Shared Automation Users' Group (SASUG)
Thursday, July 26, 2018 | 9:30AM
Berkley Public Library |3155 Coolidge Highway, Berkley, MI 48072

Call to Order
Andrea Dickson, SASUG Chair

Introductions

Approval of Agenda:
Motion by: Becky Willemsen (MDHT)
Seconded by: Paul McCann (DEXT)

Approval of Minutes from the June 28, 2018 meeting:
Motion by: Connie Ozinga (COMM)
Seconded by: Becky Willemsen (MDHT)

System Update (Anne Neville, TLN)
(No written update)

The zip code auto-fill feature:
Putting in the zip code will auto fill the city and state. TLN gave CARL a list of all MI zips so that this feature could be turned on as a convenience and a way to avoid entry mistakes. The only problem is if you enter a zip code that is not a Michigan zip code (for patrons that live out of state) it will give you an error. Just hit okay when it does that. Another problem is that there are some communities that share a zip code and if you want the city that it doesn't pull up, just type over the city to make it the one you want and hit save.

Question about searching for patrons:
You can search for patrons by phone number or address in the patron browse box. That box is actually a keyword search and you can search any of those things. If you click on the binoculars box then you can search in a more pointed way.

Text message bounce backs:
When a patron email bounces, the system gets an update and puts soft block on the patron account and won't keep sending the emails and it will notify the staff with the popup. This is not the case for text message bounce backs. With text, TLN gets the bounced text messages, but it doesn't do anything to the account for staff to know anything is wrong. So TLN is going to enter a note on these accounts. If you see a message on a patron account, please look into it with the patron by verifying the phone number with them and take the note off when you fix it.

Odd items coming to TLN:
Since the migration, TLN has had a ton of items coming in delivery that look like they should be on library hold shelves. This happened occasionally in the past, but it has been happening much more frequently. These books often have printed hold wrappers (or had written ones). Let's remind staff to be mindful of where books go; the only explanation is that staff are accidently placing these books into delivery bins. Keep in mind it will take longer for patrons to get these holds.

Question about patron notice history:
There is a notice history tab and it will tell you whether it was email or phone along with the date.
Steps for finding the notice history:
Go into patron information, select the "History" tab, then select the "Notice History" tab. You will see coming due notices, hold notices, etc.
Note about notices:
Some notices are created and sent right away and some are created and sent the next day, so that's why some patrons might say they got a notice on something they just returned. If you have patrons who are not getting the email notifications, please talk to them extensively about spam controllers and spam software. This is often the reason people don't get the email notice.
Info about reports:
TLN plans to start reports training sometime this fall on the topic of canned (preformatted) reports. Examples of some of the canned reports are some statistics, some lists, and some counts for individual libraries. There will be some circulation based canned reports and some catalog based reports. There is not really a directors station equivalent; the reports feature is actually SQL queries and if you don't have experience with that, then it's going to be extremely difficult to understand anything beyond the canned reports.

Report from the TLN Board (Paul McCann, DEXT, Ex Comm Chair)
The last TLN board meeting was the same day as the last SASUG meeting and they did approve the Brandon refund.

Report from the Executive Committee (Paul McCann, DEXT, Ex Comm Chair)
-Celia gave report on ALA meeting (with cARL); discussed a variety of improvements which CARL will be working on for us.
-Inkster has a storefront that they will open on Inkster road which is going to be a technology center mostly (and a point of drop-off/pick-up). Eventually they will be in building near the post office and hope to open June/July 2019. Temp location is mostly for internet access with a basic selection of materials. They are still paying the shared system.
-TLN has been proactive about trying to attract new members to the shared system (in terms of offering financial incentives). Discussion about what the terms would be if a library ever decided to come back to the shared system after having left.
-Meets next week again.

Unfinished Business
1. TLC CARLx ILS Post Migration Issues/Questions (Celia Morse, TLN Consultant)

Damaged items that are received in transit for holds:
The problem is that if an item comes in and you scan it in (to prompt the hold shelf status), then discover it is really damaged, once it has an on shelf hold status, there is no way to change this status and still fulfill the hold (and prompt and intransit status back to the owning library). We don't want anything going into delivery without an official in-transit status. TLN has been analyzing this issue and TLN has talked to other CARL sites about how they handle this situation.   Procedures are being discussed and further circulation training is being held off until these kinds of procedures are fully established (so they can be included with training). Please urge your staff to look at items before they go into delivery and ensure mulit-piece items are all there. We recommend that staff thoroughly look at items BEFORE they scan them into the return feature (so a problem can be spotted before it has an official on-hold shelf status). It's much easier to deal with this before it scans to the hold shelf. While

we probably can't agree on a standard of damage, we can agree if pieces are missing or if pages are falling out, the item is not able to circulate.

Item Deletion:
There is no way to completely delete an item out of the system currently. You can change the status to withdrawn but you cannot delete the item record completely. So if you link something to a totally wrong record and realize it right away, you can withdraw it and then give it a new barcode and link it to the right record. Withdrawn items will be removed from the system on a more regular basis when things settle down at TLN because that is a manual report that has to be run.

Acquisitions:
Acquisitions are being worked on. Bugs are being worked out. Baker and Taylor and Brodart are in the process. Midwest tape and Ingram is next.

MeLCat:
On schedule with MelCat. No red flags yet with the data we've sent so far. Aiming for early September.

Current Areas of Focus for TLN:
-John spent a lot of time working on reports recently; the July reports will come out faster now that they've been established.
-Still working on getting Overdrive records on the database.
-Also working on getting records all set for Mel

Suggestions for CARL enhancements:
If you have enhancement suggestions, please email Celia instead of doing a helpdesk ticket. She is keeping track of a "wish list" of improvements in order to take them to CARL. This is preferable over using the helpdesk for these kinds of requests so they can be in one spot.

Concern with number of items in send/pull lists:
If you are open on Sunday and find that you are getting huge lists, just skip it for Sunday. The list runs every day and there isn't a way to turn it off in this system. This is different from workflows because the list didn't run on Sundays in workflows. So the Sunday pull may be affecting the list.

Fine thresholds:
In workflows (and CARL), the fine thresholds are set according to patron types, if you have an ultra-low patron and the threshold is 4.99, the lost items do not count against the threshold for overdues and, conversely, overdues do not count for thresholds of lost items. The system does not add lost and overdue together.

Question about status of patrons showing as "good" when they are over the threshold:
Anne says the status does not immediately reflect in the system in real time so that can be part of the problem. Also a hard block does not override a soft block.

If there are specific concerns with specific patrons please include the patron number on a helpdesk ticket. It is very difficult to help with no patron number for these kinds of issues.

Question about patron profiles:

Patron profiles and related thresholds are posted on SASUG site for workflows. The profiles in CARL are very similar so just reference that. CARL has no exportable table, but this is what we've based it on.

Question about overrides:
CARL has no overrides except the PIN. No hold overrides, etc. If you are looking for hold overrides to get items to your tech services, you can place a circulation note on it that says to send to tech services, they would just have to remove the item note when they get it.

2. Chronology and Enumeration (Anne Neville, TLN)

Reminder about chronology and enumeration/clarification on when we should use it:
Don't use this (Chron. And Enum.) for items that have no chance of being broken into different parts. Use it for items that you think any library (even if you are not breaking apart) would potentially break apart, but keep under the same title record. Use it for multipart dvds (that could be broken up by some libraries), super large bookcds that come in multiparts (multiple boxes) that libraries might break apart, travel guides, manga. The most important thing is consistency. We need to use it or not use it. If you are linking something and you see 5 other libraries did not use chronology and enumeration, but you do want to use it, then you need to open a helpdesk ticket with the BID included so that TLN can put chronology and enumeration on those other 5 items. Basically for any item you come across where some libraries have used it and some have not, please open a helpdesk ticket with the BID. The reason we need to report it is because if one library uses it and one does not, then it will not work at all. The end goal is to enable to patron to get the proper piece of the item that they want.
There's a request for the instructional sheets on this to be updates with more specific information that pertains to the particular issue of this "all or nothing" phenomena and also when and when not to use it.

New Business

1. Mobile Book Carousels (Andrea Dickson, SASUG Chair)
   Right now the mobile book carousels are summer cookbooks and pets. This is a system wide display so we probably should give TLN some guidelines on what kind of content we want to see. Do we want to try and come up with a time frame for updating this and do we want to try and include topics that pretty much every library will have something on? Suggestions are to start doing this monthly. TLN staff has indicated that it does not take much time to formulate. Andrea Dickson is going to get together some sample topic ideas and forward them to TLN to be changed out monthly.

   Question on why we can't have stand-alone templates for the catalog so that our databases can display. CARL does not offer this and TLN staff is still focused on finalizing some major functionalities, such as overdrive records and mel. Perhaps in the future it could be explored, but that won't be for a long while as every staff member at TLN is still working hard to get different features of the system finalized.

2. Patron Initiated Address Change Procedure (Andrea Dickson, SASUG Chair)
   Patrons can change address at home and it puts a soft block on the screen so that staff can review it. The question is if a patron from WIXM uses NOVI and they do a minor address change (change rd. to Road) so that it prompts a soft block should NOVI verify it? Consensus is yes, just do a quick address verification of the picture ID. If a card is expired or something like that, then they still need to go to their home library as we have always done.

Adjournment
Motion by: Matt Church (BERK)
Seconded by: Teresa Natzke (FRAN)

Next Meeting: August 23, 2018 at Dexter District Library | 3255 Alpine Street, Dexter, MI 48130

Attendees:

Terri Lancaster (CHEL)
Lori Coryell (CHEL)
Anne Hage (HTWD)
Alyson Lobert (WALL)
Michelle Wloch (BELL)
Coleen Tobaka (TAYL)
Martin Smith (REDF)
James Lenze (GARC)
Paul McCann (DEXT)
Maryann Zurmuehlen (NOVI)
Judy McIntosh (NORT)
Amy Rosen (WHLK)
Anne Neville (TLN)
Jean Hansen (WATE)
Michael McEvoy (NORT)
Celia Morse (TLN)
Connie Jo Ozinga (COMM)
Adrienne Breznau (ROAK)
Ed Rutkowski (BRIT)
Matt Church (BERK)
Teresa Natzke (FRAN)
Becky Willemsen (MDHT)

Remote Attendees:

Don Priest (SOGT)
Donna Janke (HART)
Jacqueline Seimer (OXFD)
Jenni Gannod (CLAW)
Jessica Wilhoite (ROMS)
Jude Halloran (HIGH)
Karen Schiller (SLYN)
Laura Gramlich (WYDT)

Remote Attendees (Cont.)

Lucie Smith (CHEL)
Luke Ervin (SLYN)
Pam Quackenbush (LYON)
Sandy Ruhmann (ALPK)
Tina Hatch (MILF)
Holly Teasdale (LYON)
Toni LaPorte (LVCC)
Kim Oakley (ALPK)
Edmond Richardson (PONT and AUBN)