

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

**Thursday, June 28, 2018**

**Commerce Township Community Library | 180 E. Commerce St. Commerce, MI 48382**

### **Call to Order- 9:34**

Andrea Dickson, SASUG Chair

Introductions

### **Approval of Agenda**

Motion by: Joan Rogers (WATE)

Seconded by: Connie Ozinga (COMM)

### **Approval of Minutes from the May 17, 2018 meeting:**

Motion by: Amy Rosen (WHLK)

Seconded by: Judy McIntosh (NORT)

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

No written update.

EMAIL NOTIFICATIONS: When a patron complains about not getting email notification, please check the regular stuff (verify email, is it marked "Yes, Email", etc.). Also be aware that people are using spam controllers and TLN is getting auto-replies from spam controller programs. They are very common and they are OFTEN stopping TLN notifications. That is something you can ask the patron if they have in place. If they do have that in place, they will have to tell the program to allow the TLN emails otherwise they won't get them.

EDITTING IN CARLX: when we went live, libraries had no editing permissions in CARLx, then a problem was found with editing serials. For those libraries with serials, there are some permissions that allow you to edit other libraries' items. PLEASE WARN STAFF NOT TO DO THIS and to be careful.

LOST NOTICES: This is a system wide institution setting. It is the only kind of notice where patrons will get a paper notice IF email is not successful. That paper notice is a system-wide setting so no single library can opt out of that.

PATRON ADDRESS ISSUES: TLN is getting a ton of mail back because of address issues. This is mostly due to "Sponsor" address issues (parental). There is documentation on this topic on the SASUG/CARL part of the TLN website. If you leave it on the sponsor address selection then you MUST have a complete sponsor address filled into that area. Please let all the circulation staff members know how important it is to either fill out the complete sponsor address or change it back to the primary address selection. Otherwise people will not get lost notifications by mail (if the email doesn't work). Do not write "see above" in the sponsor address and leave the selection on "sponsor" because then a lost notice is generated with an address of: "see above" on the envelope. Obviously that isn't going to work. Also - bounced back mail has the return address of the item-owning library; not the patron library. Currently there is a ticket open with CARL because if you put a sponsor address in, then change it back to primary, then the sponsor address disappears. If you only want to add the sponsor name and DL then you need to put this in the note field.

### **Technology Services Update (Angie Michelini, TLN)**

No update

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

The TLN Board is meeting concurrently with today's SASUG Meeting.

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

ENTERPRISE LIST FEATURE (FROM OLD CATALOG): Sirsi was asked for a quote on how much money it would cost to get those lists out. That figure is forthcoming.

Inkster library is closed and will be for some time due to flooding/water damage. Inkster is trying to find a temporary location as well as a permanent location. The impact on the surrounding libraries has been evaluated at around a 5% increase on those libraries. The area libraries have all been supportive with providing service for Inkster patrons temporarily.

### **Unfinished Business:**

None

### **New Business**

1. TLN CARL-X ILS Post Migration (Celia Morse, TLN Consultant)  
Issues/Questions

Celia went to ALA and met with the head of CARL. TLN shared users are into the 5<sup>th</sup> week of migration and TLN is hearing and dealing with feedback from all the shared system libraries in a serious manner.

RENEWAL OVERRIDE: This topic is currently being looked at.

#### **CATALOG:**

CARL is trying to focus on getting a major catalog update enhancement (which consists of a universal record with other formats below). Since this is the focus, they are viewing other issues as low priority. They are really close and hopefully it will be on the test server at the end of July.

Marc record call number showing on the patron side of catalog is being looked into.

Patrons number in the hold queue will be going away eventually.

The library code (SPRI, NORT, etc.) on the patron side for library pickup will go away.

Text message notifications: looking into truncating these.

Notice production schedule is being looked at.

The issue of people getting multiple calls for courtesy, etc. should be gone. BUT, if a person hangs up and doesn't say anything, then the system thinks it's a failed call and it will try to call

again. The caller ID says Farmington Hills, but doesn't say library and might be different numbers.

ISSUE REPORTED BY SOME: During the checkout, renewal, etc. sometimes if there is another window open behind the one you are on and due to the mouse or some other interaction, the function on the window behind the one you are on is showing through. It is very confusing and there is a ticket open with CARL to try and look into this.

Waiting for quote on app wrapper for catalog, but bookmarks using a phone/device browser can accomplish the same thing.

CARL is aware that we need a "forgot your PIN" link on the sign in area of the catalog.

Other PIN Info: They are not going to make PINs visible in CARLx, that is not an option. The reset is there. CARL Connect will hopefully be more functional this fall in terms of circulation, placing holds, etc.

Acquisitions in CARLx is forthcoming. They are working on integrating with vendors.

Giving patrons explanations about fine details for bills before the switch: some of it can sort of be mined out of Directors Station. If you put a helpdesk ticket in with TLN it may be possible for them to see something; however, access Sirsi is coming to an end so it will be very limited what they can find.

How do you create brief title records in CARLx? You can when checking out.

REPORTS: Pending transit list will be forthcoming. Reports in general will be getting more attention in the future. TLN is getting the basics of the system worked out first. Around the first week of July some other statistics should be available.

ITEM HISTORY: TLN doesn't see a whole entire scan history of an item the way they did with Sirsi. There is some information TLN can find and libraries themselves can find. Inquire if you need help with this.

If you have items that are trying to ILL and shouldn't (because it's new, etc.) open a helpdesk ticket. Many exception items had to be manually entered and TLN can re-look at it if it isn't behaving as it should.

USING HELPDESK/EMAIL LISTS: When opening helpdesk tickets, please include AS MUCH info as possible. Patron name, ID, item ID, anything. Also answer questions from TLN in a timely manner (sometimes they may need more info) otherwise they will have to close the ticket after so many weeks go by. Screenshots are great, too, for capturing an issue that you need to move on from.

WHEN TO USE WHAT: A specific problem should be a helpdesk ticket. General questions for how the software works can be emailed to Celia. When using the SASUSERS list, ask yourself if the majority of libraries would want that information. Do not ever use the EVERYONE or CIRC list if it pertains to CARL. If you are experiencing an actual problem, please open a helpdesk

ticket, do not email the list and say is anyone experiencing this problem? It is hard for TLN to identify whether there's an issue when it's scattered through an inbox. When it's in the helpdesk they can detect patterns and zone in on problems much easier and quicker.

MelCat is still aiming for September. They have to reload our entire item and patron bibliographic database and some of that depends on MCLS.

Recently returned items: should say reshelving if it was returned within 24 hours (in the catalog).

Cards that are expired do allow renewals and holds. Patron can renew the card when they come in. The majority feels that this serves in the best interest of patron service.

2. CHRONOLOGY AND ENUMERATION (Anne Neville, TLN and Celia Morse, TLN Consultant)

This function exists for the patrons. This enables patrons to place holds on a specific items under a title record. Travel books, DVDs that are sets broken into pieces, etc. If ONE library enters ONE item wrong then the whole feature does NOT work for any library's items or any patrons. There are talks with CARL about changing this but it is really important to do this correctly. You MUST have your staff read the documentation on this feature and enter this exactly the way TLN has indicated. If your staff has questions about this, please ask TLN.

**\*IF ONE LIBRARY USES THIS, AND THE OTHER LIBRARIES DO NOT, THEN IT WON'T WORK AT ALL IN THE PATRON CATALOG FOR ANYONE.**

If you encounter another library's chronology and enumeration has not been entered correctly on a record (in other words; has made it so patrons can't use your chronology and enumeration) then open helpdesk ticket and TLN can look into it. Please try and include the CARL BID.

3. Email Fine Notices (Andrea Dickson, SASUG Chair and Paul McCann, Ex Comm Chair)

System wide fine notice was decided on \$5.00 at SASUG in January. Patrons got this by email and some patrons responded negatively to it. The notice is currently suspended pending future discussion. They are not sent by phone. They are not sent by paper.

Motion by Terri Lancaster (CHEL): Suspend fine notices for six months and revisit it at that time.

Motion Seconded: Connie Ozinga (COMM)

All in favor. One opposed.

Motion passes.

4. Renewal Parameters in CARL (Andrea Dickson, SASUG Chair and Paul McCann, Ex Comm Chair)

Currently in CARL, renewals project out from the item due date, not the date on which they make the renewal. Consider the following scenario: a patron checks out on July 1, it's due July 22, but later in the day they go ahead and renew. It would then be due August 12. Then later in the same day they decide to renew again and now they have it until Sept 2. If someone comes in and places a hold on July 2<sup>nd</sup> (and there is no other item to fill the hold) then that person would have to wait until September 2<sup>nd</sup> to get it. It used to be that patrons would wait until closer to the due date to do a renewal in order to get the max amount of days. But in this system, they can have it for the max amount of time right from the get-go. So patron behavior can be impacted. Should we examine the amount of time patrons have items? Should we be trying to give people a reason to come back regularly? Does this renewal policy keep people

away (and not thinking about the library)? Does this potentially really long due date further the issue of people who claim they brought something back (the more time that passes, the more forgetful they are)? Maybe we need to sit with this for a while and see how it goes. Maybe we need to look at how many renewals are allowed or how long things check out for. Will this negatively impact holds, etc.?

Motion by Connie Ozinga (COMM): Wait two months to talk about this again

Seconded Don Priest (SOGT)

All in favor. Motion passed.

5. Removal of Publication Date from Router List (Andrea Dickson, SASUG Chair)

Motion to remove: Ed Rutkowski (BRIT)

Second: Terri Lancaster (CHEL)

All in favor. Motion passed

**Adjournment – 12:22**

Motion by: Lori Coryell (CHEL)

Seconded by: Vanessa Verdun-Morris (TAYL)

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**Next Meeting**

July 26, 2018 / 9:30AM

Berkley Public Library | 3155 Coolidge Highway, Berkley, MI 48072

**Attendees:**

Michael McEvoy- NORT  
Wendy Mutch – NORT  
Judy McIntosh – NORT  
Paul McCann – DEXT  
Andrea Dickson – WIXM  
Sandy Ruhmann – ALPK  
Kim Oakley – ALPK  
Martin Smith – REDF  
Jaema Berman – ADDI  
Adrienne Brenznau – ROAK  
Becky Willemsen – MDHT  
Terri Lancaster – CHEL  
Jude Halloran – HIGH  
Amy Rosen – WHLK  
Joan Rogers – WATE  
Alyson Lobert – WALL  
Connie Ozinga – COMM  
Anne Hage – HTWD

Don Priest – SOGT  
Ed Rutkowski – BRIT  
Anne Neville – TLN  
Brigette Felix – TLN  
Lori Coryell – CHEL  
Donna Janke – HART  
Vanessa Verdun-Morris-TAYL  
Colleen Tabaka – TAYL  
Celia Morse – TLN  
Lauren Arnsman – BERK

**Remote Attendees:**

Carolyn Smith – DHTS  
Ed Burns – FERN  
Elizabeth Alexander – LIVS  
Jacqueline Seimer – OXFD  
Jenni Gannod – CLAW  
Karen Schiller – SLYN  
Laura Gramlich – WYDT  
Luke Ervin – SLYN  
Maryann Zurmuehlen – NOVI  
Patty Braden – ROMS  
Toni LaPorte – LVCC  
Pam Quackenbush - LYON