Shared Automation Users' Group (SASUG)
Thursday, May 17, 2018 – 9:30AM
Commerce Township Library | 180 E. Commerce Rd. Commerce, MI 48382

Call to Order: 9:31AM
Introductions

Approval of Agenda
Motion By: Becky Willemsen (MDHT)
Seconded By: Holly Teasdle (LYON)

Aproval of Minutes from March 22 Meeting
Motion By: Joan Rogers (WATE)
Seconded By: Holly Teasdle (LYON)

System Update (Anne Neville, TLN)
No written system update. Couple of reminders:
-Directors station will be available through June at least; possibly through the summer but the data will not be updated after the final conversion to CARL.
-May 18 after business day, Bib data extraction will come out and CARL will load them over the weekend. We will not be able to add records and brief title access will not be available. Acquisitions will not be available. Cannot make corrections to catalog records, combine records, etc. You can add items through May 25th if the record already exists.
-All access to the test server will be revoked at the end of business day May 25.

Technology Services Update (Angie Michelini, TLN)
No update.

Report from the TLN Board (Paul McCann, Ex Comm Chair)
-Approved the purchase of a photo copier.

Report from the Executive Committee (Paul McCann, Ex Comm Chair)
-Discussion on returning capital reserve money to BRND. Calculations were made on what that figure would be using spreadsheets.
-Power outage at TLN after the high winds was discussed in relation to different options to maintain power to computer equipment (system servers) through such an event.   Obtaining a generator was discussed but given that it is a leased building, it would be very expensive to relocate it if TLN ever relocated. Battery backup was discussed as the current situation did account for a controlled shutdown of the system. Portable generators will be discussed. Battery backup replacements are being looked at. Cloud service is being discussed.
-Discussion on CARL.

Report from the Circulation Committee (Brigette Felix, TLN)
How do different libraries handle patron files. Meeting locations for next year. Discussion of return mailers and change of address forms. Limiting a patron to one library card in the shared system. Will meet in September.

Unfinished Business:

    1. **TLC CARLx ILS Migration Update (Celia Morse, TLN Consultant and Anne Neville, TLN)**

All info will be on the CARL page.

MeLcat: New target date for MelCat is possibly September 5th.

MeLcat Users: Cannot exist in CARL. On May 25th these user IDs will change to a barcode number. There will be a list of what the barcode numbers are designated for each library or you can search CARL.

Unique Management (collection agency): CARL needs to do some development in order for each library to have different dollar policies. All participating libraries (about half the shared system) have different thresholds and they are aiming for the end of June for this to be done. Old collection accounts will be maintained but end of June for new accounts.

Hold wrappers: (Intended for use on self service hold shelves) CARL does not have the same exact format for this. The topic is being looked into. Do not expect it to be ready for May 29th. Hold receipts are still available.

Default Price (for items): It is important that each library enter prices for each item they add. TLN has set default prices for different item types. In the event that a library does not enter a price, the default price will be used by the computer system.

Fine Notices: For overdue bills, and stuff other than lost: CARL has an institution wide setting for these notices. Patrons will be getting balance due notices by email when they owe more than 4.99. If they opt into text messages, they will get a text in addition to the email. Patrons must choose a carrier from the list when they sign up. If a patron does not see carrier we can contact TLN for the patron. Email bouncebacks will trigger a big red box on patron record that shows you need to address the bounceback. It will also auto change the email notification to phone. Everyone who has currently opted in text will need to re-opt into the text. Phone notifications have been tested, but text testing will be forthcoming.

Notes about Fields in CARL:
Item categories 1 and 2: ItemCat1 / ItemCat2 – there is no equivalent to this in CARL.
Home Library field: It is the location where the patron's card is being registered. This needs to change if a patron moves from one shared system to yours. This is the field that is tied to database usage (along with the card number prefix).
Municipality: where the patron currently pays taxes.
Branch: A patron can change their preferred branch in the patron catalog. A staff member can change a branch preference for patron if requests them to, but staff should not change this without permission from patron because it is a preference they set up themselves.
Registration library: Where the patron registered first when they first got a card. It never changes.
Additional interest:
Library patron last used.
Library that last changed record.

Tech Services Users: Note about Inprocess, damage, missing, discard cards/accounts in workflows: Leave these alone so TLN can handle these accounts properly (meaning they need to really withdraw the items on the discard card, etc.).
*If any library has changed these and assigned barcodes to them, please change them back so TLN can address them or contact TLN if you have questions or have amended these accounts in some way. Example: CARL has a status of withdrawn and TLN would like to take things on the discard card and change the status to withdrawn. Inprocess is also a status and patron will see "being acquired" in the catalog. Going forward in the CARL Connect items you have to change the status to missing, withdrawn, etc. If you need to change the status back, then you go into returns. Do not create a "DISCARD" user in CARL and check thing s out to it. They will not be withdrawn. They will sit there and junk up the database.

Questions from libraries about CARL:

Process long overdue item report: Patrons with those "see note" records in relation to long standing fines. This was not ready for the test system, but the live system will have these fines. This goes for the referral fees as well.

Location/Owning Location fields: Clarification will be forthcoming. Additions/modifications to this area can be discussed in the future.

Multipart items in the test system(subfield z items – i.e. travel books, etc.). In the test system they are not reflecting subfield z. These items are being manually handled and it is taking time, but it will be in the final system. If you can hold off on adding subfield z items until after the new system is established then that would be appreciated because every time a library adds these, TLN will have to manually enter them into the new system. The documentation that describes the process of subfield z in CARL (called chronology and enumeration) will be forthcoming.

Can we adjust font size? No

Can patrons edit their own information in catalog? They can edit all the fields, BUT if they change their address, a big red box will come up in the staff side the next time they use the library and it will require that staff verify the address. This can be changed later if we don't like this feature. Patrons cannot change the barcode numbers, so authentication for databases will not be effected by the changes a patron can make on their own.

Will the prompt come up for multipart items upon discharge? Probably not on day one. But this will eventually be there.

TLN has created (to the best of their ability) the same kinds of circ rules from sirsi in CARL. This means checkout days, limits, renewals, etc. The tests on this seem to be working in circulation. Holds map hasn't been tested as much. The goal is to be as similar as possible.

How can a patron pin be changed if nobody knows the override? Override password is the same password you use to log into the system.

What will logins be and what will permissions be? That will go out next week. Carl Connect will be same login as Carlx.
Libraries that use acquisitions: there will be a separate login that lets you do everything plus acquisitions.

Format for logins will be four letter library code then "circ" and then a password. Everyone has a different password. Passwords will change every six months (potentially). More info to come on this later.

There is no way to put a comment on a hold (currently comments print on hold receipts).

Cannot customize the item type (media code) list to only item types (media codes) your library uses. But, first letter is a hotkey so that you don't have to scroll all the way through.

Entering parent info on minor child record: Note bottom right "which address" change to sponsor. Then the secondary address changes to sponsor and you can add any other information you need to. But, this "which address" selection as will result in notices going to that address if it is left that way. So if you leave it as sponsor it will go to sponsor address. When you change it back, the sponsor info WILL stay. You can toggle it to see what is there.

Drivers License of parents for minor cards: Go to notes tab in middle and then click on notes, create standard note, select free text then put DL space and the number.

Is there a way to see the date and time an item was returned in relation to a fine? TLN is going to look into this and get back with everyone.

Receipts (formatting and specific information that's printed)? There is no good way to get receipt info out of symphony. There will be something on day one but it may be basic and not library-customized.

Fine Free Discharge? This will be looked into.

Will TLN run the holds report on May 29? No.

Note: Be generous with people on holds that aren't picked up and situations that involve notices because there will not be any notifications sent out over the holiday weekend.

Will hold suspensions carry over? In the test database it did. Note difference in suspensions- in CARL the start date is always the day you do the suspension.

Are the previous user ID being pulled over? No and CARL does not save previous user ID. If someone has an old card in hand that they want to use, you could just rescan it and amend their account.

Barcode format for cards is MOD10. If you are having trouble with cards scanning, you may want to look into that (most likely only super old cards would have trouble). If you are entering random card numbers or really old numbers to try and create example accounts in the test system and you find it isn't working, it might be because this system is very specific on what can be entered in terms of barcode size, etc.

Is there going to be a check item status in CARL? Not really. Explore the return function because it has multiple purposes.   The other option would be to scan it in item maintenance.

Brief Records: Temp records. More info to come on this.

Yearly circulation for something? There is cumulative for all time. More info will come on this.

For technology questions, ask John by either email or helpdesk ticket.

How are we getting CARLx installed on library machines? The plan is to put it on flash drive and send it out in delivery next week with directions.

Is the url for the public catalog ready? No. It is being withheld on purpose because it is extremely important that the catalog stay unaltered while this process is completed. We won't find out until 28th or so. Also, the current catalog url is controlled by sirsi dynex so we may be limited in terms of assigning a redirect. The situation will be looked into.

How do we handle a situation where self checks and sorting machines are not working on Tuesday? Then you will just have to not use those on Tuesday. Hopefully you can have staff go in on Monday afternoon to test these functions.

For information on SIP user and passwords changes contact John.

Will there be support on Monday? Yes, there will be a lot of TLN staff available on Monday.

Keep your eyes on the migration website because it is changing hourly! Information is being posted all the time.

CARL Connect Item maintenance is available.

Individual libraries will not be able to test the circulation system in CarlX on Monday. This is what TLN is doing on Monday so they can resolve any issues for Tuesday.

What time on Tuesday will CARL be available? The goal will be around 9:00AM or so. TLN will be releasing more information via email messages on SASUSERs with more details on time/procedure, etc.

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

There's no additional information to add. The information was distributed at the last meeting and via email. Question of when it will start. Answer of next TLN fiscal year October. No additional questions.
Motion:
Motion to adopt the billing formula as it was presented at the March meeting and as it is detailed in the spreadsheet that was distributed?
Motion to adopt: Bryan Cloutier (OXFD)
Seconded: Becky Willemsen (MDHT)
25 in favor (unanimous vote)
Motion passed.

New Business: None

Ajournment at 11:48AM:
Motion by: Bryan Cloutier (OXFD)
Second by: Ed Burns (FERN)

Next Meeting:
June 28, 2018 / 9:30AM
Commerce Township Library | 180 E. Commerce Rd. Commerce, MI 48382

Attendees:

Kimberly Schaaf – SPRI
Dustin Brown – COMM
Andrea Dickson – WIXM
Brigette Felix – TLN
Anne Neville – TLN
Jaema Berman – ADDL
Holly Teasdle – LYON
Carrie Ralston – WALL
Kim Sharp – WHLK
Martin Smith – REDF
Colleen Tabaka – TAYL
Celia Morse – TLN
Ed Burns – FERN
Joan Rogers – WATE
Mary Jo Suchy – BELL
Suzanne Street – TREN
Bryan Cloutier – OXFD
Samantha Downes – NORT
Judy McIntosh – NORT
Maryann Zurmuehlen – NOVI
Donna Janke – HART
Bill Wines – COMM
Jude Halloran – HIGH
Adrienne Breznau – ROAK
Trista Reno - COMM
Matt Chruch – BERK
Ed Rutkowski – BRIT
Becky Willemsen – MDHT
Don Priest – SOGT
Lor Coryell – CHEL
Paul McCAnn – DEXT

Remote Attendees:

Pam Quackenbush – LYON
Patty Braden – ROMS
Sandy Ruhmann – ALPK
Tina Hatch – MILF
Toni LaPorte – LVCC
Carolyn Smith – DHTS
Dawn Dittmar – HIGH
Jenni Gannod – CLAW
Karen Schiller – SLYN
Kathy Dimond – MANC
Laura Gramlich - WYDT