

**Shared Automation System Users' Group
Meeting of September 27, 2018
System Update**

Title Router List

Load balancing on the CARL.X Title Router works to distribute holds as equitably as possible between the libraries. The Router is currently run twice daily, first at approximately 3:00am and second at approximately 2:00pm.

With one of the CARL.X upgrades we received in August, new functionality was added to the Router, making it dynamic. This means that holds are added dynamically to the router as they are placed throughout the day. However, this dynamic functionality does not yet include the same load balancing parameters that the Router utility observes when it runs twice daily. Consequently, the libraries with lower numbers are dynamically being assigned a disproportionate number of hold requests in between the runs of the Router utility. CARL has indicated that the development that will allow the dynamically updated router to also load balance the hold requests is coming in a release due out in the next couple of months. Until that functionality is in place, it is our recommendation that libraries print the morning router the very first thing when staff first arrives and work on it as soon as possible (and have it completed before 2:00pm) and for those libraries that also do the afternoon router, print it about 2:10pm and work on it as soon as possible. And ignore the dynamically added items in between.

What are your thoughts on running the Router a third time every day, say at about 5:00pm, for those libraries that like would also like to do the Router in the evenings?

We also believe that the lack of Media Type and Location for some items on the Router is also related to the newly added dynamic functionality, because when the regular Router utility runs, all items on the Router do include the Media Type and Location. It seems only the items added to the router dynamically do not include this information. We are waiting for an update from CARL on this issue.

Renewal Due Dates through CARL Discovery

CARL Discovery uses a "virtual" branch for all transactions. This means that all renewals made through CARL Discovery are credited to this virtual branch, ZTLN, rather than being credited to the individual library's Discovery environment. Therefore, renewal dates that the system assigns when a patron renews items via the catalog, are going to be based on the closed dates of the virtual ZTLN branch, not on the owning library's closed dates. The only closed dates that we can assign to the virtual ZTLN branch are those dates when **all** shared system libraries are closed: New Year's Day, Easter Sunday, Sunday before Memorial Day, Memorial Day, July 4, Sunday before Labor Day, Labor Day, Thanksgiving, Christmas Eve, Christmas Day, and New Year's Eve. Staff need to be aware that when patrons renew items through the public catalog, that renewal due dates may be assigned when your library is closed.

Reusing MeLCat Barcodes

We've had a number of questions about whether you will be able to reuse the barcodes you are using for items received from MeLCat, once the item has been updated to Withdrawn. Yes, you will eventually be able to reuse these barcodes. I say eventually for a couple of reasons. First because we've had some issues using the CARL.X Delete Utility and we're working with CARL on these issues, and second, because while we will delete MeLCat items with a Status of Withdrawn on a regular basis, it will generally be on a weekly basis (as it was in the old system), not daily. So libraries should have more than just a few barcodes to use for MeLCat items.