

OWLSnet
Administrative Advisory Committee Meeting
Outagamie Waupaca Library System
(Online – GoToMeeting) July 17th, 2020

Present: Cathy Kolbeck, Algoma; Michael Nitz, Tasha Saecker, Colleen Rortvedt, Appleton; Eva Kozerski, Black Creek; Jamie Hein, Clintonville; Tina Kakuske, Rebecca Buchmann, Dawn Taylor, Shauwn Rosendale, Door County; Stephanie Weber, Florence; Kim Meyers, Gillett; Allie Krause, Hortonville; Robyn Grove, Iola; Angela Schneider, Kaukauna; Carol Petrina, Kewaunee; Steve Thiry, Kimberly-Little Chute; Nicole Lowery, Lakewood; 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; Peg Burington, 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 May 15th, 2020 AAC meetings.

Minutes from the May meeting were approved.

4. Announcements

Bradley informed the group that the Technology and Resource Sharing Plan needs to be updated by the end of year. Bradley is looking for a committee or some reviewers to look over the plan before bringing back to AAC in September; it is required to seek library input. Sue (SCA), Peg (WAU), Allie (HPL) (if needed), Tracy (NFSL), and Steph (FLO) volunteered.

5. Staff Report

Amanda reiterated from the staff report that item-level holds have been causing phantom holds that don't show up on picklists, so continue placing bib-holds. Allie asked how everyone is liking the local holds prioritization? Ann likes it for current purpose but doesn't think it should be a permanent change. Many others in the group really like local holds prioritization while some don't see much of a difference. Bradley reminded the group that local holds is not something the system can keep in place unless it is voted on and taken to the board as a policy change.

Bradley also asked for thoughts on the Patron Communication Plan. Many thought it was done well and advertised well to patrons.

6. Are there concerns with storing photos in patron records (CARL)?

This would be a local decision, not system, so each library would make the call to use the stored photo function. In the past, OWLSnet didn't use the photo functionality in Sierra because of storage reasons. This is not a concern now; therefore, libraries can store photos if needed. Many in the group like the idea of having the option but don't anticipate using it due to patron leering and additional procedures to learn. OWLS will leave it as a local decision. If libraries decide to use in the future, OWLS would need to be contacted with enough time to get it implemented.

7. Should we continue forward with BiblioCommons?

At the November AAC meeting, the group agreed to OWLS' recommendation of implementing BiblioCommons. OWLS still recommends moving forward with BiblioCommons; however, a lot has changed since November so OWLS would like to know if anything has changed with the libraries that may impact this decision. A majority of the group still seems committed to moving forward with BiblioCommons with whatever timeline works for OWLS staff. Some would like to see it move quickly but understand the current circumstances of working from home. Others thought a longer timeline might be better.

Peg asked if there would be an app for BiblioCommons. Currently, there are no plans for purchasing an app, but Amanda said it could be put into the Technology and Resource Sharing Plan for future consideration as it is a big investment. Bradley added that BiblioCommons is already mobile responsive, so it should be easy to use without an app. OWLS can afford BiblioCommons as long as there isn't any unforeseen bad news that could hinder that.

There was concern about disabling the EZ login for CARL and other functions of CARL once BiblioCommons is implemented. Evan reassured the group that he doesn't see that as being a problem and anything that comes up can be addressed at that time. Patrons can choose either CARL or BiblioCommons to use based on their preference. Evan is almost certain that patrons can use the same credentials for CARL EZ login as BiblioCommons but he will make sure.

AAC came to a consensus to move forward with BiblioCommons, possibly with later timeline than first anticipated.

8. Should we enable text receipts in CARL?

OWLS currently provides Shoutbomb as an SMS service patrons can opt into for hold pickup notices, courtesy notices, overdue notices, and account expiration notices. OWLS will continue to use Shoutbomb because it allows patrons to renew items by simply responding to the text. Current Shoutbomb users will not have to sign up again since registration is done directly with Shoutbomb.

The SMS service provided through TLC is a one-way communication, so patrons cannot text back to renew items or view information about their account. One feature CARL has that Shoutbomb does not is the ability to send a text receipt when a patron checks out materials. This would require staff to gather information about a patron's mobile carrier at the time of registration or add that information during the transaction. None of the other notices would be enabled for text messaging, so patrons will still have to sign up with Shoutbomb on their own to get those notices.

OWLS wants to know if they should enable text receipts in CARL if SMS services will be provided by two different providers with two different signup methods? Majority of the group responded that they did not want two different services and don't think their patrons would want a text receipt for their check-outs. Also, many believe their patrons won't like the fact that they can't renew through texting. It was decided that OWLS will not be using the CARL text receipts, only Shoutbomb.

9. Final Thoughts - Discussion

Amanda mentioned quickly that TLC offers a user group conference every year that OWLS staff were going to attend. However, the conference will now be online at the end of October. Since OWLS staff are no longer traveling for this, it is more affordable for OWLS to pay for more staff to participate. It's open to everyone and very affordable for us to have 20+ people participate. Amanda will send out more info as she gets it but wanted to put it on everyone's radar. She will send the info out to AAC when she has it. If staff are interested, they need to register.

Bradley asked if there were any more questions or comments. Some expressed nervousness about CARL but also excitement. There is concern for training, too. OWLS will have documentation for the harder aspects of CARL, like serials. There will also be OWLSnet specific training offered and OWLS will work with the library trainers to get the basic necessities for staff to get through the transition.

The CARL-X trainers meeting poll is going out today for discussion, ideas and any questions there may be on CARL and how to make this as seamless as possible for staff.

The best place to ask CARL training questions is on Yammer in the CARL Trainers group. Amanda has been trying to answer questions as she's able.

Current permissions are set to the specific training login so everyone is seeing a lot of functionality that they may not have with their everyday login. There is still a bit OWLS doesn't fully understand when it comes to the permissions in CARL, so it will be a work in progress. If anyone finds they can't do something that they typically would, let OWLS know and it will be updated.

Should there be more focused training on CARL Connect first and then focus on CARL-X? Amanda thought that CARL Connect would be easier and offer more functionality staff would need to help patrons at circulation with a more intuitive interface, while CARL-X is a more advanced workflow. If libraries want to use the client and not connect, that is perfectly fine; OWLS is not restricting use of the client. Bradley added that the reason why OWLS is focused on Connect, is because TLC will focus development on that platform. When there are improvements, they will most likely be in Connect.

Individual logins – this was brought up as to whether they will be in use to track changes and other useful aspects. Right now, there is one general staff login, but Amanda is more inclined to make more individual logins, especially for directors and supervisors. Overall, general logins will give more access than what Sierra currently gives, such as reports. OWLS will still run reports, but staff will have those permissions too.

Reminder: the implementation of CARL will happen over the weekend of August 14th-16th. There will be no ILS on the 15th, so libraries typically open on Saturdays can still be open, but with no ILS. August 8th is when OWLS will be sending the bib records, so August 7th is

the last day to access bibs for any changes. Items can still be added, but changes can't be made. August 14th is the last day to do anything else in the ILS before it goes dark. Everything will be back up on August 17th. This includes InfoSoup. All of this has been posted in the Patron Communication Plan.

There is no limit for licenses for CARL X Client installations. Libraries can install it anywhere they'd like but it won't work unless it's connected to the network.

New barcode scanners: There hasn't been any discussion on the system side for purchasing new barcode scanners to allow for scanning virtual library cards that patrons access through the mobile version of the PAC. Libraries can purchase new barcode scanners if they'd like; they should just be a "plug and play" with no additional set up required. RFID pads, however, would need SIP2 setup. Some mentioned that BayScan is a reliable scanner for digital barcodes. Also, OWLS rarely, if ever, gets questions on scanners for troubleshooting, so at this point OWLS is fairly confident that any scanner libraries purchase should work. Libraries now, can try and test their scanners with CARL for confirmation on that. Appleton added that they haven't had any issues with scanning Apple or Android devices.

Printers: TLC is working on spine label development for OWLS because we have very customized labels. They are working on hard coding to add prefixes and suffixes based on branch and location code. OWLS had the ability to create templates in Sierra for libraries that was fussy and required an external program to do so. A big mapping project is underway that Bradley and Liz are working on for TLC. From the library perspective, there will be no difference. It won't be as flexible as what we had but will be as close as it can get. Possibly a few years down the road this can become part of the customer development projects. Library names will still be on the labels but might not look the same. It may be a shorter version of the name with no website. If template coding is not complete by go live, libraries can enter extra information in the call number field and then delete it, but spine labels will be available to print.

Patron Purge: There was interest in an additional patron purge before the migration. Although, OWLS doesn't typically do more than one purge a year, OWLS can certainly do one before migration. Libraries have been working on clearing old fines and it would be nice to purge many of those accounts. Molly will work on a purge and send out reports to those libraries who have manual blocks and then a list of those who's been purged to those libraries who want them.

Waiving Fines/Bills: Waiving fines from other libraries was an agreed upon decision. Libraries can accept payment for fines even if they are from another library, so this means they can be waived as well. Bills need to be paid to the owning library. Libraries should still contact the owning library before waiving any bills. Steve mentioned that at KIM-LIT, bills for juveniles are waived once they turn 16 to allow them to start fresh if they own the item(s) locally. Almost everything pertaining to bills is local decision.

Collections: Currently, only those libraries who have contacted Molly have been using collections again. Templates are still set to a \$9,999.99 threshold; no one is being sent unless you specifically asked Molly to change the threshold. Let her know if you want to start back up again and she will update your template and contact Teri Lynn at UMS.

Online Registration: Expiration dates had been set to July 20th, but OWLS has since then extended those to September 1st.

Digital Signatures: Steve asked if libraries were not collecting a digital signature at registration. It seemed split for those collecting and those not. This is a local decision to make. It does make it easier for some so they don't need to keep paper copy registration cards.

Parent Responsibility for Juveniles: Shay wanted to know if libraries were collecting a parent signature for permission for children to use the internet. A few libraries said they don't require a permission form for juveniles to use the internet, while some do. Some libraries roll this permission into registration while others allow children to use the Internet unless a parent signs a form restricting use.

10. Adjourn – 11:20am