OWLSnet
Administrative Advisory Committee Meeting
Outagamie Waupaca Library System
(Online – GoToMeeting) February 19th, 2021

Present: Cathy Kolbeck, Algoma; Owen Anderson, Tasha Saecker, Appleton; Eva Kozerski, Black Creek; Jamie Hein, Clintonville; Rebecca Buchmann, Dawn Taylor, Shauwn Rosendale, Tina Kakuske, Door County; Stephanie Weber, Florence; Kim Meyers, Gillett; Allie Krause, Hortonville; Robyn Grove, Iola; Angela Schneider, Ashley Thiem-Menning, Kaukauna; Carol Petrina, Kewaunee; Aubrey Laux, Katherine Freund, Michelle Best, Little Chute; Nicole Lowery, Lakewood; Amy Peterson, Lena; Ellen Connor, Manawa; Jen Thiele, Marinette County; LeAnn Hopp, Marion; Ann Hunt, New London; Lori Baumgart, Tracy Vreeke, John Kronenberg, NFLS; Kristin Laufenberg, Oconto; Joan Denis, Oconto Falls; Amanda Lee, Bradley Shipps, Liz Kauth, Molly Komp, Evan Bend, Dave Bacon, Chad Glamann, Debbie White, 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 December 18th, 2020 AAC meetings.**
4. **Announcements**

   There are 2 new directors: Holly at Kimberly and Katherine at Little Chute. Welcome to them both!

   This is Eva's last AAC meeting with us. We will miss her and wish her the best of luck!

5. **CARL Updates**

   Amanda shared the top 15 CARL Customer Priorities of 2021. They are:

   1. Allow renewals for items that have holds but available copies
   2. Added patron note type that pops up for staff without blocking the patron
   3. Ability to jump from page to page rather than "next page" "previous page" only.
   4. Global Patron Update
   5. Edit multiple holds at one time - change pickup location, suspend, delete, reactivate
   6. Method for allowing any item on a BID that is checked out to a patron to fill a hold on that BID by that patron
   7. Ability to configure all receipt/hold slips (ALL!) in Connect
   8. Ability to cancel arrived holds in C.C Discovery
   9. "Renew all" option in C.C Staff
   10. More detailed message why item cannot be renewed in Discovery

11. Libraries want popups in CCS. Charge/discharge, card expired, online registration, item on holdshelf, alerts, blocks, etc.
12. Ability to override renewal limit based on security permissions
13. CARL.Connect Discovery should reflect the same alternate shelf statuses found in CARL.X. Multiple statuses in CARL.X will map to the same descriptor in CARL.Connect. (For example, hold pending, shelving delay and withdrawn all map to the same display.
14. Discovery - Allow 029 image field for book rivers
15. Ability to add Close Dates without having to stop/start

Amanda then went over features of the latest release of CARL. The updated version will be loaded to our test database February 23rd and OWLS will be start testing on the 24th.

CARLX 9.6.8 and will have the following functionality:

- Customizable hold through dates by branch, location, media and patron
- Spine label font increased from 12 pt font to 14 pt font
- Damaged items workflow – sends an item to Damaged status without filling a hold or going into transit.

CARL Connect Staff 1.6.4 will include the following:

- Damaged items functionality
    - New module in "Manage" (formerly "Lists")
    - Ability to multi-select rows
    - Ability to add note, withdraw or delete item
    - Checkin page updated to support damaged item functionality
- Damaged items and checkout pages updated to address ADA/508
- Check in sounds
    - Alert plays when any lightbox pops up in circulation and during check in
    - A different tone plays when items are successfully checked in
- Fill List
    - Status, status date and holds on BID columns
    - Call number is first column followed by item number and locked in place
    - Issue where sorted columns lost sort after item is found, not found, checked in, etc. has been resolved
    - Not found now called wander list
    - Withdraw and Check In buttons moved above the grid so action can be taken against multiple items

CARL Connect Discovery 3.6.2.1

- New Titles facet

- Reverse chronological order for magazine issues

Roadmap

The following development is expected to take place in 2021.

Release 1 (June 30, 2021)

CC Staff

- Web based circ reports
- Close checkout gaps: patron account alerts (blocks, expiration delinquencies, etc.)
- User information updates, user overview interactions (go lost, claims returned, claims never had)

CARLX

- Allow renewal as long as there is available item to fill hold

Release 2 (December 31, 2021)

CC Staff

- Closing check in gaps: invalid vs unused barcodes, charge/discharge notes workflow, information column display
- Acquisitions

6. **Communicate about CARL moving forward**

Amanda noted that we seem to have moved past problems with CARL that require decisions from AAC. She asked for input on how to gather information on issues that still need to be addressed and how to communicate them with the libraries. Would monthly AAC meeting be a proper forum to discuss these issues?

The group felt that AAC may not be the place to discuss CARL issues but should be something the group all has access to since majority have a lot of the same issues come up. The group felt that it would be best to have weekly Q&A's in which staff can submit questions in advance, and have the meeting be recorded for those to access later or as needed.

An updated Daily/Weekly/Monthly Reports page was requested with links to the updated documentation so all libraries are on the same page as to what they should be doing for reports.

The OWLSnet Updates email list is helpful when pertinent information comes out. Library staff will then pass these along to staff not on the list as needed. Updates will continue in this forum.

Action Items: OWLS will set up 2 weekly meetings, one in the morning and one in the afternoon, for staff to ask questions about CARL.

OWLS will update the Daily/Weekly/Monthly Reports page with the latest documentation to CARL.

OWLS will continue sending updates to OWLSnet Updates.

7. **Should Be Short Loan**

Molly sent out the first Should Be Short Loan report last week and there were some questions coming in, so it felt necessary to open it to discussion here. Sue and others are very flexible when it comes to using CARLX and wants to make sure she is getting the items labeled appropriately.

Kelly asked who removes the message when a short loan sticker is put on an item. Molly answered that just like in Sierra, if staff are putting a short loan sticker on an item because the record indicates as such, that staff can remove the message, even if it's not their item.

Many of the group said they were using CARLX to check-in items. Those using Connect notice that it is harder to identify the short loan items, because there are no pop-ups for them. The bigger issue is having two platforms that don't fully function the same way leaving staff to go back and forth between the two or choosing the one with more information, CARLX.

Action Item: OWLS will send out an update to recommend using CARLX for check-in and check-out and will update libraries as new developments come to our attention.

8. **Other CARL Priorities**

Steph wants to know when staff will be able to pull records in like they used to in SkyRiver or will they need to continue to submit requests to cataloging and wait? Amanda said they will not be able to pull records in like they used to in Sierra, but reassured the group that we will be migrating to OCLC fairly soon. This should make the process easier, fast and more efficient since libraries will be able to go to the OCLC website, find their items, put them in a list (similar to the old WISCAT process) and system staff would then upload them. OWLS will be working with libraries to test this once it is available. This transition is expected to start next week when the data will be migrating over. After that, there will be a better idea as to how long it will take. Migration should be done in less than 3 months.

Joan asked if the patron summary tab comes up first instead of the registration tab in CARLX, since most staff need the summary more and CARLX is slow. Amanda will ask TLC if this is something they can fix or customize for us.

Volume records seem to be an issue for staff. Amanda agrees these have been confusing and tricky, so she will make note of it for future training. Bradley reminded the group that Amanda sent out an update about volume records. Staff should NOT be adding enumeration and chronology to records that don't need it or before asking cataloging because that creates item holds instead of bib holds. Items such as seasons of TV shows or books in a series are not volume records because they are on their own bib records. Staff can put the season or series number in the call number but not in the enumeration/chronology section of the record.

Ellen asked if OWLSnet can locate these records and fix them. Amanda answered that OWLS could find records that had chronology and enumeration, but wouldn't know if they were appropriately applied without looking at all of them individually. It wouldn't be an efficient process to fix them.

Bimonthly magazines should be labeled with first month listed, correct? Amanda said she's pretty sure but will double check. Tracy recalls doing it this way when she cataloged.

Ellen mentioned that MAN is seeing fewer items coming from Appleton. Tasha answered that they our working on a 3-month backlog, plus they have a new supervisor starting in Materials Management. It's going to take time to work through, but once these processes start taking shape, then they can start prioritizing them. Sue has been seeing more items coming/going from Nicolet libraries and just assumed the fill list is generating differently. Amanda agreed that the fill lists are running a bit differently in that they are filling holds in the most efficient way possible causing items to not get routed in a systematic order like Sierra did. TLC has been involved about making this a little less dynamic. Bradley added that TLC's routing pairs available items with holds quickly, but that may not be efficient in terms of transit and that's what OWLS is working towards.

Shauwn asked is anyone else has seen time discrepancies in check-out slips, specifically being off by one hour? Amanda hasn't heard this happening, but she'll look to see if there is a setting she can tweak. Elizabeth asked if Amanda does find something if she could share it with the group in an update.

Rebecca asked if it's OWLS' preference to use bulk delete over bulk withdraw since deleting items would remove circ stats? Amanda responded that it would be best to use

the Bulk Withdraw Procedure because it is more efficient; the Bulk Delete Procedure will give pop-ups for each item with fines or holds attached to it. OWLS may recommend using the Bulk Delete Procedure for magazines. There could still be fines but most likely less holds to deal with.

Elizabeth asked what the text notice history in CARLX referred to. If OWLSnet doesn't use TLC SMS or ShoutBomb, why there would be text notices in the patron history. Amanda said that this is not an actual text going to the patron, it is going to ShoutBomb. Bradley added that if the patron's phone type is set to mobile it will generate those text notices, but they go nowhere. The notice history is reliable for email notices but not text notices.

Amanda asked the group to report the time of day when there are performance and speed issues in CARL so that OWLS can report that to TLC and keep track.

9. **Adjourn**

The meeting was adjourned at 10:33 am.