

**Automation Committee Meeting
April 3, 2019
Tulare Public Library
Approved Minutes**

Present:

Tony Arellano, Faythe Arredondo, Smruti Deshpande, Yvonne Galvan, Dani Haas, Mary Jo Lawrence, Kristie Pratt, Mollie Roache, and Mary Ellen Tyckoson (chair)

Also Present: Kevin Nelson, Chris Wymer

Absent/Excused: Rebecca Adams, Brian Martin

- I. The meeting was called to order at 10:06 AM by Mary Ellen Tyckoson.
- II. Introductions were made
- III. Adoption of Agenda – The agenda was adopted as distributed.
- IV. Comments from the Public - None.
- V. The minutes of February 6, 2019 were approved as distributed.
- VI. Projects for Discussion and Action
 - a. BlueCloud Circulation demo/discussion - Tyckoson

BlueCloud circulation is a web-based client for performing circulation tasks against Horizon. Functionality is still being developed and it probably isn't ready for production use in SJVLS yet, but Tyckoson wanted JSAs and any staff members they designate to start exploring the interface. BlueCloud Circulation updates automatically with new releases, which have been coming out about every 2 months. Opening a patron record for checkout, adding a new record, and looking at items out and fine blocks (bills) were demonstrated. The newer JSAs haven't had an introduction to BlueCloud Central yet, so Tyckoson will schedule a Skype session and invite anyone who needs a refresher to join the meeting as well.

- b. Horizon security – Tyckoson

SirsiDynix has been putting significant work into enhancing the security of all of their products, including Horizon. With the next release (7.5.6) we expect the database level logins to change from branch specific to workstation specific. As we get closer to implementation we will need to come up with a workflow for creating and configuring that login, which only has to be done once when a workstation is first put in use.

Horizon staff logins will also see some changes with the next release, most notably enforcement of password complexity rules. The exact rules we implement will be based on a discussion with the Automation Committee to find a more secure, but not too onerous set of rules. There will also be a lockout feature for repeated bad login attempts and more actions in Horizon will record the user.

c. Updates from COSUGI – Wymer & Tyckoson

There is a long list of changes/new functionality coming to Horizon with release 7.5.6 (Q3 2019) including

- New fields for encrypted patron id and password – this will require some customer relations work and staff training, plus we'll need to explore how it integrates with PCReservation, EZProxy and SIP.
- Access to the record of a borrower blocked for excessive fines or other circulation rules without overriding those rules
- Merge duplicate borrowers
- Configure “claimed returned” to age to LOST instead of missing
- Change pickup location of items already on the hold shelf
- “You saved \$\$\$” message on CKO receipts
- Emailing of CKO receipts moved to server (hopefully fixing our workstation anti-virus problem)
- A waiver button on the blocks view
- Comments display for payment history
- Special loan period for “end of day”
- Delete unused invoices and purchase orders

Given the complexity of the 7.5.6 release we will look for an upgrade date that is enough after the initial release date for the dust to settle, but at least a month before Tyckoson’s planned retirement date in March 2020.

Analytics – the backend has been overhauled to improve performance. They are working on map visualizations, national data comparisons, integrating BC data like EResource Central and possible external data sets like Census data.

ERC – there is now a connector for Freegal available for purchase and they are working on Zinio. They are also working on improving the reporting interface.

Enterprise – Responsive design will be in the next release, with option to select which content is available based on the viewing form factor. There is an upgrade to the version of jquery, but so far Chris has only found one customization that needs to be rewritten. They are also working to get back to AA certification for accessibility. There are also upgrades planned to solr (the backend indexing).

d. Blue Cloud Mobile statistics – Wymer

Wymer reviewed the statistics on downloads and use of the new mobile app. The figures are very positive. Data shared during the meeting is posted in the systems shared \Resource Sharing\BC Mobile Stats folder. Pratt asked about directing users to the mobile app from Enterprise and Wymer talked a bit about the technical issues with Android. He will put the iPhone/iPad widget in place to already users on those devices and continue to work on the Android problem.

e. Analytics next steps – Wymer

Wymer collected feedback on Analytics usage. Arredondo reported that staff members in Tulare County are really happy with the reporting available, but some reports may need a few tweaks. Others are using it but haven’t pushed it out much to staff yet.

e. Status report on projects – Nelson/Wymer/Tyckoson

Nelson reported that there are four year 3 CENIC sites still in installation phase due to facilities issues. Year 4 installations (6 branches) are under way. Year 5 contracts are signed and will have 2 new fiber locations and 9 bandwidth upgrades. Next year we plan to just ask for upgrade bids on anything less than 100 mg. WiFi installations for the year 4 branches are also in progress.

Logic Vang compiled jurisdiction-level reports on workstations needing upgrades before support ends on Windows 7 and all workstations must be on Windows 10 (January 14, 2020). Nelson distributed the reports and explained what they covered (PCs in TrackIT) and what was not covered, e.g. laptops, computers that haven't been installed yet. Timing of orders for PCs and Windows 10/Office 2019 was discussed. The System office is planning on a May PC order and probably an early fall order to allow plenty of installation time. There was a brief discussion of ordering 2D scanners to allow scanning of patron barcodes from the mobile app. TPL has been testing 2 models and Roache will share info on the one they liked best.

Wymer reported on a problem that came up in our bibliographic records after BlueCloud Mobile went live. BC Mobile interprets records with an 856 tag and indicators 4 and 0 as an online resource and displays a download button rather than listing holdings and allowing holds. He has fixed thousands of records where it should display the holdings by removing extraneous 856 tags or fixing indicators as well as fixing a lot of broken links for government documents.

Tyckoson has changed pre-overdue notice renewal links to point to Enterprise for Kern and Tulare Public. If others would like it changed open a TrackIt ticket or send Tyckoson an email. There is also a small tweak Wymer needs to make in Enterprise when we change the pre-overdue link to make the login window more clearly indicate it's the library.

- VII. The next Committee meeting will be May 22, 2019 in Visalia.
- VIII. Announcements – Tulare County is taking an item to their Board to go fine free for overdue items starting April 30th. Tyckoson clarified that DebtCollect bases its collection agency assignment on transaction location and that fines are based on transaction location. All staff will need to pay attention to cko/debt location for fines and generally trust Horizon to calculate fines correctly. At this point in time we are not considering changes to the long-standing policy on collection and retention of fine money at any location (except for collections accounts).

There being no further business the meeting was adjourned at 12:23 p.m.