

Shared Automation Users' Group (SASUG)

Thursday, February 22, 2018, 9:30AM

Livonia Civic Center Library | 32777 5 Mile Road, Livonia, MI 48154

Call to Order – 9:31AM

Andrea Dickson, SASUG Chair

Introductions

Approval of Agenda:

Motion by: Lori Coryell (CHEL)

Seconded by: Connie Jo Ozinga (COMM)

Approval of Minutes from the January 25, 2018 meeting:

Corrections suggested:

Motion by: Patty Braden (ROMS)

Seconded by: Becky Willemsen (MDHT)

System Update (Anne Neville, TLN)

- Shared system supplies: (part of annual cost) There is a link on the system update handout to supplies. Order supplies via helpdesk if your library is interested.

-Calling Tree Test: 75% of libraries reported receiving the call at the bottom.

-Errors in patron records: Many records in our system currently have incorrect info (for example 20,000 have no zip code), in addition, there are item barcodes where patron barcodes should be, etc. Please review with staff the proper procedure for filling out the field.

-CARLX required numeric barcodes. TLN has a number of system barcodes (DISCARD CARD, BOOKCLUBS, ect.), and will take care of these because CARLX handles this differently. Same with items; there are a number of items that are using something other than a barcode number in the barcode field.

-TLN will be providing lists to each library of patrons and items that have an alpha characters in the barcode field (other than the TLN-issued system ones) and if they are not fixed, they will go away during the migration.

-TLN has sent a list of short record items for libraries to take care of. If your library needs one, open a helpdesk ticket.

-MeL issues are being examined related to this topic and different solutions are being explored.

Reminder: April 1st/2nd – NO MELCAT.

-Reminder on patron PINS: alpha or too-long PINS will be changed to last four digits of phone number.

Technology Services Update (Angie Michelini, TLN) No Update

Report from the TLN Board (Celia Morse, TLN Consultant)

Audit review took place and it was a clean audit. Board approved the telecommunications contract.

Also approved purchase of equipment for TLN training room/mobile lab. Due to a problem with router order, Board gave approval to move to different vendor.

Report from the Executive Committee (Paul McCann, DEXT, Ex Comm Chair)

-Discussion of INKS library closure due to the flooding; meeting had good attendance (especially by libraries neighboring Inkster). Jim Pletz after meeting issued list of what Inkster will still do/what TLN

will do. For example, Inkster will still pay TLN consortia costs. Two days a week TLN will pick up books at Inkster and TLN will forward loaned books back to owning libraries. Neighboring libraries will issue temp cards to Inkster patrons. Inkster library is in negotiations of a temp lease at a different location. Everyone is doing the best they can with the situation.

-CARL funding cost balance: The goal is finding a stable and fair funding formula. Resolution will hopefully be reached at the March/April meeting. Approved purchase of training room at TLN/mobile lab.

-CARL is going to offer a loan history retention opt-in program for patrons. It will contain a five year history of patron's checkouts. This would not be automatically enabled; patrons would have to enable it themselves.

-Marketing materials approved (for CARLX migration).

Report from Circulation Committee (Brigette Felix, TLN)

Unfinished Business

1. CARL Marketing Materials (Andrea Dickson, SASUG Chair):

-Approval for \$5000 for printing materials/promo items for libraries to use as a way to let patrons know about the system switch.

-Discussion of whether we want to have all libraries print their own bookmarks or have them printed then distribute. Also, do we want the word CARL on any of the marketing materials? Some libraries do want some kind of phrase that other than "catalog" to promote the new catalog. However; the word CARL will not be anywhere in patron view, so many libraries do not want that word in the promo materials.

-The catalog is not very customizable beyond some specific library branding. Concern about patrons thinking that the catalog is the library home page (some libraries currently run into that problem). CARL does have a link from the catalog to the library home page.

-If you want to see an example of the catalog Monroe County New York is a good example because they are a consortia similar to us.

-Some of the marketing material will be turned into documents that each library can alter and put their own branding into. Watch for an email asking if your library would like to order printed bookmarks and how many your library would want. Pens will also be out soon.

New Business

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

TLN staff have been very busy with migration-related work. TLN is working out how everything is going to work with our system. Things come up every day, for example: the CARL mobile catalog will have geo-location on it, so if people have location turned on their phone, it will tell them the nearest library with the item they are looking for. TLN has had to enter the library hours for each library into our system for this to work. On a side note: every library needs to check if their hours are right on their websites. This is just one small project of many.

2. Item Type Clean-up (Celia Morse, TLN Consultant)

-Every library should be focused on cleaning the collection, weeding, cleaning up records. For example: get rid of extremely old medical or travel books. Some libraries will find that they have a listing for really old books that are not physically on the shelf. Those need to be discarded; they were probably meant to be discarded long ago but never got entered into the system as a discard.

-Linking errors: situations where the wrong item type was selected, etc. Look at the shared system page under statistics, monthly stats, select your library and look at total items by itemcat2. You will see every item type that has been used at your library; check this and see if anything surprising comes up. Those may be mistakes that need to be corrected or discarded. If these items do not get cleaned up, they will move with us to the new system. This is really important.

-There are also other ways to find these incorrect items: directors station, item search and display in workflows (then use the toolbar icon at top and limit by item type) and see what comes up, or you can go into the advanced search in Enterprise and limit by item type, or itemcat2 (age level option).

-If you have item types that only have three items, ask yourself if those can be another more common item type. See if there are any items on the discard card that are hanging on for years because of a super old fine and just get rid of it. Consider having TLN run a long-overdue report and consider getting rid of those. TLN is not going to be transferring really long overdue bills into CARL. It's not worth the time, energy and space to transfer all these super old fines.

-If you have a large amount of items linked as an outdated item type (like video), TLN can change all of those items at once if you put a helpdesk ticket in.

-Final data bibliographic extract May 11, patron end of May, date for item is TBA.

-Recommendation for libraries to have updated documentation on how to link so that staff are not making mistakes.

3. **Combined April & May Meeting** (Andrea Dickson, SASUG Chair)

No May SASUG meeting because it's the day before the migration. The April meeting is at Commerce but it is the same week as training. Do we want to do a combined meeting earlier in May? Possible May 17th date, Commerce will check availability and email will go out about this to confirm.

Adjournment – 10:47AM

Motion by: Becky Willemsen (MDHT)

Seconded by: Connie Jo Ozinga (COMM)

Next Meeting: March 22, 2018 – 9:30AM

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

Attendees:

Michael McEvoy (NORT)
Kimberly Schaaf (SPRI)
Sandy Ruhmann (ALPK)
Jude Halloran (HIGH)
Becky Willemsen (MDHT)
Ed Burns (FERN)
Michelle Wlock (BELL)
Amy Rosen (WHLK)
Anne Neville (TLN)
Donna Janke (HART)
Don Priest (SOGT)
Maryann Zurmuehlen (NOVI)
Elizabeth Alexander (LIVS)
Toni LaPorte (LVCC)

Anne Hage (HTWD)
Adrienne Breznau(ROAK)
Brigette Felix (TLN)
Celia Morse (TLN)
Martin Smith (REDF)
Patty Braden (ROMS)
Lori Coryell (CHEL)
Connie Jo Ozinga (COMM)
Colleen Tabuka (TAYL)
Andrea Dickson (WIXM)
Alyson Lobert (WALL)
Suzanne Street (TREN)
Judy McIntosh (NORT)
Joan Rogers (WATE)

Teresa Natzke (FRAN)

Remote Attendees:

Ed Rutkowski (BRIT)
Edmond Richardson (AUBN, PONT)
Holly Teasdale (LYON)
Jacqueline Seimer (OXFD)
Jan Waun (AUBN)
Jenni Gannod (CLAW)
Karen Schiller (SLYN)
Laura Gramlich (WYDT)
Nicole Kessler (LIPK)
Paul McCann (DEXT)