

## V-Cat Council Meeting Minutes

Thursday, November 4, 2021, 9:30 am.

Due to precautions concerning COVID-19 this meeting was held by remote attendance only.



### Call to Order and Announcements:

Chair J. Jochimsen (Abbotsford) called the meeting to order at 9:31 am.

### Members Present Via Go To Meeting:

J. Jochimsen (Abbotsford), D. Frandrup (Antigo), V. Calmes (Colby), L. Renel-Faledas (Crandon), E. Brewster (Three Lakes), S. Bedroske (Dorchester) leaving at 11:42 a.m., M. Handel (Medford), K. Heiting (Granton) leaving at 11:47 a.m., K. Metzke (Greenwood), T. Hall (Loyal), K. Roesler (MCPL), P. O'Connell (Minocqua), V. Roberts (Rhineland), T. Blomberg (Rib Lake), D. Kiefer (Merrill), H. O'Hare (Tomahawk), C. Lemerande (Wabeno), M. Highfill (Westboro), R. Ludvigsen (Gilman), and B. Hardin (Withee).

### Also Present:

J. Kinney (MCPL), C. Luebbe (MCPL), O. Carlson (MCPL), J. Zellers (Merrill), A. Hamland (WVLS), K. Zimmermann (WVLS), J. Klingbeil (WVLS), and R. Metzler, (WVLS)

### Absent:

F. Albrecht (Laona), C. Huston (Stetsonville), J. Ziebell (Neillsville) with T. Hall (Loyal) as a proxy, L. Petersen (Owen), and C. Soderstrom (Thorpe).

### Approval of the Agenda:

P. O'Connell (Minocqua) moved to approve the agenda; V. Roberts (Rhineland) seconded. Motion carried.

### Approval of the September Meeting Minutes:

E. Brewster (Three Lakes) moved to approve the minutes, seconded by D. Kiefer (Merrill). Motion carried.

### V-Cat Financial Report:

K. Zimmermann (WVLS) presented the V-Cat Financial Report to the Council. E. Brewster (Three Lakes) moved to approve, seconded by K. Roesler (MCPL). Motion carried.

### Bibliographic / Interface Committee:

Chair C. Luebbe (MCPL) presented for the Bibliographic / Interface Committee. The Committee met twice since the last V-Cat Council meeting.

Topics discussed:

- ILS functionally list which will be used to evaluate potential ILS vendors.
- Minimum required MARC Fields for adding non-marc alert bib records to the catalog and which fields need to be present to save.
- Aspen configuration including formats, facets, display details, item status mapping.
- Volume field in magazine item records. The Committee planned to bring a recommendation to the Council but decided to wait due to the Aspen implementation. The Committee wanted to give people guidance that will last.
  - A volume field must be present for Sierra to allow patrons to request the correct issue of the magazine. Aspen will be able to display both call number and volume.
- The Committee discussed the results of a survey libraries were asked to complete regarding preferences for adding pre-publication bib records to the system.

Pre-publication On-Order Bib Records.

Recommendation: Bibliographic and/or item records may be created after items have been ordered.

Records for books and audiobooks: up to 6 months prior to anticipated publication.

Records for all other material types: up to 3 months prior to anticipated publication.

T. Hall (Loyal) moved to approve the recommendation as written, P. O'Connell (Minocqua) seconded. Motion carried.

#### **Cooperative Circulation Committee Report:**

K. Roesler (MCPL) reported on behalf of the Committee. The Committee met most recently on October 14.

The Committee discussed several topics. First, Aspen implementation was discussed, and feedback gathered. As a result of this discussion a survey was sent out to library staff. Another topic of discussion was the ability for patrons to update their accounts in Aspen and what should be included. The Committee agreed that patrons should be able to update their email, and possibly address and phone number. The Committee also discussed linking accounts in Aspen. Accounts that are linked in Aspen are not linked in Sierra. The Committee chose not to enable linked accounts at this time and will revisit the feature at a later date. Other Aspen topics the Committee discussed were the ability to enable purchase suggestions, self-registration, and masquerade mode.

The Committee continued a discussion on patron record fields, including gender information in patron records.

Finally, the Committee reviewed ILS functionality requirements for potential ILS vendors.

#### **V-Cat Strategic Plan 2021-2023**

K. Zimmermann (WVLS) noted there was one small typo corrected but no other changes made from the Strategic Plan shared with the Council at the September 2021 meeting. No discussion.

S. Bedroske (Dorchester) moved to accept the presented plan for the next two years, seconded by D. Frandrup (Antigo). Motion carried.

#### **ILS Admin Report:**

K. Zimmermann (WVLS) presented the following:

a. Standardized Check out periods update

Three libraries left: Merrill, MCPL, and Dorchester. All libraries should be completed by beginning of December. K. Zimmermann (WVLS) expressed excitement to have every library on board and thanked the Council for coming together on this project.

b. V-Cat ILS Evaluation and Review Report

WVLS staff have been going through a system review with Innovative. Informed by the results of the staff survey, WVLS has been looking for ways to make Sierra work better for V-Cat.

The survey indicated that library staff were most dissatisfied with the Search/Holds function. Including:

- The way that staff can no longer place holds from patron account and have Sierra save the search. A workaround is possible: if placing holds in the Search/Holds function, Sierra will remember the patron information.
- Duplicate records in the search results.
- Exactness in the title search is required to receive relevant results.

The Innovative team suggested reviewing and changing the indexing rules in our set-up. R. Metzler (WVLS) and K. Zimmermann (WVLS) are skeptical that a change would improve the duplication of bib

records in the results list. There's an additional cost to the review, and Innovative could not provide WVLS staff with a best practices recommendation.

The Innovative team also suggested changing the default search to Keyword in the Search/Holds function. A recommendation was presented to the Council from the ILS Administrator to make this change.

A keyword search provides fewer duplicate records and would be more responsive to search queries that are close but not exact. E. Brewster (Three Lakes) noted that she encourages her staff to use keyword and that it may be a bit disorientating to not need to use the drop down, but they would adapt. E. Brewster (Three Lakes) asked if the change would happen in both Catalog and Search/Holds function. K. Zimmermann (WVLS) clarified that this change would only affect the Search/Holds function, the Catalog function would not be affected.

K. Zimmermann (WVLS) provided a demonstration of the results in both a title and keyword search and noted that this change is a global change. If the recommendation is passed all log ins would be affected.

K. Zimmermann (WVLS) noted that the facets displayed in search results could also be organized in a different order.

E. Brewster (Three Lakes) asked if the order of functions could be changed. K. Zimmermann (WVLS) clarified that this order is done at the log in level. If a library would like a change, send in a ticket with a current screenshot of the order and details of the requested change.

K. Roesler (MCPL) moved to approve the recommendation, seconded by D. Frandrup (Antigo). Motion carried.

#### ILS Migration Progress Report

K. Zimmermann (WVLS) has been working with the Bibliographic / Interface and Cooperative Circulation Committees to discuss and refine the functionality lists. Lists have also been sent out to focus groups and library directors. She is hoping to work with the committees on the lists at their next meetings and have a draft Request For Information document ready for potential vendors by the next V-Cat Council meeting. If Council members have suggestions of potential ILS vendors, those suggestions can be sent to K. Zimmermann (WVLS).

Milwaukee County Federated Library System is considering Symphony, Polaris and Sierra, and Carl X.

While Milwaukee County Federated Library System has decided not to choose any ILS that is open source, WVLS would consider this option.

WVLS is looking for volunteers to serve on an ILS Evaluation and Review Committee. This committee would likely have monthly meetings with the possibility of a few working meetings in between. Any library staff member is welcome. If anyone is interested in volunteering, they should send an email to K. Zimmermann (WVLS).

K. Zimmermann (WVLS) has been in discussion with Northern Waters Library System (NWLS). They are also undergoing an ILS evaluation and review process. Currently their committee is meeting bi-weekly

and working on a staff survey and functionality lists. K. Zimmermann (WVLS) and the NWLS' ILS Admin are comparing notes to see where collaboration may be possible. There is potential for joint vendor demonstrations.

#### c. Aspen Discovery Layer Report

The implementation is going well. There have been a few snags with indexing the records, but this is being worked on by the Aspen team. K. Zimmermann (WVLS) shared a preview of Aspen with the Council.

Council members were reminded about the first Aspen training that will be held on November 9.

#### Masquerade Mode Discussion

K. Zimmermann (WVLS) introduced the Council to the Masquerade Mode functionality in Aspen. She shared results of the Masquerade Mode portion of the Additional Aspen Configuration Questions survey and noted that most library staff reported they would like access to Masquerade Mode for their patrons only. Some library staff preferred access to all patrons. Two libraries indicated they preferred that no staff have access to Masquerade Mode.

A discussion about the options occurred. It was expressed that having access to all patrons would be useful for libraries that frequently assist patrons from other libraries.

Council members expressed understanding for the need for access to all patrons and agreed that it could provide better customer service.

K. Roesler (MCPL) asked why library staff would need to access customer accounts in Aspen. K. Zimmermann (WVLS) answered that staff would be able to help patrons reset their Overdrive defaults, place holds using the better search options that Aspen provides and assist patrons with their renewals. With Masquerade Mode all of this can be done without asking the patron for their pin number. This is something only staff will have access to, patrons will not be able to masquerade as someone else. It does time out and there's a button to end the masquerade session.

J. Jochimsen (Abbotsford) asked if each library can have one log in. K. Zimmermann (WVLS) answered that a shared login would be preferred when creating lists. However, there is concern about security if a staff member leaves. Masquerade Mode is accessible anywhere, not just in a library.

D. Frandrup (Antigo) asked if there are ways to track changes made to patron records in Masquerade Mode. K. Zimmermann (WVLS) indicated that WVLS staff will look for an answer to that question.

D. Frandrup (Antigo) also asked if patrons can be logged into more than one instance of their account in Aspen. K. Zimmermann (WVLS) confirmed that, yes, this is possible with Aspen.

It was clarified that Masquerade Mode is a most appropriate way of logging in on behalf of the patron in Aspen.

E. Brewster (Three Lakes) moved to recommend that libraries allow Masquerade Mode for select staff with access to all V-Cat patrons, with the understanding that a library can choose to limit that further either for their patrons or for their staff. This motion was seconded by D. Frandrup (Antigo).

T. Blomberg (Rib Lake) asked if patron reading history is visible in Masquerade Mode. K. Zimmermann (WVLS) answered that reading history will not be accessible in Masquerade Mode.

Motion carried.

d. V-Cat Training Report (ILS Administrator and ILS Support Specialist)

Marc Alert Training was held on October 20th. Eight individuals from seven libraries attended, with an additional two requesting a recording.

Create Lists Training was offered in two sessions. Eleven individuals from nine libraries attended the "Basics" session on October 20th. An additional five individuals requested a recording. On October 27th, four people from three libraries attended the second session covering more advanced searching and tools. In addition, twelve individuals requested the recording.

V-Cat Cataloging Training was held on October 27th. Six individuals from five libraries attended and an additional two requested a recording.

Aspen trainings will be offered in November and December. A full listing is available on the V-Cat Training Page. Libraries were asked to plan to have all staff who assist the public attend Aspen Patron Experience Training in December.

e. Library Card Pre-Expiration Notices Report

K. Zimmermann (WVLS) thanked E. Brewster (Three Lakes) for sharing concerns during the last meeting about all expired patrons getting notified by Shoutbomb. After investigating, it was discovered that Shoutbomb would have sent a notice to every patron with an expired card. K. Zimmermann (WVLS) is working with Shoutbomb to find a solution.

K. Zimmermann (WVLS) noted that when a patron's card is expired or near expiration there can be complications with placing holds and receiving hold notifications.

E. Brewster (Three Lakes) mentioned that in that situation she pushes out the expiration date for about 15 days. This way the patron is not expired when the hold comes in, but the expiration reminder pop-up will still remind staff to update the card. K. Zimmermann (WVLS) noted that libraries with a public hold shelf will want to place a block on the card so a self-check machine will not allow a check-out and the patron will need to go to a service desk. This way staff can renew the patron's card.

K. Zimmermann (WVLS) shared that Shoutbomb does not send a notice for a hold that is repeated for the same patron within a 40-day period. WVLS staff is working with Shoutbomb to shorten that waiting period.

K. Zimmermann (WVLS) went on to note that for some V-Cat libraries that are open three or less days a week will have a longer hold shelf time because of the way Sierra works. Sierra will keep the hold active for seven open days. This means that some holds are staying on the hold shelf for longer than one week.

The Council was asked if this length of hold shelf time is the intention of the recommendation. K. Zimmermann (WVLS) will start talking with libraries open 3 or 4 days and report back.

Additionally, J. Klingbeil (WVLS) and K. Zimmermann (WVLS) are working on pre-expiration notices by email. K. Zimmermann (WVLS) expressed a goal for enabling pre-expiration notices by email by the first half of next year. The plan is to use the language passed in the recommendation from the September 2021 meeting.

f. Other Items to Report

K. Zimmermann (WVLS) reminded Council member to run both the Bib Level and Title Level pull lists every day the library is open, and to email her if they would like lists to run automatically.

K. Zimmermann (WVLS) announced that the T. B. Scott Library in Merrill is no longer collecting gender information for patron accounts. The patron records will have a '-' in the gender field. While libraries were encouraged to discontinue the practice of collecting gender information, this is a local decision. It was noted that all other public library systems in Wisconsin using Sierra do not collect gender information.

K. Zimmermann (WVLS) mentioned she plans to present a slate of V-Cat Committee at the February meeting. Committee members need not be Council representatives. Committee members were asked to notify K. Zimmermann (WVLS) if they wanted to step down from a committee. Information was requested about committee descriptions and membership. K. Zimmermann (WVLS) indicated she would send out detailed information.

**ILS Support Specialist Report:**

R. Metzler (WVLS) presented the following:

a. V-Cat Database Maintenance

This process happens routinely during the third week of the month. R. Metzler (WVLS) reminded members that if their library an item or bib record that needs attention their cataloger will be notified.

b. Cataloging Report

R. Metzler (WVLS) reported that work continues to be done to update bib records that do not have subject headings. WVLS plans to outsource approximately 3,242 bib records that have multiple library holdings attached. R. Metzler (WVLS) estimated the cost of outsourcing for the multiple library bib records at \$2,121. She will rerun the list to be certain that all bib records get sent for outsourcing. Libraries that will be outsourcing their individual bibles include Colby, Crandon, Dorchester, Granton, Gilman, Laona, Merrill, and Thorp. The outsourcing will occur in November or early December. R. Metzler (WVLS) reminded the Council that the goal date for libraries to finish this work is November 30.

R. Metzler (WVLS) mentioned she has a goal to finish updating bib records that have had a local heading requested by the end of the year.

R. Metzler (WVLS) shared a new training document that will assist catalogers in choosing the best records from OCLC. This document will be shared on the WVLS training page and sent to catalogers/directors.

**Other Sierra Topics:**

None were shared during the meeting.

**Request for Agenda items:**

None were shared during the meeting.

**Upcoming meetings:**

V-Cat Bibliographic Control and Interface Committee Meeting Tuesday, December 7 at 10 am

V-Cat Cooperative Circulation Committee Meeting, TBD in December 2021, or January 2022

V-Cat Council Meeting Thursday, February 3, 2022, at 9:30 am

**Adjournment:**

H. O'Hare (Tomahawk) moved to adjourn, seconded by P. O'Connell (Minocqua). Motion carried. Meeting adjourned at 11:55 am.

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SUBMITTED: 11/12/2021 R. METZLER, RECORDER

DRAFT