TLC (The Library Corporation)

In attendance: Donna Morris, Anne Fischer, Karen Marriott, Lloyd Lovely, Kay Bauman

TLC (The Library Corporation) presented a demonstration of their ILS product called CarlX

- John Burns – Library Automation Consultant
- Lorrie Ann Butler – Director of Product Strategy & Customer Relations
- Kristen Kokx – Product Owner
- Ebony Pacheco – Product Owner

Introduction

LS2PAC is the public access catalog and LS2Kids is the catalog for children.

The company was founded in 1974. It is a family owned and operated business that now includes 3 generations. They are headquartered in Inwood, WV and have offices in Denver, CO, White Bear Lake, MN and Singapore.

They do not have shareholders or a board of directors, which they believe helps them respond faster to customers.

They acquire libraries they are not acquired.

Bibliofile was an original product that got TLC into the library market.

Over 900 ILS implementations: 15% public libraries; 19% school libraries; 24% academic, special and other libraries.

CarlX is the ILS product they showed us. It is for large libraries.

TLC has a diversified revenue stream due to the breadth of their products.

They acquired TechLogic in 2005

Carl Corp

- Carl system was created in 1983
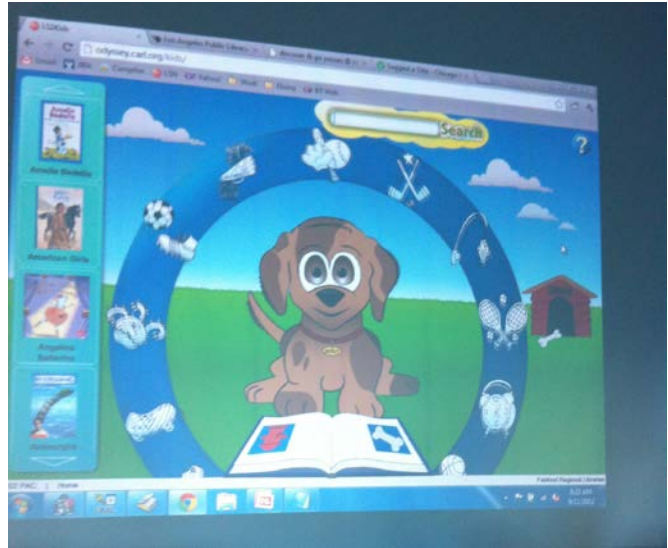- Acquired by TLC in 2000

CarlX

- Introduced in 2004
- Founded on the Carl Solution Legacy product
- New, flexible UNIX and Oracle platform

TLC (The Library Corporation)

Oracle came from Tandem. TLC has migrated 9 libraries from Tandem in the past 2 years.

LS2PAC – the online catalog

- Have access to the style sheets, branding, color, facets, texts to make them customized.
- Lucene database, which is open source, is the underpinning. The relevancy order may be changed in the results. The default is author, then title, then subject. Newer items are pushed up and the more something is searched will cause it to move up in relevance.
- Overdrive and 3M – they've just entered into an agreement with them. They are currently creating marc records with OverDrive. You will be able to download OverDrive titles directly from the catalog without having to go to the OverDrive site.
- RSS feeds can be in the catalog and can be anything on the web. Indexing RSS feed on the internet.
- Pull databases into the catalog that use open URL Z39.50 protocol. ExamplesGale, Britannica, EBSCO and Newsbank. So will not pull in all databases into the catalog.
- Novelist, Goodreads, eVance, Library Thing and Syndetic Solution, B&T Content Café (working with ChiliFresh now) are options and libraries can offer moderated book reviews.
- Allow customer tagging of content in the catalog. They do have a bad word list and customers do have to log in to write a review. Customers can rate without writing a review.
- They have advanced Boolean searching. Customers may choose the 'begin with' in the advanced search, which is the equivalent to a true browse.
- When you search for P!NK or It (by Stephen King), the search function understands what you want
- For reserves, you can "Select All" and place reserves on all at once or add all to a list
- Amazon.com supplements Syndetics so that you have even more cover art
- They also have APIs if you want to hire someone to do custom development for you.

LS2Kids is their catalog for 5-9 year olds

Suggest a title – create our form and on our web services and they moved to CARL X as an order. Will merge multiple requests for the same title and retain customer information for reserves. Will place reserves automatically when title is ordered.

eCommerce and web services

TLC (The Library Corporation)

- Customer account
- Authorize.net is who they use for payments by customers. It is either passed through TLC vendor or the one we choose. They do a monthly PCI healthcheck.
- Examples were good. Seems very text heavy and busy

Staff Side

- Kristin Kokx – product owner is a software development liaison with development and library. All products owners are librarians.
- All in one client
- Circ and Outreach functionality
- Can control security by role or individual
- Can search various fields in customer transactions
- They call the migration process 'design sessions'
- Flex grid on transactions has ability to put a default view or print Excel clipboard – no ability to email it at this time.
- Each location can customize the customer receipt
- Have an offline circulation system in case of no data communication line. It opens a very basic client and checks the server every 3 minutes.
- They can allow brief bib record for such things as uncataloged paperbacks. What you can do is create a "category" bib record for each paperback type i.e., Bib 1- adult paperbacks, Bib 2 – Romance, Bib 3 – Mystery, etc. then all of that type would be inventoried under that bib number
- It has the ability to manage a floating collection as well as a rotating collection
- Has issue/volume hold option as well as title and bib holds
- Can suspend holds for vacations, etc.
- Can develop how holds are filled for example by delivery route, etc. Has load balance and can not fill for a location that is closed for a period of time.
- Can phone, mail, text, email on holds. Also have a courtesy reminder on holds and check outs.
- Use email to text gateway for texts
- They do have cards associated
- Can have customer checkout history save by each customer; currently only done at staff side and require disclaimer be signed. This is security controlled so not all staff can see.
- SIP (Standard Interchange Protocol) – SIP fields can be used to get statistics
- Outreach – homebound, nursing homes function
- Self-check they will work with anyone

Ebony – Catalog/Acquisitions functionality

- Indexing – design sessions where library tells them what we want indexed
- Bib number created on the order for a title can stay with it when cataloged.

TLC (The Library Corporation)

- Search script in global MARC update, which can be used for record cleanup. It's a SQL like search.
- Work in Connexion or within client.
- Create templates (for example by format) and macro editors to combine frequently entered data into one stroke.
- Automatic suppression of record in PAC. Can suppress by item, bib, agency. Can suppress for a specific time period, for example, when library closed for a move.
- Validate ISBNs and UPC codes
- Authority control manual or in batch; Security control for authority work
- It is RDA ready
- Record has fields for both price and cost
- They have the option to distribute shipping and special charges among copies
- Several libraries use Peoplesoft and export
- Wellington City Library is a user.
- They've done some apps for the iPhone and Android for the OPAC
- About 55 libraries have CarlX, they'll send us an unedited list.

General Technical Notes

- You would have three servers: Web, Application, & Database server
- You can have a dual "logical" environment, i.e., live and new release both on the Product (Application) server. When you're ready to go live with a new release, you would make them both the same.
- Two levels of security for your servers:
  Application level
  System level – Unix & Database (Oracle)
- Use third party tools for queries
  Crystal Reports
  Excel
  SQL Developer
- They use the SCRUM Development Methodology (http://scrummethodology.com/)
  It is considered agile & fast; they have a new release every three months
  It brings in the "voice of the customer"
  You don't have to accept every release
  There are updates in between the releases for bugs & customer development
- They have automatic deployment of the Windows client
- Each release contains
  70% bug and new development
  10% technical improvements
  20% local customization