KLAS Users' Group Meeting 2020 NLS National Virtual Conference

Wednesday, December 2, 2020

Time: 4:35 – 5:35 pm

Welcome and introduction of speakers

KLAS Users' Group Vice President Michael Lang welcomed everyone and introduced James Burts, Andrea Callicutt, and Katy Patrick.

Keystone Presentation

- **Community, Training and Events**

  KLASusers.com: This website has features like discussion forums, blog posts, and KLAS release lists. To view documents, sign up for a free account.

  KLASUsers e-list: Contact Keystone to subscribe to e-mails. There is a weekly wrap-up to highlight important news, changes, and improvements.

  KLAS Development Advisory Committee (KDAC): The members of this committee are selected to represent all segments of the KLAS Users' communities – Talking Book Libraries (small, medium, and large), Instructional Resource Centers, and special libraries/organizations. The committee meets once a month and Keystone representatives share upcoming development projects. Members provide feedback and recommendations for future development and KLAS features. You can contact a member of the committee to share something you want discussed at the meetings. You can also contact Keystone directly at ks7@klas.com.

  <u>Online and in-person training and events</u>

  When the KLAS Users' Conference changed to a biennial schedule, the Program Committee decided to offer Keystone or User-led online webinars and roundtables during the off-year. User-led programs

were either TBL or IRC focused. Since 2021 is a conference year, the committee will schedule 1 webinar per quarter.

The 2021 KLAS Users' Conference is scheduled for June 29 – July 1, 2021. Planning committees meeting on a regular basis and are committed to respond to the needs of the community during this time. They will decide about the format of the conference – either in person, virtual, or hybrid – by May 1, 2021 at the latest.

KLAS Administrator Training: The first online training was offered in October 2020. There will be another opportunity after the first of the year and it will be comprised of four afternoon sessions. Attendees are provided with exercises to complete outside of class time.

A map of current LBPH customers was shared that showed which states were hosted or self-hosted. A full list is also available. Please contact Keystone if there are questions about hosting and Keystone services. Some libraries have been moved to either an east coast or west coast Amazon server.

- **New Features**

All but three libraries are on v7.7.

Duplication is in full swing with 12 libraries and branches on Scribe and 11 libraries on Gutenberg. There are more installations coming soon on both systems. NLS and Keystone have been working together to get more systems out as soon as possible.

SHELF Project is live and fully supported on v7.7, along with a handful of improvements to get it more automated. SHELF enables libraries to share locally produced titles with each other and is particularly helpful in sharing the back catalog of books not yet on BARD. Local serials are also fully supported.

Custom text configuration is no longer over-written during KLAS updates. If changes are needed for fonts, reach out to Keystone.

Nightly Patron Service now uses "Media Circ Cutoff", so circulation limits can be set on specialized media like DVD, large print, and braille. It applies to physical media only, not duplication.

New Features - Reports

The User Login Report is a new administrator report for maintenance of user accounts

There are new patron reports to monitor patrons who are starting/resuming service and patrons who have stopped service. It was discussed in the recent webinar on reports (log in to view - https://klasusers.com/index.php/recordings/494-11-19-2020-keystone-webinar-reports). Both reports currently require batch manager program to run before the report is generated.

Circulation Report updates: Circulation Basis is now counted correctly for virtual titles and there is a new option to group stats by "whole range".

New Features - Patrons

Patron find tool updates: the ability to search by patron email, and it no longer drops criteria when scrolling past the initial entries.

Spaces are automatically removed from Patron ID and Circulation ID

Validation has been added to ensure all records have something in the Last Name field.

Batch Pat Medium Updates now creates a backup before applying the update to a whole query of patrons. This makes it possible to set everyone back to previous settings if needed. If you need to reset changes made by this tool, contact Keystone as soon as possible after using it.

Patron Main tab "Last Change of Address" field is now "Last Change of Contact". If you update an e-mail address or phone number, it will trigger an update to field.

Query tool now can search by NoteType. This is a controlled field that can be used in addition to comment subject line and makes it possible to query notes more accurately.

Sorting of Notes by date improved to include time. It will sort in correct order.

Overdue Notice now skips virtual/duplication titles. However, it will include the duplication cartridge.

New Features - Catalog

There have been bug fixes for fields that use headings.

Issues with SearchLinks have been cleaned up: titles will not continue to show up in search results for a heading that has been removed, and MARC record updates will no longer hang due to reindexing SearchLinks.

Customer Support can restore a deleted item, plus related Copy and Holding records as needed. If you have deleted an item prematurely, customer support can help.

New features - WebOPAC

The WebOPAC now redirects users to a log-in screen instead of displaying "must be logged in" error message.

There are improved set-up and config of separate OPACS for multibranch systems.

Search terms can now include a colon without causing issues, if entered.

New Features - Assorted Bug Fixes

User Group mapping will no longer be lost at upgrades.

Holding Summary Report in catalog has been corrected. There was stray data before but results are accurate now.

LUN count on Equipment main tab has been corrected. It will give correct count just for that model of equipment.

New Features - Duplication

In Front Desk book search, the Add to Service Queue function has been fixed.

A Shuffle Service queue function has been added, which is helpful to use after a Talking Book Topics order form is entered into KLAS to avoid sending too many books in one genre or subject. It randomly rearranges titles while keeping series books in order relative to each other.

A Batch Manager program has been added to Sanitize queues, removing withdrawn titles and books without eDocs. It runs on a routine basis so manual use of the function is not necessary.

BARD Load program will now remove downloaded titles from patron Service Queues

Local Titles and Local Serials are now fully supported on both systems.

Creating a Dup order from Quick Request now uses the sequence as entered. It will still be "flipped" in reverse order if the order is created from the Service Queue, since the most recently added title goes to the top of the list.

An alert now displays when assigning a physical copy to a Duplication patron. However, you are still able to send the physical copy if it was not selected in error.

The automatic cartridge inventory function has been fixed, correcting the NumCopiesOut field on PatMedium and in some reports. The cartridges are now being counted correctly.

New features - Scribe

There have been big improvements. Use of Scribes at multiple locations within a multi-branch system is now supported.

There have been improvements to Initial Titles. A leaflet format is now supported, titles selected by patron Language when possible, and it can be suppressed for single-title cartridges.

Duplication Orders can only be assigned if PatMedium is active and the patron does not have any blocks.

Scribe mail cards can now include title information for up to 8 titles, depending on mail stock.

A Scribe Help Page is now available with more information about possible error messages.

New Features - Gutenberg

Walk-in orders are now supported. There is a "Serve Now" option on Create Dup Order screens, or an existing order can be changed using the "Walk-In" button on the Orders tab. Walk-In orders get priority and go to the top of Gutenberg's order queue. The DuplicationType field displays "Walk-In".

Cartridges that are left in ASG status due to an error can be reused for new Duplication Orders

Partial checkouts are no longer possible.

New Features - PIMMS and NLS

There are new Transfer statuses for machines: TFO/Transferring Out, TFP/Transferring Out w/ Patron, TFR/Transfer Rejected, and TFA/Transfer Accepted.

Machines currently checked out to a patron will now be automatically transferred.

There are new Scheduled Reports: PIMMS Machine Exception Report (which lists machines that can't be synced with PIMMS), Rejected Machine Transfers, and Rejected Patron Transfers.

A one time report was run to provide additional readership and circulation data directly to NLS. Libraries requested that they be able to view and approve the results before it was sent to NLS. Keystone agreed and every library was given access to their report.

- **Upcoming Development**

Keystone is working on KLAS support for Single Sign-on.

There will be a function to load catalog records form a spreadsheet so they can be batch loaded to KLAS.

There will be continued duplication improvements, including Electronic Braille support, pushing WebOPAC "rush" Reserves to the top of the Service Queue, and an update of the "Completed" date stamp.

- **Questions and Discussion**

  Q: When does the Sanitize program run?

  A: Look in your batch manager. If you don't find it, send an e-mail to ks7@klas.com, Attn: Katy.

  Q: Can we have the ability of fulfilling the duplication orders of another state?

  A: Keystone has taken note of this request and are looking at future development. The current issue involves technical concerns relating to the patron name and address. They are determining how much data is passed between libraries to enable the duplication to occur. They are also looking into how status updates are managed as there could potentially be a long lag with the transferring of data.

  Q: When syncing with PIMMS, there are equipment reports with error messages/conflicts. Are we supposed to ask Data Management with assistance in interpreting errors, or Keystone?

  A: Katy's instinct at the current moment is to start with Keystone or cc: both. NLS had no comments at this time. Mike will send out a note to everyone and give guidance.

  Q: For the RUB project, everyone has different ways of inputting the ratings into local systems. NLS mentioned that they were working on updating records, but they have stopped due to staffing concerns. What is the easiest way to input besides having to open a record and change?

  A: Mitake says a new feature in KLAS will help. They are working on writing up a post. It will involve a spreadsheet and working with query sets, but they will write specific instructions.

Q: How soon will NLS put together machine repair groups to supplement repair capacity?

A: Mike will refer the question to Neal Graham and find out.

Q: How is Duplication on Demand training requested?

A: Keystone has been scheduling with staff for each library before implementation.

NLS Input on Current and Future Needs of KLAS System: Mike Martys

- **Machine Data**

  All the circulation systems interact with PIMMS - patrons and machines. They are working on getting machine data as accurate as possible and making sure PIMMS accurately reflects what appears in the circulation systems. They also need to ensure that everyone uses consistent statuses. This is important so NLS can better understand the impact of the pandemic on volunteer repair organizations across the country. NLS will be pursuing contracts with outside vendors for machine repair. However, to understand what repair services they need, they need to understand what's happening. NLS also needs to know the total number of DTBs in the entire system. They are not running out of players, but they are trying to project when it will be depleted. It is important to leverage each existing player in the system and make sure they are repaired, so the network is well positioned for future.

- **Patron Referral Source Codes**

  As part of a government directive to improve data, NLS is requiring all libraries to map their patron referral source codes to a standard set of codes, and to work toward a commonality between all libraries so they can draw conclusions. Audit recommendations are taken very seriously.

- **Digital Braille and Other Topics**

  Per a question from Mitake, BRF files are available for RSYNC to shadow the system for braille files. It is important for the eReaders to duplicate the braille files properly.

  Some of the libraries RSYNC directly from NLS, which has moved to a Google depository. They have asked those libraries to move there.

  NLS will elimitate the need for patrons to apply for BARD. It is dependent on information from PIMMS and the circulation system. When it arrives in PIMMS and knows that patron is meant to use Internet, it will tell BARD to create the account. This new process is coming next year.

  With microservices, the intention of NLS is to design them in such a way that the circulation systems can interact directly and control them. Right now, they have to wait for NLS to load BARD reports. There will be a statistics microservice: an API that can be used at any time. Multiple devices will be interacting with patrons, and all of those will funnel stats to the microservice that can be accessed right away. Logging into a website will not be necessary. NLS will make the API information and how to use them available.

Conclusion

Michael reminded everyone to e-mail ks7@klas.com if there are additional questions and thanked Keystone and NLS for the updates