



# SAN JOAQUIN VALLEY LIBRARY SYSTEM

ADMINISTRATIVE HEADQUARTERS  
2420 Mariposa Street · Fresno, CA 93721

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## Automation Committee Agenda Packet May 4, 2022

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Wednesday, May 4, 2022  
Time: 10 am  
For information: (559) 600-6256  
Meeting Online via Teams

The public may participate by using the following URL

<https://go.sjvls.org/automation220504>

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

Call: (559) 785-0133  
Phone Conference ID: 195 372 537#

### **TO THE PUBLIC:**

Enclosed are the agenda and prepared attachments for this meeting.

Copies of these materials may be made at the public's expense.

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

### **FOR THOSE WITH DISABILITIES:**

In accordance with the Americans with Disabilities Act, if you need special assistance to participate in this meeting, please contact the Fresno County Public Library at (559) 600-6237 no later than 10 am on Tuesday May 3, 2022.



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## MAY 4, 2022 - AGENDA

### A. CALL TO ORDER

### B. ROLL CALL AND INTRODUCTIONS

### C. ADOPTION OF AGENDA

### D. PUBLIC COMMENT

1. The public may comment on any items relative to SJVLS and not on the agenda.

### E. APPROVAL OF MINUTES OF APRIL 6, 2022 (Attachment 1)

### F. ITEMS FOR DISCUSSION AND ACTION

1. Discussion and Action: Certification of the Need to Continue Virtual Meetings (Wymer)
2. Discussion and Action: Charges for Damaged Items (Wymer) – Attachment 2
3. Discussion and Action: MobileStaff Update (Wymer) – Attachment 3
4. Discussion: 2022 COSUGI Conference Recap (Wymer)
5. Discussion: Palace Project (Wymer)
6. Discussion and Action: Annual Patron Purge (Wymer) – Attachment 4

### G. STAFF REPORTS

1. Senior Network Systems Engineer
2. System Administrator

### H. CALENDAR ITEMS

1. Set the date and agenda building for the next meeting, tentatively June 1, 2022, via Microsoft Teams.

### I. ANNOUNCEMENTS

1. Committee members can share items relating to collaboration, innovation, and professional development of interest to the Committee.

### J. ADJOURNMENT



# SAN JOAQUIN VALLEY LIBRARY SYSTEM

## Automation Committee Meeting

### April 6, 2021

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#### **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. Kristin Baer was introduced as the interim JSA for Fresno County and is filling in after Dani Haas's retirement.

###### **i. PRESENT**

1. Heidi Clark, Kristin Baer, Kristie Pratt, Yvonne Galvan, Faythe Arredondo, Rebecca Adams, Anthony Arellano, Brian Martin, Krista Riggs, Amy Taylor, Chris Wymer (chair)

###### **ii. EXCUSED**

1. Smruti Deshpande

###### **iii. OTHERS PRESENT**

1. Mike Drake, Kevin Nelson, Aaron Lusk, Logic Vang, Mark Lewis

##### **C. ADOPTION OF THE AGENDA**

1. Pratt motioned to add an item to Projects for Discussion and Action to discuss circulation rules and policies for the new State Park Pass program. The need for the agenda item arose after the agenda was published.
  - i. Arellano seconded the motion.
  - ii. The motion passed unanimously.
2. Clark motioned to adopt the agenda with the added agenda item.
  - i. Pratt 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. The minutes of March 6, 2022 were approved as distributed.

##### **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. Adams seconded.
      3. The motion passed.
  2. State Library Park Pass Program - Pratt
    - i. As a part of a new program, the State Library is providing day-use passes for patrons to visit State Parks and would like the passes to be a combination of “lucky day” passes that don’t fill hold requests and passes that can be requested. In addition, they would like the passes to be fine free. Pratt asked the committee about their approach to the new State Library Park Pass program, how to handle requests within the system, and what information local staff need to provide SJVLS if new item types are needed. Riggs shared that when she asked the State Library about making passes requestable and the State said their preference would be to allow passes to be requested, but not float between libraries. As a result, they’re going to take the approach of not allowing requests on their initial allotment of passes. Baer reported that Fresno’s approach is going to be making some of the items “lucky day” but allowing requests on the others. The committee discussed request rules and procedures for changing whether the passes can be requested, along with the information the system office needs to create new item types. Changing from not filling holds to filling holds is a simple process and can easily be accommodated. For new item types, SJVLS staff need to know any exceptions to the circulation defaults, such as a \$0 fine rate, and how many renewals are allowed.
    - ii. The next point that was discussed was whether checking out these passes would be limited to that member’s patrons. Madera’s item type was created with rules to limit checkout to only Madera residents. The committee discussed what checkout and request limitations make sense in terms of allowing patrons to use the passes and make the process easier for staff. Only allowing residents of a library jurisdiction to request and checkout passes has the potential to deny non-resident borrower types the ability to use this service, and updating borrower types to the jurisdiction they live in will change the e-resources borrowers can access. Galvan inquired about how long other members are planning on allowing the passes to checkout. Madera’s plan is to allow 3-week checkouts, as was Tulare Public. Merced’s plan was for a 2-week checkout. Taylor commented that it would be preferable for the entire system to have a standard approach to handling non-resident borrowers so that all patrons receive the same treatment in accessing passes but allow individual jurisdictions to determine local policy for allowing requests and checkout periods. It was agreed that non-resident borrowers may not live in a member’s jurisdiction, but by registering with that member and using their locations that branch is effectively their main branch. Taylor commented that even if a borrower resides outside of the system boundaries, their registration and usage of the local branch shows they’re more likely to use that library than where they live. Clark commented that non-resident borrowers have shown

they have the wherewithal to get a card in that jurisdiction and use those resources, so they should be allowed to use all the resources available. Drake asked about how to handle child borrowers. Pratt commented that she wasn't sure about restricting child borrowers from checking out, because sometimes parents get a card for their children but not themselves. Riggs commented that Madera's approach was to only allow adult borrowers was that taking a day trip to a State Park would require an adult to travel to the location. If an adult doesn't already have a card that would be a good time to encourage them to register. The committee's consensus on checkouts was that any borrower registered within a jurisdiction should be able to check out passes from that jurisdiction. Once the item types are created, the system office will also create reports to identify passes that age to lost so they can be deactivated.

## **G. STAFF REPORTS**

1. Senior Systems Network Engineer
  - i. Nelson reported that the Spring PC Order is open, but there isn't finalized pricing now because of supply chain problems. CENIC projects are still in progress.
2. Associate System Administrator
  - i. Drake reported that he's been working on State Park Passes and will be busy with that for the foreseeable future.
3. System Administrator
  - i. Wymer reported that he hasn't had a lot of time to work on System Administrator tasks. He was out of the office for a period, which prevented him from working on projects. He's working on reconnecting Porterville to the network, along with developing procedures for ECF devices. He's worked with the State Library on revising the Annual Plan of Service forms. Wymer also reported about problems encountered with DayEnd the previous week. A new DayEnd PC was set up and since Wednesday it has been running successfully again. His other update was that he's working on recording CENIC e-rate disbursements.

## **H. CALENDAR ITEMS**

1. Date and location for next Automation Committee Meeting
  - i. May 4, 2022 via Teams.

## **I. ANNOUNCEMENTS**

1. Pratt announced that the Wilson and Lamont branches re-opened this week. Kern County now only has one branch that's still closed, their Northeast branch. They just need to hire and train staff and then the branch will re-open as well.
2. Clark announced that she's filling in for Roache while she's out on leave. Tulare Public is currently down two staff members and working short staffed.
3. Martin announced that he set up a Minecraft server for Kings County's Summer Reading Program for Teens and Adults. If anyone is interested, he can provide the login information. He has the world set up and is working to recreate the library.

**J. ADJOURNMENT**

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

## **CHARGES FOR DAMAGED ITEMS**

### **BACKGROUND**

Occasionally, materials sent in transit to fill hold requests are damaged by the patrons borrowing the material. When this happens, the decision about whether to charge the patron for the damaged item is made by the owning jurisdiction. This requires checking in the item and returning it to the owning library so the damage can be evaluated, and fees added to the borrower’s account.

Recently, a situation arose where a patron damaged material they received through a hold request. Staff at the checkout location checked the item in as damaged and sent the item back to the owning jurisdiction to decide on whether to charge for the material. The owning jurisdiction decided to charge the borrower for the damaged to the material but assessed the charges by checking the item out to the patron again and setting the item as lost.

This had the desired effect of charging the patron for the material, but it also created confusion for the patron. Seeing the item listed as “lost” on their account gave them the impression that staff at the check in location did not actually check in their materials. Additionally, the way it was checked out to the patron to charge them left the impression that the borrower visited a branch outside of their jurisdiction to checkout the material. This also complicates the system office’s ability to troubleshoot charges, since the values recorded in the database are not accurate.

To avoid confusing patrons and ensure that charges are properly assessed, we need to make sure staff throughout SJVLS handle damaged items from other jurisdictions in a consistent manner.

### **QUESTIONS FOR DISCUSSION**

- Do we have an established policy on how to handle other member’s items that are returned with damage?
- How can we handle damaged items and fees to avoid confusing patrons?

### **OUTCOME:**

Motion:

Second:

\_\_\_\_\_PASSED

\_\_\_\_\_REJECTED

## **MOBILESTAFF UPDATE**

### **BACKGROUND**

The newest version of MobileStaff introduces the Driver’s License field in borrower registration, allowing us to use it with tablets to register patrons and circulate items. This feature is especially useful for staff doing outreach events, where access to the network and the Horizon client are not always available or are difficult to set up and manage.

In order to utilize the new driver’s license field, SJVLS will need to update borrower records and the Horizon borrower registration form to use the new field instead of the one we used previously. The new field will soon be included in BC Circulation as well. Doing so now will allow staff to start using MobileStaff when they are away from the library and prepare us for the addition in BC Circulation.

In addition to updating the driver’s license field used in the database, we will also need to train staff on how to register borrowers in MobileStaff, since the form is different from how it looks in the client.

### **QUESTIONS FOR DISCUSSION**

- Is this feature something your staff would utilize? Do we want to transition our Driver’s License field to the new Horizon-field?
- Is there anything missing from the registration screen that your library uses when registering patrons?
- Is there anything specific you’d like us to focus on when we put together training materials?

### **OUTCOME:**

Motion:

Second:

\_\_\_\_\_PASSED

\_\_\_\_\_REJECTED

## **ANNUAL PATRON PURGE**

### **BACKGROUND**

Each June SJVLS purges inactive borrowers from Horizon. Each jurisdiction defines their own parameters for when a patron is considered inactive, but the general conditions are borrowers who have been inactive for longer than 3 years and owe less than \$5, or borrowers who have been inactive for 7 years, regardless of amount owed.

In 2020 we introduced self-registration for patrons. Patrons who self-register for a library card are given 6 months to visit a library branch and finalize their registration, or their account expires. We have not purged any self-registered accounts, because of the on-going pandemic and to give patrons additional time to finalize their registration.

With this year’s patron purge approaching, we need to define criteria for the purging of inactive self-registered borrower accounts.

### **QUESTIONS FOR DISCUSSION**

- Do we want to purge self-registered borrowers in this year’s purge?
- What timeframe should be used to consider a self-registered borrower “inactive”?
- What information do we need to include in reports? Will you need to delete these accounts from OverDrive or CloudLibrary?

### **OUTCOME:**

Motion:

Second:

\_\_\_\_\_ PASSED

\_\_\_\_\_ REJECTED