

NLS Telephone Forum – 03-29-2017  
(paraphrased)

**Comment: (Richard Smith - NLS)**

Welcome. We have a nice group. We have 49 people on the line for our call this afternoon. We have a pretty full room here at NLS. We'll go around the room and introduce ourselves. My name is Richard Smith, Chief of the Network Division...

**Comment: (Library Staff - NLS)**

MaryBeth Wise, Network Consultant; Shana Osborne, Equipment Control Officer; David P., Publications and Media; Margie Goergen-Rood, Quality Assurance; Michael Martys, Automation Officer; Michael Katzmann, Chief of the Materials Development Division; Andrew Skinner, Production Control; Meredith Beckhardt, Reference Section; Vickie Collins, Network Services Section; Steve Prine, Network Division; Neil Bernstein, R&D; Kevin Watson, Equipment Repair Officer;

**Comment: (Richard Smith - NLS)**

Okay. We have a few presentations to start us off and then we'll open it up for questions. I know, the Chairs we talked with last Wednesday. In particular, they asked for a couple of people to talk about certain items. We want to get Kevin Watson up here to talk about the Battery Recycling Operations Alert that went out.

**Comment: (Kevin Watson - NLS)**

Hello everybody. I'm sure you received the announcement we sent out a little while ago. Has anybody not received that? In a nutshell, on April 1<sup>st</sup> our free service (will go to) a rather expensive paid service - \$35 for a box to return your batteries with. We've got until April 1<sup>st</sup> to order (battery cartons) that are in line with your current usage. Call2Recycle does track that usage, so you don't have to go back and count every box that you've ever received. That's pretty much it. I'm just here to answer questions today. We've already said what we've got to say (in the Operations Alert).

**Comment: (Richard Smith - NLS)**

Okay. Well, we're going to go through a few more presentations and maybe if anyone has questions, they could do that. The next person – I think, Steve? You wanted to just mention...

**Comment: (Steve Prine - NLS)**

Yeah, one of the questions that came up from the Chairs last week was the status of the budget – and it's important to define that there are multiple budgets in Washington. IMLS' budget comes from the Executive Branch of government and NLS' budget as well as the Library of Congress is in the Legislative Branch. So, while there is certainly discussion going on about budget reductions on the Executive side, not just with IMLS but in other areas, to date, we are not hearing anything from Congress regarding reductions in our budget. That doesn't mean it won't happen. There's no ongoing discussion of it at the moment – and in fact, even though the Executive Branch has been under a hiring freeze since the inauguration, that did not apply to Congress or to the Library of Congress, so we're in the process of filling a number of positions that need to be filled – happily. So, that's the quick status of the budget. I will mention one other thing: 46 libraries were authorized to send books to recall in the first six months of 2017, and if any library is looking at what they need to send in – and realizes that they don't have the time or the staff or the resources to get it in by the end of June, if you would contact me either by phone or email to let me know, we can move you to the second six months. This isn't a requirement but we realize that workloads at libraries shift and change with the seasons, and if anyone is running into that situation, we would be glad to make some accommodations for it.

**Comment: (Richard Smith - NLS)**

Someone mentioned uploading books...

**Comment: (Michael Martys - NLS)**

Yes I can probably talk to that. There were some issues with the uploading of the books. They are now back on track. There were actually two issues. One was with the upload server itself. And then the second one was the movement of the books from the upload server into BARD. There were actually two distinct problems that happened at the same time. They've both been reconciled and local book production is moving along fine right now...So if anyone is having any problems let me know.

**Comment: (Richard Smith - NLS)**

Ashley are you there? Can you open it up for questions?

**Question: (John Mugford - NM)**

...Getting back to Kevin's earlier comments – this would be Operations Alert 17-21, Call2Recycle. Could you just summarize the ramifications?

**Answer: (Kevin Watson - NLS)**

Well we're not sure what the ramifications will be right now. At this point, NLS is scrambling to figure out how to either pay for, or find alternate ways to dispose of the batteries. The general scenario is that Call2Recycle found themselves losing money on the free box shipping arrangement and had to generate income in order to maintain their existence.

**Comment: (Michael Katzmann - NLS)**

There are two sources of batteries that Call2Recycle recycles. One is consumer batteries and the other is from industrial enterprises and they class us as one of those "industrial enterprises." Now, they came to us initially to encourage us to participate in the program, which we did – and that was maybe four or five years ago. So, they are continuing the free service for consumer batteries – and this is where the Operations Alert talks about "drop off points" like Home Depot and Best Buy. They will continue and they are a particular point at which you can drop batteries off. Obviously if you come with a 40-foot trailer full of batteries, they might get upset. So if you're discreet about it, that is one of the options that the representative talked about. I don't think he was particularly keen on doing it that way... So we are looking at alternative methods of disposal... One way or another we'll come up with a solution but, at the moment – as the Operations Alert says – order sufficient cartons to see you through six months or even a year and hopefully in that time we'll have found an alternative disposal site. Or, take them to Best Buy.

**Question: (John Mugford - NM)**

So the cartons that can be ordered between now and April 1<sup>st</sup> can be used for recycling purposes, correct?

**Answer: (Michael Katzmann - NLS)**

That's right. Yes... (unintelligible)

**Question: (John Mugford - NM)**

I guess my next question is regarding labeling. There's no shortage of cartons at the moment – or is there? Has anyone had a direct experience with taking batteries to Home Depot?

**Answer: (Richard Smith - NLS)**

One of the Conference Chairs says that...they were very acceptable to receiving them.

**Question: (John Mugford - NM)**

"They" being both? Or one or the other?

**Answer: (Richard Smith - NLS)**

I forget the details. They just said they contacted...I don't know if it was Best Buy (or) Home Depot. They contacted a battery recycler and they said that they would be fine to take (batteries). I forget which Chair it was. If you have information, please join the conference call.

**Question: (John Mugford - NM)**

Okay...my general understanding...is that two sizes of label stock that are used for the purposes of – I'll call it – Duplication on Demand – they're part of the process. One being the container label, which is LA009, and the other is cartridge labels, LA011. My understanding is, the NLS supply of these labels is in the process of discontinuance. Is that correct?

**Answer: (Library Staff - NLS)**

Right.

**Question: (John Mugford - NM)**

I've only so far seen one vendor. I need to look up the name. I think Taylor is part of the name. I believe that Perkins contracts with them. There may be others. As many of us know, if a state entity is looking to acquire anything, often three quotes are required. ...Is there a short list of these types of label vendors?

**Answer: (Richard Smith - NLS)**

Not that I know of, John but if a state library (that) has a vendor would send them to me by email. I have one...in Louisville that we have used in the past – not frequently. I know North Carolina says they were approached by someone. If you send me your vendor, I'll put together a list of vendors and send them out. So please do. That's [rsmith@loc.gov](mailto:rsmith@loc.gov).

**Question: (John Mugford - NM)**

And it was pointed out to me by a staff member that the container labels are essentially the same labels that were used for cassette containers as well, so what factors are driving the discontinuance of that particular supply?

**Answer: (Vickie Collins - NLS)**

One factor is, really when we were doing labels we were suggesting that it was for replacement in small quantities and that if libraries needed larger quantities we've almost always encouraged them to purchase those individually.

**Question: (John Mugford - NM)**

And was that happening?

**Answer: (Richard Smith - NLS)**

I think (for) those that were doing their own duplication, it was.

**Question: (John Mugford - NM)**

There should be a number of programs with experience in acquiring container label stock as well as – well the digital cartridge label falls under a different category. Certainly container label stock for many years so I would think that obtaining a short list of reliable vendors wouldn't be that difficult, but it would help if it were coordinated through the National Library Service, given that for a number of years (NLS) has assumed responsibility.

**Answer: (Richard Smith - NLS)**

I know one library...that uses the Government Printing Office which...was not open to the other libraries – and I think other libraries have used their government printing sources also.

**Question: (John Mugford - NM)**

Could this be put into the form of an Operations Alert so that it could be generally shared.

**Answer: (Richard Smith - NLS)**

Yes. If I get any responses I will put it into an Operations Alert. I have the Louisville one. You're going to send me yours, right John?

**Question: (John Mugford - NM)**

Did I say I had one?

**Answer: (Richard Smith - NLS)**

Well, if you find one, send it in and I'll put a list together.

**Question: (Erica McCaleb - FL)**

Hello. My question is about the Multi State ordering. We were wondering if the Magazines and Special Media...we noticed that that's been out of stock for quite a while. Do you know if there are plans to get more of those printed?

**Answer: (David P - NLS)**

There are no plans that I know of. Let me do some research on that and I'll get a more exact answer and email it to you if I may.

**Question: (Erica McCaleb - FL)**

Okay. That would be fine. And the same question for the applications. We noticed for the past couple months that applications have been out of stock or we've gotten very low quantities. We were just wondering if that's kind of indicative of the low stock, or...

**Answer: (David P - NLS)**

Well to tell you the truth, this is the first I've heard of it so I'm glad to have heard of it. We will double-check on that. We've received no alerts to the effect that stock was low on any of these publications at your Multi State Center.

**Question: (Mike Marlin – CA9)**

Before I ask my question – in response to John Mugford – it is true that Montana, California and several other libraries did a bulk order with Taylor Communications in Illinois. I don't have my computer in front of me, but I'll send that information to Richard. It also of course begs the question of "is this the long-term NLS strategy in terms of providing cartridges for Duplication on Demand increasingly, and not supplying the labels? I'm just pointing out that there's a sort of irony in terms of – if you're going to reduce the copy allotment and transfer some of those funds over to the duplication process for local libraries, wouldn't it make sense to continue to provide labels for that effort?"

**Answer: (Michael Katzmann - NLS)**

Well, we're not reducing copy allotment quantities. Libraries still order as many copies of books as they want.

**Comment: (Mike Marlin – CA9)**

Okay. Yeah. I thought that there was a correlation between...over the next three to five years – to shift some funds from one to the other. Perhaps I'm mistaken.

**Comment: (Steve Prine - NLS)**

And Mike, we are not requiring libraries to participate in Duplication on Demand either. I think that needs to be said because we are beginning a pilot project with some WebREADS libraries, because that's the only circulation system at the moment that will interface – allow us to do it. Obviously our long-term goal is to move away from physical collections completely – beginning within 3 to 5 years, and beyond that, as long as we need to. But we do know that at the point that we have enough wireless players for everyone in the country, we're going to have a hard time justifying physical copies of books. The dichotomy there though is that we know that in every state, every reader isn't going to have wireless access. Some people are going to have to get hard copies, so that's where Duplication-on-Demand is going to really come into play down the road. Now, be that at a regional or sub-regional library or be that at a remote site, it will probably be needed to meet that.

**Comment: (Michael Katzmann - NLS)**

And we are providing labels for the Duplication on Demand, but a Duplication on Demand label is not a copy-specific label, because obviously the nature of Duplication on Demand – the content changes every time it does the circulation, so for example, for the WebREADS libraries participating in the pilot, we're providing labels for the cartridge and the only label on the container is the return address label – and the information on the cartridge will just have information about the library and not about the content on the cartridge.

**Question: (Mike Marlin – CA9)**

Good discussion. I appreciate hearing your point of view. My question however, is entirely different (laughter). My question is about recall – and Steve's comments about sending items in the first six months – and we have met our quota but still have a lot left. Does that mean that we can now send the rest of it? Or do we have to wait until the second six months?

**Question: (Steve Prine - NLS)**

You've sent in everything that you were authorized to send in in the first six months?

**Answer: (Mike Marlin – CA9)**

That is correct.

**Answer: (Steve Prine - NLS)**

Okay then. You're going to have to wait until the next six months. Yeah my comment was 'if there were libraries that hadn't sent stuff in, or given their workload and staffing levels, don't think they're going to get to it by the end of June – to let us know.

**Question: (Catherine Durivage - MN)**

Hi. I know that the KLAS User's Conference met last week and there was discussion about PIMMS. Is there any update you can give us regarding where things are with some of the address issues we are experiencing? And is there any discussion of a conduit we can use to let you guys know of problems? We are going to our consultants and I know that that is fine but it would be nice if there was a different way to resolve some of these issues because

we're getting a lot of negative feedback from patrons and family members about duplicate copies of publications and subscriptions that should have been cancelled so, I just wanted to know if there was any comment you could provide about PIMMS. We use KLAS and we're here in Minnesota.

**Answer:** (Michael Martys - NLS)

We're going to have to investigate the address issue. There is no simple answer to say "this is the problem and this is what we need to resolve it." What we'll have to do is take some of these and investigate them. Most of it has to do with the migration – when the migration was done – and some of the data issues that were injected into the system at that time. But KLAS is actually one of the circ systems that is functioning well with PIMMS – and we actually need to investigate these items. I guess the thing to do would be to talk to us directly with Data Management and resolve (the problems).

**Question:** (Catherine Durivage - MN)

So, when you say "talk to you directly" just continue to send things on to our consultant? Or is there a different avenue?

**Answer:** (Michael Martys - NLS)

Right. I may have to be involved, too, to follow up on some of these.

**Question:** (Catherine Durivage - MN)

Well, would you have any objections if we CC'd you on our emails?

**Answer:** (Michael Martys - NLS)

Not at all.

**Question:** (John Mugford - NM)

A question on magazine circulation count – which is something I don't look at very often but, I was required to do IMLS reporting for the last five years, which led me to look back at available data. Anyway, it occurred to me on the magazine circulation side, the numbers, generally speaking, have diminished by more than half. I think in the case of New Mexico it may have been closer to seventy five percent. Is magazine circulation being counted differently? Or has there been that substantial of a drop off in the last few years?

**Answer:** (Michael Katzmann - NLS)

So it sort of started around 2013. There was obviously a big drop off the first maybe, 18 months, because what was happening was that the initial data – the quality was not great, so there were a lot of patrons receiving cassette magazines, but they were either not there or had moved on and, libraries didn't realize that there was a problem because in the old system the cassettes went out and never came back, so with the cartridges, if they don't come back, the system will not send any more. I think the last year or so, there was a slight rise. It was either just about steady, or a slight rise so, that drop off seems to have leveled out. I can actually run the database and get you some real numbers going back, if you're interested.

**Question:** (John Mugford - NM)

As a practical matter, I'm not aware of any complaints from patrons but at least on paper it looks like a substantial drop off in service distribution. Is it thought that that's the new normal so to speak?

**Answer:** (Michael Martys - NLS)

It might be, John, that the earlier number was not a normal. It might be a better way to think of it, in that there was a certain percentage that would count it as circulation when it was not a legitimate circulation. The things were going out but nobody was reading them.

**Question:** (John Mugford - NM)

I see. So if four magazines go out on one cartridge, it's counted as four circulations. Right?

**Answer:** (Michael Katzmann - NLS)

I think it's actually reported both ways. We report number of cartridges and number of books. The last time I looked, the average number of books on a magazine cartridge was just over two. I think 2.3. And a big reason for that, is probably half the magazine subscriptions are for TBT only. So a big chunk has one magazine – TBT – every two months. So without TBT there would probably be about four books on a cartridge.



**Question: (Patricia Shotzbarger – PA9)**

Hi. I wonder if anyone else is having problems with audio readers only getting braille magazines. That seems to be our big problem with PIMMS. Suddenly people who have not subscribed to braille are getting (braille magazines). I've been working with Tracie at Data Management just this week. And I figured, let me try to create a magazine subscription so that I can cancel it – and I discovered that PIMMS allows you to have multiple subscriptions to the same magazine, which it shouldn't. And then when I cancel the magazine, it is not canceled.

**Answer: (Michael Martys - NLS)**

PIMMS actually does what the circulation system tells it to do. It doesn't enforce the rules per se. The reasons for the multiple subscriptions have to do with institutional accounts. There was a legitimate type of an account where having multiple subscriptions made sense. So if PIMMS has multiple subscriptions for the same account, it was basically told that by the circulation system. You guys are on CUL and I know that there are a few issues there. But when those things are identified that they're cleaned up. Also there's a reconciliation process that is built into PIMMS so that the data can be verified and corrected – and CUL has not fully implemented the reconciliation process, so some of the reconciliation might have to be done manually for the short term.

**Question: (Patricia Shotzbarger – PA9)**

Well, number one, Tracie told me that PIMMS should not allow double magazine subscriptions. That's something they were going to look into. In my CUL, I only had one subscription because I created it to try to cancel it and then yesterday I canceled a subscription while I was on the phone with Tracie and as of today, it still does not show up in her system as cancelled.

**Answer: (Michael Martys - NLS)**

We'll need to talk to Data Management about it, but the...

**Comment: (Patricia Shotzbarger – PA9)**

But we don't even know where the braille subscriptions are coming from because these aren't even braille users. In CUL we don't have any record of them having braille ever and, braille subscriptions are popping up here and there. I don't know if it's unique to Philadelphia or if other libraries are experiencing this.

**Comment: (Michael Martys - NLS)**

I'm just going to make a general comment and this is really not specific to you. We've had experience with some of the CUL systems basically putting in erroneous transactions with PIMMS. I'm not saying that that's your case, but basically what is happening is that there were some erroneous transactions that went into the system and they're causing some of the problems. PIMMS does what the circ system tells it to do. The circ systems have the ability to reconcile all the data – meaning they can verify all the data – and so the problems are turning out to be these interactions between the two systems – and CUL has a little bit more of an issue right now than any other system, and we're aware of it and, until CUL makes a few adjustments, some of these corrections will have to be done manually – and I will talk to Data Management about these sorts of things. The way we're trying to approach this is that data management is supposed to be working on these things very promptly and resolving them very quickly. In the architecture of the system, PIMMS is not a smart machine. It does what the circ systems tell it to do, and if the system tells it to do something incorrect, it will do something incorrect. It's not supposed to be a machine that makes decisions on its own... and so most of our problems are in that area. I wish I had a better answer for you, but it's a bit of a transition period right now. I can assure you that we've been expressing our desire to Data Management that they deal with this as a 'high-priority' item – and as fast as possible.

**Comment: (Steve Prine - NLS)**

If you run into more of these audio patrons getting braille magazines, send me the information.

**Comment: (Patricia Shotzbarger – PA9)**

Yeah I just talked to Tracie yesterday and we started with two. We have under 10. We have a handful and we're trying to figure out what's happening but also I had canceled somebody and it didn't come through on her end and actually yesterday when I was on the phone with her I canceled another transaction and as of this morning it still hadn't gone through to her, so I have under 10 and we're going to work our way through it.

**Comment: (Michael Martys - NLS)**

That last comment is the most concerning to me. We'll talk to Data Management about that.

**Comment: (Patricia Shotzbarger – PA9)**

Yeah I've only given her two. I have six or eight total. I gave her two because let's figure out what's wrong before we try to fix eight of them. We really seem to have a problem with braille magazines. It's not audio. But I also – before we did this – tried to go through every audio magazine patron and match up what we had in CUL with what BARD said they were giving us so I did a lot of database cleanup at this end for the audio readers. We just can't figure out where this braille is coming in and I didn't know if it was a CUL thing or if other braille libraries were having that issue.

**Comment: (Michael Martys - NLS)**

In this particular case, when you do that magazine transaction, the CUL system should immediately invoke a transaction against PIMMS and it should be visible and identifiable – and if it's not there, they should know within five minutes where the problem is.

**Comment: (Patricia Shotzbarger – PA9)**

And that's why I did it while I was on the phone with Tracie yesterday because adding the magazine went through and canceling the magazine didn't so I did it with her so she could look into the system real time at her end to see what was happening. I didn't get any notice here that something hadn't gone through.

**Comment: (Michael Martys - NLS)**

I would presume that they did not see the transaction coming out of CUL, which means it's a CUL problem.

**Comment: (Steve Prine - NLS)**

And if the patron calls you and says "I've got a braille magazine" ask them for the label. The address label. Because that would help us and Data Management track it back to where the subscription came from.

**Comment: (Richard Smith - NLS)**

5, 4, 3, 2, 1... Have a good day everyone!

No more questions or comments.