Automation Committee
Agenda Packet

SAN JOAQUIN VALLEY LIBRARY SYSTEM
2420 Mariposa Street
Fresno, CA 93721
559-600-6256

May 21, 2025   Hanford Public Library   10:00 a.m.

The next meeting of the SJVLS Automation Committee will be held at:

Hanford Public Library
401 N Douty St
Hanford, CA 93230
May 21, 2025, at 10:00 a.m.

Enclosed are the agenda and prepared attachments for this meeting.

Copies of these materials may be made at the public's expense.

Accessibility and Accommodations: In accordance with the Americans with Disabilities Act, if you need special assistance to participate in this meeting, please contact the San Joaquin Valley Library System at (559) 600-6256 no later than 10:00 a.m. on Tuesday, May 20, 2025.

Public records: Disclosable public records related to this agenda are available for public review at the Fresno County Public Library, Business Office, located at 2420 Mariposa Street, Fresno, CA 93721, during regular business hours, 8:00 a.m. – 5:00 p.m., Monday through Friday.

AGENDA

A. COUNCIL OPENING

    1. Call to Order
    2. Introductions
    3. Adoption of the Agenda
    4. Public Comment – The Public may comment on any items relative to SJVLS and not on the agenda.

B. APPROVAL OF MINUTES OF JANUARY 15, 2025 (ATTACHMENT 1)

C. ITEMS FOR DISCUSSION AND ACTION

    1. ACTION: FY 2025-26 Meeting Schedule – Wymer (Attachment 2)
    2. DISCUSSION: Horizon – Wymer
    3. ACTION: ODBC Connector for BC Analytics – Wymer (Attachment 3)
    4. DISCUSSION: Borrower Legal Names – Wymer
    5. DISCUSSION: Borrower Registration and Updating Info – Wymer
    6. DISCUSSION: Cataloging – Wymer
    7. DISCUSSION: Suggested Search Terms in Enterprise – Wymer
    8. DISCUSSION: Windows 11 Transition – Wymer

D. STAFF REPORTS

    1. Senior Network Systems Engineer
    2. Associate System Administrator
    3. System Administrator

E. CALENDAR ITEMS

    1. Set the date and agenda building for the next meeting, tentatively Wednesday, July 16, 2025 online via Microsoft Teams.

F. ANNOUNCEMENTS

    1. Committee members can share items relating to collaboration, innovation, and professional development of interest to the Committee.

G. ADJOURNMENT

SAN JOAQUIN VALLEY LIBRARY SYSTEM
Automation Committee Meeting
January 15, 2025

DRAFT MINUTES

A. CALL TO ORDER

    1. The meeting was called to order at 10:00 a.m. by Chris Wymer

B. ROLL CALL AND INTRODUCTIONS

    1. Roll call was conducted.

        i. PRESENT

            1. Yvonne Galvan (Coalinga-Huron), Tiffany Polfer (Fresno), Kristie Pratt (Kern), Brian Martin (Kings), Sarah McIntyre (Madera), Matt Johnson (Mariposa), Smruti Deshpande (Merced), Alex Pollock (Porterville), Faythe Arredondo (Tulare County), Sheri Haveman (Tulare City), Chris Wymer (Chair)

        ii. OTHERS PRESENT

            1. Kevin Nelson (SJVLS), Aaron Lusk (SJVLS)

    2. Introductions were conducted.

C. ADOPTION OF THE AGENDA

    1. Pratt (Kern) motioned to adopt the agenda as distributed.
        i. Polfer (Fresno) seconded the motion.
        ii. The motion passed.

D. PUBLIC COMMENT

    1. There were no comments from the public.

E. APPROVAL OF PREVIOUS MEETING MINUTES

    1. Polfer (Fresno) motioned to adopt the agenda with a correction to Selma's re-opening date.
        i. Deshpande (Merced) seconded the motion.
        ii. The motion passed.

F. PROJECTS FOR DISCUSSION AND ACTION

    1. BC Mobile 2.0 Migration – Wymer
        i. Wymer provided an update on the BC Mobile 2.0 migration. SirsiDynix completed the initial set up and provided links to test versions of the app. During December, Wymer spent some time working on setting up location displays and holds policies to support the app. He informed the

committee that he's run into some small issues with logo displays and configuring searching to both allow ERC content to be searched and allow SJVLS to be able to manage the Search Sources. He hopes to be able to finish initial testing and train JSAs soon.

2. SirsiDynix Acquisition – Wymer
    i. Wymer informed the committee that SirsiDynix was sold to the N Harris Constellation Corporation. They're no longer owned by a private equity firm. Harris is a technology-focused ownership group that views their acquisitions with a long-term focus and have a history of retaining the companies they. Wymer believes this is a positive thing and should allow SirsiDynix to continue to have the resources needed to develop their products.

3. Preferred Name Change – Wymer
    i. Wymer provided an update on the preferred name and legal name transition. He recently ran into an issue where he was unable to create a legal name alphabetical search. When he reached out to SirsiDynix for assistance, they said that custom searches were a billable expense. Wymer told support that Horizon 7.6.1 was delivered with a search index for a legal names, and SirsiDynix support asked Development for more information. SirsiDynix development created a custom script that will update the Horizon database and build a working legal name alphabetical search.
    ii. Wymer has to test the script on the test database, and the set up will take a few hours to complete. He is going to disable the overnight task that overwrites the test database with a fresh copy of the live database in order to test the updated search over multiple days.
    iii. He will update committee members with the results next week.

4. Damaged Item Procedures Review – Wymer
    i. Wymer informed the committee that before Christmas he was contacted by Madera County staff to tell him that there have been issues with damaged items procedures not being followed. He asked the committee to please share the procedures with staff and remind them of the steps to follow.
    ii. Pratt mentioned that she has encountered situations where a patron returns an item damaged, and staff return it to the owning jurisdiction according to the procedures. When the item arrives at the owning library, staff are checking out the item to the patron and marking it lost. Patrons are then contacting Kern County staff saying they returned the item, but it's listed as lost on their account. Wymer said this is not the correct way to handle the situation and provided the correct steps to charge a patron for damaged items.
    iii. McIntyre asked about the steps in the damaged procedures, mentioning that there were too many steps and some of them are repetitive. Wymer explained the process and why each step is important.
    iv. Wymer asked the committee to notify him if procedures are not being followed and he will address them on a case-by-case basis.
    v. McIntrye also asked about the procedure for handling items that go missing from the hold shelf without being checked out. Pratt clarified

the steps for handling missing items. Wymer will email the procedures to the committee after the meeting.

G. STAFF REPORTS

1. Senior Systems Network Engineer
    i. Nelson provided an update on the status of the WiFi Expansion project. SJVLS has completed the Kern County metro branches and are transitioning to the outlying communities. Tulare County is scheduled next after Kern.
    ii. Nelson is finalizing the PC Order. He's working with a new Dell rep for the order, and the price quotes are looking better than we expected.
2. System Administrator
    i. Wymer gave an update on the OverDrive authentication transition project. OverDrive reached out earlier this week to start the transition. Wymer will work on setting up test cards and other aspects for the migration.
    ii. Wymer also provided an update on the Online Tutoring RFP. Vendor presentations were held last week. SJVLS received 3 responses. The Electronic Resources Committee will meet tomorrow to vote on a recommended vendor to send to Administrative Council.
    iii. Wymer's final update related to filling SJVLS's vacant Supervising Librarian and Librarian III positions. Wymer was unable to find a candidate to fill the Supervising Librarian position in the last round of interviews. He also opened an internal promotional opportunity for Fresno County Librarians. Unfortunately, no one submitted interest in promoting to the open position. As a result, Wymer will open both the Supervising Librarian and Librarian III positions at the same time. He will also attempt to do a better job of advertising the open positions.

H. CALENDAR ITEMS

1. Date and location for next Automation Committee Meeting
    i. March 19, 2025, at 10:00 am at the Visalia Library.

I. ANNOUNCEMENTS

1. Pratt announced the Southwest and Holloway-Gonzales branches re-opened. The Wilson re-opening was delayed to February 18. Kern River Valley is closed but is offering pop-up services to patrons to allow them to pick up holds. A similar process is planned for Rosamond, but a start date hasn't been announced.
2. Arredondo announced that all Tulare County Libraries will be closed this upcoming Friday for an all-staff training.
3. Polfer announced that all Fresno branches will be closed February 11, 2025 for the Annual Library Meeting.
4. McIntrye announced that Madera County received the PLA Digital Literacy Grant and will be holding digital literacy classes for patrons soon.

J. ADJOURNMENT

1. There being no further business to discuss the meeting adjourned at 10:47 a.m.

DATE: May 21, 2025

TO: SJVLS Automation Committee

SUBMITTED BY: Chris Wymer – Administrative Librarian

SUBJECT: FY 2025-26 Meeting Schedule

RECOMMENDED ACTION:

1. Approve the FY 2025-26 Automation Committee meeting schedule.

Approval of the recommended action will establish the schedule of meeting dates and locations for SJVLS's Automation Committee in the upcoming fiscal year.

ALTERNATIVE ACTION(S):

Alternatively, Automation Committee could propose different meetings dates or locations that work better for the committee members.

FISCAL IMPACT:

There are no fiscal impacts associated with the recommended or alternative actions.

DISCUSSION:

This agenda item establishes the Automation Committee meeting schedule for the upcoming year, including meeting locations, to allow committee members to avoid conflicts with meeting dates.

PRIOR AGENDA REFERENCE:

No prior reference.

Motion: Second:

_____ PASSED   ____ REJECTED

SJVLS Automation Committee Meeting Schedule

FY 2025-26

Date	Location
July 16, 2025	Teleconference
September 17, 2025	Tulare Public Library
November 19, 2025	Teleconference
January 14, 2026	Teleconference
March 18, 2026	Visalia Library
May 20, 2026	Fig Garden Library

DATE: May 21, 2025

TO: SJVLS Automation Committee

SUBMITTED BY: Chris Wymer – Administrative Librarian

SUBJECT: ODBC Connector for BC Analytics

RECOMMENDED ACTION:

1. Approve adding the ODBC connector in BC Analytics.
2. Approve expenditures from the Maintenance-Equipment budget line in the amount of $1,800.

Approval of the recommended action will approve the expenditure of $1,800 for the one-time costs associated with setting up an ODBC connection between Horizon and BC Analytics.

ALTERNATIVE ACTION(S):

Alternatively, Automation Committee could elect not to add the ODBC connection and continue working only with harvested data for reporting.

FISCAL IMPACT:

Approval of the recommended action would increase the expenditure from the Maintenance-Equipment budget line in FY 2023-24, in the amount of $1,800. There are already sufficient funds available to pay the expenditure and it would not require an increase in membership dues.

DISCUSSION:

BC Analytics is a powerful reporting tool for staff. One of the biggest limitations is that data is harvested daily for use in reports, preventing staff from querying information as it exists right now. A second limitation is only certain pieces of data are harvested in BC Analytics, and thus, not everything in Horizon can be used in reports. The ODBC connector provides a direct connection between BC Analytics and Horizon, allowing live data to be included in reports, and allowing for reports on data attributes that are not normally harvested.

Setting up the live connection requires SJVLS and SirsiDynix staff to set up and configure a secure connection between the two networks and comes with a one-time set up cost of $1,800.

PRIOR AGENDA REFERENCE:

No prior reference.

ATTACHMENTS INCLUDED AND/OR ON FILE:

On File – SirsiDynix quote to add ODBC Connector.

Motion: _____   Second: _____

_____ PASSED   _____ REJECTED