

Shared Automation Users' Group (SASUG)

Thursday, January 25, 2018

Novi Public Library | 45255 W. 10 Mile Road, Novi, MI 48375

Call to Order- 9:31

Andrea Dickson, SASUG Chair

Introductions

Approval of Agenda:

Motion by: Ed Rutkowski BRIT

Seconded by: Becky Willemsen MDHT

Approval of Minutes from the October 26, 2017 meeting:

Revisions: None

Motion by: Toni LaPorte LVCC

Seconded by: Michelle Wloch BELL

System Update (Anne Neville, TLN)

-Review of routing slips: review the meaning of the different colored slips with staff.

-Bulk ordering for MelCat: better pricing has been obtained by individual libraries instead of bulk. Any library still using bulk ordering may want to look into ordering individually for a better price.

-Short MARC catalog records (brief title records w/last activity date of never): TLN will provide each library with a list of items that fall into that short record category for the library to review. TLN can remove them globally for you, but you may want to review them first.

-No further new electronic resource integrations w/enterprise because we are leaving the system and this procedure costs money. Any new accounts for electronic resources won't show in the catalog currently but will be there with the new catalog. This applies to libraries that are new to any electronic resources. Libraries that have been subscribed to electronic resources have no change.

-Local Item 1 will not exist in the new system (a very limited number of libraries still have some items with this type) and TLN will have to eliminate these item types by reassigning these items to a new item type.

-Some libraries are assigning library cards with longer expiration dates than the normal 1-3 years (mostly staff) and that is not appropriate. TLN is going to be changing these accounts to have a 1 year expiration date.

-MelCat: No MelCat participation as of April 1st. MelCat will resume participation July 1st (pending a meeting of certain milestones). The goal is to get as many MelCat item records out of the system as possible before the migration. Renewals will be changed to no renewal in our current system closer to the transition period.

-For libraries that are on Cable internet connection: obtain a static IP address. This is necessary for CARL. Direct questions on this topic to TLN.

Technology Services Update (Angie Michelini, TLN)

No update

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

- Exec Com recommended/approved access to the old system for a time. Board approved.
- TLN training room getting new updates to facilitate upcoming CARL training. New projector equipment, lighting, computers, etc. Approved by TLN Board.
- Discussion of CARL's billing factor. CARL does not include a terminal login charge; fee schedule being assessed for shared system libraries. Findings will be presented at a future date.
- Discussion of establishing a shared system mission statement.

Report from Circulation Committee (Brigette Felix, TLN)

- Nov. Meeting: Elected secretary
- Discussion of microfilm readers
- Ways to encourage attendance at circulation meetings: efforts made to put out fliers and information.
- Damaged books/etc.
- Holds area discussion (behind the counter or in public area)
- Jan 11 meeting: Had higher attendance, talked briefly about migration information and what can/cannot be discussed due to nonshared system libraries in attendance. Celia was guest speaker.

Unfinished Business

None

New Business

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

- CARL has loaded our bib data on their server so they can review it for any problems. There have been no major issues with our records.
- Currently looking at patron data.
- Hardware has been installed at TLN.
- Currently in the design phase as well.
- Examining the circulation map.
- Beginning of March will be the second data extract.
- TLN training March/April. TLN must make sure CARL is functioning properly and make recommendations to CARL *before* library staff start training so that staff are training on the final product. Concerns / comments about staff training discussed. CARL training team will be here April 24 – 27 and May 1-4. Two different sets of training classes on various aspects of the system will be offered each day at different locations. A mobile lab and TLN will serve as training locations. There will be a total of seven circulation classes. One person from every library will attend. Very large libraries may have two. Additional training from TLN staff will be available in the weeks following. There will be a test server to learn on. Already there are some training videos up on the TLN website. Go to Shared system page on TLN site, under CARL migration. Mobile locations so far will be on April 24-26 at Waterford and May 1-2 at Dexter. May 3-4 will be downriver, location TBA. We will be training on the Windows client. An email containing all the details on what topics will be on what days/times/locations will be forthcoming.
- Memorial Day weekend CARL will be loading our final data. Monday is when they will make all our connections to third party software (self-checkouts, sorters, envisionware, SAM, etc.) so staff may need to go in and check those on Monday to make sure they work. If a library is not concerned about this software working on day one of the new system then Tuesday could work. A memo detailing this information will go out.

- Patron PINs will be between one and six numbers (no more than six numbers; no letters), so any patron that currently has a long PIN (or still has changeme) will be automatically changed to last four digits of phone number.
- Overdrive should work over Memorial Day during the transition.
- Migration update by email will be forthcoming soon.

2. Notice Production Schedule (Anne Neville, TLN and Celia Morse, TLN Consultant)

- Currently TLN runs various reports to create all the patron notices and sends them various ways (phone, email, paper). This is a system-wide global setting in CARL. For example, we must all pick a single hold shelf date duration as a shared system. Other examples of global settings we need to agree on are the overdue notice schedule and courtesy notice schedule.

-Recommendations:

- Hold pick up notices: item stays on hold shelf for 7 days.
- Hold notifications will be sent first email, with failover to phone, with no more paper notifications.
- Overdue/courtesy notices:
 - a. Courtesy notices will be a three day notice (currently two) by email, then phone if no email, with ability for patrons to opt into text.
 - b. On the day something is due they will get an overdue notice (via email, phone).
 - c. Another overdue notice will be sent via email/phone at seven days late.
 - d. An item will automatically have a LOST status at 21 days. *The notices will come from the library that checked the item out (it will still follow the owning library's rules). Patron will be notified of LOST bill by email first, phone second and then paper.

Notes about notices:

If the patron wants to opt into text notices, then it will be in addition to the other methods, not in lieu of. If patron does not have email or phone, they will not get a notification.

Email bouncebacks will automatically flag the patron record so staff will easily see they have an incorrect email the next time that patron record gets brought up.

Patrons will be able to change their own email address or phone number in system.

New system messages will sound more human (not as much like a computer).

CARL does not send SMS text for overdue notices. CARL might consider changing this in the future.

Motion to accept all the recommendations: Ed Rutkowski, BRIT

Seconded: Patty Braden, ROMS

3. SAS Mission Statement (Andrea Dickson, SASUG Chair)

- There is currently no mission statement regarding the purpose of being part of the shared system. A mission statement has the potential to help guide a billing formula, global system-wide rules, etc.
- Discussion about mission statement possibly including the ideas of facilitating access and sharing.

-Discussion about whether this warrants a subcommittee or whether this is something that can be discussed as SASUG. Group agrees that a few people coming up with some options to present to SASUG at a future date will be sufficient.

4. Carl Marketing (Andrea Dickson, SASUG Chair)

A group of volunteers have been working on and discussing materials that can be used system wide for the purpose of continuity throughout the coop community.

- Bookmark that has key dates and information on it.
- Images for websites, social media, etc.
- Press release.
- Materials from Somerset County CARL transition were obtained and we can tweak it for our system. Suggestion for buttons and pens.

Adjournment

Motion by: Becky Willemsen, MDHT

Seconded by: Joan Rogers, WATE

Next Meeting

February 22, 2018 / 9:30AM

Livonia Civic Center Library

32777 5 Mile Road

Livonia, MI 48154

Attendees:

Kimberly Schaaf, SPRI	Jacqueline Selmer (remote)
Sandy Ruhmann, ALPK	Jenni Gannod, CLAW (remote)
Michelle Wlock, BELL	Karen Schiller, SLYN (remote)
Joan Rogers, WATE	Laura Gramlich, WYDT (remote)
Becky Willemsen, MDHT	Ed Rutkowski, BRIT
Donna Janke, HART	Alyson Lobert, WALL
Jude Halloran, HIGH	Suzanne Street, TREN
Andrea Dickson, WIXM	Michael McEvoy, NORT
Patty Braden, ROMS	Martin Smith, REDF
Toni LaPorte, LVCC	Adrienne Breznau, ROAK
Connie Jo Ozinga, COMM	Julie Farkas, NOVI
Teresa Natzke, FRAN	Judy McIntosh, NORT
Vannessa Verdun-Morris, TAYL	Paul McCann, DEXT
Don Priest, SOGT	Amy Rosen, WHLK
Celia Morse, TLN	
Anne Neville, TLN	
John Inman, TLN	
Brigette Felix, TLN	
Anne Hage, HTWD	
Maryann Zurmuehlen, NOVI	
Eva Saboluk, NOVI	
Ed Burns, FERN (remote)	