

**AUTOMATION COMMITTEE**

**September 29th, 2021**

**10:00 a.m.**

**Via Teams- The public may participate using the link below:**

**<https://go.sjvls.org/automation210929>**

**AGENDA**

- I. Call to Order**
- II. Roll Call and Introductions**
- III. Adoption of Agenda**
- IV. Comments from the Public**
- V. Approval of Minutes of July 28th, 2021 (Attachment 1)**
- VI. Projects for Discussion & Action**
  - A. Discussion: Kids Catalog Implementation - Wymer**
  - B. Discussion and Action: Borrower Registration Standards (Attachment 2) - Wymer**
  - C. Discussion and Action: Resource and Budget Planning for FY 2022-2023 - Wymer**
  - D. Status Report on Projects – Wymer/Drake/Nelson**
- VII. Set date and Agenda building for next meeting, tentatively November 17th, 2021, at Tulare Public Library.**
- 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, September 28th, 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  
July 28th, 2021  
Via Teams  
Draft Minutes**

**Present:**

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

**Also Present:** Mike Drake, Ashley Nuhfer, Logic Vang, Kevin Nelson, Kristin Baer

- I. The meeting was called to order at 10:01 AM by Chris Wymer.
- II. Roll call was conducted.
- III. Adoption of Agenda – The agenda was adopted as distributed.
- IV. Comments from the Public - None.
- V. The minutes of May 26<sup>th</sup>, 2021 were adopted as distributed.
- VI. Projects for Discussion and Action
  - A. Discussion: Circ Rules and Catalog Settings Review
    1. Wymer informed the committee that he would like to schedule a circulation rules and catalog configuration review with each JSA now that all member libraries are re-opening and resuming normal library services to make sure that the circulation rules in Horizon and any messages in the catalog are correct. Wymer will email each JSA a spreadsheet with their current circulation rules, and the JSAs will sign up for individual meetings to review their current configuration.
  - B. Discussion: ECF Funding Record Keeping Requirements
    1. Wymer and Nelson provided committee members with an overview of the ECF Funding Program's record keeping requirements. ECF funds can be used to purchase laptops and hotspots to lend to patrons without a computer or internet access at home. Devices purchased with ECF Funds have individual device spending limits of \$250 for hotspots, and \$400 for laptops. Those spending limits must include any warranties, service contracts, recycling fees, taxes, and any other fees. Libraries that receive funding are required to keep records on the devices and services they purchase. The record keeping requirements include: a signed affidavit that the patron has an unmet need, the device type, the device make/model, the equipment serial number, the deidentified name of the person the device was lent to, the dates the device was loaned out and returned to patrons or the date that the library was informed the item was missing, lost, or damaged.
    2. Wymer presented possible ways that SJVLS could meet the record keeping requirements for the program. Wymer asked the committee about how the affidavits will be collected. Pratt asked if there was a set format for the affidavit, or if it could be a digital form or if a paper form was required. Nelson mentioned that USAC hasn't specified a required format for the affidavit. Pratt suggested that participating members could upload digital copies of the affidavits to the System Shared Drive. Nelson mentioned that it could be setup, and that the uploaded forms could then be uploaded to our e-rate consultants document management system. Arellano asked if there would be a system-wide form for

patrons to sign. Wymer mentioned that it would be desirable if each jurisdiction didn't need to provide specific language related to borrowing the devices. Pratt asked if there were any additional considerations with minors and signing affidavits. Nelson mentioned that USAC's advice was to have the parents sign the affidavits for the minor. Lawrence replied that minors are not legally able to sign affidavits. Wymer noted that there could be potential problems if the parent signing the affidavit for the minor but isn't the responsible party on the minor's borrower record. Haas asked how we would track which borrowers already filled out an affidavit, Wymer replied that this could be handled with a note in the borrower record.

3. Wymer presented a possible option for recording the circulation of ECF devices. A custom task could be created to populate lending information within the ILS. Wymer provided a description of how the task would work. Another option would be to investigate using Web Services to query the data and record it to a database outside of the ILS.
4. Wymer discussed the policy implications of tracking borrower circulation data. The 1983 SJVLS Computer Use Agreement has a section regarding tracking circulation data, where the data collection can be done if it is a process that was authorized by law. This appears to give us the ability to meet these record keeping requirements without having to amend circulation policy.
5. Wymer presented an option for tracking a master list of devices. Track-it could be utilized to record the inventory of the individual devices, including their make/model and serial number. Bib records could be created in Horizon to allow devices to be linked to records that accurately describe all of the device features. The device serial numbers can be entered as notes in the item records.
6. Nelson discussed the per-device spending limits, as well as potential laptops that the system office would be able to support. Many of the members participating in the program received quotes for Chromebooks, which are devices SJVLS cannot support. Nelson informed the committee that after some research he found Lenovo laptops that are under the per-device limit, have adequate specifications, and can be managed by the existing public PC clean-up scripts.
7. Pratt asked if there were any requirements about the lending periods for the devices. Nelson mentioned that there aren't clear requirements at this time. Nelson's interpretation was that the loan periods could be determined by each member. Wymer noted that all of these devices would receive unique itypes, allowing them to use special circulation rules and making their activity easier to track.
8. Wymer will draft an ECF circulation policy and bring a draft version to the next committee meeting.

#### C. Discussion: Borrowers in Collections

1. Wymer provided the committee with an overview on the procedures for handling borrowers in collections. During the set up for the annual long-term borrower purge, there were more borrowers than normal that were in collections in one jurisdiction but did not have that jurisdiction's in-collections btype. In addition, there was evidence that staff were changing borrower's btypes from the in-collections btype to a regular btype, and waiving fees that were assigned by other jurisdictions.
2. To help clean up current borrowers in collections, SJVLS staff will create two reports to help identify borrowers that are in debt collect for a jurisdiction, but do not have the debt collect btype of that jurisdiction. He will also update the list of collections contacts for each jurisdiction and send an updated list to the JSAs.

#### D. Discussion and Action: Enterprise and Web Services Upgrades – Wymer

1. Wymer informed the committee that there are new versions of Enterprise and Web Services available, and he would like to schedule upgrades in the next month. The newest version of Enterprise introduces new search configuration options including stop words and synonym lists that will help us improve search results. Wymer would like to install the newest version of Web Services to make sure we're prepared for Merced to launch CEP. Fresno motioned to schedule updates to Enterprise and Web Services, Kern seconded. The motion passed unanimously. Wymer will inform the committee when the updates are scheduled.
- E. Discussion and Action: Kids Catalog Set up
1. Wymer updated the committee on the work to customize the kids catalog profile. Drake was able to add the requested custom categories, and icons. Wymer informed the committee that he was also able to work out the customizations needed to use the kids catalog as both a profile and a room. The only remaining challenge was recreating the custom search categories for a Spanish profile because many of the searches do not return results. He asked the committee if they wanted the same custom searches to be available in Spanish. Arellano asked to move forward with the kids catalog as it was currently presented and to work on creating the custom Spanish categories once the profile was live. Wymer informed the committee that this was possible. Arellano motioned to move forward with the kid's profile in its current configuration and to add the Spanish customizations over time. Merced seconded the motion. The motion passed unanimously.
- F. Discussion and Action: Driver's License in Borrower Records
1. The newest version of Horizon introduced a driver's license column to the borrower record. Previously, SJVLS was storing a borrower's driver's license in a custom field. This custom field is not used by other applications other than Horizon and prevented libraries from using mobile applications to register borrowers at outreach events. Wymer would like to investigate copying the values from the custom field to the newly created field, so that members can take advantage of mobile registration options. One consideration with the change is there may be some values that won't copy from the old field to the new field because of differences in data type. Wymer is not sure how many records would be affected.
  2. The committee discussed different options for re-configuring the borrower registration views to account for the new field. The decision was made to alter the borrower registration and edit views to make it easier for staff to know which field was which. Roache asked if the borrower registration standards would need to be updated because of the differing data type. Pratt inquired about removing notice fields from the borrower registration view that are no longer used but leaving them in the edit view so they can be accessed for the records that use them. At the next committee meeting the borrower registration standards will be reviewed and updated, if needed.
  3. Roache motioned to update the driver's license and borrower registration and edit views, Kern seconded. The motion passed unanimously.
- G. Discussion: Shafter Separation from Kern County
1. Wymer informed the committee that the Shafter City Library separated from the Kern County Library System and is operating as an independent city library. This means the city of Shafter is no longer considered a system member of SJVLS, and any residents from Shafter will be registered as in-state, out-of-system borrowers.
- H. Discussion: Mobile Printing
1. Nelson asked the committee members how they are handling mobile printing within their jurisdictions. Fresno is currently trying to figure out how to handle printing of web pages, because their vendor changed the way the function works. Kern is using mobile print through Envisionware, as are Tulare Public Library, Kings County, and Madera County.

Vang explained that the issue Fresno is encountering is that previously a URL could be pasted into the mobile print interface to print the content of the web page. That process has changed and is no longer supported. The proposed solution is to print the webpage as a PDF, and then submit the PDF for mobile printing. Currently, Fresno is considering having patrons email the URL they want printed to a branch email address, where staff will open the webpage and send it for printing. This presents security risks, as there isn't a way to verify if the links are safe prior to clicking them and goes against best practices for network security. The other jurisdictions started the mobile printing solution after this feature was removed, so they haven't had to work out this problem.

#### I. Discussion: Resource and Budget Planning for FY 2022-2023

1. Wymer asked the committee if there were any resources they want to pursue adding to the automation system in fiscal year 2022-2023. To add any new resources, we will need to increase the automation budget, which means they need to be presented to Admin Council during the budget planning cycle that begins in January.
2. Pratt suggested looking into costs for the kid's version of the mobile app, to complement the kid's catalog profile for Enterprise.
3. Wymer asked the committee if there was any interest in an email newsletter or marketing type platform. Pratt mentioned that Kern County is in the middle of a 3-year agreement with LibraryAware.
4. Roache inquired about the possibility of a consortia OverDrive subscription. Wymer mentioned that proposal was previously brought up with Nathan Boyer and the Electronic Resources Committee. One of the problems is some of SJVLS's members already belong to other OverDrive reciprocal lending agreements and would have to leave those before we could start one for SJVLS. The second problem is when this was presented to Admin Council, Admin Council decided not to pursue a reciprocal lending agreement. Pratt inquired if any CloudLibrary licenses would migrate to OverDrive. Wymer wasn't sure but would investigate the question.
5. Pratt asked about the possibility of investigating other options for printed and email notices.
6. Wymer will research the possible options and bring the information back to the committee at the next meeting.

#### J. Status Report on Projects – Wymer/Drake/Nelson

1. Wymer informed the committee that he has been working on the kids catalog customizations. The new SirsiDynix Master Agreement has been signed, and the new agreement includes a new product: BlueCloud e-Resource Management, a product for managing and tracking e-resource usage statistics. Wymer and Nelson set up a new server for the new email and SMS processor for Horizon. Once it's set up, this will allow us to start sending email CKO receipts.
2. Drake informed the committee that he has been working on a PERL script to automate the updating of OCLC holdings, as well as working with Web Services that will provide us with more options to work with data from Horizon. Drake was able to automate adding a block to 2,000 borrower's accounts to help with Shafter's separation from Kern County, which was something SirsiDynix said couldn't be done.
3. Nelson informed the committee that the CENIC year 6 installs are moving along. We received notice from Geolinks that the first fixed wireless branches installed at Piedra, but that's only one end of the circuit. There's still a long process ahead of us. He also updated the committee that we need to migrate our older Linux servers to new versions that are not going out of support.

VIII. Announcements

- A. Lawrence shared that Madera County's bookmobile is almost finished being set up, and they expect it to be ready to go into service in October. There's a possibility that they may be opening a new branch in Raymond in the coming years.

There being no further business the meeting was adjourned at 12:02 p.m.

## SJVLS Borrower Registration Data Entry Standards

Because we have a shared database and our borrowers often utilize more than one jurisdiction, we all have an interest in maintaining the integrity of our borrower data. These are the Jurisdiction-approved guidelines for data entry of borrower records which all staff should be trained to follow.

Data entry rules for the Address are based on the US Postal Service Addressing Standards.

Field	Format
<p><b>1</b>    <b>LOCATION:</b> Enter the branch where the borrower is registering. Click the code button on the right side of the form and select the proper code for your library’s jurisdiction which is listed in parentheses.</p>	<p>AUB - Auberry Branch Library (Fresno Co.)</p> <p>BEA - Beale Memorial Library (Kern Co.)</p>
<p><b>2</b>    <b>NAME:</b> Enter the borrower's name in ALL CAPS in “phone book” format.</p> <ul style="list-style-type: none"> <li>* Use the full legal name as it appears on ID.</li> <li>* Place commas between last name and first name and between first name or middle initial and titles, such as JR., III.</li> <li>* Do not add comments in this field.</li> </ul>	<p>LAST NAME, FIRST NAME, TITLES</p> <p>Examples:</p> <p>CRUZ, JOHN MORALES</p> <p>CLINTON, WILLIAM J.</p> <p>MORA-FLORES, GABRIEL, JR.</p>
<p><b>3</b>    <b>ADDRESS – PERM</b> – Borrower's physical address of their permanent residence. <b>REQUIRED</b> for all borrowers.</p> <ul style="list-style-type: none"> <li>* Enter address in ALL CAPS, no punctuation, on a single line whenever possible.</li> <li>* Put the apartment (APT), suite (STE), space (SPC), etc. at the end.</li> <li>* If the street name makes the address too long to put apartment/unit number at the end, put the street address on Line 1, and the APT / STE on Line 2.</li> <li>* Proper entry of mailing address affects our postal rates and is based on USPS standards.</li> <li>DO NOT enter PO Boxes here. See 3A.</li> </ul>	<p>NUMBER STREET UNIT</p> <p>Example:</p> <p>1/ 3077 W SAMPLE AVE</p> <p>1/ 1307 GRAND AVE APT 311</p> <p>1/ PO BOX 987</p> <p>1/ 123 CECIL B DEMILLE BLVD</p> <p>2/ STE 501</p>
<p><b>3A</b>    <b>ADDRESS – MAILING</b> – Use only if borrower has an address for mail delivery of correspondence / notices that differs from their PERMANENT address.</p> <ul style="list-style-type: none"> <li>* Click "New" to create an additional address.</li> <li>* Click “Mailing” radio button</li> <li>* Enter the PO Box/address, City St, and postal code following rules in #3, 4 &amp; 5</li> </ul>	<p>Example:</p> <p>PO BOX 123</p> <p>818 FIRST AVE APT 114</p>
<p><b>3B</b>    <b>ADDRESS – TEMP</b> – Use only if borrower has a temporary mailing address, e.g. summer resident or college student</p> <ul style="list-style-type: none"> <li>* Click “New” to create an additional address</li> <li>* Click the “Temp” radio button.</li> <li>* Enter the begin and end date for which that address will be used, using the format DD/MM/YYYY</li> </ul>	

Field	Format
* Enter the street address, City St, and postal code following rules in #3, 4 & 5.	
<p>4 <b>CITY, ST</b>  Enter the city code  * Most cities in SJVLS and many other CA cities have a code. If you aren't sure of the code, click on the codes button.  * Since the City Code is an abbreviation of the actual City and State, make sure the full name of the City/ST that is displayed is correct.  * If there is no city code, enter the full name of the city and the state abbreviation in Line 3 of the address. Use ALL CAPS and do NOT use a comma.  * Put "SPAC" in the City, ST Box. Otherwise it won't let you save the record because this is a required field.  * Do NOT enter the zip code on this line. Use the Postal Code field.</p>	<p>CITY CODE  Example:  MAR (displays as MARIPOSA CA)  VIS (displays as VISALIA CA)  TUL (displays as TULARE CA)    If no city code, then enter CITY and State on Line 3 of the address.  Example:  BEATRICE NE  DALLAS TX</p>
<p>5 <b>POSTAL CODE:</b>  Enter the zip code. If you have a 9 digit code, please enter it.</p>	<p>12345  12345-6789</p>
<p>6 <b>NOTICE BY:</b> Click "Stnd" radio button for mail or phone notices, click "email" for email notices.  <u>If email</u>  * Name - this is the name that will appear on the email.  * Address - this is the full email address: jsmith@comcast.net  * Pay close attention to punctuation. Don't forget the @ symbol. They are *not* case sensitive.  * IMPORTANT: All phone types must be "no telephone notices" for email notices to be delivered.</p>	<p>NAME:  Example:  Mary Martin  ADDRESS:  Example:  Mary.Martin@sjvls.org</p>
<p>6a <b>PREOVERDUE</b> - check mark if the borrower wants to receive a reminder 3 days before an item is overdue. Only applicable for borrowers with email notices.</p>	
<p>7 <b>BIRTH DATE</b>  Enter the <u>borrower's</u> date of birth. Do <u>not</u> enter the Guardian's DOB on this line.</p>	<p>MM/DD/YYYY  Example  01/29/1986</p>
<p>8 <b>BTPE</b> - Is the borrower a permanent resident of your library service area?    YES - Enter the correct BTPE from your library jurisdiction's list of btypes.</p>	<p>YES Examples  FAD Fresno Adult  FCH Fresno Child</p>

	<b>Field</b>	<b>Format</b>
	<p>Use the Codes button if unsure.</p> <p>NO - See <u>Correct Combination of Location, Btype &amp; Bstat</u></p>	<p>FSURF Fresno Internet Surfer</p> <p>FST Fresno Staff</p> <p>FYA Fresno Young Adult</p> <p>-----</p> <p>NO Examples</p> <p>FNC Fresno Out of State, Non-Res</p> <p>FNR Fresno In-Jurisdiction Non-Res</p> <p>FNS Fresno Out-of-Jurisdiction Non-Res</p> <p>FTR Fresno Temp. Resident</p>
9	<b>EXPIRATION DATE</b> - automatically calculated based on the Btype selected.	
10	<b>LANGUAGE</b> - enter the language Telemessaging should use.	<p>LANGUAGE</p> <p>eng - English</p> <p>spa - Spanish</p>
11	<p><b>STAT CLASS (Bstat):</b> Is the borrower a permanent resident of your library service area?</p> <p>YES - Enter the proper code or codes assigned to your library jurisdiction.</p> <p>NO - Enter the appropriate “x” code. See <u>Correct Combination of Location, Btype &amp; Bstat</u>.</p> <p>*Do not use codes from other library jurisdictions. Use only those assigned to your library jurisdiction.</p> <p>*All out of state borrowers get the “xzout” bstat regardless of the library jurisdiction.</p> <p>*Do not use codes starting with “x” for borrowers who are permanent residents of your jurisdiction.</p>	<p>Examples of resident Bstats:</p> <p>TP1 Tulcentr22</p> <p>Examples of non-resident Bstats</p> <p>XKINGS</p> <p>XLOS</p> <p>XSAC</p> <p>XTULCO</p> <p>Out of state resident is always</p> <p>XZOUT</p>
12	<p><b>PHONES</b></p> <p>Enter the home phone number with the area code. <u>See a list of Valid TM3 Area Codes</u>.</p> <p>* If no phone number, enter 000-000-0000 and make it “h-no” type.</p> <p>* If the borrower only has a cell phone, list it as Mobile. Do not list it again under Home.</p> <p>* If the number has an extension, enter one space, then “x” followed immediately by the extension number, e.g. x1234. Do not write out the</p>	<p>nnn-nnn-nnnn</p> <p>nnn-nnn-nnnn xnnn</p> <p>Examples:</p> <p>559-488-3462</p> <p>661-868-3333</p> <p>559-600-6285 x5675</p>

	<b>Field</b>	<b>Format</b>
	<p>word "extension".</p> <p>* Do not put comments such as MESSAGE or MOM in the phone number field.</p> <p>* To receive email notices, all phone numbers must be "No Telephone" types.</p> <p>* Telemessaging calls the first (eligible) number listed in the Borrower Phone area. "First" is defined as lowest "Order" value in borrower_phone for that borrower.</p>	<p>If no phone: 000-000-0000</p>
13	<p><b>BARCODE</b> Enter the barcode you are assigning to this borrower. If a customer's card is lost, enter Date Lost. DO NOT DELETE barcodes.</p>	
14	<p><b>PIN#</b> Enter the 4-digit pin chosen by borrower.</p>	
15	<p><b>DRIVERS LICENSE#</b> Enter the driver's license or ID number of the person who has signed for responsibility exactly as it appears on the document including dashes. *Put in only the license or ID number, no notes or comments. *If it is an out-of-state license, add a hyphen at the end followed by the two-letter abbreviation for the state.</p>	<p>Example: B1234567 VAR123456-MA H507603316-MN D252-420-55-463-0-FL</p>
16	<p><b>PARENT/GUARDIAN</b> Enter name of parent or guardian using same format as line #1.</p>	<p>LAST NAME, FIRST NAME, TITLES</p>
17	<p><b>GUARDIAN ADDRESS</b> - No longer used. See 19a</p>	
18	<p><b>GUARDIAN CITY</b> - No longer used. See 19a</p>	
19	<p><b>GUARDIAN ZIP</b> - No longer used. See 19a</p>	

19a	<p><b>NOTICE TO</b> - No longer used.</p> <p>If the Parent/Guardian wants their name on the notice, enter their name as C/O on Line 1 of the Addresses section and the child's address on Line 2.</p> <p>If the guardian's address is DIFFERENT from the child's, enter the guardian's address as the PERM address; and the child's as TEMP with begin and end dates in the past.</p>	<p>Name: SMITH, KEVIN</p> <p>Line #1: C/O SMITH, JANE</p> <p>Line #2: 123 MAIN ST</p>
20	<p><b>PAC ACCESS TYPE</b> - Use this field if your jurisdiction has assigned access codes for use of online resources or Internet</p>	
21	<p><b>BARCODE(ID)</b> - enter the assigned barcode again. The BARCODE and BARCODE(ID) should match.</p>	
21a	<p><b>NOTE</b></p>	
21b	<p><b>COMMENTS</b> - Enter date of birth for guardian here. Also any notes regarding disconnected phones, returned mail, etc.</p>	
22	<p><b>HOME SERVICE</b> – some jurisdictions may use this for book-by-mail services.</p> <p>* If you accidentally click in this section, you must click the 'delete' button before you can save the record.</p>	
23	<p><b>PROXY BORR</b> – leave this section blank.</p> <p>* If you accidentally click in this section, you must click the 'delete' button before you can save the record.</p>	
24	<p><b>KEEP CIRC HISTORY</b>  <input type="checkbox"/> Jurisdiction Preference <input type="checkbox"/> Keep History <input checked="" type="checkbox"/> Do Not Keep</p>	<p>DO NOT KEEP is automatically selected when the record is saved.</p>
25	<p><b>SOURCE</b></p>	<p>Set up (3/11) so Tulare Co. could record bookmobile stops. Can be used by other members for this purpose.</p>