

**OWLSnet
Administrative Advisory Committee Meeting
Outagamie Waupaca Library System
May 17, 2013**

Present: Michael Nitz, Colleen Rortvedt, Paula Wright, Appleton; Rebecca Buchmann, Black Creek; Jamie Hein, Clintonville; Stephanie Weber, Florence; Kay Rankel, Gillett; Carolyn Habeck, Hortonville; Beth Carpenter, Kimberly/Little Chute; Tony Wieczorek, Kaukauna; Susan Grosshuesch, Kewaunee; Pam Ellingson, Lakewood; Becky Bartell, Lena; Ellen Connor, Manawa; Jennifer Thiele, Marinette; Ann Hunt, New London; Mark Merrifield, NFLS; Kristin Backhaus, Oconto; Joan Denis, Oconto Falls; Wanda Boivin, Oneida; Evan Bend, Patty Hankey, Laura Jandacek, Rick Krumwiede, Gerri Moeller, Anne Paterson, OWLS; Elizabeth Timmons, Seymour; Kristie Hauer, Shawano; Melanie Waldron, Shiocton; Becca Berger, Linda Streyle, Tracy Vreeke, Sturgeon Bay; Amanda Burns, Suring; Peg Burington, Waupaca

1. Call to order

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

2. [Minutes of the March 15, 2013 meeting](#)

Ellen from Manawa was in attendance at the meeting and asked to be added to those present. The minutes of the meeting stand as corrected.

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

- Paula from Appleton shared a PowerPoint presentation about their ongoing plan to increase usage on their self-check machines.
- The Manitowoc-Calumet system is exploring a merger with the Eastern Shores Library System. The Calumet County library directors will be meeting with OWLS next week as part of their decision making process.
- InfoSoup libraries will be manning a booth this year at the Pride event in Green Bay.
- The Gillett library has been chosen to be the recipient of a Packer player visit on June 10 and it will be broadcast to all public libraries in Wisconsin. The Packer player chosen to visit has not been revealed yet.
- The Oneida library will have an open house and pie contest on May 18.
- Jennifer from Marinette is continuing to work on her PhD and may be contacting several libraries for research purposes.
- Rick commented that WiLS may be contacting and interviewing some directors for research as part of the system SRLAAW (System and Resource Library Administrators' Association of Wisconsin) process.
- Colleen from Appleton announced that there are some extra seats available on their Illinois library bus tour on May 23 for anyone that is interested.

5. Information – to be presented by OWLS and OWLSnet member library staff
- OWLSnet needs to notify member libraries by July 1 of the 2014 OWLSnet membership fees. Over the past 18 years, the increase in OWLSnet membership fees has averaged 1.3% annually. In 2012 and 2013, there were no increases. Rick said that it's easy for a small increase to be absorbed into the budget if it's not intended for a specific purpose, so it may make more sense to ask for increases in years when we are planning for specific projects. OWLS and NFLS will not be receiving any increases in state aid next year, but this year's expenses are running under budget. A 1% increase in membership fees may not generate much additional income, but it could help to maintain our current level of service rather than have to discontinue a service. Someone asked what would be the highest percent of increase libraries could expect to finance a special project. Most of the projects we have looked at cost approximately \$20,000 a year so a 4% increase would be the most required. However, many products no longer require just a one-time cost but are subscriptions with annual fees. For instance, a discovery layer for our catalog could cost this amount annually. Beth from Kimberly/Little Chute commented that while her municipality would like her to hold the line on budget increases, if an increase in membership fees is needed to maintain a healthy system, they support it. Oconto Falls commented that their costs are going up but their collection is going down which has a negative impact on the system as a whole. Those in attendance concurred that budgets are tight for every library, but there was support for a 1% increase if it's needed to continue current programs and services. Rick will project the 2014 budget and discuss it with Mark, and they will make a recommendation to the OWLS Board based on the needs of the budget.
 - Sierra/Circulation
 - The number of Shoutbomb subscribers is increasing. In April, there were 687 subscribers. Evan has brought the last batch of Shoutbomb promotional cards, please take what you need. We will have more printed. Evan will send out an email, please respond if you would like more cards and let him know how many cards you need.
 - The percentage of fees paid via ecommerce has been very consistent. 10% percent of all fines paid monthly are paid through ecommerce.
 - We upgraded to Sierra 65 on March 19 and upgraded to 1.1.0 on May 7. The upgrade caused some problems with sorting in InfoSoup. One of these has been fixed (items owned by a library now sort to the top in the library) and another is still a problem (items no longer sort in alphabetical order by location.) A patch was installed on May 14. This broke our material type scopes, and as a result, we could no longer search by type of item in InfoSoup. This problem has also been fixed. Innovative has kept the call open for a while so if anyone notices a search problem, please let us know. We are also having some receipt printer problems with the Express Lane self-check machines. The receipt printer settings are not being retained so the printers have to be reset daily. This issue is currently in Innovative software engineering. Sierra's architecture is entirely different than Millennium so it may take longer to get problems fixed. Gerri apologizes for the difficulties with the last upgrades and assured the group that she is pushing our updates out as far as possible to limit our exposure to buggy updates. We won't be scheduling any upgrades during summer because everyone is so busy with summer reading programs.
 - The Too Long in Transit feature has been installed but it is not working. OWLS has opened a call with Innovative to get it fixed.

- The new discard process seems to be working well but we have been surprised by the number of emails we receive asking for items to be deleted. It can be difficult to track all of the requests sent to the owlsnethelp list. We asked Evan to look into building a form that libraries could use to discard items. A form may make it easier for OWLS staff to handle discard item requests.
- Some staff have found searching for titles in Sierra to be confusing. There are more tools in Sierra with facets than there were in Millennium. All of the old limiters are still available in Sierra. Gerri demonstrated searching in Sierra. Unlike Millennium, searching in Sierra is very similar to InfoSoup. The phrase indexing in title searching will bring up items with the book title, uniform title and series title. The location limiter corresponds to the location in the item record. The topic limiter is subject related. It was mentioned that it would be helpful if the publication date displayed in the results list. Gerri will investigate and see if she can get it added. While it is possible there are duplicate records in our system, many are legitimate and just a different version or edition of a title. Staff should look at the bib record numbers to see if they are the same bib record. Please send any errors or duplicates that you find to OWLS. Is anyone interested in attending a future training session on searching in Sierra? A number were people indicated interest.
- Preferred searches are now coming from mail@mail.owls.lib.wi.us and no longer from iiiexporter@mail.owls.lib.wi.us. This could cause problems for your patrons if your patron had the old address in their white list.
- You may find that the format for print templates (hold slips and transit slips) is configured incorrectly for your library and text is overlapping on your transit and holdshelf slips. Innovative relies on the third party software, iReport to create print templates. The templates are created in iReport and then imported into Sierra, and staff at OWLS have just learned some things that might fix this. If you notice your transit slips and/or holdshelf slips are displaying text that is overwritten, please let Gerri know. Note: this doesn't apply to other circulation slips, just the transit and holdshelf slips.
- The OWLS office recently received two complaints about damaged items being circulated instead of being sent back to the owning library. Please review the [Damaged/Missing Materials with Holds procedure](#) and share this information with your staff. Please don't send damaged materials to another library to fill the next hold. It makes it more difficult for libraries to locate the patron who may have damaged the item.
- We have appreciation points from Innovative that OWLSnet received for being a Sierra beta partner. These points can be used to purchase older Innovative software with no additional cost for us. There are three specific products that may be of interest. We could purchase a backup API. Currently, we back up information from our servers on tapes and store the tapes offsite. A backup API would give us more flexibility than our current process with the option to secure our server data on something other than a tape. Another product, Quick click ordering is an acquisitions product that may provide a smoother ordering/acquisitions process. Libraries using acquisitions would log in at the vendor site, place their order from a cart and import the cart into Sierra. We are not sure if it will work well but there is no downside to purchasing this product. There is also a product that allows libraries to capture and store pictures of the patron in the patron record. This product would require a separate server and special cameras to connect to Sierra; both would be an additional cost for us.

With increasing self-check machine usage, it may not be useful to have a patron picture in a record. Appleton commented that it may be helpful to identify public computer abuse. Some patrons may have problems with their picture being stored in their patron record, seeing it as an intrusion of privacy. Appleton commented that if it is a use it or lose it deal, they would be interested in the patron image product. If we don't spend these points by the end of the month, we will lose them. OWLS will make sure all of the points are used, even if they are simply used to purchase additional training classes from Innovative.

- Gerri attended the IUG conference in April. Innovative was recently sold to two venture capital firms, and most of the previous leadership team has left. Obviously, we're concerned about what this might mean for the company. The current CEO comes from a software industry background, and both of the firms that now own Innovative have primarily invested in the software industry. They've begun to implement some changes to the company that are standard in the software industry. They've added a library relations team to assist customers with expediting problem resolutions, and are upgrading the helpdesk software and implementing service commitments. Gerri has weekly meetings with a Sierra representative to stay on top of open calls and other functional issues. Innovative has also recently hired more people to handle calls. In the past they ran very lean. They have opened an office in Dublin which expands their service hours. The Dublin office will be helpful to us with the ability to perform our upgrades during our downtimes. Sierra 2.0 should come out in January 2014. Paula at Appleton also attended the IUG conference and found it informative. She suggested that other library staff take advantage of the scholarships offered by Innovative to attend the conference. Black Creek asked about IUG memberships and if they should renew. OWLS recommends not keeping IUG memberships as it doesn't seem to be helping in the enhancements process.
- InfoSoup Development update
 - The Overdrive statistics are now being posted again. Thank you for your patience. We should be resuming our regular schedule for posting these monthly reports.
 - Evan strongly recommends that someone from each library sign up for the WPLC (Wisconsin Public Library Consortium) listserv so that we have good representation from our system. Overdrive recently proposed holding an Overdrive ebook reading challenge on very short notice. They received lots of complaints from libraries; as a result, WPLC decided not to participate this time, although there would likely be more interest if there was more time to prepare (and more input into the title.)
 - Currently, if a patron's barcode changes and they are an active Overdrive patron, it can cause problems if Overdrive is not notified of the change. However, we learned at the last IUG meeting that Overdrive is willing to use the patron record number as the Overdrive account number instead of the barcode. While this wouldn't affect how patrons access Overdrive, if we make this change we would no longer have to take extra steps when a patron's barcode changes. Their Overdrive account will continue to work with the new barcode. If the Overdrive server went down, there might be problems accessing materials but it would be unlikely this would happen often. The Libraries agreed we should have Overdrive change their account number from the patron barcode to the patron record number. We will contact Overdrive to coordinate the transition. There shouldn't be any disruption to the service and we'll do our best to quickly resolve any problems with patron accounts. Libraries will be notified after the

process is done.

- The adult reading challenge has 99 patrons signed up so far. There are 440 reviews posted from 29 different libraries. The next prize drawing is on June 30 with two Kindle Paperwhites to be given away. At the prize drawing in August, two Nook Glowlights will be given away. Since these prizes are identical in price and patrons seem to have a preference of one over the other, are the libraries OK with offering the next four prize winners a choice of a Nook Glowlight or Kindle Paperwhite? The group agreed this would be fine.
 - On June 1, Evan will post a book review list, puzzles and activity sheets to the Books to Hoot About page for the Summer Library Program.
 - Some libraries have begun buying Recorded Books bundles (i.e. one physical copy and one digital copy). The Digital copy is added directly to the OneClickdigital collection as a "one user per copy" title. MARC records for the new digital copies are sent by Recorded Books and processed by Appleton/OWLS staff. Other than seeing these MARC records (or seeing the title added to the collection) OWLS does not have any way of knowing when a library purchases a "bundle." It would not be a bad idea for libraries ordering bundles to occasionally check to make sure the digital copy has actually been added to the OneClick collection. Alternatively, libraries can send Evan a list of purchased bundles. This is just a short term suggestion to make sure the digital copies are being processed and added correctly. If you have any questions about this, contact Evan.
 - Also, if you'd like to request that an item be added to our Overdrive collection, please contact Anne at the OWLS office.
 - OneClickdigital statistics will be added to the OWLSnet statistics page. The circulation numbers are trending upward but are still under 500 circs per month. The OneClickdigital collection contains 4000 older titles plus additional new titles. If we could maintain a minimum of 500 circs per month we could justify the cost of this product.
 - We are in the process of moving the old web server to a hosted server. InfoSoup is not being moved. Submissions from any forms on InfoSoup will now come from the email address forms@mail.infosoup.org
 - OWLSnet planning update
There is an OWLSnet planning committee meeting after lunch today.
6. Decision – consensus decision or vote
- None
7. Ideas submitted for discussion
- Should OWLS delete billed items after a period of time? Maybe after items have been billed one year or two years? Some library staff thought the OWLS office was already doing this as a regular process. OWLS does not do this currently but we could. We could delete older billed items from the system while retaining the bill on the patron's record. OWLS doesn't have a preference. The problem with billed items is that they still show up in InfoSoup and it may look

like we own the item. If we delete the item, it will help clean up the catalog and the system. However, if we do decide to delete older billed items, it breaks the connection between the patron and the item. If an item is then dropped in the book drop, libraries cannot easily trace it back to the patron to remove the bill. Laura keeps an archived list with history of deleted billed items. Some libraries stated a preference for the items to remain in the system, and others would like the items deleted. Appleton has started to delete their own billed items after 6 months and has had few problems with their process. There was no consensus for removing billed items. We won't do anything for now. Individual libraries can continue to remove their billed items if they want. Libraries can think about it and we will revisit this topic in the future.

- Should we adopt a standard procedure for returned mail address formatting? This would involve adding documentation to the records of patrons who have had mail returned. Appleton has been using a standard format that makes it very easy to identify patron records with mail returned. We could consider making a standard system process for patrons with mail returned. If libraries are interested, OWLS can do some research and make some proposals to the group. Eventually, we can add the formatting procedure to the patron registration procedures. Should we take a look and revisit this topic at a future AAC meeting? Yes, the libraries would like to look further into this issue.
- We will be offering a training session on reports and statistics after the AAC meeting today. The session will last approximately an hour. Please submit any topics you are interested in for future training sessions.

8. Discussion – discussion of issues that may be up for decision at future meetings

- None.

9. Adjournment

- Meeting adjourned at 12:15pm.