

AUTOMATION COMMITTEE

January 22, 2020

10:00 a.m.

Via Skype- The public may participate at any of these locations

Coalinga-Huron District Library, 305 N 4TH ST, COALINGA CA 93210

Fresno County Public Library, 2420 MARIPOSA ST, FRESNO CA 93721

Beale Memorial Library, 701 TRUXTUN AVE, BAKERSFIELD CA 93301

(Beale library is closed at meeting time, please call 661-868-0769 no later than 5pm on Tuesday if you wish to participate there.)

Kings County Library, 401 N. DOUTY ST, HANFORD, CA 93230

Madera County Library, 121 N "G" ST, MADERA CA 93637

Mariposa County Library, 4978 10TH ST, MARIPOSA, CA 95338

Merced County Library, 2100 "O" ST, MERCED CA 95340

Tulare County Library, 200 W OAK AVE, VISALIA, CA 93291

Tulare Public Library, 475 N "M" ST, TULARE CA 93274

AGENDA

I. Call to Order

II. Roll Call and Introductions

III. Adoption of Agenda

IV. Comments from the Public

V. Approval of Minutes of November 20, 2019 Attachment 1

VI. Projects for Discussion & Action

a. Enterprise Mobile Template - Wymer

b. Allowing users to update Horizon account in Enterprise – Wymer Attachment 2

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

VII. Set date and Agenda building for next meeting, tentatively March 25, 2020 in Tulare.

VIII. Announcements

The disclosable public records related to this agenda are available for public inspection at:

Fresno County Public Library, Business Office

2420 Mariposa Street

Fresno, CA 93721

**Automation Committee Meeting
November 20, 2019
Visalia Branch, Tulare County Library
DRAFT Minutes**

Present:

Rebecca Adams, Tony Arellano, Faythe Arredondo, Yvonne Galvan, Dani Haas, Mary Jo Lawrence, Brian Martin, Anne-Marie Montgomery, Mollie Roache and Mary Ellen Tyckoson (chair)

Also Present: Kevin Nelson, Chris Wymer

Excused: Kristie Pratt

- I. The meeting was called to order at 10:02 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 September 25, 2019 were approved as distributed.
- VI. Projects for Discussion and Action
 - a. Syndetics Unbound – Tyckoson/Wymer

Syndetics Unbound is installed on Enterprise. In addition to the added cover images for DVD, we now have another enriched content tab (below the holdings) with “if you liked this” recommendations, titles in series, awards and reading levels. Syndetics gets our holdings in a weekly export, so it generally should not show recommendations for items we don’t own. Wymer talked about options for creating book/DVD lists via Syndetics to create widgets for use on web pages. Because it is linked to Library Thing data, you can create lists based on Library Thing user tags. He will schedule a Skype session on using lists/widgets after we’ve worked out a couple of issues.

- b. HIP decommission project – Wymer

The My List “slurp” was reset for 48 borrowers and they have been emailed to let them know to stop using HIP and use Enterprise. The Enterprise 5.0.1 upgrade is now scheduled for December 23rd, giving us a tiny bit more breathing room before the end of HIP public use. The upgrade should allow us to decouple HIP from the request process, since it fixed the problem with the suspended hold calendar not displaying in the hold list.

- c. SMS messaging setup decisions – Tyckoson

We have an install date of November 26th for SMS messaging. Settings for system defaults were discussed, along with cases where a location exception can be made.

We decided to only allow 1 phone number per patron, US numbers only, and will enable hold, overdue, and general messages by default. We may consider pre-overdues later once we have a feel for the message volume. The SMS message will count as the notice delivered by default, but a location can change that if their patrons want to receive the email/TM3 call in addition to the text message. Some adjustments to notice language were made. Madera and Tulare County will see if we can make the message include the Spanish text as well within the 160 character limit. We have some areas to clarify with SirsiDynix after installation and will need to come up with a plan to test. Wymer is working on how we enable patrons to select SMS notices in Enterprise. Once we have enabled SMS on the mobile phone types, staff can enable it for a patron by checking the appropriate notice types in the patron's phone number settings. Staff should still follow the regular patron settings as well for notices (phone, email or print) for cases where an SMS message can't be set. Hold and overdue notices are generated by DayEnd, but we schedule the time period for calls so they aren't set in the middle of the night.

d. Self registration discussion – Tyckoson

Following up on previous discussion of pre/self registration Tyckoson stated that without working with a contractor we can really only offer pre-registration with no privileges since there are too many factors that need to be verified before allowing access to online resources. For full self-registration with immediate access to online resources we would need to look to an outside company to provide the necessary programming. After some discussion the committee voted to propose a placeholder value for an outside service in the 2020-2021 budget. Tyckoson will get a cost estimate from Quipu for their "ecard" service with the validity checks and data reformatting we anticipate needing. If approved for the budget an RFP will probably need to be issued next year.

e. 2021 budget discussion – Tyckoson

We were able to add the SMS messaging this year because our "SirsiDynix" line was over-budgeted due to BlueCloud Mobile only being a partial year charge. For the 2021 budget year we don't anticipate having more than the normal \$4000 cushion we allow for new eRC connectors. Tyckoson asked if anyone had discussions going on within their jurisdictions for new services that would involve Horizon add-ons. There is some desire to continue to make improvements to Enterprise which could involve custom work by SirsiDynix, especially since Wymer will have less time for programming work while the Library Program Manager position is vacant. There is a support level that comes with a block of consulting hours. Most consortia of our size have that so we may propose that as an option at least for next year. Roache indicated that she would like access to more Horizon training. Tyckoson will look to see what training credits cost.

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

Nelson noted that we are currently homeless as our offices were broken down for reuse in the new office on very short notice. Currently SJVLS is operating out of the data center. The PC Fall order is ready to go and he will submit the order tomorrow before going on vacation. On the circuit installation/upgrade front most of the bandwidth upgrades have been completed but we are still waiting for our problem new installation locations. Arellano asked about Office licenses. Kevin is still

working out a quote for staff machine licenses noting that Microsoft academic pricing is very complex. TechSoup is still the far more economical route for public PC licenses. We expect to see the next round of CENIC bids in January.

Wymer had nothing additional to report.

Tyckoson noted that auto-renewal is occasionally having problems with run time, which should take a few minutes but sometimes takes hours. In her attempts to fix this she has been moving it around in the DayEnd schedule, which may have inadvertently caused some auto-renew emails to be delayed by a day. We do occasionally see the auto-renew email task fail part way though. When that happens the notices after the error don't get sent.

VII. The next Automation Committee meeting will be January 22, 2020 via Skype.

VIII. Announcements –.

Roache asked about parent/guardian rules used by others. Arellano asked if anyone was checking out hot spots. Tyckoson noted that if anyone is considering this they need to make sure the hot spots are CIPA-compliant filtered. Madera has a hot-spot lending program in the works using a variety of funding sources.

There being no further discussion the meeting was adjourned at 11:32.

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Allow Patrons to Update Account Information in Enterprise

Background

New features in Enterprise and Web Services allow us to have more control over the way patron account information displays in Enterprise, as well as allowing patrons to edit their own account information. Previous versions defined a small set of account information that would be displayed and was not editable.

With the new features we can mark individual parts of a patron's account as: hidden, read-only, or editable. Hidden values will not display in Enterprise. Read-only values will be displayed but cannot be updated. Editable values can be updated by the patron.

Currently, patrons can view: Line 1 of their address, city/state, zip code, phone number, email name, and email address.

These are the fields that we can display to patrons, fields that can be edited are marked "(E)".

Basic Account Info

- Address List (E)
- AlternateID (E)
- Approved (E)
- Birthdate (E)
- Block List
- Created Date
- Display Name (E)
- Estimated Overdue Amount
- Language (E)
- Last Activity Date
- Last CKO Date
- Last Update Date
- Library (E)
- Note (E)
- Notice to Guardian (E)
- Number of CKOs
- Parent Guardian Name (E)
- Patron Type (E)
- Phone List (E)
- Photo (E)
- Primary Address
- Primary Phone
- Privilege Expires Date
- Registered Date
- Enable Auto Renew (E)
- Last Update Patron

Patron Address Fields

- Begin Date (for temp addresses) (E)
- End Date (for temp addresses) (E)
- City and State (E)
- Email Address (E)
- Email Name (E)
- Address Line 1-4 (E)
- Notice by (E)
- Postal Code (E)

Patron Phone Fields

- Phone Number (E)
- Phone Type (E)

Discussion

Do we want to display more account information using the new features? If so, what fields should we show?

Do we want to allow patrons to edit their own account information? If so, which fields?