

## **Shared Automation System Users' Group (SASUG)**

Virtual meeting: Thursday, July 23, 2020

9:30 am

### **MINUTES**

Call to Order 9:49 am

Introductions were made in the chat box. Thank you to Garrett Hungerford (REDF) for hosting the Zoom meeting due to technical difficulties.

**Approval of Agenda – Motion by Garrett Hungerford (REDF) / Seconded by Patty Braden (ROMS)**

**Approval of June 25, 2020 Minutes – Motion by James B. Lenze (GARC) / Seconded by Paul McCann (DEXT)**

**Approval of July 9, 2020 Minutes – Motion by Toni LaPorte (LVCC) / Seconded by Jonathan Deahl (WATE)**

System Update

Anne Neville, TLN

The CARL upgrade will involve some downtime for the production server. Some features that will be added are: “same group only” filter for new items in libraries with branches, improvement to receipts on CARL Connect, partial fine payments on CARL Connect, and continuing to improve mobile with issue-level holds, saved searches and lists, and loan history. Brigitte Felix (TLN) and Anne got a demo of GoTo Training which CARL staff will be using. Hopefully an online platform will be up by the fall. There are two reports staff should not run: holds purchase alert and holds expired list. CARL runs all of these overnight so staff just need to find and transfer the one for their library. With the CARL upgrade, the fill list display will also be improved.

Report from TLN Board

Paul McCann, Ex Comm

The Board met July 16. The generator is an issue and the attorney is getting involved because there are issues with the contractor not responding at this time. Otherwise it is ready to go.

Chair Report from Ex Comm

Paul McCann

The August meeting is rescheduled for the 13<sup>th</sup> because of Director Search Committee training. The Board approved a three year contract with Overdrive. The TLC Conference for CARL users will be virtual this year. Situation review-Delivery is going well and 42 or 43 libraries are back doing shared system loaning. TLN staff are still mostly working from home. DEXT is making printing free during this time so staff don't have to handle cash. All libraries are accepting of auto-renewal now.

Unfinished business:

1. FRBR Demo

Celia Morse, TLN Consultant

Celia demonstrated the FRBR catalog. When doing a search for Pride and Prejudice on the production catalog there were 262 results in a random order. When it was searched in the test catalog, the main bibliographic record showed up second on the list but it showed all available format options. The number of editions under the format will be removed so patrons can click on the media type they want and place holds.

Minutes prepared by SASUG Secretary, Adrienne Breznau, Royal Oak Public Library

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This is more for title searching rather than author or subject searching and one-word titles still have some limitations. It works well for series but doesn't display them in order. Once we make the move to FRBR we cannot go back. Open a Help Desk ticket to report incorrect links. The data is from October. Celia can demo this for staff. Please send Celia comments and feedback.

2. Auto-Renewal Testing Update Anne Neville  
Alyson Lobert (COMM) and Anne have talked to the libraries who were hesitant about auto-renewal but now everyone is on board. Testing is underway. TLN staff emails are on the test server so patrons won't get emails for them. There are various parameters being tested and it's going well but there is no time frame yet because Anne wants to test every scenario and that takes time.
3. PDF Conversion for TLN Monthly Reports Paul McCann  
TLN statistics will continue to be posted in PDF format. Paul sent instructions for converting them to Excel and provided an on-screen demonstration.

### New business:

1. Resumption of in-building service/demand management Paul McCann  
Discussion about when libraries anticipate allowing patrons back into the building for traditional browsing. Due to the extremely restricted nature of library services during the pandemic, some libraries are interested in removing the local-holds only restrictions on new items. Submit any changes to parameters via the Help Desk, or change the media type away from "New." Many libraries have increased the quarantine time for returned materials based on new information about virus detectability on certain types of materials. Libraries have to act quickly for items on hold at their libraries for their patrons or CARL will rebalance the list and it might be filled from another library. Kimberly Schaaf (SPRI) and Adrienne Breznau (ROAK) will work on a survey for members to answer various questions brought up in the chat and discussion and results will be presented at the next meeting.

### Adjournment

**Motion to adjourn Jonathan Deahl (WATE) / Seconded by James B. Lenze (GARC)**  
**Meeting adjourned at 11:15 am**

### Remote Attendance:

Adrienne Breznau (ROAK)  
Garrett Hungerford (REDF)  
Alyson Lobert (COMM)  
Jonathan Deahl (WATE)  
Amy Rosen (WHLK)  
Andrea Dickson (WIXM)  
Anne Hage (HTWD)  
Anne Neville (TLN)  
Azita Frattarelli (RIVW)

Carrie Ralston (WALL)  
Celia Morse (TLN)  
Colleen Tabaka (TAYL)  
Don Priest (SOGT)  
Donna Janke (HART)  
Ed Burns (FERN)  
Edmond Richardson (PONT)  
Erin Chapman (TREN)  
Jaema Berman (ADDI)

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James B. Lenze (GARC)  
Jen Osborne (BRIT)  
Jenni Gannod (CLAW)  
Jessica Wilhoite (ROMS)  
Jody Wolak (WAYN)  
John Inman (TLN)  
Jackie Seimer (OXFD)  
Jude Halloran (HIGH)  
Karen Schiller (SLYN)  
Kelly Ray (WYDT)  
Kimberly Schaaf (SPRI)  
Laura Gramlich (WYDT)  
Laura Fromwiller (OXFD)  
Martin Smith (REDF)  
Maryann Zurmuehlen (NOVI)  
Matt Church (BERK)

Bonnie Holzerland (MDHT)  
Michael Cummings (FLAT)  
Michael Mcaffery (DHTN)  
Michael McEvoy (NORT)  
Minni Shetty (AUBN)  
Michelle Wloch (BELL)  
Pam Quackenbush (LYON)  
Patty Braden (ROMS)  
Paul McCann (DEXT)  
Sandy Ruhmann (ALPK)  
Tamara Sochacka (HMTK)  
Teresa Natzke (FRAN)  
Tina Hatch (MILF)  
Terri Lancaster (CHEL)  
Toni LaPorte (LVCC)

Postponed for future meetings:

1. Patron-Type Subcommittee report

Kimberly Schaaf, Springfield Township

Next Virtual Meeting:  
Thursday, August 27, 2020  
9:30 am