

**SHARED AUTOMATION SYSTEM USERS' GROUP**  
**MEETING OF MARCH 22, 2018**  
**SYSTEM UPDATE**

**Statistical Summary**

Circulation System Availability:	Jan: 100%	Feb: 100%
Patrons:	Feb 1 <sup>st</sup> : 459,412	Mar 1 <sup>st</sup> : 456,647
Items:	Feb 1 <sup>st</sup> : 4,103,992	Mar 1 <sup>st</sup> : 4,081,680
Bib Records:	Feb 1 <sup>st</sup> : 950,594	Mar 1 <sup>st</sup> : 948,189
24/7 Phone Renewals:	Jan: 560	Feb: 509

**Shared System Helpdesk Ticket Response**

To ensure that the migration to CARL goes as smoothly as possible, TLN shared system staff will need to focus their attention on the myriad details associated with the migration. Also, over the next 6 weeks, TLN staff will be in all day CARL training for 4 of those weeks. To that end, please be aware that this means that non-urgent shared system helpdesk tickets may wait several days before being addressed. We will continue to address shared system emergency tickets as quickly as possible, but other shared system tickets will be handled as time permits amid migration preparation.

**Migration of Symphony Auto-Generated Item IDs**

As part of the migration, the item ID length and check digit schema (14 character, codabar MOD10) will be enforced on the CARL-X system. One issue that has arisen as part of this change is the approximately 75,000 Symphony auto-generated item IDs used by many libraries. These auto-generated item IDs do not comply with any existing barcode schema but are so numerous that we will need to migrate them into the CARL system. The current auto-generated barcodes are 9-15 characters long with a dash in the middle. In order to make these items eligible to be migrated, TLN will change these item IDs to 16 characters in length by adding leading zeros to the auto generated IDs. TLN will implement the change of all auto generated item IDs to 16 character item IDs on 05/25/2018 as part of the final item extract.

**Examples:**

- An issue of the magazine Popular Photography has a current ID of 0161-7370. TLN will change this item ID to 00000000161-7370 in order to make the item ID eligible for migration.
- An issue of the magazine Entertainment Weekly has a current ID of 884766-14163001. TLN will change this item ID to 0884766-14163001 in order to make the item ID eligible for migration.
- The records for the Michigan Activity Pass items are populated with auto generated IDs to provide placeholders for the OPAC. These items will also be changed to make them eligible for migration (1791119-13001 will become 0001791119-13001).

**Important Dates to be aware of prior to the migration**

- Friday, May 18, 2018, 6:00pm – Freeze bibliographic changes in Symphony WorkFlows. This means that no bibliographic records can be added, modified, or removed beyond this date.
- Friday, May 18, 2018, 6:00pm – Freeze Acquisitions in Symphony WorkFlows. This means that no further orders can be placed through Symphony WorkFlows and no creation of new bibliographic records for orders. You will continue to be able to receive items from existing orders up until May 25, 2018.
- Friday, May 18, 2018, 6:00pm – Freeze Serials in Symphony WorkFlows. This means that you will no longer be able to create control records, check in new issues, or any other serials function.
- Friday, May 25, 2018, 6:00pm – Symphony Workflows becomes unavailable and the final data extract begins. This mean that you can continue to add items to and modify items on existing bibliographic records, place holds, do regular circulation operations, until 6:00pm on Friday, May 25, 2018.

## CARL Training Suggestions

All training must be done on the test server and test database. Libraries cannot use the live system or the production server for staff training. The test system will continue to be available for training after our go live date.

Assemble a cart of items to be discarded (or items with minimal checkouts) for staff to practice on. Be sure to include short loan items (if you have them) and examples of any materials that require special handling.

Include several patron cards. Staff will begin by adding new users to the test database, and these cards will be used to practice checkouts, holds, etc.

Begin by training at least two key staff members who will then work with the rest of the circulation staff to practice. Have staff work in groups of 2-3 with the patrons and items on the test cart.

REMINDER: There are CARL.X training videos on the Shared System Migration page on the TLN website. They can be found here:

<http://tln.lib.mi.us/dept/shared-automation/migration/>

Encourage your staff to watch them before training begins.

## Suggestions for Training

- Create a new library card (consider using a last name like “test” or “practice” so the test patrons can be quickly identified)
- Check out several items (of various types) to the new card
- Change the due date on one of the items to add three more days
- Change the due date on several items to tomorrow and leave on cart until they are several days overdue
- Add a note to a patron record
- Change a patron’s address
- Renew an expired card
- Create a manual fine on a patron record
- Place three holds on a patron card. (Use items from the cart that are already checked out.)
- Renew three items, one with no more renewals allowed
- Discharge several items, including at least one with holds and another that is overdue
- Clear the fines for the overdue items
- Discharge a damaged item and create a bill
- Accept a partial payment for overdue items/bills
- Waive a fine
- Check out items to a patron who owes fines
- Place a hold for a patron who owes fines
- Check out an item on hold to the patron who placed the hold
- Check out an item on hold being picked up by someone else for the patron who placed the hold
- Check out an item with a hold for another patron that was found on the shelf (override the hold request)
- Mark an item “missing”
- Mark an item “claims returned”
- Mark an item “never had”

Thanks to Donna Janke at Hartland Cromaïne for providing their training materials to use as a guide for this list