulation client.
  - § If the transaction file comes without the correct statistical category again, it will be returned to the agency to manually enter.
  - § It is difficult to check out items with different due dates in the offline circ client. Other Innovative libraries have reported using multiple sessions on one PC to work around this problem. Transactions from all sessions would have to be sent into the server.
    - The due date problem and other offline circ functions will be addressed in the next release.
- Location codes
    - § OWLS is beginning work on adding location codes.
      - Adding location codes is a long involved process that also requires Innovative to add the new code to the scopes, among many other steps. Even if you see the new location code available in item records, wait until OWLS notifies you that it has been added.
  - System crash
    - § Some settings prevented troubleshooting the cause of the March 6<sup>th</sup> system crash.
    - § Those settings have now been fixed so, hopefully, next time the system crashes it won't be down for as long and we will be better able to find the problem.
  - Procedure for fixing multivolume records
    - § If an item was not entered in Geac as a multivolume first, then patrons will not be able to place holds on the volumes until a volume number is added to the item record.
    - § Contact Holly if you have any questions about this.
  - Linking Patrons Policy
    - § Rick presented the draft Linked Patron Records Policy to the OWLS board Thursday the 16<sup>th</sup> and it passed contingent on acceptance at AAC.
    - § **The AAC accepted the policy:** Any OWLSnet library may link the patron record of a child under the age of 16 to the patron record of the child's custodial parent or guardian. An OWLSnet library may link the patron records of multiple children to a single custodial parent or guardian. No other patron's records may be linked.
  - Volunteers
    - § Rick is working on developing the system policy for volunteers.
    - § He sent a survey out to other consortiums in the state asking them what their policies are. None of the other consortiums have policies on volunteers but are interested in seeing ours when we develop one.
    - § The policy on volunteers was brought up at the recent OWLS board meeting and there were wide ranging opinions.
    - § Basically, the policy will keep any limits on the tasks of volunteers a local library decision but will focus on recommendations for training volunteers

and for holding volunteers to the same level of accountability as paid employees in the system.

§ NFLS will be discussing confidentiality statements for volunteers with their libraries.

- Circulation users Group

- Several requests for a circulation users group have been made.

- A general discussion of the form of this group followed

- § The group should have meetings (or at least one meeting) and also have a listserv for discussion of circulation topics.

- § The group should be primarily for circulation staff.

6. Other business

- Marion is receiving fewer and fewer items meant for MRT.

- § Other agencies commented on mistakes with van codes.

- § Everyone was asked to remind their staff to make sure they are putting the correct van code on the transit slips.

- There have been a couple of reports of standard printers that are shared on the network not printing in Millennium. OWLS is investigating this. Please contact Judy if you are having difficulty with a standard printer printing from the staff client.

- Request for enhancement—there should be more than one last patron available on an item record.

7. Adjournment

- The business meeting was adjourned at 2:25 p.m.

- There was no OWLSnet Users Group Meeting