

AUTOMATION COMMITTEE

December 15th, 2021

10:00 a.m.

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

<https://go.sjvls.org/automation211215>

To call in and participate in the meeting:

Call: (559) 785-0133

Phone Conference ID: 450 056 219#

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 17th, 2021 (Attachment 1)**
- VI. Projects for Discussion & Action**
 - A. Discussion and Action: Certification of Need to Continue Virtual Meetings - Wymer**
 - B. Discussion and Action: Borrower Registration Standards – Wymer (Attachment 2)**
 - C. Discussion and Action: Electronic Device Lending Guidelines – Wymer (Attachment 3)**
 - D. Status Report on Projects – Wymer/Drake/Nelson**
- VII. Set date and Agenda building for next meeting, tentatively January 12th, 2022, online 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, December 14th, 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 17, 2021
Via Teams
Draft Minutes**

Present: Anthony Arellano, Yvonne Galvan, Dani Haas, Mary Jo Lawrence, Brian Martin, Kristie Pratt, Mollie Roache, Marisol Rodriguez and Chris Wymer (chair)

Excused: Rebecca Adams, Smurti Deshpande

Also Present: Mike Drake, Kevin Nelson, Logic Vang, Mark Lewis, 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 September 29, 2021 were adopted as distributed.
- VI. Projects for Discussion and Action
 - A. Kids Catalog Feedback – Wymer
 1. Wymer asked the committee if they had received any feedback on the Kids Catalog theme. Haas from Fresno commented that a few staff members were excited about the new theme but hadn't received any comments from patrons. The other committee members indicated that they hadn't received feedback from patrons.
 - B. Borrower Registration Standards – Wymer
 1. Wymer presented the updated borrower registration standards and asked the committee to double check that all the changes discussed during the previous meeting were included in the revised document. Haas commented that the comments field was missing guidance on recording the expiration date for non-US ID cards, which was discussed in the previous meeting.
 2. Rodriguez asked about guidance on recording the postal code for addresses where the city/st isn't already entered in Horizon. Wymer replied that the postal code is still recorded in the postal code field, but the city and state for the borrower are recorded in address line 3.
 3. Roache asked about handling California identification cards that are not driver's license and if there needed to be any special data entry with those IDs. Pratt commented that when an individual replaces an ID with a driver's license in California, their ID number remains the same, so we do not need any special notations for non-driver's licenses.
 4. Pratt asked about how Horizon determines what phone number to call when there are more than one active phone numbers in the borrower record. Wymer replied he didn't have a chance to test but would ask Drake to investigate it after the meeting.
 5. Roache asked about the procedure for handling lost barcodes when the borrower reports the card as lost but doesn't replace it. Wymer will double check if the guidance is necessary and make the necessary updates to the document.
 6. Wymer told the committee that he would incorporate the edits and can return to the committee with an updated draft in the December meeting. Haas motioned to table

approving the registration standards until the next meeting. Roache seconded the motion. Motion passed.

C. ECF/Broadband Grant Device Lending – Wymer

1. Wymer discussed lending rules for the hotspot and laptop devices provided through ECF or Broadband Grants funding. Some jurisdictions have requested that these devices only circulate to borrowers registered in their jurisdiction, while others have allowed any adult borrower registered in SJVLS and in good standing to borrow devices. As long as the funding does not include restrictions on device circulation, Wymer would like to standardize the lending rules among the members. He pointed out that under the State's definitions of Universal Borrowing and Equal Access that any California resident is eligible to check out materials from other system members without restriction. Roache commented that is how the circulation of video games at the Tulare Public Library works. They cannot be requested, but any borrower registered in the system can travel to their library and checkout the items.
2. Lawrence commented that devices could be returned to a library in a different jurisdiction from where it was checked out and asked about how to handle returning the items to their home library. Wymer asked if the devices were being issued with cases. Lawrence commented that only some of their laptops have cases, and Martin said none of Kings County's have cases. Haas commented that Fresno does not provide cases with their devices. The concern is returning them through shipment could cause damage. Roache commented that one possibility might be to require patrons to return the devices to the library they borrowed them from, which is a procedure they follow for blood pressure kits.
3. Wymer commented that setting up restrictive lending rules could unnecessarily prevent patrons from checking out devices, such as a borrower registered with the Laton branch because they want to access Fresno County's eBook collection but does their primary borrowing at the Hanford branch in Kings County. Because they're a Fresno patron, they would not be able to borrow a device from Kings County. Roache asked how many patrons would travel long distances to checkout a device. She pointed out that for locations like Tulare Public Library are near the boundaries of other jurisdictions and that if a patron from Visalia wanted to travel to their library to checkout a laptop, she would be happy the devices are being used.
4. Pratt asked if the devices would display in the catalog. Lawrence commented that her devices appear in the catalog. Wymer commented that there are already bibliographic records, and he's in favor of allowing patrons to see where devices are available for checkout. Wymer mentioned he couldn't remember if the devices accepted requests, and the committee members informed him they do not.
5. Arellano mentioned that once they re-open he's in favor of allowing non-Porterville residents to check out devices. Martin mentioned that Kings is going to allow all adult borrowers in good standing to check out devices. Pratt just wants to make sure that no child borrowers to check out devices because of the requirements to sign an affidavit. Lawrence commented that she would like devices to remain in Madera County, and the circulation rules to do so are already established.
6. The committee decided to have Wymer draft a device lending policy and bring it back to the committee at the December meeting for discussion and approval.

D. Horizon 7.6.0 – Wymer

1. Wymer informed the committee about a bug in Sybase that will require SJVLS to migrate the Horizon database to MSSQL before we are able to upgrade to the next version of Horizon. The next version of Horizon implements several important security features, and as a result, SJVLS will be prioritizing the database migration in the coming months. Pratt asked if the migration would only require changes to the database or if it will also include changes to staff workstations. Wymer answered that the migration will require

- updates to every staff workstation, and asked Vang if it would be possible to automatically push out the changes. Vang replied that he wasn't sure without more information. Wymer and Vang will investigate possible ways to help with the updates once the migration plans develop.
- E. New Brown Act Requirements and Certification of Need to Continue Virtual Meetings – Wymer
 - 1. Wymer updated the committee on the new modifications to the Brown Act, regarding allowing the committee to continue to meet virtually. To continue virtual meetings, the committee is required to certify that there is an existing need to continue to meet virtually in the interest of reducing the health and safety risk inherent in personal attendance at public meetings.
 - 2. Arellano motioned to certify the need to virtual meetings in the interest of protecting public health and safety. Pratt seconded. The motion passed.
 - F. Status Report on Projects – Wymer/Drake/Nelson
 - 1. Wymer did not have a lot to update, most of his time has been occupied with Administrative Librarian tasks. He announced that the Supervising Librarian, which is the System Administrator position, was posted on Tuesday.
 - 2. Drake informed the committee that he observed that items with a status of missing in Horizon need to be updated to a withdrawn status so they can be deleted from the system. He reminded the committee that they need to be manually updated, and that it seems not everyone is doing the process.
 - 3. Nelson provided an update on circuit installations. They're still moving forward. Year 6 had 44 branches and 31 branches are completed. Some of the challenging branches are going to start having work done by Geolinks. Year 7 has 22 upgrades, and 6 are already finished. We're still running into equipment shortage issues. HP Printers are back ordered until next year, and other devices have similar challenges.

VIII. Announcements

- A. Roache shared that Tulare Public Library is hiring for a Librarian, and the position doesn't require a MLIS, so anyone with a bachelor's degree is eligible to apply.

There being no further business the meeting was adjourned at 10:58 a.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. These instructions are in the same order as the sections appear when you are entering a patron for the first time. The screen is arranged differently when you are just editing a patron's information. If section in Horizon's registration is not covered in this form, we are not using it now and you do not need to fill that out.

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

	Field	Format
1	<p>LOCATION: 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>* Branches are listed alphabetically by their abbreviations.</p>	<p>AUB - Auberry Branch Library (Fresno Co.)</p> <p>BEA - Beale Memorial Library (Kern Co.)</p>
2	<p>NAME: Enter the borrower's name in ALL CAPS in "phone book" format.</p> <p>* Use the full legal name as it appears on ID.</p> <p>* Place commas between last name and first name and between first name or middle initial and titles, such as JR., III.</p> <p>* Do not add comments in this field.</p>	<p>LAST NAME, FIRST NAME, TITLES</p> <p>Examples: CRUZ, JOHN MORALES CLINTON, WILLIAM J. MORA-FLORES, GABRIEL, JR.</p>
3	<p>ADDRESS – PERM – Borrower's physical address of their permanent residence. REQUIRED for all borrowers.</p> <p>* Enter address in ALL CAPS, no punctuation, on a single line whenever possible.</p> <p>* Put the apartment (APT), suite (STE), space (SPC), etc. at the end.</p> <p>* 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.</p> <p>* Proper entry of mailing address affects our postal rates and is based on USPS standards.</p> <p>DO NOT enter PO Boxes here. See 3A.</p>	<p>NUMBER STREET UNIT</p> <p>Example: 1/ 3077 W SAMPLE AVE 1/ 1307 GRAND AVE APT 311 1/ PO BOX 987</p> <p>1/ 123 CECIL B DEMILLE BLVD 2/ STE 501</p>
3A	<p>ADDRESS – MAILING – Use only if borrower has an address for mail delivery of correspondence / notices that differs from their PERMANENT address.</p> <p>* Click "New" to create an additional address. When the pop up asks "Insert after displayed record, yes or no" choose yes.</p> <p>* Click "Mailing" radio button.</p> <p>* Enter the PO Box/address, City St, and postal code following rules in #3, 4 & 5.</p>	<p>Example: PO BOX 123</p> <p>818 FIRST AVE APT 114</p>

3B	<p>ADDRESS – TEMP – Use only if borrower has a temporary mailing address, e.g. summer resident or college student.</p> <ul style="list-style-type: none"> * Click “New” to create an additional address. When the pop up asks “Insert after displayed record, yes or no” choose yes. * Click the “Temp” radio button. * Enter the begin and end date for which that address will be used, using the format DD/MM/YYYY * Enter the street address, City St, and postal code following rules in #3, 4 & 5. 	
4	<p>CITY, ST Enter the city code</p> <ul style="list-style-type: none"> * 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 a <u>City/St code cannot be found</u>, 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. <u>Leave the City, St box empty.</u> * If there is no city code, leave the City, St box empty. * Do NOT enter the zip code on this line. Use the Postal Code field. 	<p>CITY CODE Example: MAR (displays as MARIPOSA CA) VIS (displays as VISALIA CA) TUL (displays as TULARE CA)</p> <p>If no city code, then enter CITY and State on Line 3 of the address. Example: BEATRICE NE DALLAS TX</p>
5	<p>POSTAL CODE: Enter the zip code. If you have a 9 digit code, please enter it.</p>	<p>12345 12345-6789</p>
6	<p>NOTICE BY: Click “Stnd” radio button for mail or phone notices, click “email” for email notices.</p> <p><u>If email</u></p> <ul style="list-style-type: none"> * 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>NAME: Example: Mary Martin ADDRESS: Example: Mary.Martin@sjvls.org</p>
6a	<p>PREOVERDUE - check mark if the borrower wants to receive a reminder 3 days before an item is overdue. Only applicable for borrowers with email addresses in their borrower record.</p>	
7	<p>BIRTH DATE 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>

8	<p>BTPE - Is the borrower a permanent resident of your library service area?</p> <p>YES - Enter the correct BTPE from your library jurisdiction's list of btypes. Use the Codes button if unsure.</p> <p>NO - See <u>Correct Combination of Location, Btype & Bstat</u></p> <p>* NOTE – borrowers with an in-collections btype are exempt from the location, btype, bstat combination requirements. In-collections btypes are used to indicate the jurisdiction that sent a borrower to collections, and on occasion will not match the borrower's location or bstat.</p>	<p>YES Examples</p> <p>FAD Fresno Adult FCH Fresno Child FSURF Fresno Internet Surfer FST Fresno Staff FYA Fresno Young Adult ----- NO Examples</p> <p>FNC Fresno Out of State, Non-Res FNR Fresno In-Jurisdiction Non-Res FNS Fresno Out-of-Jurisdiction Non-Res FTR Fresno Temp. Resident</p>
9	<p>EXPIRATION DATE - automatically calculated based on the Btype selected.</p>	
10	<p>LANGUAGE - enter the language Telemessaging should use.</p>	<p>LANGUAGE eng - English spa - Spanish</p>
11	<p>STAT CLASS (Bstat): 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. NO - Enter the appropriate "x" code. See <u>Correct Combination of Location, Btype & Bstat</u>.</p> <p>*Do not use codes from other library jurisdictions. Use only those assigned to your library jurisdiction. *All out of state borrowers get the "xzout" bstat regardless of the library jurisdiction. *Do not use codes starting with "x" for borrowers who are permanent residents of your jurisdiction.</p>	<p>Examples of resident Bstats: TP1 Tulcentr22</p> <p>Examples of non-resident Bstats</p> <p>XKINGS XLOS XSAC XTULCO</p> <p>Out of state resident is always XZOUT</p>
12	<p>PHONES 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. * If the borrower only has a cell phone, list it as Mobile. Do not list it again under Home. * If the number has an extension, enter one space, then "x" followed</p>	<p>nnn-nnn-nnnn nnn-nnn-nnnn xnnn</p> <p>Examples: 559-488-3462 661-868-3333 559-600-6285 x5675</p>

	<p>immediately by the extension number, e.g. x1234. Do not write out the word "extension".</p> <ul style="list-style-type: none"> * Do not put comments such as MESSAGE or MOM in the phone number field. * To receive email notices, all phone numbers must be "No Telephone" types (-no). * 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. * TM3 will not call numbers that begin with 999, so any numbers beginning with xxx-999-xxxx cannot receive phone notices. <p>SMS NOTICES</p> <ul style="list-style-type: none"> * Only mobile phone types (m, m-no) are eligible to receive SMS notices. To sign a borrower up for SMS notices, you must check the checkbox for the notice types they want to receive (hold, overdue, general). 	<p>If no phone: 000-000-0000</p> <p>Make sure phone type is h-no</p>
13	<p>BARCODE</p> <p>Enter the barcode you are assigning to this borrower. If a customer's card is lost, enter Date Lost. DO NOT DELETE barcodes.</p> <p><u>If a borrower reports their card as lost and does not replace it, enter today's date in the date lost field. Then, in the barcode (ID) field add an "L" before the barcode number. This will report the card as lost if a patron tries to use it, along with preventing access to CKO if staff click "cancel" on the lost card popup message.</u></p>	
14	<p>PIN#</p> <p>Enter the 4-digit pin chosen by borrower.</p>	
15	<p>DRIVERS LICENSE#</p> <p>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.</p> <ul style="list-style-type: none"> *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. *If it's an ID from outside the United States, add a hyphen at the end followed by an abbreviation for the Country and note the ID expiration date in the comments field. 	<p>Example: B1234567 VAR123456-MA H507603316-MN D252-420-55-463-0-FL</p>
16	<p>PARENT/GUARDIAN</p> <p>Enter name of parent or guardian as it appears on their ID, using same format as line #1.</p>	<p>LAST NAME, FIRST NAME, TITLES</p>
17	<p>GUARDIAN ADDRESS - No longer used. See 19a</p>	
18	<p>GUARDIAN CITY - No longer used. See 19a</p>	

19	GUARDIAN ZIP - No longer used. See 19a	
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19a	<p>NOTICE TO - 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 Line #1: C/O SMITH, JANE Line #2: 123 MAIN ST</p>
20	<p>PAC ACCESS TYPE - Use this field if your jurisdiction has assigned access codes for use of online resources or Internet</p>	
21	<p>BARCODE(ID) - enter the assigned barcode again. The BARCODE and BARCODE(ID) should match.</p> <p><u>*If a borrower reports their card as lost or stolen and does not replace it, add an "L" in front of the barcode number in this field.</u></p> <p>* We use this field to validate the borrower's active barcode in the event more than one barcode are set as active <u>in the list of barcodes-</u></p>	
21a	<p>BORROWER NOTE – Enter any notes related to the borrower's account that you want to show to the borrower.</p> <p>* Notes entered here display to the borrower when they view their personal information in Enterprise.</p>	
21b	<p>COMMENTS - Enter date of birth for guardian here, and any other borrower notes that you do not want to display to patrons. <u>If a borrower's ID is from a country outside the United States, record the ID expiration date here.</u></p>	
22	<p>HOME SERVICE – 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>PROXY BORR – 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>KEEP CIRC HISTORY ()Jurisdiction Preference () Keep History (*) Do Not Keep</p>	<p>DO NOT KEEP is automatically selected when the record is saved.</p>
25	<p>SOURCE</p>	<p>Set up (3/11) so Tulare Co. could record bookmobile stops. Can be used by other members for this purpose.</p>

DATE: December 15, 2021
 TO: SJVLS Automation Committee
 SUBMITTED BY: Chris Wymer, Administrative Librarian
 SUBJECT: Electronic Device Lending Guidelines

BACKGROUND:

SJVLS member libraries circulate electronic devices to patrons to help bridge the digital divide and provide internet access for disadvantaged patrons both in the library and at home. These devices include laptops, hotspots, and laptop/hotspot bundles, and were purchased with various funding sources, including library budgets as well as State or Federal grants.

Recently, some SJVLS member libraries requested lending rules for electronic devices that restrict device checkout to patrons registered with that member library. There are areas within SJVLS where patrons utilize library branches in multiple jurisdictions, and restricting lending could be problematic and prevent them from accessing a device. However, there are also concerns about patrons returning devices to different library than it was checked out from and the potential to damage the device when returned in transit.

This discussion attempts to find a middle ground between protecting devices from damage when returned through delivery, while also making devices as accessible as possible for patrons.

PROPOSED SOLUTION:

Any SJVLS patron will be able to checkout electronic devices from any SJVLS member library unless the funding source's terms and conditions state otherwise.

SJVLS member libraries are allowed to require devices be returned to a library within their jurisdiction, to avoid potential damage in delivery. Note – this is not something that can be enforced within Horizon and would have to be enforced by library staff.

These devices will not fill holds outside of their jurisdiction and will only be requestable within the jurisdiction if the member library wants to allow it.

We will review circulation stats and member feedback at least once a year and make any revisions based on observations, if necessary.

OUTCOME:

Motion:

Second:

_____ PASSED

_____ REJECTED