

**Shared Automation System Users' Group (SASUG)  
Thursday, January 24, 2019 9:30 am  
Novi Public Library**

**Call to Order – 9:30 am**  
Lori Coryell, SASUG Chair

Introductions

**Approval of Agenda:**  
**Motion to approve by: Alyson Lobert (WALL)**  
**Seconded by: Andrea Dickson (WIXM)**  
**Motion passed by unanimous voice vote.**

**Approval of Minutes from the December 13, 2018 meeting:**  
**Motion to approve: James Lenze (GARC)**  
**Second: Toni LaPorte (LVCC)**  
**Motion passed by unanimous voice vote.**

**System Update (Anne Neville, TLN)**

Clarification with regard to the 2-hour delay implemented for hold notification emails, this also applies to text notifications, since they are sent out as email.

There will be a CARL upgrade soon, expected week of January 28, for bug fixes. This will not involve a CARL-X client upgrade.

Written report was distributed. Here inserted with additional comments.

*App Wrappers for CARL.Connect Discovery Mobile Available*

The App wrapper for CARL.Connect Discovery mobile is now available in both the Apple App Store and in the Google Play Store. Patrons should search for TLN Library Catalog in both stores.

*Email Update*

TLN Shared System Staff announced late last year that we would be moving Shared System email notifications from the Xmission to a Gmail hosted mail service. After completing the initial setup, it was discovered that Gmail has some hard sending limits that could cause issues during our peak email loads.

TLN Shared System Staff decided to setup an in-house email server to process all Shared System email notifications. This in-house server provides the Shared System staff a more in-depth ability to track emails through the sending and delivery process, an ability that was lacking in the previous email configurations.

On 1/17/2019 TLN moved the CARL email notifications to the in-house email server, with the final steps in the process being completed on 1/20/19 & 1/21/19. There was some initial slowness in delivery to Yahoo hosted addresses, but this issue has been resolved and all Shared System email notifications are going out in a timely manner.

If your library continues to have reports of non-delivery of Shared System email notifications, please open a help desk ticket using Department: Shared Automation, with a Ticket Category of

SAS Patron Notification. Please include the Patron ID when submitting Patron Notification Tickets.

All email notifications from the Shared System now come from the librarynotices@tlnotices.org email address. Please make sure that patrons reporting Shared System email notification issues white list this new email address.

### *Chronology and Enumeration*

In order for patrons to place issue level holds on titles with multiple volumes in the public catalog, if one item on the record has Chronology and Enumeration (C & E), then every item on the record must have C & E added. This affects items like graphic novels with multiple volumes on the same record, books on CD where the CD sets have been broken up, DVDs of television series with disc sets broken up, travel books with multiple years on the record, encyclopedia volumes, etc.

If your library is the first one to break up the set

- Add C & E to each of the items you are adding to the record
- Open a helpdesk ticket with the department Cataloging and the category Chron and Enum, and provide the BID and the Title of the record that needs C & E added to its items.

If you see a record with only some of the items having C & E, or your patron cannot place an issue level hold on a record in the public catalog

- As a workaround, you can place an issue level hold for the patron in the CARL.X Staff Client.
- Open a helpdesk ticket with the department Cataloging and the category Chron and Enum, and provide the BID and the Title of the record that needs C & E added to its items.

When you are adding items to an existing record, please pay attention to the items already on the record.

- If all the existing items have C & E, add C & E to your item.
- If none of the existing items have C & E, do not add C & E to your item.

### **Report from the TLN Board (Paul McCann, DEXT)**

The Board was informed of the result of SASUG vote on remote voting. They are interested to see how this will work in practice.

### **Report from the Executive Committee (Paul McCann, DEXT, ExComm Chair)**

The January Ex-Comm meeting was canceled.

### **Unfinished Business**

#### **1. TLN CARL·X ILS Post Migration (Celia Morse, TLN Consultant)**

As mentioned by Neville, an upgrade to CARL for bug fixes is planned for next week. This includes the missing buttons/info on some results screens when searching a single location. This does not include a new client release.

A larger release is expected in the next several weeks which will improve function of the dynamic router. It will also suppress patron's position in hold queue in My Account in Discovery. A brief discussion of latter point ended with sense of the meeting that it was still desired to suppress this information.

CARL staff will be visiting for a local check-in. Acquisitions will be a focus. A meeting may be called with libraries using Acquisitions.

John Inman is currently working to load Overdrive records into CARL.

Serials claiming is moving up in the project hopper.

A generator is on order for TLN headquarters, to be installed when weather accommodates.

## **2. Remote Voting (Lori Coryell, SASUG Chair)**

The results of the paper ballot on the question, Shall remote voting be included in SASUG bylaws? was Yes:19, No:15, No response:16.

A vote on the full revised bylaws will now be upcoming.

A committee of officers is being formed to work out the implementation of remote voting, including providing for meeting procedures, equipment, operation, and hosting requirements. It is hoped that this will be in place by mid-year.

## **3. SASUG Mission and Vision Statements (Lori Coryell, SASUG Chair)**

Statements were included in meeting materials. They had not been revised since presented at December meeting.

**Motion to adopt the SAS Mission and Vision Statements by Paul McCann (DEXT)**

**Seconded by: Alyson Lobert (WALL)**

**Motion passed by unanimous voice vote.**

## **4. 2019 Meeting Locations – June 27 & July 25 (Lori Coryell, SASUG Chair)**

These dates still need a meeting location. Please consider hosting and get in touch with Coryell if interested.

## **New Business**

### **1. Patron Thresholds in CARL (Anne Neville, TLN; Celia Morse TLN consultant)**

Concerns have been expressed about the thresholds currently set for blocking patrons.

Patrons can be blocked when they exceed any one of 3 thresholds:

- Amount of fines owed (fines only, does not count any fees for lost items)
- Number of overdue items.
- Number of lost items

For example, for the Ultra Low user Type, the thresholds are \$4.99 in fines, 9 overdue items, or 1 lost item. So a block will be placed when patron reaches \$5 or more in fines, or 10 or more overdue items, or 2 or more lost items. The fine and overdue thresholds vary by user Type. The Lost Threshold is 1 for all Types intended for patron accounts, but some other Types are higher.

The initial concern has been from some libraries who would prefer the block to be placed at 1 lost item. An item becomes Lost after 21 days overdue.

Neville is investigating whether the lost threshold can be set to 0 in CARL as it exists, and is creating a chart of full parameters for all user Types. Various parts of this have to be collated from different sources.

Discussion acknowledged that some libraries would prefer the lost threshold to be 0. Others are interested to see the chart to assess the fine threshold for the Types they use in light of it not including lost item costs.

This item will be discussed further once the chart of parameters is complete and can be distributed.

### **Items from Attendees**

There was a discussion of libraries interested in going fine-free, and efforts to educate local Boards. Cromaine and Milford are the only current fine-free SAS libraries.

Auto-renewal was also mentioned. This is not currently supported in CARL. It would need to be a system-wide decision.

Per request for update on Digital Cards, allowing patrons to open account online, that can be used for access to eContent. Celia Morse is looking at Quipu, which has a digital card utility that can confirm residency. They have implemented it in other CARL systems, and availability can be set by library. Celia will see if there is group interest, once sure that it will work on our system, and pricing obtained.

The new White Lake building is slated to open in June. Belleville's target moving to "late 2019", but look for the pictures from a drone fly-over coming soon to their website.

### **Adjournment**

**Motion by: Joan Rogers (WATE)**

**Seconded by: Patty Braden (ROMS)**

Meeting adjourned at 10:53 am.

### **Next Meeting**

February 28, 2019, 9:30AM

Livonia Civic Center Library

32777 5 Mile Road, Livonia, MI 48154

#### **Attendees:**

Adrienne Breznau (ROAK)  
Alyson Lobert (WALL)  
Amy Rosen (WHLK)  
Andrea Dickson (WIXM)  
Anne Hage (HTWD)  
Anne Neville (TLN)  
Brigitte Felix (TLN)  
Celia Morse (TLN)  
Connie Jo Ozinga (COMM)  
Donna Janke (HART)  
Donna Winter (LVCC)  
Ed Rutkowski (BRIT)  
James Lenze (GARC)  
Joan Rogers (WATE)

Jody Wolak (WAYN)  
jude halloran (HIGH)  
Judy McIntosh (NORT)  
Julie Porecca (TAYL)  
Kimberly Schaaf (SPRI)  
Lori Coryell (CHEL)  
Martin Smith (REDF)  
Maryann Zurmuehlen (NOVI)  
Michelle Wolch (BELL)  
Pam Quackenbush (LYON)  
Patty Braden (ROMS)  
Paul McCann (DEXT)  
Sandy Ruhmann (ALPK)  
Suzanne Street (TREN)  
Toni LaPorte (LVCC)

#### **Online Attendees:**

Carolyn Smith (DHTS)  
Edmond Richardson  
(AUBN/PONT)  
Jacqueline Seimer (OXFD)  
Jenni Gannod (CLAW)  
Karen Schiller (SLYN)  
Jessica Wilhoite (ROMS)  
Kelly Bennett (FERN)  
Laura Gramlich (WYDT)  
Minni Shetty (AUBN)  
Tina Hatch (MILF)  
Azita Frattarelli (RIVW)