

**Automation Committee Meeting**  
**March 3<sup>rd</sup>, 2021**  
**Via Teams**  
**Draft Minutes**

**Present:**

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

**Excused:**

Smruti Deshpande

**Also Present:** Mike Drake, Kevin Nelson, Logic Vang, Aaron Lusk, Amy Taylor

- I. The meeting was called to order at 10:03 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 January 27<sup>th</sup>, 2021 were adopted as distributed.
- VI. Projects for Discussion and Action
  - A. Discussion and Action: 2020-2021 Remaining Budget
    1. Wymer presented to the committee the cost information for possible expenditures discussed at the previous meeting and provided an update on the current budget. To pay the EZ Proxy renewal, we will have to ask Admin Council to approve a budget line transfer from the ILS budget line to the OCLC budget line, in the amount of \$3,900. That will leave \$9,715.75 for the ILS budget. The Enterprise Kids Catalog Template costs are \$1,800. The setup of the template costs \$800, and then there's a yearly \$1,000 subscription fee. Wymer informed the committee that next year's budgeted amount is enough to add this service. Pratt inquired if the fees were per catalog profile, or if the pricing was for all profiles. Wymer answered that the setup fee is for all profiles.
    2. Wymer reached out to both Backstage Library Works and OCLC to inquire about cleaning up old bibliographic records. The quote from Backstage was more than we have available this year. OCLC recommended a reclamation project, which went beyond what we are trying to accomplish. In discussing the project with OCLC, Wymer was informed that there is no limit to the number of catalog records that can be exported from Connexion. As a result, SJVLS staff can perform the clean-up work on their own without having to pay a vendor.
    3. Wymer presented another possible option, paying for instructor-led training from SirsiDynix on the BlueCloud Analytics reporting software.
    4. Wymer informed the committee about the costs for potential catalog enhancements. The Bento Box display would be a one-time cost of \$2,400 and the Rivers display would be a one-time cost of \$3,700.

5. Roache asked about the possibility of training other staff members to assist with records clean up. Wymer responded that the only staff he would be comfortable with working on these records would be staff from cataloging centers. The clean-up work would involve batch exporting catalog records from Connexion, and importing them into Horizon, and Wymer has reservations about including staff that are not familiar with the interface or process. Staff at cataloging centers already have a high workload, and he is unsure if they would be able to take this on as well.
  6. Taylor asked about the costs for the BlueCloud Analytics training courses. Wymer and Drake tried to look up costs for the training but were unable to locate exact costs. Taylor asked about other training options. Wymer did not have other ideas prepared and mentioned that he focused on Analytics because it was a product that staff use themselves. Haas pointed out that some of the trainings, including instructor led trainings are free to sign up for. The committee decided that it would be better to pursue free training courses first before paying for training.
  7. After discussing training, Wymer informed the committee about the potential need to keep some funds in reserve to pay for an additional SMS message bundle. Wymer presented the committee with information about costs for SMS packages, and asked for feedback on what to do. SMS messages are purchased in bundles and we have 12 months to use them. An additional 10,000 messages would cost \$1,000, and an additional 25,000 messages would cost \$1,500. The committee discussed possible options, Arellano suggested purchasing an additional 25,000 messages this year, which when combined with the 25,000 messages that we purchase with our annual maintenance would give us enough SMS messages to last through the end of next fiscal year. Wymer will verify with SirsiDynix that this purchase and sending of messages will work out the way we think it will.
  8. Taylor inquired about the specifics of the possible display options in Enterprise. Wymer explained that the Bento Box display separates search results into boxes based on the source of the material. For example, physical library materials would be populated in one box, digital catalog results in another box, and database articles in another. The Rivers display creates scrolling carousel of book covers, similar to a Netflix style display. Pratt asked if there was a way to allow users to select which way their search results are displayed. Wymer thinks that there may be a way to switch the way search results are displayed but will get more clarification. Arellano asked how the Kids Catalog displayed search results. Wymer provided a demonstration, and the search results are similar to search results in the regular catalog. Taylor mentioned that if the Kids Catalog search results could be presented with a Rivers display that it could create a search interface that is similar to other online platforms.
  9. The committee reviewed the possible options that were discussed and provided their feedback on each option. Arellano motioned that the committee recommend to Admin Council to purchase an additional block of 25,000 SMS messages, the Kids Catalog Template, and the Rivers display for Enterprise. Roache seconded the motion. The motion passed unanimously.
- VII. The next Automation Committee meeting will be May 26<sup>th</sup>, 2021 online via Teams.
- VIII. Announcements –
1. There were no announcements.

There being no further business the meeting was adjourned at 11:27 a.m.