

**OWLSnet**  
**Administrative Advisory Committee Meeting**  
**Outagamie Waupaca Library System**  
**(Online – GoToMeeting) September 18<sup>th</sup>, 2020**

Present: Cathy Kolbeck, Algoma; Owen Anderson, Michael Nitz, Tasha Saecker, Colleen Rortvedt, Appleton; Jamie Hein, Clintonville; Tina Kakuske, Rebecca Buchmann, Dawn Taylor, Shauwn Rosendale, Linda Streyle, Door County; Stephanie Weber, Florence; Natalie Snyder, Fremont; Kim Meyers, Gillett; Allie Krause, Hortonville; Robyn Grove, Iola; Ashley Thiem-Menning, Kaukauna; Carol Petrina, Kewaunee; Steve Thiry, Kimberly-Little Chute; Nicole Lowery, Lakewood; Amy Peterson, Lena; Ellen Connor, Manawa; Jen Thiele, Joanne Finnell, Marinette County; LeAnn Hopp, Marion; Ann Hunt, New London; Lori Baumgart, John Kronenburg, Tracy Vreeke, NFLS; Kristin Laufenberg, Oconto; Joan Denis, Oconto Falls; Amanda Lee, Bradley Shippis, Liz Kauth, Molly Komp, Evan Bend, Dave Bacon, John Wisneski, Debbie White, Chad Glamann, OWLS; Sue Vater Olsen, Scandinavia; Elizabeth Timmins, Seymour; Kristie Hauer, Shawano County; Shay Foxenberg; Shiocton; Jill Trochta, Suring; Peg Burlington, Waupaca; Kelly Kneisler, Weyauwega

**1. Call to Order and Introductions**

The meeting was called to order at 9:30 AM and Amanda went through roll call.

- 2. AAC Ground Rules & online meeting etiquette**
- 3. Minutes of the July 17<sup>th</sup>, 2020 AAC meetings.**

Minutes from the July meeting were approved.

**4. Staff Report**

There were no questions on the staff report. Bradley updated the group on spine labels and the templates used by TLC. Liz has been mapping the locations and we really need libraries to check their maps to make sure they are correct and get them back to Liz as soon as you can. These are hard coded in CARL by TLC; we are unable to make frequent changes. Changes are only made when the client is updated.

Questions about deleting/withdrawing items: Amanda informed the group that we don't have the same data limits in CARL as we did in Sierra. If the status is changed to "Withdrawn" patrons can't see the items in the catalog but library staff can still see these items. Fines will stay attached to those items, but if the items are deleted, then those fines are written as a Manual Fine in patron's fine history.

Once items are deleted, the circulation counts will remain. If there are issues at the end of the year, there are monthly circulation stats kept that can be looked at for acquiring the annual numbers. If libraries want to delete items that don't have fines attached to them, they can.

Libraries can view a list for their Withdrawn items by using Report 17 – Items by Status.

## **5. Extending OWLSnet Automation Services Agreements through 2021**

Our 2019-2020 Automation Services Agreements include a clause that states, "In the event that a new agreement has not been signed by December 31, 2020, the term of this agreement will be automatically extended through December 31, 2021." OWLS proposes implementing this clause and signing new agreements in 2021. The OWLS Board agrees with this. There will be no significant changes needed. There were no objections to implementing the clause. If there are concerns later, please contact Bradley.

## **6. Technology and Resource Sharing plan**

Bradley asked the group for help in brainstorming and prioritizing the most important things and figuring out how to staff and pay for those services over the next 3 to 5 years. Bradley will get in touch with those who volunteered last month for the committee. The items need to be ranked in order of importance. Bradley went through a list of items already included and asked if there were any questions or additional suggestions for the list. Steve suggested collection development software. Peg asked about a library website redesign. Bradley answered it was something we're already working on. Feel free to email Bradley ideas if you think of any more ideas. Bradley will send out a survey to rank options by importance. This is planned to be approved by the board in November.

## **7. Hold Shelf Expiration Dates**

We initially set the Hold Shelf expiration dates the same as they were in Sierra—8 days. However, Sierra did not count days closed in their calculation, but CARL does. We have increased that time to 10 days. OWLS proposes keeping the 10-day expiration date. There were some talks of raising to 14 but the overall consensus was keeping at 10 days.

## **8. InfoSoup Bounce Back**

Are libraries ready to increase the hold limit? If not, can we do so for some patron types and not others? Please fill out the Google doc, especially questions 1 and 2. These will inform OWLS if libraries are ready for the hold limit to be raised. WALTCO has the capacity to handle more and OWLS sorting can as well. If there is a tub shortage, OWLS will find the money to purchase more if it becomes an issue. Holds don't work the same way in CARL as they did in Sierra. CARL counts "Unfilled Holds" allowing for some patrons to have more than 10 holds on their account. Most of the group want to increase the limit and can handle the additional holds. Amanda informed the group of an update from TLC: a patch will be put in that will count holds all together in the next update. There is no date on the update, yet. Many libraries agreed that if a patch can be applied, then moving to 25 holds would be fine.

Please don't use manilla inter-delivery envelopes to send library materials; we are not sure how WALTCO would handle that. Also, the nylon bags are not water resistant so try not to use them if it's not needed. NFLS has space and can help store items if needed.

Libraries are still quarantining items coming in from WALTCO. Majority seem to be quarantining for 4 days from the date on the tub and then opening them up to check-in on the 5<sup>th</sup> day.

After discussion and knowing the patch will be put in place, we decided to increase the hold limit to 25 as soon as possible. If this will be an issue for your library, contact your system. OWLS will notify everyone once there is an update from TLC. If it will be soon, then most likely OWLS

will wait before increasing the limit. If sorting staff are back from quarantine, then an increase could happen next week. The final decision to increase to 15 or 25 will depend on what TLC has to say about the patch.

## 9. Holds Prioritization

When we migrated to CARL, we changed the holds prioritization back to make it consistent with our Resource Sharing Policy, but there has been some interest to discuss further. Options are to: leave as is, first come first served consistent with policy; temporarily switch to local holds first again and identify a trigger for reverting back to policy; or permanently change to local holds first. A permanent change will require an AAC vote and approval from the OWLS board.

Initial thoughts were for local holds. Larger libraries will benefit more from this because they have bigger collections. At this time, from a system viewpoint, first come first served is more equitable.

Appleton informed the group that when an item is available on their shelf and there is a local patron with a hold, the system isn't pulling that item. Patrons have been complaining that when an item is available on shelf, they are still having to wait for an item to be delivered. Amanda will look into this.

There was talk on removing the hold queue from patron view. But that can't be removed. Colleen added that there is no one sided solution; that all collections are locally funded and must maintain a level of satisfaction. We did not reach consensus on how to proceed. Libraries will take the next month to consider the options and OWLS will talk to TLC to see if any changes can be made to the queue. The group will vote at the October meeting.

## 10. Prioritizing work for OWLSnet

What issues with CARL are causing the biggest disruptions or delays in day-to-day operations at your library?

- Peg mentioned the catalog keyword is too picky. Amanda answered there wasn't much OWLS could do about that but would ask TLC.
- Patron name searching needs to be exact.
- Wrong images showing up in the catalog. This is a known issue and TLC has been working on it.
- Switching back and forth between Connect and CARLX. How long will it be before staff aren't having to toggle between the two?
- Eliminating codes from the drop-down menus that aren't used locally.
- Allow for item check-in without fulfilling next holds.
- Saving changes in Connect is very slow.
- Pop-up hold alert in Connect. Currently one in CARLX but not Connect. Bradley answered that this is on the development list for TLC.
- Checking out a hold to the wrong person and it doesn't give an alert in CARL Connect Staff.
- Scanning a patron barcode in CARL and getting "No Patron Found." But in Connect it comes up fine.
- Renewing items for patrons takes a long time. Bradley added that a "Renew All" option is in the development plan.

- Only checking the title router list. Smaller libraries are getting little to no items on the other router lists. All three lists should be checked. Issue lists should be more common than item lists.
- Loading patron information in CARLX is very slow.
- Majority of the group are upset that so much time was spent on training for Connect when they do most of their daily functions in CARLX.
- Sorting long lists in Connect by number of items rather than alpha, such as locations and media.
- When using a smartphone to access InfoSoup, could there be an indicator as to a successful login? Now, when they do, it brings them to the same page, and they aren't sure if they are logged in.
- Procedures on how to handle different patron blocks consistently.
- Hitting the 'lightbulb' in a patron record in CARLX takes too long to bring up patron information.
- A shortcut sheet for commonly used keys/functions. Amanda will locate this and post.
- A cheat sheet for patron registration. This is currently being finalized and will be posted soon.
- A pop-up in Connect when a card is expired. Amanda will look into this.
- Adding items to 'stubby' records for cataloging. Amanda let everyone know that they can add items to short vendor bibs to get things moving and that they will get updated at some point.
- Date formats in CARLX reads one way (mm/dd/yy) but then when you enter the date via keyboard instead of using the calendar, you must enter it as (dd/mm/yy). Example: birthdate or backdating check-ins. Amanda will add to the list.

Shawn asked if/when CARL client is at end-of-life, will TLC have implemented a way to print lists via Connect Staff or would it be expected for branches to have a tablet? Is it possible to export this to a spreadsheet, manipulate the data and print from there? Bradley didn't think that could be answered as to when that would be. But OWLS would make sure that until there are better printing options for Connect, before sunseting CARLX (which is not on the horizon yet).

#### **11. Is there interest in a monthly AAC meeting?**

The group was in agreement for a monthly meeting. Amanda will send out the information for the October meeting.

#### **12. Adjourn**

Meeting was adjourned at 12:01 PM