

Shared Automation System Users' Group
Meeting of January 23, 2020
SYSTEM UPDATE

Coming Soon – Ad Hoc Reports Training

TLN is the process of finalizing the details for a class on CARL Ad-Hoc Reporting. This advanced class is aimed at library staff members that have strong Excel experience and a good working knowledge of SQL queries.

Class attendees will learn how to: install the required software for Ad-Hoc Reporting; configure Microsoft Query and Microsoft Excel to access data from the ILS Oracle Database; modify existing report templates for custom reports; make use of the Carl.X Data Dictionary for Ad-Hoc Reporting.

We plan to begin offering this new session in late February or early March. We will send something to the sasusers email list when dates have been added to the SAS Training schedule.

Calling Tree Test

A test of the calling tree procedures was performed on Thursday, December 11 at 11:00am; 100% of the libraries at the bottom of the calling tree branches reported receiving the call.

Calling Trees are our primary method for communicating system problems to you. We are all dependent upon each other for this method of communication to work. To make sure the calling tree is successful in a non-test environment, please be sure to have the most recent calling tree available to staff (It is posted on the TLN website at: <http://tln.lib.mi.us/calling-tree/>) and make sure that all staff is aware of the calling tree procedures.

Reports Reminder

Please remind staff that there are two reports in the list of reports available to you in the CARL.X client, that libraries **should not be running** themselves: Report 27 – Holds Purchase Alert by Branch; and Report 80 – Hold Expired List. CARL set up these two reports to run individually by library in the overnight processes, so staff should only be retrieving the finished report for your library, not actually running the report. We cannot prevent you from trying to run these two reports, however when staff do run them, they are not using the correct parameters as set up by CARL in the overnights. Directions for retrieving each of these finished reports are located on the Shared Automation System page on the TLN web site <https://tln.lib.mi.us/dept/shared-automation/carl/> under CARL Documentation.

Circulation System Availability

Just a reminder that TLN staff often works on the system, cycles the CARL servers, etc., in the early morning hours and this work sometimes means the circulation system is intermittently unavailable. We will complete any work so that the system is available by 8:00am.

Creativity in Patron records

Please remind staff that the fields in patron records should only be used for the intended purpose. For example, the Phone field should only include the phone number, no notation regarding “cell” or home” etc., should be in this field; the Name fields should only contain the specified part of the name (Last, First, Middle) with no added notations regarding the type of patron. When fields are used for something other than their intended purpose, this can cause problems with notices or phone notification, etc. The Note fields should be used for storing additional information about the patron.

Patrons calling TLN

Please do not tell patrons to call TLN directly. If there is some issue that TLN needs to look at, or fix, or deal with, whether it is an issue with the patron record, or something in My Account, or something else, the contact must come from the library, not the patron.