

**OWLSnet
Administrative Advisory Committee Meeting
Outagamie Waupaca Library System
(Online – GoToMeeting) November 20th, 2020**

Present: Cathy Kolbeck, Algoma; Owen Anderson, Michael Nitz, Tasha Saecker, Appleton; Eva Kozerski, Black Creek; Jamie Hein, Clintonville; Tina Kakuske, Rebecca Buchmann, Dawn Taylor, Door County; Stephanie Weber, Florence; Natalie Snyder, Fremont; Kim Meyers, Gillett; Allie Krause, Hortonville; Robyn Grove, Iola; Ashley Thiem-Menning, Angela Schneider, 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, Tracy Vreeke, NFLS; Kristin Laufenberg, Oconto; Joan Denis, Oconto Falls; Amanda Lee, Bradley Shipps, 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; Sue Abrahamson, 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 October 16th, 2020 AAC meetings.

Minutes from the October meeting were approved.

4. Announcements

Homework Hotspot Labs

Tracy (NFLS) let the group know that Homework Hotspot Labs have been purchased.

They contain Chromebooks and hotspots/Wi-Fi boosters. They can be requested on the website and she hopes libraries take advantage in booking them.

5. InfoSec

Bradley addressed the group about the recent simulated phishing emails they have been receiving. OWLS has signed a 3-year contract with InfoSec to provide information security testing and training. Baseline testing was completed in October, and there will be one training module per month. This includes a training tutorial and an assessment that should take anywhere from 5-10 minutes. OWLS asks that the trainings are completed each month. So far, the November training has a 37% completion rate.

6. Tools for Virtual Programming

Bradley mentioned that the DPI Cares funding is available and can be used for virtual tools. She wanted to know what kind of tools libraries are using for virtual training that others may want to use.

Sue (SCA) purchased a tripod for holding their iPad, headphones for board members, a green screen, and web cameras.

Tasha (APL) purchased Zoom webinar software and webcams.

Allie (HPL) purchased Padcaster set-up for filming story time. This is basically a heavy-duty case for the iPad that slides into a tripod. A mic can also be attached to it. They also purchased Zoom for virtual book clubs.

Kristie (SHA) purchased FM radio connector headsets from Amazon for about \$12-\$15 each. The headsets transmit to the radio station you select so staff can speak to patrons through their car radios. The first program using these tools was a drive-around-Shawano Amazing Race event with participating community businesses.

Bradley uses a light for her workspace that she purchased from Amazon. It helps with online meetings when the lighting is not ideal.

7. BiblioCommons Overview

Evan updated the group on BiblioCommons. OWLS signed the contract, and the first meeting will be held December 1st. It takes on average 5-6 months to get set-up and go live. The launch had to be delayed due to the migration and pandemic, but OWLS is moving forward. BiblioCommons has a highly developed way of presenting data, so it is worth the investment and we should see an improved patron experience with our catalog.

Evan then showed a demo of BiblioCommons, which included a new, sophisticated advanced search. Responses from the chat were all positive.

Questions:

Will Oscar nominees or award winners display for DVDs? Yes, they are included in the awards feature that comes with the software. We can also make lists to highlight them more prominently.

When will we see this? We will know more in December when we start working with BiblioCommons and TLC. Evan guessed it will be about 3-4 months before we see a test version, and 5-6 months before go-live. OWLS is working with TLC in this process since OWLS is hosted.

8. ShoutBomb Voice Messaging

Amanda presented details informing the group that ShoutBomb can utilize CARL to sign patrons up for text messaging and voice messaging services. The text messaging aspect has been tested and it is very easy to do in CARL – it just requires changing phone type from “home” to “mobile” and making sure there are no extra characters beyond the

phone number (and dashes). This will require changing the way some libraries enter data in the phone number field. Options for this moving forward would be: putting the "P" after the phone number for patrons that need to be called; or utilizing the second phone number field for hold slips. Voice messaging will require further development with TLC. Is there any interest in voice messaging? Is there any interest in signing up patrons for ShoutBomb in CARL?

Questions:

Would patrons still have the option to receive text or voice messaging directly through Shoutbomb? Amanda answered that signup would happen at the moment of patron registration or a transaction when library staff ask if they would like to receive text notices; patrons wouldn't need to go to ShoutBomb to sign up. Libraries can opt out voice messaging if they would like to continue calling their patrons.

If libraries wanted to opt in for the voice messaging, would all patrons at the library receive automated calls, or can some be called by the library and some by ShoutBomb? Amanda answered that OWLS would have to work with TLC to develop adding some sort of check box to the account. From what we know, it would be all patrons with a pickup location of a participating library.

What is the status with text messaging in ShoutBomb? Some patrons are still not receiving these. Amanda said this is still getting worked through. We are working on changing the home to mobile preference in those patron accounts who are not getting text messages. Amanda already has a list of these patrons from ShoutBomb.

What would library staff have to do to get the calls to go out? How would it know when you are done checking in items for that day? Amanda said that staff don't need to do anything; the calls are automated. OWLS can set those times as to when they go out.

Would a patron get 5 calls for 5 items? Amanda said they would get one call. She then clarified that if they are all hold notices then it will be one message. But if there are hold pickup, courtesy, and overdue notices, there will be one call but 3 messages in the call. Allie added that she would like the hold pick-up notices aggregated in CARL. Currently, patrons are getting an email for every item checked in. Amanda agreed with this happening and will talk with TLC about it.

What is the timeline to have ShoutBomb do the voice messaging calls? We need to do further development with TLC and will send an update when we know more. This would be an instance where we would ask for a volunteer to help us work out bugs.

How will libraries find out if a call doesn't go through for some reason? ShoutBomb will send reports every day for patrons who cannot be reached.

Amanda will keep moving forward with the list of patrons who need to have their phone number preference changed from Home to Mobile. At this time, it seems split on who is interested and who is not. The group is leaning towards interested.

9. Patrons 16 or Older P-Type

There is currently no linking in CARL, so the Sierra process of unlinking patrons when they reach age 16 is not applicable. OWLS had anticipated using the Juvenile Grow Up Age in CARL to alert staff they were over 16, but that is not working as anticipated. Is it necessary to alert staff when a patron is between 16 and 18 years old?

Questions:

Right now CARL puts a hard block on when a patron turns 18, correct? Amanda didn't think it did but will investigate further.

Isn't the grow-up age relevant for overdues and bills? Bradley explained that Wisconsin law changes once a patron turns 16 in that parents no longer have access to what their children check out, but from age 16-18, parents are still responsible for bills. At 18, patrons need to sign for an adult card and take responsibility for items and issues. OWLS can make the grow up age 18 and let libraries create local practices for ages 16-18.

Joanne added that this is a sensitive issue regarding those who are over 18 but because of their mental capabilities, they are not responsible.

OWLS has changed the grow-up age to 18 and will look more into the hard blocks. The group decided to soft block those accounts where patrons have turned 18 and need to update their cards.

10. Should Expired Cards Be Able to Place Holds

CARL has functionality that allows patrons to place holds with an expired card. This was a change from Sierra we were going to ask about at the March AAC meeting. When the March AAC meeting was cancelled, OWLS decided to allow expired cards to place holds. OWLS believed this was appropriate since it requires the patron to come into the library to pick the holds up; however, OWLS is hearing it might not be useful and possibly even disruptive. Should OWLS change the setting back to the Sierra behavior of not allowing patrons with expired cards to place holds?

The group chat seemed split on allowing holds for expired cards.

Questions:

Does the system tell patrons they can't place holds because their card is expired? The system has a message when the patron logs into their account saying their card has

expired and they need to contact their library. Bradley showed the group the message patrons see when their card is expired when they log into their account on InfoSoup. Patrons also get an email a week before their card is about to expire.

What was disruptive about this? Amanda said that library staff are spending a lot of time on the phone. OWLS thought that this would help patrons have more access, especially during COVID. There isn't agreement on this functionality.

Elizabeth added that libraries want to provide service pandemic or not, and that staff want to talk with patrons and update cards; libraries want to be all inclusive.

There is not agreement today. Functionality will stay as is and will be put on the agenda for the December meeting to be voted on.

11. CARL Roadmap

Amanda went through the newest updates and functions coming to CARL in the next few months and the next year. They are as follows for end of year release Dec./Jan. 2020/2021:

- a. Damaged Item Workflow/Interface - primarily being developed for CARL Connect Staff, but will be available in CARLX.
- b. Rebranding Not Found List to Wander List – will include the reason an item is on the list.
- c. Fill List updates – change column order so call number is first and fix a sorting bug.
- d. Set Hold Shelf Expiration dates by branch instead of system-wide, more like Sierra.
- e. Sounds for actions in CARL Connect Staff Circulation.
- f. Minor updates with Discovery, but no major fixes for the problems we're seeing with FRBR.

2021:

- a. Close gaps between CARLX and CARL Connect Staff Circ: more alerts, check-in/checkout notes, and claims lost and claims returned.
- b. Web reports.
- c. Priorities from TLCU tbd.

Other Opportunities:

- a. TLC is offering an acquisition focus group/roundtable starting December 1st
- b. Consortia roundtable is being developed.
- c. Other ways to connect with other CARL libraries
 - i. Slack
 - ii. Basecamp
 - iii. Various relevant roundtables

OWLSnet Priorities for TLC:

- a. CARL Connect Staff circ functionality – expect to see some of this in 2021.
- b. Greater holds management in CARL Connect Staff.
- c. Customizable receipt settings in CARL Connect –like font and formatting – email is great but print is not as good.
- d. Allow renewals for items that have holds but available items – also a priority shared by other libraries at TLCU during our priorities roundtable.
- e. Improve item maintenance
 - i. Limit location and media codes in dropdowns or allow codes to be typed.
 - ii. Allow libraries to only edit/delete their own items.
- f. Improve Acquisitions
 - i. Roundtable December 1st –libraries are encouraged to participate.
 - ii. Utilize order records instead of dummy records during item creation.

OWLSnet Priorities:

- a. Bibliocommons migration – OWLS recognizes discovery is very frustrating and knew it was not CARL's strongest feature; however, the cost savings is allowing OWLS to implement BiblioCommons.
- b. Connecting CARL to WISCAT—currently CARL isn't transmitting item status or owning library, so OWLS is working with TLC and WISCAT.
- c. Fully integrate Shoutbomb.
- d. Recreating and automating reports—OWLS has already started, but very soon we will need to really focus on preparing for Annual Reports.
- e. Troubleshooting.
- f. Documentation/Training.

Things OWLS has done since last month:

- a. Bibliocommons project kick off.
- b. Circs and renewals only a month behind – online renewals were getting credited to the online branch. This problem was addressed in an update in early October, but the items checked out before then need manual manipulation to credit the correct library.
- c. Ecommerce payments getting sent to libraries—working on bills paid reports, but those should be up soon.
- d. Cards Held by Home Agency and Cards Held by Municipality reports up.
- e. All notices automated – big thanks to Dave!
- f. Met with library staff about location and media codes and made changes based on their recommendations.
- g. Attended TLCU virtual conference.
- h. OCLC Demo—OWLS will have a proposal for cataloging improvements for the December AAC meeting.
- i. Support – OWLSnet Help, Cat Help, SkyRiver requests.

Questions:

Currently no libraries are getting WISCAT requests. When asked about the status of ILL, Amanda informed the group that WISCAT doesn't have all the information needed in order to request items from OWLSnet libraries. This was not an anticipated issue. No one else in the state uses CARL, but there is a consortium in Michigan that Amanda has been talking to about how they get their info for MelCat. It is a solvable problem; we just need to figure out what works best for WISCAT.

When asked if spine label prefixes will be updated, Amanda replied they are expected to be added in the next update.

When asked about the OCLC demo, Amanda said it was promising and cataloging staff are excited and working on their proposal. A question was then asked about whether it would come down to pricing. Bradley said we had not yet had a chance to see how the quote added up in the budget.

When asked about sharing the slides for the CARL roadmap, Amanda said she will make her slide deck of the roadmap and priorities available for the group.

12. Other CARL Priorities

What issues in CARL are causing the biggest disruptions or delays in day-to-day operations? What questions would you like to ask or tasks you'd like to see demonstrated?

Sue asked to see how to change the due date of one item in the patron record. Amanda said you can't change the due date of an item once it has been checked out. These need to be changed at the time of checkout. Amanda is adding it to a list of priorities for TLC.

Kristie said that the lack of pop-up alerts is frustrating. When an account is blocked, staff are having to hunt and peck trying to figure out the issue. Amanda let the group know that this is an issue OWLS communicated with TLC and hope to see an update in 2021 for it.

Joan said she's been having issues when trying to delete a book; CARL says there are outstanding fines but when staff go into the patron account, it isn't there. Staff then set the item to Withdrawn to delete. Amanda asked that when staff see this, to send to OWLSnet Help for further investigation.

Natalie asked to see how to renew one item in CARLX when a patron has many things checked out. Amanda demonstrated this but Kelly also added in the chat that when in

the patron record, staff must choose one of the radio buttons “charges” or “overdues”. Once in there, staff have the choice to renew all or one item.

Joanne added that the procedure for dealing with damaged items with holds on it is kind of clumsy. Amanda agreed and OWLS expects a fix for it in the next update. Amanda also demonstrated how to mark an item damaged when there is a hold on it. OWLS will resend the procedure for damaged items with holds.

13. Adjourn

Meeting was adjourned at 11:25 AM.