

Shared Automation Users' Group (SASUG)

Thursday, March 22, 2018 – 9:30AM

Northville District Library | 212 W Cady St, Northville, MI 48167

Call to Order – 9:33

Andrea Dickson, SASUG Chair

Introductions

Approval of Agenda:

Motion by: Martin Smith (REDF)

Seconded by: Toni LaPorte (LVCC)

Approval of Minutes from the February 22, 2018 meeting:

Corrections suggested: None

Motion by: Joan Rogers (WATE)

Seconded by: Patty Braden (ROMS)

System Update (Anne Neville, TLN)

- Shared system help desk tickets: TLN is very busy with learning/working on the new system so non-urgent helpdesk tickets might take a little while longer than usual. Urgent tickets will be addressed as usual.
- Link to BookMine on enterprise and TLN homepage was removed. Web services communications between BookMine and workflows are having problems.
- Symphony-generated item IDs: a 14 digit schema is going to be enforced. There are 75,000 items with non 14 digit IDs because of magazines. All of these items will be converted into a format compatible with CARL in order to migrate them.

Dates to be aware of:

Freezing bib database **May 18th 6PM**: after this point you will not be able to add brief records. Also freezing serials and acquisitions at that time. We can add to items to existing bib records (link) through **May 25th at 6PM**. Access to SirsiDynix will not be available after May 25th at 6PM. System will be frozen and data extracted for migration to CARL.

Note: CARL will not take the open purchase orders (in acquisitions module) over from WorkFlows. These open purchase orders do not migrate well; attempting to migrate them will cause more problems than not.

April 1st – ability of patron to do a MeL request will go away. Existing MeL holds will be fulfilled. No new holds can be placed.

- Overdrive (and other electronic databases) will be available (not one click downloads from enterprise)
- Question: will patron holds migrate to CARL. Answer: That is the goal.
- Change of PINs: CARL requires the PIN to 4-6 numeric digits. TLN will put something on the My Account screen. If someone has a non-qualifying PIN at the time of migration then it will be the last 4 digits of the phone. If they don't have a phone then they will get 1234. They will get an email notification of this if an email is on the record. Question/comment about the security of

going to all-numeric PINs; numeric system is somewhat less secure than alpha-numeric system. This is something we can ask CARL for in the future.

Technology Services Update

None

Report from the TLN Board/Executive Comm (Paul McCann, DEXT, Ex Comm Chair)

TLN Board was presented with funding formula (to be discussed later in the meeting).

Report from Circulation Committee (Brigette Felix, TLN)

Circulation Committee met on March 8. They talked about TLN damaged policy procedures; the need to update it after the migration to include CARL language. Other discussion topics included language kit linking, partial payments at the non-owning library, locking cases, and getting bad smells out of books. Meets again in May.

Unfinished Business

1. TLN CARL X ILS Migration Update (Celia Morse, TLN Consultant)

CARL is loading our data right now. The patron and item databases are very messy. For example, there are about 40,000 patron records with no zip code. There are around 20,000 records that are missing a first or last name. We all need to talk to our staff about checking records twice to ensure they are correct. Same with linking. We need to check items as we link to make sure they are absolutely correct. We do not want to migrate incorrect or incomplete data. Another example: there are a ton of items that have decimal points that are messed up; an item has a price of 2999.00 instead of 29.99.

Directors Station Reports that can be done by library staff to help clean up the database:

- All Catalog Measures, select your library, then highlight your total collection and export it out to excel. From there you can order the data by the price column (highest to lowest) in order to see if there are any items with absurdly large prices (like a book for 9782.24) from accidental partial barcode scans. Use the same procedure, but sort by barcode, etc.
- All Users, select your library, export your patron database. Sort by various columns to see if any missing fields come up.

Training for TLN staff will be April 3 – 15 / 8 hours a day. That's a ton of information in a short amount of time so during this time TLN will be especially busy. All the libraries are signed up for the staff training classes. The larger libraries have been asked if they'd like to send a second person for circulation. After that is secured, if there are extra spots, notices will go out.

Training Notes:

- Do not show up for training on a different day/location than what you signed up for. This is hands on training with one person per computer. Do not bring extra people. There is limited space. Do not bring food/drinks into the training area (they want to keep touchscreens clean). Classes will have a 30 minute lunch with a simple sandwich tray. **Do not leave for lunch**; there is a strict time schedule.
- We will have access to the training server for the month of May but it will go away when we go live. Friday May 25th the training module will be available until 6PM. Staff training will have to

be done before we go live. Please do not create tons of fake names or items in the new live system. That is what the test system is for.

- Recommended that libraries do not add a bunch of new hardware (self checkouts, etc.) because TLN will not be able to help with it during this busy transition time. Question about signature pads: CARL is looking into it. Answer forthcoming.

Note about the new Catalog: The initial catalog will be similar (in terms of records listings) to what we have now. The CARL catalog is slightly better because it does figure popularity of an item into the item display (Enterprise does not). In July we will be getting an updated catalog that has all the formats of a title presented in a more centralized manner under an umbrella record so that items with the same title (just different formats) will appear in a more succinct manner.

We will be getting urls for new catalog for us to add to websites, etc.

We would normally do a symphony password change in March; we will not be doing it because it would be pointless this close to the transition.

New Business

1. TLN CARL X Training (Celia Morse, TLN Consultant)

An outline of trainings methodology suggestions was passed out (Celia to email also). Easiest way to start training would be to arrange a cart of about 60 items that do not circulate very much. Create a stack of library cards that have a similar name such as a last name of "Test" or a last name of "Commerce", etc. If you have any ideas in addition to the outline that you think would be useful for the group; post it to the SASUsers list. Or you can send it to Celia and she can post for you. The list will be distributed to circulation and SASUsers and CARL migration page.

The client software will be available for libraries to install in May. It will probably be available in a variety of methods (for installation) such as CD, download via web, flashdrive, etc.

Discussion of how libraries will staff the circulation desk while training is going on: Extra staff most likely needed to come in while training is going on. Some libraries will do training for larger groups during closed hours.

There will be no send item list / holds list on the first live date. We also might want to be prepared to not worry about the delivery, etc., until staff members get the training figured out.

2. Billing Formula (Paul McCann, Ex Comm Chair)

Spreadsheet distributed. Two reasons to change billing formula. New system does not charge based on per terminal charge and that's what makes up 25% of the current bill. With that going away we needed to find a new method to equitably divide the cost. Celia made contact with many other library systems to see how other coops deal with formulas for this cost sharing. There was not one uniform method. Celia created a survey for all SAS directors to provide input on what factors are important to them. There was an even split in the responses that base cost should be around 75 or below 75%. Factors also considered were circulation, number of card holders, and number of items in the database. There were 15 different spreadsheets made and examined that combined these and other factors.

Ex Comm is recommending a 65% base cost with 20% based on circulation and 15% based on number of items. This reflects how much demand that each library puts on the system and what the cost factors are that CARL bases its charges on. There was a total of about \$100,000 worth of savings but that doesn't translate to a guarantee that every library will save money. Over time it may be a little more variable than what we're used to. Offset of increased costs distributed over time for those libraries that have increases in cost. Libraries that have increases have been contacted. This formula was presented to the TLN board. The goal was to present a formula that was equitable.

For the first year the snapshot of the database stats (circulation, etc.) used to figure the formula will be gathered on April 30th for the previous 12 months. After that the stats will be assumed to be fairly stable unless there was some kind of catastrophic event that would alter the library's stats. Year to year data will be pretty much the same. Note: Item count does not include magazines in item totals.

It is not a voting issue on this agenda because there needs to be enough time for directors to review and respond to the budget. May 17th will be the date that it gets added to the agenda as voting issue. TLN will move forward with their budget assuming that this will be approved.
First billing and due date: October 30

Adjournment

Motion by: Toni LaPorte (LVCC)
Seconded by: Holly Teasdale (Lyon)

Next Meeting

Special Date – May 17, 2018 / 9:30AM

Commerce Township Library | 180 E. Commerce Street, Commerce Township, MI 48382

Attendees:

Toni LaPorte (LVCC)
Holly Teasdale (LYON)
Paul McCann (DEXT)
Celia Morse (TLN)
Martin Smith (REDF)
Sandy Ruhmann (ALPK)
Patty Braden (ROMS)
Vanessa Verdun-Morris (TAYL)
Connie Jo Ozinga (COMM)
Becky Willemsen (MDHT)
Michelle Wlock (BELL)
Jude Halloran (HIGH)
Suzanne Street (TREN)
Anne Hage (HTWD)
Judy McIntosh (NORT)
Wendy Mutch (NORT)
Joan Rogers (WATE)

Ed Rutkowski (BRIT)
Barb Keresztury (SOGT)
Adrienne Breznau (ROAK)
Glenn Fischer (HART)
Brigette Felix (TLN)
Anne Neville (TLN)
Alyson Lobert (WALL)
Luke Ervin (SLYN)
Michael McEvoy (NORT)
Kimberly Schaaf (SPRI)
Andrea Dickson (WIXM)

Remote Attendees:

Jenni Gannod (CLAW)
Karen Schiller (SLYN)
Laura Gramlich (WYDT)
Maryann Zurmuehlen (NOVI)

Steve McGladdery (WAYN)
Jacqueline Seimer (OXFD)
Emily Good (DBHT)
Ed Burns (FERN)