**May 2019 Staff Report**

**Upcoming Continuing Education**

* Support Staff and Circulation Services Conference—May 23rd
* Games in Libraries Conference—May 31st
* American Library Association (ALA) Annual Conference—June 20-25
* WiLSWorld—July 23rd

You can view upcoming webinars and continuing education opportunities at <https://newilibraries.org/>.

**Sierra/Circulation**

**Patron Purge**

* Molly ran the annual patron purge last month. If you would like a list of your patrons, please contact her at [mlawlor@owlsweb.org](mailto:mlawlor@owlsweb.org) or 920-832-6365.

**Sierra Upgrade**

* FAQ – With the recent upgrade, we’ve had some questions/concerns about certain functions. Here is what we know:
  + **Collection Agency**: The template on the backend and how Innovative wants to submit reports has changed. We had to update all templates to meet the new criteria while also keeping prior settings intact. Innovative now submits daily updated reports, which is why you have noticed an increase in emails. We are working with them to minimize these emails. Libraries have also noticed that they are getting a list of patrons who have fines prior to March 2, 2016. Innovative and Unique have reassured us that those fines are NOT getting counted towards the current $50 threshold to qualify patrons for collections. Before the update if a patron had a small fine before March 2, 2016 but accumulated a qualifying fine after that they were not sent to collections. This update and new configuration are picking up patrons that should have been sent to collections but were blocked based on that small fee before the qualifying date. As of right now, Sierra is only looking for patrons who accumulated a $50 fine in the past 365 days.
  + **Paying Fines**: Staff have noticed that sometimes when patrons try to pay at the desk, a message pops up saying, “Another payment action is pending for patron .pxxxxxxxx. Try again later. Invoice No. ….... could not be paid.” This is part of the upgrade trying to prevent duplicate payments, called Fine Locks. Most likely the patron just tried paying online themselves or their record is open in another Sierra session. The system will lock the patron’s fines for 4 hours until payments have processed. After 4 hours, if payments don’t show up in patron account, they may try again. If the patron’s record is open in another session close the record. Be sure to close patron records as soon as you are done with them to prevent occurrences like this as well as general privacy.
  + **Bulk Delete Function**: Those of you who use Bulk Delete may have noticed the button is grayed out. We aren’t sure how this happened, but somehow the permission was removed from those ‘acq’ logins and ‘delete’ logins. We are going through the list and adding that permission back in. If you need it before we get to your login, please contact [owlsnethelp@owlsweb.org](mailto:owlsnethelp@owlsweb.org).

**Delivery – New OWLS and NFLS delivery tubs are coming**

* Our current delivery tubs (Rubbermaid) are no longer being manufactured, so OWLS and NFLS have not been able to replace old damaged tubs that have been removed from service. This in turn has caused a slight supply shortage at Waltco.
* A new heavier duty delivery tub has been selected, and OWLS and NFLS have purchased 100 tubs. (50 OWLS, 50 NFLS).
* The new delivery tubs are 3X more expensive than the old Rubbermaid tubs, but we expect them to be more durable. Due to the increased cost, OWLS and NFLS will not be able to replace all the delivery tubs right away.
* Existing Rubbermaid delivery tubs that are in good shape will remain in service until they become damaged (cracked) or too worn to use.
* The new delivery tub covers securely “lock” in to one end of the tub. OWLS and NFLS will supply zip ties, which will be required to secure the other end of the cover.

**Encore/InfoSoup Update**

* With the Upgrade, when you are logged into Encore, the link to view your account page now says “My Account” rather than displaying your name. The Logout link is also more prominent. This is a good privacy update, but on public catalog stations it is not as immediately obvious who is logged in. There isn’t really anything we can do about it, but it is something to be aware of.
* We plan to have a new “Local History @ Your Library” brochure available at the AAC meeting. This is primarily intended to help promote MyHeritage, the various historic newspaper collections available, BadgerLink genealogy resources, InfoSoup libraries' contributions to Recollection Wisconsin, and the resources available in InfoSoup libraries and on their web sites.
* We currently have marketing materials available for: Libby, Audiobooks, MyHeritage, Digital Magazines, Self-publishing tools, Transparent Language, and Shoutbomb. Please let Evan or Chad know if you would like anything printed or have ideas for additional marketing material.
* We have posted a brief [Database Summary](https://www.owlsnet.org/sites/default/files/owlsnet/2019_Jan-Apr_Database_Summary.pdf) report to look at usage of the databases added in 2019 as well as the two RB Digital products that we continue to subscribe to.

**WPLC/OverDrive Update**

* It is a long story, but at the WPLC annual meeting at WAPL, it was decided that the Digital Library Steering Committee should reevaluate the recommendation not to increase the buying pool budget in 2020. Further surveying has shown that a significant majority of libraries would like to see an increase. The Steering Committee will be meeting on May 23. OWLSnet representatives on the Steering Committee are Jamie Hein (OWLS) and Tina Kakuske (NFLS). This would be a good chance share your thoughts on if and how you would like to see the buying pool increase. The Steering Committee recommendation will then go to the WPLC Board for a vote. Evan Bend (OWLS) and Tracy Vreeke (NFLS) are on the WPLC Board.

**Cataloging Update**

**NOW Cataloging Committee Meeting**

* The NOW Consortium had a meeting with library representatives from OWLSnet and WALS to talk about what the ideal catalog in NOW would look like. Everyone agreed that more information is better, and even came up with a list of information that was important, but we are still very far apart in how much the items need match the bib and who should have access to cataloging resources. We will talk more about this at AAC.
* The committee plans on meeting again to see if we can get closer or compromise on these issues and talk more about the future of NOW instead of the differences we currently practice.

**Technology Update**

**SAM Popup Messages – Too Many!**

* At a previous AAC meeting, comments were made concerning the number of pop-up messages SAM produces. It was reported that these pop-up messages are numerous enough to cause disruptions to patrons’ workflows in their SAM computer sessions.
* Dave contacted Comprise to see if it would be possible to decrease the number pop-ups. Unfortunately, there is no option or setting available to decrease the number of pop-up messages in SAM.
* One workaround is to increase the allowed duration of SAM sessions to reduce the frequency of pop-ups. For example, Kaukauna has increased SAM session time from 30 minutes per session to 3 hours per session with one additional hour if needed, for a maximum of 4 hours allowed per patron per day. That type of change would only be advisable for libraries that don’t usually have patrons waiting for computers.

**Office 365 Groups**

* We have made some configuration changes in our Office 365 account that should now allow you to create groups using your own library domain (rather than @owlsweb.org, which was the only option before). We are still working out some final details but should have a document ready by or before AAC with an overview of creating Office 365 Groups. If your library has already created a group using **@owlsweb.org** and would like to change it to your library domain, please contact Evan.

**ILS Platform Search Committee**

The ILS Platform Search Committee has created an Evaluation Matrix and begun compiling questions for vendor demos and site visits. Vendor demos will be held at the end of May/beginning of June.

* Innovative will demonstrate Polaris and Sierra on May 29th at Menasha Public Library.
* SirsiDynix will demonstrate Symphony on June 4th at Appleton Public Library.

**IUG Update**

* Amanda went to IUG May 5-8. Innovative has a new discovery layer called “Inspire” that they are rolling out. Innovative continues to focus on developing their core products and have some interesting enhancements coming that will mostly help us at OWLSnet work more efficiently. They also continue to improve security of their products and communications with their vendors. I have a lot of ideas that I hope to implement and some that will help us clean up and document our database. I hope to involve many of you in that process as I try to understand why we did things a certain way in the past and together we will decide if it is still relevant.