

Enclosed are the agenda and prepared attachments for this meeting. Copies of these materials may be made at the public's expense.

The public may participate by using the following URL: <u>https://go.sjvls.org/automation220727</u> To participate in the meeting by telephone, call: (559) 785-0133

Enter Phone Conference ID: 696 515 741#

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) 600-62xx no later than 10:00 a.m. on Tuesday, July 26, 2022.

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 JUNE 29, 2022 (ATTACHMENT 1)

C. ITEMS FOR DISCUSSION AND ACTION

- 1. ACTION: Certification of the Need to Continue Virtual Meetings Wymer
- 2. ACTION: Damaged Item Procedures Wymer (Attachment 2)
- 3. DISCUSSION: COVID-19 Horizon Customizations Wymer
- 4. DISCUSSION: Review of Horizon Staff Accounts Wymer
- 5. DISCUSSION: Original Cataloging Services Update Wymer
- 6. DISCUSSION: New Enterprise Theme Feedback 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, August 24, 2022, 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 June 29, 2022

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. Faythe Arredondo, Kristin Baer, Yvonne Galvan, Kelly Jo Jones, Brian Martin, Kristie Pratt, Krista Riggs, Chris Wymer (chair)
 - ii. EXCUSED
 - 1. Anthony Arellano, Heidi Clark, Smruti Deshpande
 - iii. OTHERS PRESENT
 - 1. Mike Drake, Mark Lewis, Kevin Nelson, Tiffany Polfer, Logic Vang

C. ADOPTION OF THE AGENDA

- 1. Pratt motioned to adopt the agenda.
 - i. Jones 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. Pratt motioned to adopt the minutes as distributed.
 - i. Baer seconded the motion.
 - ii. The motion passed.

F. PROJECTS FOR DISCUSSION AND ACTION

- 1. Certification of the Need to Continue Virtual Meetings Wymer
 - i. The committee discussed current conditions in their local jurisdictions and the need to continue meeting virtually.
 - 1. Baer motioned to continue virtual meetings.
 - 2. Arredondo seconded.
 - 3. The motion passed.

G. STAFF REPORTS

- 1. Senior Systems Network Engineer
 - i. Nelson reported that the outstanding Dell invoices have been paid, and the hold on placing new orders has been lifted. He is going to re-quote the Spring PC Order and then get it placed. He asked if any members had outstanding items they would like to order. Jones asked if Mariposa had placed an order. Nelson said they had not and asked Jones to contact him after the meeting to discuss options. Martin asked if he placed an order, and Nelson confirmed he did.
- 2. Associate System Administrator
 - i. Drake reported that he is compiling a list of each member's BC Analytics users and will make it available when completed so the members can review their current accounts.
- 3. System Administrator
 - i. Wymer reported that the 3-year and 7-year inactive patron purges were completed over the last 2 weeks. Summary reports are available in the system shared folders. The summary reports show the number of borrowers and dollar amount of debts purged.
 - ii. Wymer reported that the new JasperServer has been upgrade and work is underway to migrate the reports from the old server. He ran into an issue where the bad email address report would not execute, due to a SQL validation process on the JasperServer.
 - iii. Wymer reminded the committee members that SJVLS will be rebranding their logo and color scheme next week. He asked the committee to replace the SJVLS logo in their websites and other materials. Pratt asked if the new logo will be made available to staff. Wymer said he would send a link to the logo files.
 - iv. Wymer asked the committee members to remind their staff that they need to close Horizon clients overnight. He is observed a large number of clients still logged in each morning. Pratt asked if Wymer could send a list of the workstations, and he said he would add it to his morning routine.
 - v. Wymer informed the committee that due to staff shortages, original cataloging is suspended systemwide.

H. CALENDAR ITEMS

Date and location for next Automation Committee Meeting

 July 27, 2022 at 10:00 am via Teams.

I. ANNOUCEMENTS

- 1. Arredondo informed the committee that she will be going on an extended leave soon and Tulare County will have an interim JSA.
- 2. Baer informed the committee that she accepted a position with Fresno City College and will be leaving Fresno County Library in August. Polfer will transition to being Fresno County's JSA.
- 3. Wymer announced that on Friday, July 1, the Porterville Library will re-open after 2 and a half years of being closed.

J. ADJOURNMENT

1. There being no further business to discuss the meeting was adjourned at 10:21 a.m.

Damaged Items from Another Jurisdiction

BACKGROUND

Resource sharing is one of the prominent services SJVLS provides its members, allowing them to expand the number of resources available to their patrons by sharing items between member libraries. Occasionally, items belonging to one jurisdiction are damaged by patrons borrowing them in a different jurisdiction. When it happens, the decision about damage charges is made by the owning jurisdiction. This procedure provides specific instructions for handling these items so that the owning jurisdiction can charge the patron for damages without creating confusion about the source of the charges.

PROCEDURES

This section will outline the steps to follow when an item is returned damaged, and it belongs to another jurisdiction.

CHECK IN LOCATION

Please follow these procedures for checking in damaged items.

- 1. Switch to Damaged Mode Check in
 - a. Under CKI menu select "Damage Mode", you will see RED Text appear next to barcode input.

Merced Main Library (Merced Co.) - [Checkin / Request Processing]

🔚 File Edit 1 CKI	Borrower Item Blocks Tools Window	w Help
	Change CKI Date Show Blocks	
X	Hide Blocks window at CKI	CKI Date 06/07/2022
Searching		Time 11:26AM
Z39.50 Sear	Show Borrower	
New Additio	Hide 'Item Not Out' message	: C Exempt Fines C Renewal
🤣 View Ne	Hide 'Place on Hold Shelf' message	
View N	Always Put In List	
View No		# CKOs - Due Date (Carry
Wiew No	Copy Borrower Barcode to Clipboard	#CKOs Due Date/Copy
Request	Standard CKI	
View Bc	Bookdrop	
E Acquisitions	In House Use	
🗄 💼 Cataloging		
Circulation	Exempt Fines	
Open CKI W	Renewal	
Open CKC	Damaged Mode	
	banagea mode	
🗄 🛁 Off-Line Cir	Enable RFID (3M)	
Employee Serials	Enable RFID (Bibliotheca)	
	Clear	
	CKO F	F8

2. Check-in the item

	Date 06/07/2022 Fime 11:28AM		
G Standard C Bookdrop C In House Use C Exempt Fines C R	enewal		
Barcode Barcode Barcode Damaged Cher Price # CKOs Due Date/Copy	ikin Mode	Status	Destination
XrtMARC sourcebook : cataloging art, architecture, and Damaged 1048594822 75.00 21		Damaged	sjvls

- Open "Edit Item" and take a screenshot of the Prior Circ Info for the owning jurisdiction

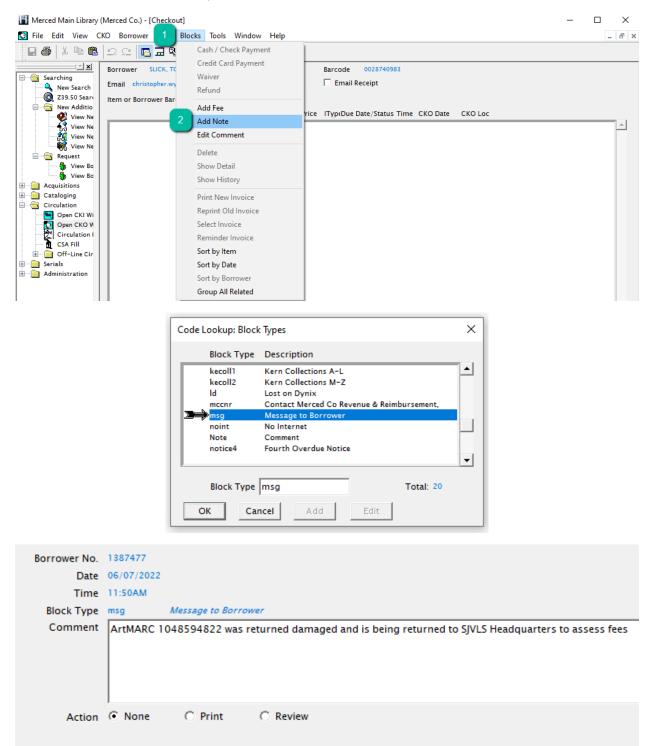
 To take a screenshot
 - i. Press the "Print Screen" button the keyboard.
 - ii. Open Word
 - iii. Paste the screenshot into the word document
 - iv. Print the screenshot

I Merced Main Library (Merced Co.) - [Checkin / Request Processing]	– 🗆 X
🛗 File Edit View CKI Borrower Item Blocks Tools Window Help	_ & ×
CKI Date 06/07/2022	
View Ne View Ne Net Ne View Ne Net Ne View Ne Net Ne View Ne View Ne Net Ne View Ne Net Ne View Ne Net Ne View Ne Net Ne View Ne View Ne Net Ne View Ne View Ne View Ne Net Net Net Net Net Net Net Net Net Net	A
Wiew Ba Acquisitions Creulation Greulation Open CKI Wi Open CKI Wi Open CKU W	
Open CKO W Circulation I Cas Fill B Off-Line Cir B Off-Line Cir B Serials B Off-Line Cir	-
OK Show Blocks Change CKI Date Edit Item Clear Circ Demo (Merced)	OVR NUM

Title	ArtMARC sourcebook : o	ataloging art, architecture, an	d					
Call No.	025.34 Ar789	Copy No.	Item No. 1600901	* Status	dmg D	amaged	Co	odes
Status Updated	06/07/2022							
Checkin Note	Damaged							
* Barcode	1048594822	Collection sjvismf	Sjvis Reference Military &	Firearms				
Internal Note								~
								~
Location		Iquarters					-	
Prior Circ Info	New Delete	SLICK, TOM MC adult: 06	5/07/22			-	- 1 of	ך י
Borrower SL	ICK, TOM MC adult							
Barcode 00	28740983	2nd ID 0028740983						
CKI Date 06	5/07/2022 Tim	e 11:28AM Loca	ation mer					
CKO Date 06	5/07/2022 Tim	e 11:13AM Loca	ation mer					
Renewals 0	by Phone 0	by OPAC 0 Aut	o Renewals 0 N	lo. of Pieces	0			
Used In-house	No. Ir	n-house Uses 0						
ІТуре	sjvibk <i>Sjvis Book</i>							
Price	75.00						_	
Statistics	ew Delete						- 1 of	ר י
Created	10/03/2002 Upda	ated 06/07/2022 Statu	s Changed 06/07/2022					
Inhouse Use	0 Last l	nhouse Date						
CKOs	21 Last	CKO Date 06/07/2022	CKO Loc					
Renewals	0 Phone Ren	0 OPAC Ren 0	Auto Renewals	0				
Bib No.	1418376							
Close	ave Page Up	Page Down	Page 1 of	1				
			-					

4. Fold the printout of the "Prior Circ Info" in half so the borrower information is hidden and place it in the item.

- 5. Open the borrower's record and add a "Message to Borrower" block noting the following:
 - a. "{TITLE} {BARCODE} was returned damaged and is being returned to {OWNING JURISDICTION} to assess fees."



b. This is what the borrower will see in Enterprise:

<mark>8</mark> Personal Infor	mation 🔽 Cl	heckouts	📕 Holds	Fines	Additional Information	
+ Miscellaneo	ous Patron Ale	rts				
Miscellaneous	s Patron Alerts	s				
	Title or Messa	аяе				
Reason		.8~				Date

- c. NOTE: BC Mobile does not currently display message to borrower blocks to patrons.
- 6. Fill out a damaged item slip and put in transit back to owning library.

ArtMARC	aloging ·
JO	nitecture
	Their
/isu	lal
	ages
Patron Name <u>SLICK, TOM ALC Adu</u> lt	
Patron Barcode 028740483	•
Type of Damage MARKINGS ON PAGES Comments PATPON FILLED IN	•
PRACTICE QUESTIONS IN PEN.	•
FRACTICE ACESTICAS IN PEN-	•
	•
Name of Staff Filling Out Slip CHPIS WYMER	•
Phone Number 559 - 600 - 6256	•
Good Time to Contact M-F 7:00 - 3:30	•
	•
IcRae and Lynda S. White	On Beh

OWNING LOCATION

When the item arrives at the owning library, please follow these instructions for adding charges to a borrower's account.

- 1. Receive the material and assess the damage.
- 2. If the borrower will be charged, add a "Damaged" block to the borrower's account, noting the following information:
 - a. In "Amount" enter the fee for the item, including any processing fees.
 - b. In "Comment" enter the barcode followed by the title of the item
 - i. NOTE: Only the first 35 characters of the comment print on the notice. The borrower can view the full block note by viewing their account in Enterprise or BC Mobile.

📲 Edit: Add Fee		- • •
Fee Category * Amount		
	C None Print C Review	
ОК	Cancel	

c. After adding the charge, update the "Message to Borrower" block with a comment that fees were assessed.

📸 Edit: Block Det	ail	8
Borrower No.	1387477	
Date	07/21/2022	
Time	03:08PM	
Block Type	Note Comment	
* Comment	Borrower will be charged for damages. Cannot erase sharpie scribbles. crw2176	~
		\sim
Action	G None C Print C Review	
ОК	Cancel	

i. NOTE: the borrower will not see the comment, but staff will be able to view it in Horizon and this creates a record of what has happened.

d. Add a second Message to Borrower block noting that they will be charged for the damages to the item. The borrower will be able to view this message in the "Additional Information" section of My Account in Enterprise.

	nt Blocks	
	lo. 1387477	
	ate 07/21/2022	
	ne 03:10PM	
Block Ty	pe msg Message to Borrower ent You are being charged for the damages to ArtMARC Sourcebook. We cannot erase sharpie and t	
	item can not longer be used by other patrons.	v v
Acti	on 🖲 None C Print C Review	
ОК	Cancel	
Personal Informatio	on 🔽 Checkouts 🗐 Holds 💽 Fines 🕼 Additional Information	
Miscellaneous P	atron Alerts	
Miscellaneous P	atron Alerts	Date
Message to ArtI	atron Alerts	Date 7/21/

- 3. If the borrower will not be charged for the damage:
 - e. Delete the "Message to Borrower" block related to the damaged item.
 - f. Add a new "Message to Borrower" block noting the title and that the borrower will not be charged.
- 4. After adding the charges, each jurisdiction will withdraw the items according to local policy.