

AUTOMATION COMMITTEE

January 12, 2022

10:00 a.m.

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

<https://go.sjvls.org/automation220112>

To call in and participate in the meeting:

Call: (559) 785-0133

Phone Conference ID: 734 178 510#

AGENDA

- I. Call to Order**
- II. Roll Call and Introductions**
- III. Adoption of Agenda**
- IV. Comments from the Public**
- V. Approval of Minutes of December 15, 2021 (Attachment 1)**
- VI. Projects for Discussion & Action**
 - A. Discussion and Action: Certification of Need to Continue Virtual Meetings - Wymer**
 - B. Discussion and Action: Borrower Registration Standards – Wymer (Attachment 2)**
 - C. Discussion and Action: Electronic Device Lending Guidelines – Wymer (Attachment 3)**
 - D. Discussion and Action: Modifying Analytics Data Extract – Wymer (Attachment 4)**
 - E. Discussion: Library Card Orders – Wymer**
 - F. Status Report on Projects – Wymer/Drake/Nelson**
- VII. Set date and Agenda building for next meeting, tentatively February 9, 2022, 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, January 11, 2022.

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
December 15, 2021
Via Teams
Draft Minutes**

Present: Anthony Arellano, Smruti Deshpande, Yvonne Galvan, Dani Haas, Mary Jo Lawrence, Brian Martin, Kristie Pratt, Marisol Rodriguez and Chris Wymer (chair)

Excused: Rebecca Adams, Mollie Roache, Mike Drake

Also Present: Kevin Nelson, Logic Vang, Mark Lewis

- I. The meeting was called to order at 10:01 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 November 17, 2021 were adopted as distributed.
- VI. Projects for Discussion and Action
 - A. Certification of the Need to Continue Virtual Meetings – Wymer
 1. Based on the recently issued indoor mask mandate, the committee voted to certify the need to continue meeting virtually.
 - B. Borrower Registration Standards – Wymer
 1. Wymer presented the revised borrower registration standards and asked the committee to review the changes. Pratt asked about handling addresses where the City/St field doesn't have an existing value, and whether that value should go on address line 3 or the next available address line field. Wymer noted that the guidelines for address were created by Mary Ellen, and because nothing has changed with these fields in Horizon, should still be accurate. Pratt then asked if we are supposed to still note the responsible party's name in address line 1. Wymer will add guidance to the registration standards.
 2. Wymer then provided an update on the borrower registration questions from the previous meeting about lost barcodes that are not replaced and phone notifications when the patron has more than one active phone in the borrower record. For lost barcodes that are not replaced, the guidance remains the same – note the lost date of the barcode and add an "L" in front of the barcode in barcode(ID). This combination allows Horizon to register that the barcode was reported as lost and prevents access to the borrower account if the lost card is not activated. For the phone notifications question, Wymer reported that the number Horizon calls is the phone number with the lowest ord value with notifications enabled.
 3. Pratt asked about the guardian fields, and whether they still need to be on the registration standards, since those fields were going to be hidden from new borrower registrations. Wymer will remove the guidance on these fields and add a reference that the fields only show on the edit borrower screen.
 4. Pratt then asked about the borrower PIN field, and whether it could be set as a required field. Wymer said he believed it was possible and will check if that change can be made.
 - C. Electronic Device Lending Guidelines – Wymer

1. Wymer presented the electronic device lending guidelines that were developed based on the discussions about ECF device lending from the previous meeting. Wymer drafted guidelines as opposed to a policy so there would be flexibility, and no one felt like they were forced to comply. Arellano suggested modifying the statement “Any SJVLS patron will be able to checkout electronic devices from any SJVLS member library..” to read “Any *adult patron in good standing* will be able to checkout electronic devices from any SJVLS member library...”. Wymer will update the guidelines to include the updated text.
2. Deshpande asked about having the devices fill requests, and if a member would be able to restrict their ability to fill holds. Wymer replied that these items will not fill holds outside the jurisdiction, but that the members could decide to allow patrons to request the items and pick them up at one of their locations if they desired.
3. Deshpande then asked about how we will manage CIPA compliance on these electronic devices. Martin shared that he purchased 3rd party software, Senso, to handle filtering and CIPA compliance, and that he would share the software information with the group after the meeting. Nelson noted that all devices provided by the library need to be CIPA compliant. Vang shared that he got an approach from Madera’s tech, and that any free solutions are not going to meet our needs. Martin also shared the costs of the filtering solution and monitoring software.
4. Wymer asked if it would be beneficial to investigate having the system office maintain the monitoring software subscription, so that each of the members wouldn’t have to maintain their own subscription. Pratt noted that Kern has an alternative solution and would want to opt-out of a system provided subscription. Martin noted that other solutions don’t meet CIPA filtering requirements. SJVLS will investigate the feasibility of a system-wide subscription for monitoring software.
5. Pratt asked about adding a statement to guidelines about all electronic devices being installed with CIPA-compliant filtering and monitoring software. Wymer will add that to the guidelines.

D. Status Report on Projects – Wymer/Nelson

1. Nelson provided an update on the PC order. The order has been placed, but delivery of items is random. Some items are coming in quickly, but others are severely delayed. This is a result of the supply chain issues facing every industry now. He encouraged members to plan further in advance for their technology needs to make sure items are received by the time they’re needed. Circuit installs are moving along, but we’re running into issues with AMS installs because of the supply chain. Nelson also provided an update on the recently discovered log4j vulnerability. He reported that none of SJVLS’s systems are affected by the vulnerability, and our network has been set up to reject any attempts to exploit it. In reviewing logs, it was discovered that there were several attempts to perform the exploit, but none of were successful.
2. Wymer didn’t have a lot to update. His time has been focused more on administrative tasks, including e-rating bookmobiles. He informed the committee that 5 applications were received for the Supervising Librarian position and interviews will be scheduled for January 5th. He’s also been working with SirsiDynix and the network staff to prepare a plan for the MSSQL migration.

VIII. Announcements

- A. Pratt shared that all Kern County Library branches will be closed from December 23 through January 1 and will re-open January 3. They will also re-open some of their closed branches beginning the second week of January and hope to have the rest of their branches open by the beginning of February. The Wofford Heights branch has been permanently closed and its items are being re-distributed to other branches.

- B. Arellano inquired about what level of service other members are providing to their patrons. Pratt replied that Kern is open at 13 locations and offering full services. They are requiring masks and have started in-person programming. Martin stated that all Kings branches are open normal hours and have started limited in-person programming. They had their Winter Open house but had less activities than in previous years. Deshpande replied that Merced is similar, they have re-opened their locations and are resuming programming, but Children's storytimes have been postponed for the month of December. Haas replied that Fresno also re-opened all their branches, but some of them have shorter evening hours at larger locations. They're offering hybrid programming for patrons. Rodriguez noted that Tulare County has re-opened their branches with the exception of Terra Bella, but with shortened hours. Their in-person programs have been conducted outside and they will not resume in-person programs soon.
- C. Deshpande asked if there were any updates on Porterville. Arellano replied that the City Council approved furniture for their new temporary location. The estimated delivery time is 16 weeks, but there's not guarantee they'll arrive on time. They currently cannot enter the building, but staff have been processing materials to get ready for opening day. They're still waiting on RFID tags to complete the processing. They're hoping to re-open in April or May.

There being no further business the meeting was adjourned at 11:00 a.m.

SJVLS Borrower Registration Data Entry Standards

Background

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.

Data Entry Standards

Ord	Field	Format
1	<p>Location</p> <p>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> <ul style="list-style-type: none"> • Branches are listed alphabetically by their abbreviations. 	<p>AUB - Auberry Branch Library (Fresno Co.)</p> <p>BEA - Beale Memorial Library (Kern Co.)</p>
2	<p>Name</p> <p>Enter the borrower's name in ALL CAPS in "phone book" format.</p> <ul style="list-style-type: none"> • Use the full legal name as it appears on ID. • Place commas between last name and first name and between first name or middle initial and titles, such as JR., III. • Do not add comments in this field. 	<p>LAST NAME, FIRST NAME, TITLES</p> <p>Examples: CRUZ, JOHN MORALES CLINTON, WILLIAM J. MORA-FLORES, GABRIEL, JR.</p>
3	<p>Address – Perm</p> <p>Borrower's physical address of their permanent residence. REQUIRED for all borrowers.</p> <ul style="list-style-type: none"> • Enter address in ALL CAPS, no punctuation, on a single line whenever possible. • Put the apartment (APT), suite (STE), space (SPC), etc. at the end. • 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. • If registering a child borrower that requires a parent/guardian as a responsible party, enter C/O and their name in Line 1 and enter the rest of the address in the Lines below. • Proper entry of mailing address affects our postal rates and is based on USPS standards. DO NOT enter PO Boxes here. See 3A. 	<p>NUMBER STREET UNIT</p> <p>Example: 1/ 3077 W SAMPLE AVE</p> <p>1/ 1307 GRAND AVE APT 311</p> <p>1/ 123 CECIL B DEMILLE BLVD 2/ STE 501</p> <p>Parent/Guardian Example: 1/ C/O MUMMY PIG 2/ 3 ASTLEY STREET 3/ PEPPATOWN</p>

3A	<p>Address – Mailing</p> <p>Use only if borrower has an address for mail delivery of correspondence / notices that differs from their PERMANENT address.</p> <ul style="list-style-type: none"> • Click "New" to create an additional address. When the pop up asks "Insert after displayed record, yes or no" choose yes. • Click "Mailing" radio button. • Enter the PO Box/address, City St, and postal code following rules in #3, 4 & 5. • If registering a child borrower that requires a parent/guardian as a responsible party, enter C/O and their name in Line 1 and enter the rest of the address in the Lines below. 	<p>NUMBER STREET UNIT</p> <p>Example: PO BOX 123</p> <p>818 FIRST AVE APT 114</p>
3B	<p>Address – Temp</p> <p>Use only if borrower has a temporary mailing address, e.g. summer resident or college student.</p> <ul style="list-style-type: none"> • Click "New" to create an additional address. When the pop up asks "Insert after displayed record, yes or no" choose yes. • Click the "Temp" radio button. • Enter the date to begin using the temporary address in begin. • Enter the date to stop using the address in end. • Use the format MM/DD/YYYY for begin and end dates. • Enter the street address, City St, and postal code following rules in #3, 4 & 5. 	
4	<p>City, ST</p> <p>Enter the city code</p> <ul style="list-style-type: none"> • 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. • 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. • If there a city code cannot be found, 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. Leave the City, St box empty. • Do NOT enter the zip code on this line. Use the Postal Code field. 	<p>CITY CODE</p> <p>Example: MAR (displays as MARIPOSA CA) VIS (displays as VISALIA CA) TUL (displays as TULARE CA)</p> <p>If no city code, then enter CITY and State on Line 3 of the address. Example: BEATRICE NE DALLAS TX</p>
5	<p>Postal Code</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>Notice By</p> <p>Click “Std” radio button for mail or phone notices, click “email” for email notices.</p> <p><u>If email notices are their notice by method:</u></p> <ul style="list-style-type: none"> • Name - this is the name that will appear on the email. • Address - this is the full email address: jsmith@comcast.net • Pay close attention to spelling and punctuation. Don't forget the @ symbol. They are *not* case sensitive. • IMPORTANT: All phone types must be “no telephone notices” for email notices to be delivered. 	<p>NAME: Example: Mary Martin</p> <p>ADDRESS: Example: Mary.Martin@sjvls.org</p>
6a	<p>Preoverdue</p> <p>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>Birth Date</p> <p>Enter the borrower's date of birth.</p> <p>Do not enter the Guardian's DOB, or the ID expiration date on this line.</p>	<p>MM/DD/YYYY Example: 1/29/1986</p>
8	<p>Btype</p> <p>Is the borrower a permanent resident of your library service area?</p> <p>YES - Enter the correct BTYPE from your library jurisdiction's list of btypes. Use the Codes button if unsure.</p> <p>NO - See Correct Combination of Location, Btype & Bstat</p> <ul style="list-style-type: none"> • 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>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>Expiration Date</p> <p>Automatically calculated based on the Btype selected.</p>	

10	<p>Language</p> <p>Enter the language Telemessaging should use.</p>	<p>LANGUAGE eng – English spa – Spanish</p>
11	<p>Stat Class (bstat)</p> <p>Is the borrower a permanent resident of your library service area? YES - Enter the proper code or codes assigned to your library jurisdiction. NO - Enter the appropriate “x” code. See Correct Combination of Location, Btype & Bstat.</p> <ul style="list-style-type: none"> 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>Examples of resident Bstats: TPI Tulcentr22</p> <p>Examples of non-resident Bstats</p> <p>XKINGS XLOS XSAC XTULCO</p> <p>Out of state resident is always</p> <p>XZOUT</p>
12	<p>Phones</p> <ul style="list-style-type: none"> Enter the home phone number with the area code. See a list of Valid TM3 Area Codes. 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 immediately by the extension number, e.g. x1234. Do not write out the word “extension”. Do not put comments such as MESSAGE or MOM in the phone number field. To receive email notices, all phone numbers must be “No Telephone” types (-no). 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. Telemessaging will not call numbers that begin with 999. Any numbers beginning with xxx-999-xxxx cannot receive phone notices. <p>List of Phone Types</p> <ul style="list-style-type: none"> h (Home) h-no (Home, No telephone notices) m (Mobile, with telephone notices SMS) 	<p>nnn-nnn-nnnn nnn-nnn-nnnn xnnn</p> <p>Examples: 559-488-3462 661-868-3333 559-600-6285 x5675</p> <p>If no phone: 000-000-0000</p> <p>Make sure phone type is h-no</p>

	<ul style="list-style-type: none"> • m-no (Mobile, no telephone notices SMS) • o (Other, with telephone notices) • o-no (Other, No telephone notices) <p>SMS Notices</p> <p>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).</p>	
13	<p>Barcode</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> <p>If a borrower reports their card as lost and does not replace it, enter today's date in the date lost field. Then, in the barcode (ID) field add an "L" before the barcode number. This will report the card as lost if a patron tries to use it, along with preventing access to CKO if staff click "cancel" on the lost card popup message.</p>	
14	<p>PIN#</p> <p>Enter the 4-digit pin chosen by the borrower</p>	
15	<p>Driver's License#</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"> • Put in only the license or ID number, no notes or comments. • If it is an out-of-state license, add a hyphen at the end followed by the two-letter abbreviation for the state. • If it's an ID from outside the United States, add a hyphen at the end followed by an abbreviation for the Country and note the ID expiration date in the comments field. 	<p>Example:</p> <p>B1234567</p> <p>Out-of-state Examples:</p> <p>VAR123456-MA</p> <p>H507603316-MN</p> <p>D252-420-55-463-0-FL</p>
16	<p>Parent/Guardian</p> <p>Enter the name of the 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>Guardian Address</p> <p>No longer used.</p>	

	Removed from New Borrower Registration screen, but still appears when editing a borrower, due to usage in older accounts.	
18	<p>Guardian City</p> <p>No longer used.</p> <p>Removed from New Borrower Registration screen, but still appears when editing a borrower, due to usage in older accounts.</p>	
19	<p>Guardian ZIP</p> <p>No longer used.</p> <p>Removed from New Borrower Registration screen, but still appears when editing a borrower, due to usage in older accounts.</p>	
19a	<p>Notice To</p> <p>No longer used.</p> <p>Removed from New Borrower Registration screen, but still appears when editing a borrower, due to usage in older accounts.</p>	
20	<p>PAC Access Type</p> <p>Use this field if your jurisdiction has assigned access codes for use of online resources or Internet</p>	
21	<p>Barcode ID</p> <p>Enter the assigned barcode again. The BARCODE and BARCODE ID should match.</p> <ul style="list-style-type: none"> • If a borrower reports their card as lost or stolen and does not replace it, add an "L" in front of the barcode number in this field. • We use this field to validate the borrower's active barcode in the event more than one barcode is set as active in the list of barcodes. 	
21a	<p>Borrower Note</p> <p>Enter any notes related to the borrower's account that you want to show to the borrower.</p> <ul style="list-style-type: none"> • Notes entered here display to the borrower when they view their personal information in Enterprise. 	
21b	<p>Comments</p> <p>Enter date of birth for guardian here, and any other borrower notes that you do not want to display to patrons.</p>	

	<ul style="list-style-type: none"> • If a borrower's ID is from a country outside the United States, record the ID expiration date here. 	
22	<p>Home Service</p> <p>Some jurisdictions may use this for book-by-mail services.</p> <ul style="list-style-type: none"> • If you accidentally click in this section, you must click the 'delete' button before you can save the record. 	
23	<p>Proxy Borrower</p> <p>Leave this section blank.</p> <ul style="list-style-type: none"> • If you accidentally click in this section, you must click the 'delete' button before you can save the record. 	
24	<p>Keep Circ History</p> <p>This field is automatically filled in when the account is saved. System policy</p>	DO NOT KEEP is automatically selected when the record is saved.
25	<p>Source</p> <p>Set up (March 2011) so Tulare Co. could record bookmobile stops. Can be used by other members for this purpose.</p>	

DATE: January 12, 2022
 TO: SJVLS Automation Committee
 SUBMITTED BY: Chris Wymer, Administrative Librarian
 SUBJECT: Electronic Device Lending Guidelines

BACKGROUND:

SJVLS member libraries circulate electronic devices to patrons to help bridge the digital divide and provide internet access for disadvantaged patrons both in the library and at home. These devices include laptops, hotspots, and laptop/hotspot bundles, and were purchased with various funding sources, including library budgets as well as State or Federal grants.

Recently, some SJVLS member libraries requested lending rules for electronic devices that restrict device checkout to patrons registered with that member library. There are areas within SJVLS where patrons utilize library branches in multiple jurisdictions, and restricting lending could be problematic and prevent them from accessing a device. However, there are also concerns about patrons returning devices to different library than it was checked out from and the potential to damage the device when returned in transit.

This discussion attempts to find a middle ground between protecting devices from damage when returned through delivery, while also making devices as accessible as possible for patrons.

PROPOSED SOLUTION:

Any adult SJVLS patron in good standing will be able to checkout electronic devices from any SJVLS member library unless the funding source’s terms and conditions state otherwise.

SJVLS member libraries are allowed to require devices be returned to a library within their jurisdiction, to avoid potential damage in delivery. Note – this is not something that can be enforced within Horizon and would have to be enforced by library staff.

These devices will not fill holds outside of their jurisdiction and will only be requestable within the jurisdiction if the member library wants to allow it.

All devices lent to patrons must have CIPA-compliant filtering and monitoring software installed, to avoid jeopardizing our e-rate funding.

We will review circulation stats and member feedback at least once a year and make any revisions based on observations, if necessary.

OUTCOME:

Motion: _____ Second: _____

_____PASSED _____REJECTED

DATE: January 12, 2022
 TO: SJVLS Automation Committee
 SUBMITTED BY: Chris Wymer, Administrative Librarian
 SUBJECT: Modifying Analytics Data Extract

BACKGROUND:

At the beginning of the new Master Agreement with SirsiDynix, Merced County purchased an additional service, the Community Engagement Platform (CEP). CEP is a marketing automation platform that helps libraries develop, maintain, and automate email marketing and events calendars to stay in touch with their patrons. One of the key features of the platform is an integration with Horizon that allows library staff to develop criteria to decide if, and when, emails are sent to patrons.

For example, a library could create a “re-connect” campaign that sends emails to patrons who haven’t visited a branch in the last 6 months. CEP would query borrowers in Horizon, find those that match the criteria for the campaign, and send an email based on a template staff create.

To build dynamic lists for automated emails, CEP utilizes our reporting layer, BlueCloud Analytics, to query patron records, locate those that meet the campaign’s criteria, and extract the data to insert into emails. Currently, our reporting platform does not extract personal identifiable information, to reduce the number of systems storing patron information and mitigate the risks of a data breach. While this reduces SJVLS’s potential risk, it also limits the potential applications of Merced’s new subscription, because patron information is currently not available.

PROPOSED SOLUTION:

This proposal seeks permission to modify the BlueCloud Analytics data extract process to include personal identifiable information, to allow Merced to utilize the full potential of their CEP subscription.

There would be no budgetary impact to this change. SirsiDynix allows us to modify our data extract once a year, without charge.

This change has benefits to all SJVLS members. It enables the ability to create more in-depth patron reports, and locate errors in borrower records, and potentially generate notices to patrons.

There are some risks associated with this change. PII would be stored in a 3rd-party system. SirsiDynix has measures in place to secure data and prevent breaches and meets industry standards. There’s also the risk of staff reporting on large amounts of PII, so access to PII reports would need to be carefully controlled.

OUTCOME:

Motion:	Second:
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<u> </u> PASSED	<u> </u> REJECTED
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