

**AUTOMATION COMMITTEE**

**November 17th, 2021**

**10:00 a.m.**

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

**<https://go.sjvls.org/automation211117>**

**To call in and participate in the meeting:**

**Call: (559) 785-0133**

**Phone Conference ID: 183 556 514#**

**AGENDA**

- I. Call to Order**
- II. Roll Call and Introductions**
- III. Adoption of Agenda**
- IV. Comments from the Public**
- V. Approval of Minutes of September 29th, 2021 (Attachment 1)**
- VI. Projects for Discussion & Action**
  - A. Discussion: Kids Catalog Feedback - Wymer**
  - B. Discussion and Action: Borrower Registration Standards (Attachment 2) - Wymer**
  - C. Discussion and Action: ECF/Broadband Grant Device Lending – Wymer**
  - D. Discussion: Horizon 7.6.0 – Wymer**
  - E. Discussion and Action: New Brown Act Requirements and Certification of Need to Continue Virtual Meetings - Wymer**
  - F. Status Report on Projects – Wymer/Drake/Nelson**
- VII. Set date and Agenda building for next meeting, tentatively December 15th, 2021, 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, November 16th, 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  
September 29, 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:** Smurti Deshpande

**Also Present:** Hilda Crawford, Mike Drake, Kevin Nelson, Logic Vang

- I. The meeting was called to order at 10:00 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 July 28<sup>th</sup>, 2021 were adopted as distributed.
- VI. Projects for Discussion and Action
  - A. Kids Catalog Implementation – Wymer
    1. Wymer reviewed the status of the Kids Catalog with committee members, noting that most of the styles, customization, and configuration of profiles and rooms is nearly complete. The remaining work centers around cleaning up CSS in the mobile view, as well as addressing some issues with accessibility mode. He hopes to be able to finish that work by the end of next week.
    2. Once the final work on the profile and room is completed, Wymer would like to arrange a training webinar to introduce the Kids Catalog template to staff. The training would give staff the ability to see the template, get a general tour of the features and how it works, and ask any questions they might have. This would give them more information and experience with the template prior to patrons, so they would be prepared to answer any questions. There will be two training sessions, one scheduled in the morning and a second offered in the afternoon. Wymer will send the meeting invites to the JSAs on Monday so they can forward them to staff as well.
  - B. Borrower Registration Standards – Wymer
    1. The committee reviewed borrower registration standards to ensure that everyone was the same page regarding registering patrons, and to address some newly discovered issues with driver’s licenses. Each field in the borrower record was reviewed along with the guidance for how data should be entered in that field. The committee recommended updating guidance for a few fields to reflect changes since the document was last revised. The changes include: updating guidance on phone numbers to include directions for SMS notices, clarifying recording parent/guardian names, and clarifying the usage of the Barcode(ID) field.
    2. There were two separate issues with the driver’s license field that were discussed with the committee. The first issue was the way out-of-state licenses were being entered in the field. SJVLS’s guidance on the field is to record the DL number and add a hyphen plus

the abbreviation for the state the license is from. Wymer discovered there were approximately 680 accounts where this field contained more than 30 characters and notes beyond the scope of the field. Wymer will send a report to the committee members with a list of their borrower accounts that need to be cleaned up and send out updated guidance on handling out-of-state driver's licenses. Haas informed the committee of a second issue with the driver's license field. Fresno recently discovered that when a patron renews their Consular IDs, they are given a new ID number instead of retaining the previous one. The committee discussed possible options for handling this change. One suggestion included changing the borrower's expiration date to coincide with the expiration date of the ID. This won't work for our purposes, because our accounts expire after 3 years, when consular IDs expire after 5 years. Manually updating the expiration date isn't an option because subsequent account updates would reset the manually set expiration date. Another option discussed was adding a note to the borrower's account with the expiration date of the ID. Roache pointed out doing so would require staff to click through the blocks screen every time a patron checked out material, which is onerous. Her preference would be to make an internal note in the borrower record and have checking the ID# when the account expires. The committee decided to record the expiration date of all foreign IDs in the comments field, and have staff check that field as a part of renewing a borrower's account. Wymer will add clarification for the new fields in borrower records, SMS and auto-renew, and will hide new fields we're not using, preferred ID, password, and change password at next login, and distribute an updated version when it's completed.

#### C. Resource and Budget Planning for FY 2022-2023 – Wymer

1. Wymer reviewed quotes for possible new services that the committee identified at the previous meeting. The options reviewed were an Overdrive reciprocal lending agreement, the BlueCloud Mobile Kids app, and HTML notices.
2. Wymer informed the committee that an Overdrive reciprocal lending agreement is something the Electronic Resources Committee would have control over. Establishing a reciprocal lending agreement would require 4 of our members to leave the Overdrive reciprocal they're currently in, as well as everyone committing to platform fees and minimum contributions. When it was presented to Admin Council previously, they voted against setting up an agreement.
3. Wymer then reviewed the BlueCloud Mobile Kids Catalog quote. The quote was only for a single app instance, and a minimal number of beacons, which would be insufficient for our needs. Adding in the extra templates and beacons would increase the cost.
4. Wymer the reviewed possible options for HTML notices. He contacted Unique Management and Patron Point about their products. Both companies would be able to deliver HTML templates for each of our notice types, with configurable templates customized for each of our members. Both products offer pathways to implement full blown email marketing platforms but would be starting with HTML notices.
5. After reviewing options and quotes, the committee decided not to request any new services for the upcoming budget year.

#### D. Status Report on Projects – Wymer/Drake/Nelson/Vang

1. Wymer did not have a lot to update, most of his time has been occupied with Administrative Librarian tasks.
2. Drake had nothing to update.
3. Nelson provided an update on circuit installations. They're still moving forward, but the newest problem is the global shortage of parts and chips, which makes getting equipment challenging. The fall PC order is nearly ready, and the global chip shortage has impacted that as well. The costs of PCs have increased significantly, to where the costs of a single

PC are \$1,500, without monitors. Vang explained that while the costs are high, these PCs have specifications that will allow them to remain in service for longer than 5 years. There were options to reduce PC costs, but that would require compromising on PC features, such as VGA ports, or providing memory card ports for patrons. Nelson said the PC order will open on Friday, October 1<sup>st</sup>.

4. Vang provided an update to the committee on work he's done to provide patrons a local space on public PCs to save files such as email attachments and pdfs. This helps with issues where patrons must download a file from the web in order to print it. In addition, he's worked out a script that will purge the local directory when the user logs out, so their data is not saved for the next session.

#### VIII. Announcements

- A. Pratt shared that Kern County is expanding service hours at their currently open locations to open at 11:00 AM instead of 12:00 PM. They also have funding to open some of their currently closed branches. They need to hire and train staff before that can happen.
- B. Roache shared that Tulare Public Library will start offering evening hours on Thursday evenings.
- C. Adams shared that Mariposa Library changed their hours to only be open Monday-Friday, they are not offering Saturday hours currently.

There being no further business the meeting was adjourned at 12:04 p.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><b>LOCATION:</b> 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><b>NAME:</b> 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><b>ADDRESS – PERM</b> – 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><b>ADDRESS – MAILING</b> – 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 &amp; 5.</p>	<p>Example: PO BOX 123</p> <p>818 FIRST AVE APT 114</p>

3B	<p><b>ADDRESS – TEMP</b> – Use only if borrower has a temporary mailing address, e.g. summer resident or college student.</p> <ul style="list-style-type: none"> <li>* Click “New” to create an additional address. When the pop up asks “Insert after displayed record, yes or no” choose yes.</li> <li>* Click the “Temp” radio button.</li> <li>* Enter the begin and end date for which that address will be used, using the format DD/MM/YYYY</li> <li>* Enter the street address, City St, and postal code following rules in #3, 4 &amp; 5.</li> </ul>	
4	<p><b>CITY, ST</b></p> <p>Enter the city code</p> <ul style="list-style-type: none"> <li>* 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.</li> <li>* 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.</li> <li>* If there is no city code, 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.</li> <li>* If there is no city code, leave the City, St box empty.</li> <li>* Do NOT enter the zip code on this line. Use the Postal Code field.</li> </ul>	<p>CITY CODE</p> <p>Example:</p> <p>MAR (displays as MARIPOSA CA)</p> <p>VIS (displays as VISALIA CA)</p> <p>TUL (displays as TULARE CA)</p> <p>If no city code, then enter CITY and State on Line 3 of the address.</p> <p>Example:</p> <p>BEATRICE NE</p> <p>DALLAS TX</p>
5	<p><b>POSTAL CODE:</b></p> <p>Enter the zip code. If you have a 9 digit code, please enter it.</p>	<p>12345</p> <p>12345-6789</p>
6	<p><b>NOTICE BY:</b> 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"> <li>* Name - this is the name that will appear on the email.</li> <li>* Address - this is the full email address: jsmith@comcast.net</li> <li>* Pay close attention to punctuation. Don’t forget the @ symbol. They are *not* case sensitive.</li> <li>* IMPORTANT: All phone types must be “no telephone notices” for email notices to be delivered.</li> </ul>	<p>NAME:</p> <p>Example:</p> <p>Mary Martin</p> <p>ADDRESS:</p> <p>Example:</p> <p>Mary.Martin@sjvls.org</p>
6a	<p><b>PREOVERDUE</b> - 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><b>BIRTH DATE</b></p> <p>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</p> <p>Example</p> <p>01/29/1986</p>

8	<p><b>BTPE</b> - 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 &amp; 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  -----</p> <p>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><b>EXPIRATION DATE</b> - automatically calculated based on the Btype selected.</p>	
10	<p><b>LANGUAGE</b> - enter the language Telemessaging should use.</p>	<p>LANGUAGE  eng - English  spa - Spanish</p>
11	<p><b>STAT CLASS (Bstat):</b> 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 &amp; 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><b>PHONES</b>  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"> <li>* Do not put comments such as MESSAGE or MOM in the phone number field.</li> <li>* To receive email notices, all phone numbers must be "No Telephone" types (-no).</li> <li>* 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.</li> <li>* TM3 will not call numbers that begin with 999, so any numbers beginning with xxx-999-xxxx cannot receive phone notices.</li> </ul> <p><b>SMS NOTICES</b></p> <ul style="list-style-type: none"> <li>* 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).</li> </ul>	<p>If no phone: 000-000-0000</p> <p>Make sure phone type is h-no</p>
13	<p><b>BARCODE</b></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>	
14	<p><b>PIN#</b></p> <p>Enter the 4-digit pin chosen by borrower.</p>	
15	<p><b>DRIVERS LICENSE#</b></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"> <li>*Put in only the license or ID number, no notes or comments.</li> <li>*If it is an out-of-state license, add a hyphen at the end followed by the two-letter abbreviation for the state.</li> <li>*If it's an ID from outside the United States, add a hyphen at the end followed by an abbreviation for the County and note the ID expiration date in the comments field.</li> </ul>	<p>Example: B1234567 VAR123456-MA H507603316-MN D252-420-55-463-0-FL</p>
16	<p><b>PARENT/GUARDIAN</b></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><b>GUARDIAN ADDRESS</b> - No longer used. See 19a</p>	
18	<p><b>GUARDIAN CITY</b> - No longer used. See 19a</p>	
19	<p><b>GUARDIAN ZIP</b> - No longer used. See 19a</p>	

19a	<p><b>NOTICE TO</b> - 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><b>PAC ACCESS TYPE</b> - Use this field if your jurisdiction has assigned access codes for use of online resources or Internet</p>	
21	<p><b>BARCODE(ID)</b> - enter the assigned barcode again. The BARCODE and BARCODE(ID) should match.</p> <p>* We use this field to validate the borrower's active barcode in the event more than one barcode are set as active.</p>	
21a	<p><b>BORROWER NOTE</b> – 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><b>COMMENTS</b> - Enter date of birth for guardian here, and any other borrower notes that you do not want to display to patrons.</p>	
22	<p><b>HOME SERVICE</b> – 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><b>PROXY BORR</b> – 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><b>KEEP CIRC HISTORY</b> ( ) Jurisdiction Preference ( ) Keep History (*) Do Not Keep</p>	<p>DO NOT KEEP is automatically selected when the record is saved.</p>
25	<p><b>SOURCE</b></p>	<p>Set up (3/11) so Tulare Co. could record bookmobile stops. Can be used by other members for this purpose.</p>