Migration Update   January 29, 2018

The migration is moving forward on schedule. CARL staff have finished loading our bibliographic database onto their servers, and out of nearly a million records only one was kicked out with errors, so we have a clean database. The servers have been installed in the server room here, and CARL staff were here last week to make the connections to their Denver office and install the operating system.   TLN staff have daily calls with CARL staff to understand how our new system will work so the staff here can fill out workbooks with all of our policy decisions.

To the extent possible, we are trying to move all of our existing policies to CARL, but we recently learned that the length of time items remain on the hold shelf and the notice production schedule must be standardized among all of our libraries. SASUG had an extensive discussion on Thursday and unanimously approved the following standard policies: Items on hold for patrons will be held for seven days, and the pickup notice will be sent via email. If the email fails or if the patron has no email address, the automated phone notification system will be used. Libraries can continue to call locally, but patrons will also receive an automated phone call if no email address is available. Patrons can choose to opt in for SMS text notifications through the online catalog, and the SMS text message will be sent in addition to the email or phone message. Courtesy notices will be sent three days before items are due via email or phone, and patrons can opt in to receive SMS text in addition to the other notification methods. The first overdue notice will be sent the day the item is due and a second notice will be sent when the item is seven days overdue. SMS text is not available for overdue notices at this time. The notices will be sent via email if available with a failover to automated phone messaging. Items will become assumed lost at 21 days and patrons will receive the bill via email with a failover to automated phone messaging, and if the phone call fails, a paper bill will be generated.

We have also learned that the CARL Connect catalog requires the patron to have a numeric pin of up to six characters. Currently some patrons have pins that include letters and there are even some that are still using CHANGEME as their pins. As part of the data conversion, any pin containing letters will be converted to the last four numbers of the patron's primary phone number. Patrons whose pins are affected will also receive an email recommending that they change their pin before the migration, and information will be posted in "My Account" in the Enterprise catalog.

I will send separate emails with training and MelCat information so this does not become too lengthy. I am available to meet with library staff and library boards to provide an update on the migration and answer any questions. Please contact me if you are interested.

Please contact me if you have any questions.

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