AUTOMATION COMMITTEE
January 27, 2021
10:00 a.m.
Via Teams- The public may participate using the link below:
https://go.sjvls.org/automation210127

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 18th, 2020 (Attachment 1)**
VI. **Projects for Discussion & Action**

    A. **Discussion: Introducing New Delivery Supervisor Tisha Smith – Wymer/Smith**
    B. **Discussion: BC MobileStaff Kiosk Mode Demonstration – SirsiDynix**
    C. **Discussion: ILS RFP Update – Wymer**
    D. **Discussion: FY 20-21 Budget – Wymer**
    E. **Action: Staff Passwords – Wymer (Attachment 2)**
    F. **Discussion: HIP Decommissioning – Wymer**
    G. **Discussion: Enterprise Summary Holdings Widget – Wymer**
    H. **Status Report on Projects – Drake/Nelson/Wymer**

VII. **Set date and Agenda building for next meeting, tentatively March 24th, 2021, via Teams.**
VIII. **Announcements**

In accordance with the Americans with Disabilities Act, if you need special assistance to participate in this meeting, please contact Christopher Wymer at 559-600-6256 no later than:
10:00 AM on Tuesday, January 26th, 2021.

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 18, 2020
Via Teams
Draft Minutes

Present:
Rebecca Adams, Anthony Arellano, Faythe Arredondo, Smruti Deshpande, Yvonne Galvan, Dani Haas, Brian Martin, Kristie Pratt, Mollie Roache and Chris Wymer (chair)

Also Present: Ignacio Negrete, Mike Drake, Kevin Nelson, Logic Vang, Aaron Lusk

Excused: Mary Jo Lawrence

I.   The meeting was called to order at 10:02 AM by Chris Wymer.

II.   Roll call was conducted. Ignacio Negrete was sitting in for Mary Jo Lawrence.

III.   Adoption of Agenda – Fresno motioned to modify the agenda to add an agenda item regarding Duplicate borrowers registered in different jurisdictions. Tulare Public seconds. The agenda was adopted as modified.

IV.   Comments from the Public - None.

V.   The minutes of September 30th, 2020 were adopted as distributed.

VI.   Projects for Discussion and Action

  A. ILS RFP Update - Wymer
      1. Wymer provided an update to the committee on the RFP. The RFP closed on Monday afternoon. We received 3 bids from Sirsi Dynix, Equinox, and Innovative. Innovative only submitted a single copy of their bid, but were given an opportunity to correct the deficiency, since it did not affect the substance of their bid. They have provided us with the required copies.
      2. Wymer and Drake are working to review the responses and determine which systems meet SJVLS's requirements. They will finish the review by November 30th and will schedule vendor presentations with the vendors whose responses indicate they meet our requirements. Wymer will also upload the vendor's bids to The Source to facilitate allowing staff to review the proposals.
      3. There was discussion about the timing of presentations. It was decided that it would work best for all jurisdictions to schedule one presentation per day, to minimize the impact on staffing and allow as many staff as possible to participate. Presentations will be scheduled between 10 and 12, with one presentation a day, beginning December 9th.

  B. Federated Search in Enterprise - Drake
      1. Drake demonstrated federated searching of Gale's databases in Enterprise. Federated searching will allow patrons to search for database content within the catalog, and link to full text articles that they find.

2. Pratt asked about the options available for displaying tabs for database search results. She was interested in knowing if database results could be grouped into a single database tab, instead of a tab for each search target. Drake explained options for setting up federated searching include setting up each Gale database as a separate search target. We can display the different search targets as tabs at the top of search results, or as sub-tabs under a single database tab. Roache asked if these searches and full text views would count towards usage statistics. Drake said that they should, but we would need to follow up to see how it works.

C. BC Mobile – Patron Self-Service – Wymer
   1. Wymer gave an update on the potential for implementing patron self-service. At present, there are two issues that prevent us from implementing the feature. The first is if we were to enable barcode only checkout, all patrons would be able to checkout all items at all locations. However, RFID security tags would not be disabled in that instance, and the items would set off security gates when patrons left the library. The second is if we purchased the RFID checkout option, items sent to fill hold requests from libraries without RFID would not be able to be checked out through self-service, and would have to be checked out at a circulation desk, or self-check station. Both of those issues have the potential to create a poor user experience, and as a result, we cannot implement self-service at this time.

D. Duplicate borrower accounts in different jurisdictions – Wymer
   1. Recently Haas reached out for advice on how to handle duplicate borrower accounts for self-registered borrowers. Recently, a self-registered Fresno borrower was identified as a duplicate borrower record, and the existing record was a Tulare County borrower account. Hass explained how she handled the two records within Horizon.
   2. The committee discussed different considerations for handling this situation, including how to update borrower account information, how to handle fines, borrower types, barcode numbers, and adding notes to the borrower's account. Pratt shared the approach she has taken with Kern County borrowers. Considerations for borrower accounts in collections were also discussed.
   3. The committee decided on a procedure for handling these accounts that involves merging the two accounts together to retain any updated address or contact information, updating the borrower's location and borrower type, adding a note to inform the patron of the duplicate account, and to contact the patron letting them know about the duplicate account. For borrowers in collections, staff with inform the JSA of the jurisdiction the borrower is in collections for, informing them of updated address information. SJVLS will put together procedures for handling this process and share it with the JSAs.

E. Status Report on Projects – Drake/Nelson/Wymer
   1. Nelson gave an update on CENIC year 6, heard back from USAC and they approved the category 2 requests. EdTechnologyFunds will review how much is covered by category 2 funding. We received the state grant portion to cover equipment costs for branch upgrades. We're still waiting to hear back on the year 6 state grant for wireless and other upgrades, because it was a very large quote. Year 7 upgrades are being requested. Kevin is asking for quotes on upgrades to any branches currently at 10 mbps or lower, because the 10mbps costs are increasing. He also gave an update on the PC Order, the order has closed and will placed soon. There may be delays in shipping the order related to the pandemic and the holidays. Arellano asked Kevin

about how to set up a temporary internet connection when Porterville opens a temporary location.

2. Drake had no updates.
3. Wymer informed the committee about the progress of the Spanish self-registration form. He needs each jurisdiction to test registrations to make sure the confirmation messages are correct, and that the borrower record writes to Horizon correctly. SMS notices are now back to being sent via Horizon's built-in process. Wymer is still involved with providing information and documents to our e-rate consultant when they need them. Click and Collect is now a regular feature within the mobile app and can be turned on for any member that wants to use it. He has also been working on an updated Auto Renew notice with better formatting and notice language. He hopes to enable it in the next few days. Wymer is almost finished with the circ slip training and will put together a training for the JSAs soon.

VII.   The next Automation Committee meeting will be January 27th, 2020 online via Teams.

VIII.   Announcements –
1. Kern County announced that they were testing Click and Collect but it stalled because the Beale library got busy, and they had issues involving linked accounts. All Kern branches will be closed on 12/4 for a staff training, and they'll be closed from 12/24/20 – 1/4/21.
2. Tulare County announced that they're also testing Click and Collect and hope to make it live to their patrons in early December.

There being no further business the meeting was adjourned at 11:34 a.m.

Staff Password Complexity Profile

Background

Horizon 7.5.6 introduced password complexity profiles for both staff and patron accounts. The committee decided previously to wait to implement passwords for patron accounts. While we wait to implement patron passwords, we can set up password requirements for staff profiles. This will provide an extra layer of security by requiring staff to set up more secure passwords. Defining a password complexity profile will establish the minimum requirements for staff user passwords.

Password Complexity Profile

The following values can be configured in a password complexity profile. Any options we do not want to use can be left blank and will not be enforced.

- Self-password change - If the password can be changed by the user.
- Number of upper-case characters
- Number of lower-case characters
- Number of numerical characters
- Number of special characters
- Minimum length
- Maximum length
- Number of characters that can be repeated
- Disallow last number of passwords
- Days before password change
- Days before to warn before password expiring
- Number of failed logins before account lockout
- User lockout timeout (in minutes)
- Number of failed logins before disabled
- Disable account after password expired for XXX days