

**Automation Committee Meeting**  
**September 29, 2021**  
**Via Teams**  
**Approved 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 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.