

Migration to CARL
Frequently Asked Questions

2/16/2018

Why are we leaving SirsiDynix?

The shared system libraries decided to issue an RFP for a new system for the following reasons:

- Concerns about the public interface, including searching problems and lack of responsive design for mobile devices
- Concerns about the inability to meet development targets
- High annual maintenance costs

Why was CARL chosen?

- Intuitive public interface
- Better online catalog search results
- Future development plans
- More compatible corporate culture
- Cost savings

Will my library be billed for migration costs?

No. The Capital Reserve Fund was created to fund major equipment purchases and to pay for a new system. The fund balance is more than enough to pay for the system purchase and migration.

Will my library have to purchase new equipment or rebarcode?

No. Any equipment that works with our current system will work with the new system. The barcodes we use now are industry standard and will work with the new system.

What is the timeline?

We have not finalized the calendar with the CARL staff but here is the tentative timeline:

- November 15—Project kickoff
- December 1—First test data extract sent to CARL
- January-February—TLN staff fills out workbooks defining library policies for CARL
- January—Equipment installed
- March 1—Second test data extract sent to CARL to be loaded on our test server
- Early April—TLN staff training
- April-May—Local library training
- May 26-28—Final migration of transaction file. **NO SYSTEM WILL BE AVAILABLE DURING THIS TIME PERIOD**
- May 29—Live on CARL.X

Why do we have to close over Memorial Day weekend?

CARL staff estimate that it will take three days to convert the transaction file and make all of the connections to third party products currently in use at shared system libraries, including but not limited to SAM, Envisioware, Overdrive, Hoopla, and Zinio. The final data conversion will begin at the end of business on Friday May 25 and continue on Saturday, Sunday, and Monday. They do not recommend that libraries use a backup system and then try to upload the transactions at the start of our first day live on the new system in case there are unexpected problems. We believe it will be best to follow their recommendation, so no system will be available during that three day period.

No shared system library is scheduled to be open on Sunday or Monday, and only about half of the libraries were scheduled to be open on Saturday. We recommend that libraries close for the day but we recognize that this is an individual decision. Libraries can choose to be open for all services other than circulation and use the day to highlight other offerings including downloadable collections like Overdrive and Hoopla, public computers and

wireless internet access, reference services, and programs. Libraries could also use the day for staff training and close to the public.

Will MelCat borrowing be suspended during the transition?

Yes. We will suspend MelCat borrowing and lending on April 1 and we hope to resume service in early July.

Will any library services have to be suspended before the final data migration?

The bibliographic and serials databases will be frozen at the end of the day on May 11 and the data will be extracted and sent to CARL to begin loading into our new system. We are waiting to learn whether libraries will be able to add items to existing records for an additional time period. All other activity including holds placement and patron record updates can continue on SirsiDynix until the final data migration.

Will the new system be a lot different?

It will be very similar to Symphony. There will be new terminology to learn but the checkout system will still be Windows based. There are several videos posted on the CARL migration web page (<http://tln.lib.mi.us/dept/shared-automation/migration/>) that will give you an idea of what the new system will look like.

Will my annual shared system costs change?

The SAS Executive Committee is beginning to examine the billing formula. Currently the budget is divided into a base cost (75% of the total budget) and a fee for each additional user beyond the three included in the base cost (25% of the total budget). The CARL system does not limit the number of staff users so a new billing formula has to be devised.

Does this mean my library will no longer have a limited number of staff logins?

That is correct.

Will we have access to a reports module similar to Directors Station?

Libraries will have access to statistical information and will be able to create reports, but it is not a separate module like Directors Station. TLN staff will post daily and monthly statistics as quickly as possible, and TLN expects to offer reports training to library staff in the summer. The top training priority is circulation and other training classes will be offered once libraries are comfortable with using CARL for daily circulation activities.

What can my library do now to prepare for the migration?

Database cleanup is always a good idea. Weed the nonfiction collection to remove old and out of date materials (especially in subject areas like health, travel, and computers). Use the Total Items Linked by Type and Item Cat 2 shared system report to find and correct linking errors, for example item types not normally used by your library, juvenile item types placed in the adult collection, etc).

Share information with everyone on the library staff.

Ask questions.

Please contact Celia Morse (cmorse@tln.lib.mi.us) with any questions.

This document will be revised as the migration progresses.