

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

Virtual meeting: Thursday, February 25, 2021

9:30 am

**MINUTES**

Call to Order—9:30 am

**Approval of Agenda – Motion by James B Lenze (GARC) / Seconded by Jonathan Deahl (WATE)**

**Approval of January 28, 2021 Minutes – Motion by Don Priest (SOGT) / Seconded by Patty Braden (ROMS)**

System Update

Anne Neville, TLN

The CARL passwords will be changing on March 23<sup>rd</sup>. New passwords will be sent in the delivery a couple weeks prior. On Saturday, March 6 at 6:15 pm CARL will be unavailable for approximately 4 hours for system maintenance. A bug report for the new in-transit report: if you select both owning and controlling branch a report of several hundred items will result because the date parameters will be ignored. To work around this, only run to and from branch reports and this will be fixed in the next release. We will potentially have the new CARL upgrade in late March. Please note-patrons who are soft blocked do not automatically change to hard blocked if they reach the thresholds for blocking. Remove a soft block before putting on a manual hard block.

Report from TLN Board

Celia Morse, TLN

The meeting time has been changed to 9 am beginning with the March meeting but will likely be changed again when in-person meetings resume. The Employee Assistance Program benefit was approved, as was workman's comp and insurance and also a whistleblower policy. The transfer of funds recommended at the last SASUG meeting was also approved. The audit was postponed to March.

Report from Ex Comm

Paul McCann, Ex Comm Chair

New software is being implemented that will hopefully eliminate some steps with MeLCat. Please consider allowing your new items to circulate in CARL. 14 libraries are participating right now and everyone is benefitting. It would be nice to have 50% of libraries doing this. There is a question into the attorney about the language in the bylaws where Ex Comm "sets" policy and if that were to be changed to "recommends" policy would remote meetings still be allowed. When the current Open Meetings Act exceptions expire on March 31 the meetings will have to be in person again which could be difficult due to lack of venues and social distancing. There could be a vote to change the bylaws depending on the attorney response.

Unfinished Business:

A. Hard Blocks and Overrides

Kimberly Schaaf (SPRI)

Status quo will remain in place. Will review again at the next meeting.

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### B. Holds: Limits in CARL / Expired Cards

Terri Lancaster (CHEL)

CARL's new release features the option to modify what types of holds (i.e. holds in transit and on the shelf) would count towards the limit. TLN has the option to set a card expiration to be a patron's date of birth. Delivery is caught up now.

### C. Fill list / Router

Celia Morse

Reminder-please fill holds for pickup at your branch first thing in the morning. If a copy is discharged at another library that will override your item on the shelf. The CARL.X router is a thing of the past and the Fill List is the future. With the new release, CARL Connect will also have a damaged item feature that will not be on CARL.X. Sorting issues with the fill list will be fixed with the next release.

### New Business:

#### A. TLN Website redesign suggestions

Angie Michelini (TLN)

TLN staff are getting feedback from all the committees for the TLN website. There was a suggestion to have the Shared System page feature a separate log-in to protect copyrighted information and allow Zoom links to be posted. Officers could also have access to upload agendas and minutes. Any input is appreciated for a potential October 2020 launch. Please email Angie with any further input: amichelini@tln.lib.mi.us.

#### B. Patron Type: Blind and Physically Handicapped

Minnie Shetty (AUBN) / Kimberly Schaaf

The wording of this patron type is archaic and makes some staff uncomfortable. Libraries who use this patron type (7 libraries currently) or who are considering using it should brainstorm via email and bring suggestions to be voted on at the next meeting. Today's suggestions included "Home Delivery" and "Outreach." The circulation parameters will remain the same. This will be a voting item on the next agenda.

#### C. Patron Conduct Policy Violation Blocks

Kimberly Schaaf

Discussion about how other libraries handle it when a patron is blocked at one library due to code of conduct violations. Recommendation to check with your attorney. Anne Neville will look into how various note types affect patron access and the discussion will be continued at the March meeting.

### Adjournment

**Motion to adjourn by Patty Braden (ROMS) / Seconded by Jonathan Deahl (WATE)**

**Meeting adjourned at 11:20 am.**

### Next Meetings:

March 25, 2021 / 9:30AM – Virtual

April 22, 2021 / 9:30AM - Virtual

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### Remote Attendance:

Adrienne Breznau (ROAK)	Jessica Wilhoite (ROMS)
Alyson Lobert (COMM)	Jody Wolak (WAYN)
Amy Rosen (WHLK)	John Inman (TLN)
Andrea Dickson (WIXM)	Jonathan Deahl (WATE)
Andrea Polsgrove (TLN)	Jordan Wright (FERN)
Angie Michelini (TLN)	Jude Halloran (HIGH)
Anne Hage (HTWD)	Judy McIntosh (NORT)
Anne Neville (TLN)	Karen Schiller (SLYN)
Azita Frattarelli (RIVW)	Kim Oakley (ALPK)
Bonnie Holzerland (MDHT)	Kimberly Schaaf (SPRI)
Brigette Felix (TLN)	Laura Gramlich (WYDT)
Carrie Ralston (WALL)	Maggie Weddell (FERN)
Cathy Buehner (HIGH)	Martin Smith (REDF)
Celia Morse (TLN)	Maryann Zurmuehlen (NOVI)
Colleen Tabaka (TAYL)	Matt Church (BERK)
Don Priest (SOGT)	Minni Shetty (AUBN)
Donna Janke (HART)	Terri Lancaster (CHEL)
Donna Winter (LVCC)	Tina Hatch (MILF)
Ed Rutkowski (BRIT)	Pam Quackenbush (LYON)
Edmond Richardson (PONT)	Patty Braden (ROMS)
Erin Chapman (TREN)	Paul McCann (DEXT)
Garrett Hungerford (REDF)	Sandy Ruhmann (ALPK)
Hilary Savage (BELL)	Teresa Natzke (FRAN)
Holly Teasdale (LYON)	Terri Lancaster (CHEL)
Jaema Berman (ADDI)	Tina Hatch (MILF)
James B Lenze (GARC)	Toni LaPorte (LVCC)
Jenni Gannod (CLAW)	