



Automation Committee Agenda Packet

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

September 17, 2025

Tulare Public Library

10:00 a.m.

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

**Tulare Public Library
475 North M St
Tulare, CA 93274
September 17, 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, September 16, 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 JULY 16, 2025 (ATTACHMENT 1)

C. ITEMS FOR DISCUSSION AND ACTION

1. ACTION: Decouple HIP from Horizon – Wymer (Attachment 2)
2. ACTION: Auto-Renew Notice Language – Wymer (Attachment 3)
3. DISCUSSION: Preferred Names and Mailed Notices – Wymer (Attachment 4)

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 November 19, 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

July 16, 2025

DRAFT MINUTES

A. CALL TO ORDER

1. The meeting was called to order at 10:01 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), Matt Johnson (Mariposa), Smruti Deshpande (Merced), Alma Guzman (Porterville), Faythe Arredondo (Tulare County), Sheri Haveman (Tulare City), Chris Wymer (Chair), Stephen Guenzi (SJVLS)
 - ii. OTHERS PRESENT
 1. Kevin Nelson (SJVLS), Logic Vang (SJVLS), Aaron Lusk (SJVLS), Crystal Pina-Juarez (Tulare City)
 - iii. ABSENT
 1. Sarah McIntyre (Madera),
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 minutes as distributed.
 - i. Pratt (Kern) seconded the motion.
 - ii. The motion passed.

F. PROJECTS FOR DISCUSSION AND ACTION

1. Update Default Notice Language
 - i. Fresno County submitted a request to update the default notice language used for holds. They observed the notice still contains language from the COVID pandemic about libraries having different hours and/or offering curbside pickup, which is no longer the practice at their branches. Because default notice language is shared by all

members, all members need to review and agree to the notice language. If the committee would be reviewing holds language, it seemed logical to review the rest of the notice language at the same time.

- ii. The committee reviewed the default notice language for all notices, and recommended changes to overdue notices, except the first notice, lost notices, and hold notices. The changes to overdue notice language were to standardize how we handle the distinction between a single item and multiple items. The changes to the lost notice were to address that some members still charge a processing fee for lost items and others do not. The language was updated to clarify that a processing may be charged, if applicable. The changes to hold notices were to remove the references to curbside pickup and limited hours, as well as a revision to the Spanish translation of the SMS holds message.
 - iii. After reviewing the notice language, Wymer shared that this week he noticed Telemessaging is only making calls for first overdue notices, when it's configured to also send calls for second overdue notices. He would like to update the configuration to send two notices. Pratt asked if increasing the number would mean that final overdue notices would be sent as phone calls, since Kern only sends a first overdue notice before sending the final. Wymer believes it should continue sending final notices as lost notices but will review the call file after making the change to ensure that's the case.
 - iv. Wymer will implement the revised notice language and have it start being used the day after the meeting.
 1. Johnson (Mariposa) motioned to modify the notice language with the committee's revisions.
 - a. Deshpande (Merced) seconded.
 - b. The motion passed.
2. Changes in Zipbook Tracking and Reporting
- i. At the previous meeting, the committee discussed changes and challenges with Zipbooks. Beginning this year, the State Library is requiring libraries that use Zipbooks funding to add at least 80% of the titles to their collections. Committee members shared their approaches to tracking Zipbooks. Johnson said he requires any title purchased to have a record available in WorldCat and uses a spreadsheet he received from Madera County to track their purchases and offered to share it with anyone who's interested. Haveman shared Tulare City's process for ordering titles, which includes creating placeholder bibliographic and item records for the Zipbook. This is being done so the borrower will receive notices when the Zipbook needs to be returned, and so it's easier for staff to track what materials have been returned. Haveman shared that lately she's been encountering errors when she checks in returned Zipbooks and the system cannot delete the placeholder bibliographic record.
 - ii. Wymer believes there are a couple of reasons the bibliographic record cannot be deleted, and that the use of Fast Add records for Zipbook orders is likely the source of the problem discussed at the previous meeting. Because the Zipbook record includes a field for ISBN, this

prevents a complete record from being imported into Horizon. Recently, Wymer has overlaid placeholder Zipbooks records with full records when the titles are on the best seller list. With full records in Horizon, other members are linking their materials to the record, as they're supposed to. When Zipbooks are returned, they're configured to delete the item and bibliographic record when they're checked in, however, Horizon will not delete a bibliographic record when there are still items attached. Wymer will work with Haveman to update their process and Zipbook collection to address the issue and update their workflow.

3. Windows 11 Transition

- i. Wymer gave an update on the Windows 10 end-of-life date, and the system's transition to Windows 11. Since the last meeting Vang has done a lot of work to create and secure a Windows 11 image for staff and public use and no longer has the problems securing public PCs. Currently, the Windows 11 image for public PCs is ready for small-scale deployment and testing. SJVLS would like to deploy both Windows 11 and migrate PC Reservation to CloudNine at the same time. Staff PCs can be upgraded starting now.
- ii. For the public PCs, Vang's plan is to do a small test deployment in Fresno Central's computer lab and then expand it to all of Fresno Central. If the test deployment goes smoothly, he will be ready to start expanding to another small location. Wymer asked if there were any volunteers and Johnson volunteered to test in Mariposa after Fresno.
- iii. Wymer informed the committee that as the transition gets closer SJVLS will schedule a training to review the migration to CloudNine and provide more information about the service and how to update public PCs. To help with the initial deployment, SJVLS will set up a form where techs and/or JSAs can schedule a date to update a single branch. This will allow Vang to work closely with staff, review all the steps, and answer any questions they may have. Once a single branch is done, the hope is the tech and/or JSA will be able to upgrade their other branches on their own.
- iv. Wymer shared the following points of consideration with the committee regarding the change:
 1. Make sure your PCs can upgrade to Windows 11. Some older models can't run the newer operating system.
 2. Consider whether you need to purchase new PCs for the upgrade. To help with this, Vang will provide more information about what models cannot upgrade.
 3. The imaging process is the same for Windows 10 and 11.
 4. Staff should backup their bookmarks, saved passwords, and other browser settings, in case they're lost during the upgrade.

4. Migrating Reports to BC Analytics

- i. Wymer informed the committee that the ODBC connector for BC Analytics was installed earlier this month. Wymer and Guenzi have been learning how to use it and the best way to format reports using the connector.
- ii. Wymer would like to start by migrating the reports that are scheduled, so the reports from Jasper can be compared with the new ODBC reports

in BC Analytics. He asked the committee members to review the output of both reports and make sure they're consistent.

- iii. Wymer also asked the committee to review which reports they run that aren't scheduled. Those reports will be migrated as well, but Wymer doesn't have a way to track which are used.

G. STAFF REPORTS

1. Senior Systems Network Engineer
 - i. Nelson provided an update on the 2021 Wifi Expansion project. Currently all locations are complete except for two branches with facilities issues.
 - ii. The 2024 E-Rate Category 2 project is moving along. SJVLS signed change orders last Friday and the project should start soon.
 - iii. Nelson mentioned that recently router power supplies have been dying unexpectedly and SJVLS was out of spares. He ordered additional power supplies to have spares available if more fail.
 - iv. The 2025 project is still waiting for a funding decision commitment letter. This project will upgrade headquarter routers to support future bandwidth upgrades and to set up a 5-year enterprise licensing agreement for our wireless access points, reducing the cost to members to provide Wifi in their branches.
2. Associate System Administrator
 - i. No report.
3. System Administrator
 - i. Wymer informed the committee that he's been working on training Guenzi and that Guenzi is doing a great job so far.
 - ii. Wymer let the committee know annual stats are compiled and ready to review.
 - iii. Wymer is working on a grant application to cover most of the unfunded portions of the E-Rate projects Nelson discussed.
 - iv. Wymer worked with Kings County to provide instructions and advice on the best way to handle Hanford's move to their temporary location.

H. CALENDAR ITEMS

1. Date and location for next Automation Committee Meeting
 - i. September 17, 2025 at the Tulare Public Library.

I. ANNOUNCEMENTS

1. Polfer announced that the Selma closure will be extended through August. She also shared that Fresno County is starting work on Student Success Cards, and that Summer Reading is in full swing.
2. Johnson shared that Mariposa County is discussing the transition of all government entities using .gov domains for their website and email. Mariposa may need to implement the change quicker than other members, but if that's the case SJVLS will work with them to help with the change.

J. ADJOURNMENT

1. There being no further business to discuss the meeting adjourned at 11:41 a.m.

DATE: September 17, 2025
TO: Automation Committee
SUBMITTED BY: Chris Wymer – Administrative Librarian
SUBJECT: Decouple HIP from Horizon

RECOMMENDED ACTION:

1. Authorize the System Administrator to decouple HIP from Horizon.

Approval of the recommended action will decouple HIP from Horizon for placing requests. Requests through Web Services are already decoupled, this would remove the final request dependency with HIP.

ALTERNATIVE ACTION(S):

Leave the configuration as-is. Requests placed through the client will continue to route through HIP.

FISCAL IMPACT:

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

DISCUSSION:

The Horizon client is configured to route requests through HIP before writing them to the database, which is a holdover from the time when HIP was the primary catalog for SJVLS. In January 2020, HIP was retired as the public catalog and all searching was directed to Enterprise but HIP was still used in the background as a middle-tier between the Horizon client or Web Services and the Horizon database.

Web Services was decoupled from HIP a while back, removing the middle-tier dependency to place requests through Enterprise or BC Mobile. At the time the Horizon client could not be decoupled from HIP because of several bugs that would be introduced as a result. With the release of Horizon 7.6.1, those bugs have been resolved, and the client can be decoupled.

PRIOR AGENDA REFERENCE:

No prior reference.

Motion:

Second:

_____ PASSED

_____ REJECTED

DATE: September 17, 2025

TO: SJVLS Automation Committee

SUBMITTED BY: Chris Wymer – Administrative Librarian

SUBJECT: Auto-Renew Notice Language

RECOMMENDED ACTION:

1. Approve modifications of the Auto-Renew notice language, as identified by the committee.

Approval of the recommended action will update the Auto Renew notice to use the language approved by the committee.

ALTERNATIVE ACTION(S):

Alternatively, Automation Committee could decide not to modify notice language for Auto-Renew notices.

FISCAL IMPACT:

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

DISCUSSION:

At the previous meeting when this committee reviewed default notice language, Auto-Renew notice text was not included in the review. Additionally, Madera's committee rep contacted SJVLS in August to ask about potentially updating the notice language, to remove confusion about whether the items were renewed or not. The current formatting of an Auto-Renew notice is provided on the next page.

PRIOR AGENDA REFERENCE:

Automation Committee Agenda – July 16, 2025. Item #2.

Motion:

Second:

_____ PASSED

_____ REJECTED

EXAMPLE AUTO-RENEW NOTICES

SUCCESSFUL RENEWAL

AUTO-RENEW NOTICE

12/14/2024

Notice For: TOM SLICK PREFNAME

One or more items that you borrowed were due today. As a courtesy, we attempted to automatically renew them for you. Please check the due dates for the items listed below to see which items auto renewed and which are still due. Please disregard this notice if you already returned the item(s). Contact your local library branch if you have any questions.

Renewed

Due Date: 01/03/2025

Title: MARC manual : understanding and using MARC records /

Barcode: 1048602898

Thank you for using your local library.

FAILED RENEWAL

AUTO-RENEW NOTICE

12/10/2024

Notice For: THOMAS TEST SLICK

One or more items that you borrowed were due today. As a courtesy, we attempted to automatically renew them for you. Please check the due dates for the items listed below to see which items auto renewed and which are still due. Please disregard this notice if you already returned the item(s). Contact your local library branch if you have any questions.

Not Renewed

Due Date: 12/09/2024

Title: Arranging and describing archives and manuscripts /

Barcode: 1048594814

Thank you for using your local library.

DATE: September 17, 2025

TO: SJVLS Automation Committee

SUBMITTED BY: Chris Wymer – Administrative Librarian

SUBJECT: Preferred Names and Mailed Notices

DISCUSSION:

At the beginning of the year SJVLS implemented a new name field, allowing borrowers to use their preferred name on notices. While the feature has been well-received, SJVLS has become aware of an issue with the way preferred names are being recorded in Horizon.

Staff are entering only a single name in the preferred name field and omitting a borrower's last name. This might create an issue when we need to mail a notice to a borrower. USPS standards require a full name on mail in order for it to be delivered. Additionally, using only a single name creates the potential for confusion if two borrowers with the same name have holds arrive at the same time. There wouldn't be an easy way tell which "John" holds belong to without a last name.

Questions for discussion:

1. Has any mail been returned as undeliverable where the borrower only has a single name?
2. Have there been any conflicts with holds on the hold shelf?
3. Have there been other issues with borrowers with only a single name for their preferred name?
4. Is this something that needs to be corrected, or is it a non-issue?