

OWLSnet Administrative Advisory Committee Meeting Online via GoToMeeting - March 17, 2023

Present: Cathy Kolbeck, Algoma; Nicole Casner, Tasha Saecker, Owen Anderson, Appleton; Rachel Hitt, Black Creek; Jamie Hein, Clintonville; Rebecca Buchmann, Dominic Frandrup, Morgan Mann, Dawn Taylor, Shauwn Rosendale, Door County; Steph Weber, Florence; Melissa Krause, Ann Stearns, Fremont; Shannon Stoner, Gillett; Allie Krause, Hortonville; Robyn Grove, Iola; Ashley Thiem-Menning, Kaukauna; Carol Petrina, Kewaunee; Holly Selwitschka, Kimberly; Michelle Best, Katherine Freund, Little Chute; Amy Commers, Marinette; Le Ann Hopp, Marion; Ann Hunt, New London; John Kronenburg, Tracy Vreeke, Lori, Holly Handt, NFLS; Amy Peterson, Oconto; Rachel Pascoe, Oconto Falls; Eliza Skenandore, Oneida; Amanda Lee, Bradley Shipps, Molly Komp, John Wisneski, Kristin Laufenberg, Chad Glamann, John Wisneski, Dave Bacon, OWLS; Sue Vater Olsen, Scandinavia; Elizabeth Timmins, Seymour; Kristie Hauer, Shawano County; Shay Foxenberg; Shiocton; Jill Trochta, Suring; Eric Bailey, Waupaca; Kelly Kneisler, Weyauwega

1. Call to Order and Introductions

The meeting was called to order at 9:33 AM and Amanda went through roll call.

2. AAC Ground Rules & online meeting etiquette

3. Minutes of the January 20, 2023, AAC meeting were approved.

4. Announcements

- a. OWLS deleted Appleton's withdrawn magazines.

5. What's coming up with CARL

Ebony Pacheco-Hoos and Cindy Phillips were present and informed the group of the upcoming changes to CARL Solution. TLC made changes to their release cadence and will now have two release a year instead of 4. These will come out in the spring, around March, and the fall, around September. This gives them more time to work on bigger projects. Current projects they are working on include:

- Cognos for CARL Solution: long-term support for Cognos, refining documentation, and SQL access. Cognos will allow libraries to run custom reports and schedule reports.
- Development in process: CARL Connect Staff; this is the future and will receive most of the development, but CARL-X will not go away.
- CARL Connect Claims Returned functionality: like Go Lost but will be a jumping point for adding in functionality for claim never had, damaged, etc.; adding more info into the grid like the status of the item returned.

- CARL Connect Staff Items Redesign: For items, the page will still have the cover art but will add in the hold information (stat counts and hold counts). It will also be moved into a grid and not the collapsible view it is now; working on having less clicks for navigating.
- CARL Connect Staff Holds Management: seeing the holds queue better and management overall, such as placing holds and seeing how many holds there are and what types of holds. In CARL-X, the clearing holdshelf process will carry over to Connect Staff but with improvement. Staff will be able to move through the holdshelf with a laptop or tablet without running a report. Staff can pull up a list of their holdshelf items through the “Manage” function and be able to clear expired holds, cancel holds, mark as missing and replace holds, clear and replace, update pickup branch, extend pickup date, etc.
- CARL Connect Staff User Overview: Staff will be able to deal with holds directly within a patron account.
- Overall Development: Adding PayPal as a payment processor into CARL Connect Discovery, CARL-X SSL so no more need for a VPN tunnel, CARL APIs, additional REST APIs, https for APIs, and fixing small bugs across products.

The functionality matrix will get updated with each release and will be available for customers. The 2023 Roadmap overall and beyond includes reevaluating the current workflows such as holds in patron account, the hold queues, and batch loading in CARL Connect Staff.

Questions from the group included:

- Could you avoid a release at the start of the school year? They will consider the school year for release but no promises.
- In the end, will we be able to see the bib record in items? The intent is to allow users to see the bibs from items.
- When will we see these changes? We are about a month and a half away from the initial redesign of items and beginning of holds shelf management and claims returned. More will come in future releases.
- Will we be able to place multiple holds on a title for book club cards with less clicks? TLC has heard from training and other libraries about the multiple title holds function and are looking at how they can add this into holds management.
- What is the ETA for just one interface? Ebony reassured the group that there is no plan to take CARL-X away. There is still functionality in X for specific staff so it will stay.

- When will acquisitions be in Connect? For acquisitions, staff can currently view invoices in Connect but they cannot approve them.
- When will we be able to approve an invoice in Connect? This should be released in the Fall.
- Will there be a creation date that we can see somewhere that will remain static unlike the status date? And will it be easily exportable and viewable for reports? Currently, there is an overall creation date for items, it's just buried under a lot of clicks. TLC can look at adding the creation date to the report data file "Generic Trans Report" and "Items by Status."
- Will the holds management portion include cancelled holds on the holdshelf? Holds management will not yet include cancelling holds on the holdshelf.

Thank you to Ebony and Cindy for providing training to staff last week and taking their time to go over what's to come for CARL.

6. App Launch

Amanda addressed the group that the app is now available in the app stores. She has asked libraries to share this with staff and a limited number of patrons who they think will provide feedback. Amanda wanted to focus on a few things today:

1. Reading history is available in the app, but patrons need to have opted in using the old catalog (CARL Discovery).
2. It's very difficult to use self-check with Android devices. This is because of the cameras on the devices and the way they respond to the barcodes. There's nothing we can do about this, unfortunately.
3. She created a template for libraries that included as much information as possible and resources that are available to patrons. One of those resources is OverDrive in the E-Resources screen. Some libraries thought this should say Libby. Libraries can change this if they'd like for their library. Please let Amanda know if you have questions about making changes in the app.
4. Amanda is still waiting for Capira to link Google calendars for a few libraries. In the meantime, she's linked the Events screen to those libraries' calendar website.
5. The Tockify calendar doesn't directly link to the app to populate the Events. If libraries have a Google Calendar, we can link that. Some libraries have linked to their calendar's website.
6. Lists and shelves from BiblioCommons will not display in the app. There isn't even an option to make a list in the app.

7. Amanda can change the filters in the search function, but she can't change anything else about it. She also can't change anything about the account functions. However, she will pass along feedback to Capira.

Feedback has been positive so far and she feels we can move forward with the April 3rd full launch, unless there is a push to launch sooner. The group felt confident that we could launch on March 27th. Chad went over the marketing toolkit that is available to everyone and where to find it. There is also a link on the NFLS page with direct access to it. The toolkit includes example Facebook posts, customizable graphics through Canva, table tents, bookmarks, etc.

Kelly asked if there are ethical reasons or other reasons, why the loan history needs to be enabled? Bradley responded that, yes, having it disabled has been OWLSnet standard. We will always ask patrons to opt-in to storing reading history. This goes way back to the implementation of the library records provision of the Patriot Act.

Ann asked if we knew how many downloads there were so far. Amanda was unsure. Jamie mentioned that he had seen the OWLS calendar in their app. Amanda will check each library configuration to make sure the correct calendar is linked. Holly asked if we start using the app on April 3rd. Amanda said libraries can start publicizing on March 27th. Michelle asked if the feedback icon would stay or if it was just for testing. Amanda answered that she could leave it on for a while to see what people think. Morgan asked if there will be any short videos available to share in the marketing push? Chad answered, yes. Dave added that he just installed the app and asked if there was a way to secure the app with a PIN? Bradley responded that patrons will have to login with their PIN the first time, and they can secure their whole phone with a PIN. Bradley added that we may need to have a marketing push about the opt-in option for history, so that patrons are aware of how to do this.

7. Discuss Information Security Policy

Bradley reviewed sections of the Information Security Policy that were highlighted in yellow. The highlighted portions pertain to the libraries specifically. Bradley hopes to create an Information Security Policy for OWLSnet and to have it done by the end of the year. This would need to go through the AAC approval process but then contractually need to be followed by libraries. The policy speaks to the responsibilities of staff. Please report any policy violations to OWLS or sketchy activity you aren't sure about. OWLS relies on you to report any suspicious behavior or possible breaches. OWLS wants to revamp the procedure for cancelling an email account and the employee separation process. OWLS strongly encourages the use of strong passwords and reminds staff not to leave them laying around. Please use a password manager and multifactor authentication when you can. OWLS uses LastPass and we're not sure about others out there. OWLS pays \$580 a year for 13 staff to use LastPass. Other options could be more

affordable; it depends on what you need and what works best for you. Dominic added that Door County is looking to use Dash Lane after the hiccup LastPass experienced. No passwords were compromised in the LastPass breach. Dave believes now that LastPass understands how the unauthorized access happened, they are more secure. He is sure they have also implemented additional measures to monitor and prevent those issues in the future. Sometimes that's what it takes to provide better security.

Bradley wanted to add that our current password practices in CARL are not modern network security and not okay, so we will be changing the practice of shared logins. Not now, but it will need to happen in the near future.

Kelly asked about Windows updates. Bradley answered that libraries should not be upgrading to Windows 11 yet. They can, however, run updates as suggested. We need to make sure that the upgrade will work with all our core software.

Bradley added that staff shouldn't be using a public Wi-Fi connection for business, if they are, they should be using a VPN. Free options are available for personal use. It's important to understand that consumer VPN products are vastly different than the VPN services that OWLS has created for internal use.

This led to more discussion on Wi-Fi and best practices that carried into the next topic.

8. Discuss OWLSnet Network Connection Policy

Bradley informed the group that this policy used to be one sentence, last revised in 2009 and needed significant updating. The new policy says more about connecting to the OWLSnet network. The revised policy will be presented for approval at the May AAC meeting.

Dominic mentioned that library public Wi-Fi is unsecure for patrons and asked if we should change this. Bradley answered that if we added password protection, staff would still be posting the password on a wall. It would be better to advise patrons on the risks of using public Wi-Fi rather than giving them the illusion of more secure Wi-Fi. Dave agreed with this. Dominic asked if library staff could receive training on VPN set-up and other security on devices for best practices. Maybe for a Tech Days training. Bradley said we could do this, but it would take some time to develop. If staff are tech brave, they can do this, and OWLS will help if they'd like. Tracy added that John has been working on a cyber security check list. Lori suggested that staff not share login information with other staff, especially for sites like WordPress and Weebly. Each should have their own logins so that when one leaves, they can easily be removed. Kristin wanted to confirm that patrons could use library computers for increased network security. Bradley confirmed that using the library computers are more secure than using the Wi-Fi on their own device. Elizabeth added that her staff always move their patrons over to the public computers when they know they're working on sensitive web work.

9. WPLC Selectors

Bradley informed the group that we can create as many accounts as we need to in the InfoSoup OverDrive Marketplace. OWLS will manage the list of Marketplace accounts. Advantage selectors are those folks who can login and select materials that can fill holds for patrons in InfoSoup. Purchased titles would be paid through local funds. Please email Kristin if you would like to be an Advantage selector.

Some folks want everyone to contribute more to InfoSoup Advantage collection. We currently have a few libraries who purchase Advantage titles, but would it make a dent if everyone pitched in? Bradley said it would make a dent but how could we implement this to make it fair? Maybe adding on a 5% surcharge for OWLSnet fees? OWLS couldn't make this mandatory, but libraries could discuss with their boards and try to contribute. This would be a future discussion.

System selectors select for the statewide collection. Each system should have two, so OWLSnet may have up to 4 (2 from OWLS and 2 from NFLS). These selectors specialize in one or more content areas, receive training, and attend committee meetings. WPLC is currently searching for selectors with experience in selecting Juvenile/YA and Spanish language materials. Contact your system director if you would like to be a system selector. Currently, there are no system selectors.

Kelly said that during the pandemic in 2020, Evan set many staff up to purchase and provide support through the marketplace. Is this the same as that? Bradley answered that it is the same. Tracy added that if you did get set up with Evan to select titles, then please let OWLS know that. Kristin included that if a library wants to purchase titles but not create an account or ordering, she could help with that. You can let Kristin know the titles you want to purchase and she will place the order and invoice you. Bradley sent out an email with all the different options available for WPLC selectors and their descriptions. If anyone has follow up questions, please email Bradley.

10. Community Fiber Projects

We are aware of several community projects to bring high speed internet and fiber to underserved areas, which we whole-heartedly support. However, if your municipality switches you to their community network, you will lose access to many OWLSnet services that are provided over our wide area network, like CARL, and MyPC Management. In the short-term, you need to communicate with your community broadband project leaders that the library cannot switch. In the long-term (5+ years), we are looking at our network model and which services could be converted to cloud access. Tracy added that maybe there could be some signage added by network routers and switches saying to contact OWLS before doing anything.

Libraries may see a benefit to using community fiber to provide public Wi-Fi, especially if they can provide more bandwidth than TEACH and free up library bandwidth for staff

use. The only downside would be that OWLS won't be able to provide you with Wi-Fi usage statistics for the library annual report. Dominic let the group know that their public Wi-Fi at Door County is running parallel to the community broadband provider, which is an issue for reporting purposes.

Michelle added that she would love a sign for tech equipment but would need to know where to place them. They would be nice for all the part-time staff and change over.

Bradley said that OWLS will write something up and laminate to send out to libraries. Dave or John should know where to place them.

11. Adjourn at 11:46 AM