

**OWLSnet**  
**Administrative Advisory Committee Meeting**  
**Outagamie Waupaca Library System**  
**May 15, 2009**

**Present:** Rita Schiesser, Algoma; Kathy Beck, Kris Kipping, Vicki Lenz, Michael Nitz, Katie Scullion, Appleton; Rebecca Buchmann, Black Creek; Kathy Mitchell, Clintonville; Kay Rankel, Gillett; Carolyn Habeck, Hortonville; Maggie Waggoner, Kaukauna; Susan Grosshuesch, Bonnie Joski, Kewaunee; Barbara Wentzel, Kimberly/Little Chute; Pam Ellingson, Lakewood; Lyn Hokenstad, Manawa; Trinitie Wilke, Marion; Sandra Hipke, Jennifer Thiele, Marinette; Ann Hunt, New London; Mark Merrifield, NFLS; Jennifer Hollihan, Oconto; Joan Denis, Oconto Falls; Beth Carpenter, Patty Hankey, Laura Jandacek, Rick Krumwiede, Gerri Moeller, Anne Paterson, OWLS; Sue Vater Olsen, Scandinavia; Kim Klarner, Lois Zibell, Seymour; Kristie Wilson, Shawano; Becky Rickel, Shiocton; Becca Berger, Linda Streyle, Sturgeon Bay; Peg Burington, Waupaca; Kristi Pennebecker, Weyauwega

**Guests:** Lynn Stainbrook, Lori Denault, Brown County Library

1. Call to order

The meeting came to order at 9:30am at the Appleton Public Library.

2. [Minutes of the March 20, 2009](#)

The minutes of the meeting were accepted as distributed.

3. AAC ground rules

Rick reminded everyone that with such a large group it can be difficult to hear and follow the discussion. He asked everyone to help the meeting function more effectively by remembering the AAC ground rules:

- Only one person speaks at a time
- Please wait until you are recognized to speak
- If you've spoken to the issue already, please let others speak

4. Announcements

- Lyn Stainbrook and Lori Denault of the Brown County Library were welcomed.
- Barbara Wentzel from Kimberly/Little Chute announced this was her last AAC meeting. She will be retiring at the end of July. Congratulations and Good Luck on your new endeavors, Barbara!
- Beth Carpenter from OWLS will be the new director at Kimberly/Little Chute starting July 6. Congratulations, Beth! We will miss seeing you daily at the OWLS office.
- Sue from Scandinavia attended Legislative Day in Washington, D.C. She visited the Library of Congress and utilized their surplus book program for libraries. Sue shipped 6 boxes of surplus books back home to the Scandinavia Library.
- OWLS' expert kite maker, Terri Larkin, offered to present a short kite-making instructional session after the meeting for anyone who was interested.
- Peg Burington from Waupaca had a great experience with Leadership Waupaca County and encouraged member library staff to enroll in leadership programs that various counties in the area offer. In the past, OWLS has helped sponsored attendees. Libraries should check with their system offices to find out if scholarships are available.

## 5. Information from OWLS and OWLSnet staff

- Brown County update
  - Gerri, Mark, and Rick met with Brown County Library staff last week, and Rick will be meeting with the Brown County Library Board last week. There are still a number of unresolved issues.
- Committee and user group update
  - Patron Registration Committee

The patron registration committee has completed the duties they were charged with when the committee was formed. Gerri thanked the committee for their hard work.
  - Tech Talks/Circ Works

OWLSnet hosted a trial Tech Talks/Circ Works meeting, “Things All Circ Desk staff Should Know”, using Go-to-Webinar software on April 30. The 1 hour meeting consisted of a half hour presentation followed by a question and answer session. There was a large turnout – at least 35 people (we don’t have an exact number, since some people attended in a group). While there were some technical difficulties (mainly with chat), member library staff offered positive feedback, both immediately after the meeting, and in a follow-up survey. For many libraries, the remote format made the meeting more convenient and allowed more library staff to participate. If anyone is interested in receiving an outline of the material covered at the last meeting, please contact Laura. OWLS will work out the technical difficulties, including making the chat easier to use and view, before the next meeting. The next Circ Works/Tech Talks meeting will be held in early August with a presentation on Viewing Holds followed by a question and answer session. Laura will send out a doodle poll to find the best time and dates for the meeting.
- Circulation update
  - Two Millennium updates have recently been installed. The first update is intended to correct the problem with patrons being unable to change their pickup location in Info Soup.
  - The second update turns barcode validity checking on again. While this feature was enabled when we went live with Innovative, at some point it became inactive – although we’re not sure how long it’s been inactive.

Barcode validity checking displays an error message when you attempt to save a record with a barcode that does not match the code of our barcode format. If you mis-scan an item, you will also get an error message that the barcode is invalid. Staff will also start seeing error messages when editing a patron record with a barcode field that contains text after the barcode (such as lost 01/01/2008 gm/OWLS). You can simply ignore the error message in this case, and save the record anyway.

The group discussed a possible change in procedure. We could delete old patron barcodes in a record to avoid this error message, although some libraries do use this information. The group decided to live with the procedure as it is and revisit later if necessary.

- Customizable hold slips have been implemented in several libraries. Staff from libraries using the new hold slips, love the new slips. It is a real time-saver, simple to set up and can be customized for individual libraries. Please contact Gerri if you are interested in implementing this feature.
- OWLS hosted a meeting last month to discuss the items on the IUG Enhancement ballot and choose voting recommendations. Libraries and system staff found it fun and useful, as it

offered an opportunity for libraries to provide input about the proposed enhancements. The final enhancement voting results have been posted on the IUG website and members can login to see them. OWLS will use the same format for next year's IUG Enhancement voting process.

- The maximum number of holds per person will be reduced to 15 on June 1, 2009. Bookmarks notifying patrons of this change and "My Lists" booklets have been created and are available for libraries to take. Kathy Mitchell from Clintonville thought the wording on the bookmarks should say "Library staff can show you how to keep track of your items" instead of "help you keep track".

The group revisited the issue of the reduced holds limit and the effects on teachers, book clubs, internal cards and institution cards. Libraries are concerned about overriding item limits to accommodate their patrons who are teachers. Many teachers use their personal cards for school items. The Oconto library addresses this by promoting family involvement and encourages children to use the library to check out their own materials. The Kaukauna library feels the lack of a teacher card option has negatively affected their library's relationship with local schools. When several teachers borrow using a single institution card, the items can be difficult to track down and retrieve. It was decided that a committee should be formed and charged to look at the current policy and develop a proposal addressing these issues before the next school year begins. For the time being, libraries should use their best judgment in regards to making exceptions when overriding checkouts.

Gerri will set the internal cards to reflect a higher checkout amount so libraries aren't overriding. Gerri will also verify that institution cards are set to a 75 hold limit and a 75 item checkout limit.

- The group reviewed the one page, pdf-fillable [patron registration form](#). It was intended to be a double-sided page, but we accidentally printed it on two pages for the meeting - which is likely what patrons would do. It was agreed that this form should go back to the draft stage and two one-page forms should be created, one for adults and one for juveniles. We should consider a landscape format and have a visually distinct design at the top to set apart adult forms from juvenile forms. Once an acceptable patron registration form is developed, OWLS will provide blank print copies for libraries as well an online format. Libraries can create their own forms but they must have OWLS approval before using. There was concern about the conversion process from old form to new form. Libraries can adjust their expiration dates to one year and have patrons fill out a new form when their card expires. Gerri will look at globally adjusting patron records to reflect whether they have a little form (old registration form) or big form (new registration form) on file.
- The cataloging staff will be offering a 2 hour class on serials, covering general serial questions and instruction on the basic serials holdings display on June 24, 25 or 26. Anne will send out an email with some examples to help libraries determine if the basic serials holdings display is something they would like to use. She will also send out a doodle poll to find the best time and dates for the meeting.
- Gerri is continuing to work on spine label printing using Millennium's print templates. She's still searching for a spine label vendor and has no sample to show just yet. The process is easy and can be done from the circulation module. Gerri demonstrated the process during the lunch break. The printer OWLS recommends is a direct thermal transfer printer that costs approximately \$300 - \$400. Hub labels for DVDs and CDs can be printed using this feature but OWLS discourages printing barcodes with this process. We order barcodes from a vendor that specializes in them. They ensure that our barcodes are unique, conforming to our numbering and format specification, by using a special ordering process. They also are

made of higher quality materials that have a longer life, wear better and do not fade. Gerri hopes to have a spine label sample for the next AAC meeting.

- InfoSoup Development update
    - LibraryThing is up and running in InfoSoup. Beth posted a [screencast](#) in InfoSoup showing how to use LibraryThing. Please take a look and share it with your patrons.
    - Beth has had several queries about ordering additional black reusable InfoSoup bags. If she places a group order of 1000 or more, she can get a good deal of \$1.81 each. Beth will send out an email to see which libraries are interested and if the quantities are enough to place a group order.
  - Delivery update
    - Anne Miller and Rick Krumwiede are working on guidelines for seeking reimbursement from Waltco. No delivery update at this time.
  - Project Updates
    - LSTA funds have been released from DPI for AirPAC. It has been purchased and is ready to be scheduled for installation.
    - The SSL (Secure Sockets Layers) certificate has been installed on the server. This is the first step to installing Ecommerce. There have been some complications with the certificate, so we have a call placed with Innovative.
    - OWLS is installing SAM at more libraries. It continues to be more complex than anticipated because of the set-up configurations and the interactivity of existing software products on active computers. Dave will most likely have to revisit libraries that installed early and apply updates to their configurations. OWLS will work on creating and sending out SAM usage reports after all of the SAM installations are completed.
    - The first report on wireless statistics was posted in May and reflected the April wireless usage. OWLS will continue to refine the process and post the wireless statistics report on a regular basis.
6. Decision – consensus decision or vote
- No consensus decisions or votes were made at this meeting.
7. Discussion – discussion of issues that may be up for decision at future meetings
- Millennium release 2009A (R2009a) is scheduled to be released in May of 2009 and OWLS would like the group's thoughts about an installation date. There will be minimal upgrades that libraries will actually see; most of the upgrades are behind the scenes involving updating code. There are two upgrades that will affect us. The first is a feature that allows library staff to see the last four patrons who checked out an item. Once we upgrade, we'll be able to ask Innovative to turn this optional feature on. The second is a new AirPAC interface. OWLS would like to install R2009a before we install AirPAC so patrons won't be inconvenienced by having to learn and use two different AirPAC interfaces. AirPAC needs to be installed by the end of the year as it has been purchased with grant money, and we need to follow as much as possible, our outline for implementing that grant.

OWLS would like the upgrade to be done early in the week on a Tuesday or Wednesday and done on a day that Beth is onsite. In the past, upgrades have caused some problems with InfoSoup, and it would be best if she were available to fix things. The system would be brought down in the late afternoon, around 4:00pm for approximately 2 hours. SAM will work but won't

be connected to Millennium. Offline circ will be functional during this time. We're assuming that there won't be a new client to install, and we're not planning to ask libraries to log in at a scheduled time. This means that not only will it take longer to log in, but it's likely that the system will be running slowly for the first day and a half after the installation.

**The libraries agreed Wednesday, June 10 at 4pm would be a good day/time to install R2009a, given the installation information remains as outlined above.** Since the new software has not yet been released, it's possible that some of our assumptions may be incorrect. If that's the case, Gerri will notify the libraries and new date will need to be determined.

*Note: As of Friday, June 5<sup>th</sup>, the new software has not been released. The upgrade to R2009a has been postponed.*

- The Millennium server will be four years old at the end of July and it is time to replace it. The group discussed the document: [Things to consider when replacing the Millennium server](#). The server replacement will require libraries to be down 1 full business day as Innovative requires scheduling a full 24 hours to replace the server. The ideal replacement day is likely a Tuesday, since we want plenty of time to deal with issues before the weekend, but Mondays tend to be very busy for the libraries. During this time Millennium and InfoSoup will be completely unavailable. All financial functions (excluding fiscal close) must be closed and finalized the night before. Staff members at one library with a 3M self-check and one library with a Millennium self-check must be available later in the day to test the self-check machines. KAU volunteered to be the Millennium self-check tester. The group asked Gerri to look at the Monday, Nov 30, 2009 (the Monday after Thanksgiving holiday) as a possible date to replace the Millennium server.

## 8. Other Business

- Becca from Door County expressed concern about downloadable DVDs and their impact on circulation statistics. Rick commented that such downloads don't meet the state definition of a circulation. It was suggested that contacting Mike or John at DPI to express this concern would be a good thing to do.
- Vicky from Appleton expressed concern about circulating items with multiple parts which tend to be large and take up additional van space. It can be time-consuming for staff to count multiple parts of items before checking an item in. Items can be set to Lib Use Only which will restrict holds being placed on these items. However, libraries would have to override in order to checkout locally. Gerri will look into a possible technical solution that doesn't involve overriding to checkout. The circulating library is responsible for retrieving missing parts from their patrons.
- Libraries are putting messages in patrons' records indicating someone other than the patron has permission to pick-up a hold. However, all libraries may not honor this, and it's important to indicate this to the patron. Libraries agreed that a library card is required to pick up a hold. Some libraries have implemented policies that spouses can carry each other's card if they frequently pick up holds for each other.
- Peg from Waupaca questioned the group about their local practices on forgiving long term bills on patron accounts. It's always important to note who owns the billed item and not forgive a bill for an item that belongs to another library. Laura can look up long-term billed items and tell you who owns the item. As long as it is your own item, it is OK to forgive long-term bills.

## 9. Meeting adjourned at 1:35pm.