



# SAN JOAQUIN VALLEY LIBRARY SYSTEM

ADMINISTRATIVE HEADQUARTERS  
2420 Mariposa Street • Fresno, CA 93721

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## Automation Committee Agenda Packet June 1, 2022

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Wednesday, June 1, 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/automation220601>

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

Call: (559) 785-0133  
Phone Conference ID: 922 081 79#

### **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 Thursday, May 31, 2022.



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## 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 MAY 4, 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: Damaged Items from Another Jurisdiction (Wymer) – Attachment 2
3. Discussion and Action: Spoken Word Series Authority Records (Wymer) – Attachment 3
4. Discussion: OPAC Renewals & Requested Items Bug (Wymer)
5. Discussion: SJVLS Logo Transition (Wymer)

### G. STAFF REPORTS

1. Senior Network Systems Engineer
2. Associate System Administrator
3. System Administrator

### H. CALENDAR ITEMS

1. Set the date and agenda building for the next meeting, tentatively Wednesday June 29, 2022, online via 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

### May 4, 2021

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## DRAFT MINUTES

### A. CALL TO ORDER

1. The meeting was called to order at 10:02 a.m. by Chris Wymer

### B. ROLL CALL AND INTRODUCTIONS

1. Roll call was conducted.
  - i. PRESENT
    1. Anthony Arellano, Faythe Arredondo, Kristin Baer, Smruti Deshpande, Yvonne Galvan, Brian Martin, Kristie Pratt, Chris Wymer (chair)
  - ii. EXCUSED
    1. Rebecca Adams, Heidi Clark, Mike Drake, Krista Riggs
  - iii. OTHERS PRESENT
    1. Kevin Nelson, Aaron Lusk, Logic Vang, Mark Lewis

### C. ADOPTION OF THE AGENDA

1. Arellano 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. Pratt motioned to adopt the minutes as distributed.
  - i. Deshpande seconded the motion.
  - ii. The motion passed.

### 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. Martin motioned to continue virtual meetings.
    2. Baer seconded.

3. The motion passed.
2. Charges for Damaged Items - Wymer
  - i. Recently a situation arose where a borrower damaged another jurisdiction's items. Staff at the check out library checked the item as damaged, captured the borrower information, and sent the item back to the owning library to determine if the borrower would be charged for the item. The owning library decided to charge the borrower but did so by checking the item out to the borrower again and setting the item as lost. This gave the borrower the impression that the check in library did not actually check the item in.
  - ii. Wymer asked if the Committee had previously discussed or approved a policy or procedure for this situation. The only procedure was how to check in the item to prevent it from filling holds, capture the borrower information, and return it to the owning library. The committee discussed a procedure to standardize how charges are added to borrower accounts. When the owning jurisdiction receives the damaged item, they will assess the damage and if they decide to charge the borrower, they will add a damaged block to the borrower's account with the cost of the item. In the comments for the block, staff will record the barcode, title, and a brief description of the damages. This information is being recorded to allow jurisdictions to communicate the reason for the charge when sending a patron to collections. Pratt added that Kern County includes a message to borrower note on the borrower record that an item was returned damaged, and the owning library may decide to charge them for the damage. Kern County also requires a screenshot of the last borrower details from within Horizon so they can document the charges for their collection agency. Arellano mentioned that documenting the damage before sending the item in transit is important to separate items damaged by patrons from items that were damaged in transit.
  - iii. Wymer will draft a procedure for handling damaged items and return to the committee at the next meeting for approval.
3. MobileStaff Update – Wymer
  - i. Wymer provided an update on the newest version of MobileStaff, which introduces a field for recording driver's license/ID numbers in patron registration, which will allow SJVLS libraries to start using the app on bookmobiles and at pop up events.
  - ii. Wymer provided a demonstration of patron registration and highlighted a few differences between patron registration in Horizon and in MobileStaff. He also discussed the need to update the driver's license field used during patron registration, as well as the timing of the change. Wymer will document the process and send an email to the committee members with more details about the timing of the transition.
    1. Pratt motioned to transition the driver's license field to the new field and clean up old entries.
    2. Arellano seconded the motion.
    3. The motion passed.
4. COSUGI Conference Recap – Wymer

- i. Wymer provided a summary of the sessions he attended at the COSUGI conference, focusing on planned development of Horizon and BlueCloud products. BlueCloud Circulation is starting to develop patron and item management features that would enable SJVLS libraries to begin testing it as a replacement for Horizon at circulation desks. Wymer also reviewed new features being introduced in the next release of Horizon. Noteworthy enhancements include the ability to specify a Preferred Name for patron notices, SIP enhancements including the ability to determine what patron personal information is returned with a SIP request, encrypting SIP communications, and being able to include “value of the library” messaging on self-check checkout receipts. The new version will also require SJVLS to migrate the Horizon database platform before we can upgrade. Wymer informed the committee that SirsiDynix’s next Enterprise release will be the final major release, then they will start developing a new discovery platform using their Cloud Source Open Access product as the foundation.
- 5. Palace Project – Wymer
  - i. Wymer gave the committee an update on the status of SJVLS’s participation in the Palace Project sponsored by the State Library. SJVLS’s Electronic Resources Committee (ERC) is in the process of evaluating whether to include the CloudLibrary shared e-Book and e-Audiobook collection, and if their staff ask about the project to let them know ERC will decide if we will participate.
- 6. Annual Patron Purge – Wymer
  - i. Wymer reminded the committee that the annual purge of inactive patrons will happen in June, and he will send out an email to confirm purge parameters in the next week or two. He asked if the committee wanted to include inactive self-registered patrons in this year’s purge. The decision was made to purge inactive self-registered borrowers using the same 3-year purge criteria as patrons that registered through the library. As a result of this decision, no self-registered borrowers will be purged this year.
  - ii. Pratt motioned to use the same purge criteria for self-registered borrowers that we use for regularly registered patrons.
  - iii. Arellano seconded the motion.
  - iv. The motion passed.

## **G. STAFF REPORTS**

- 1. Senior Systems Network Engineer
  - i. Nelson reported that the Spring PC Order will be closing by the end of the week so the order can be placed.
- 2. System Administrator
  - i. Wymer reported that the Spring library card order was submitted last week. Wymer is in the process of drafting next year’s CLSA Plan of Service. He has also been working to finalize the agreement with CTC Energy and Technology. His final update was to report that he submitted a grant application for funding to pay for the costs to reconnect Porterville to SJVLS’s network.

**H. CALENDAR ITEMS**

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

**I. ANNOUNCEMENTS**

1. Arellano announced that the Porterville Library is getting closer to re-opening in a new temporary location in the next few months. They do not have a firm date yet but are hoping to open in June or July.
2. Pratt shared that Kern County's final closed branch re-opened today.

**J. ADJOURNMENT**

1. There being no further business to discuss the meeting was adjourned at 11:35 a.m.

DATE: June 1, 2022  
 TO: SJVLS Automation Committee  
 SUBMITTED BY: Chris Wymer, Administrative Librarian  
 SUBJECT: Damaged Items from Another Jurisdiction

**RECOMMENDED ACTION:**

1. Approve the procedures for checking in and charging borrowers for damaged items that belong to another jurisdiction.

Approval of this action will establish procedures for items damaged by borrowers that belong to another jurisdiction.

**BACKGROUND:**

Occasionally, materials sent to fill hold requests are damaged by the patrons when borrowing the material. When this happens, the decision 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. The following procedures are being proposed to ensure owning jurisdictions can charge borrowers for damaged items and avoid confusing borrowers about the source of the charges.

**PROPOSED SOLUTION:**

The procedures on the following page outline steps for checking in the item, preserving the previous borrower information for the owning jurisdiction, informing the borrower, and adding the charges to the borrower’s account.

**OUTCOME:**

Motion:

Second:

\_\_\_\_\_PASSED

\_\_\_\_\_REJECTED

## Damaged Items from Another Jurisdiction

### BACKGROUND

Resource sharing is one of the prominent services SJVLS provides its members, allowing them to expand the number of resources available to their patrons by sharing items between member libraries. Occasionally, items belonging to one jurisdiction are damaged by patrons borrowing them in a different jurisdiction. When it happens, the decision about damage charges is made by the owning jurisdiction. This procedure provides specific instructions for handling these items so that the owning jurisdiction can charge the patron for damages without creating confusion about the source of the charges.

### PROCEDURES

This section will outline the steps to follow when an item is returned damaged, and it belongs to another jurisdiction.

### CHECK IN LOCATION

Please follow these procedures for checking in damaged items.

1. Switch to Damaged Mode Check in
  - a. Under CKI menu select “Damage Mode”, you will see RED Text appear next to barcode input.
2. Check-in the item
3. Open “Edit Item” and take a screenshot of the Prior Circ Info for the owning jurisdiction
  - a. To take a screenshot
    - i. Press the “Print Screen” button the keyboard.
    - ii. Open Word
    - iii. Paste the screenshot into the word document
    - iv. Print the screenshot
4. Fold the printout of the “Prior Circ Info” in half so the borrower information is hidden and place it in the item.
5. Open the borrower’s record and add a “Message to Borrower” block noting the following:
  - a. “[TITLE] {BARCODE} was returned damaged and is being returned to {OWNING JURISDICTION} to assess fees.”
6. Fill out a damaged item slip and put in transit back to owning library.

### OWNING LOCATION

When the item arrives at the owning library, please follow these instructions for adding charges to a borrower’s account.

1. Receive the material and assess the damage.
2. If the borrower will be charged, add a “Damaged” block to the borrower’s account, noting the following information:
  - a. The fee for the item
  - b. Barcode and title of the item
  - c. Reason for damage fees
  - d. Any other local notes such as on damaged shelf.
3. After adding the charges, system office recommends withdrawing the item.



DATE: June 1, 2022  
 TO: SJVLS Automation Committee  
 SUBMITTED BY: Chris Wymer, Administrative Librarian  
 SUBJECT: Spoken Word Series Authority Records

**RECOMMENDED ACTION:**

1. Approve modifying the Series Marc Map to include subfield H.

Approval of this action will modify the marc map that processes series titles from 8XX tags in bibliographic records, allowing for distinct series authority records for print, spoken word, and other mediums.

**BACKGROUND:**

The 8XX tags in bibliographic records contain series information that's used to link titles in the same series. Subfield H contains medium information that is used to differentiate print copies from audio copies. With our current configuration, Horizon does not create distinct series authority records for different mediums, such as: print and spoken word. As a result, both Book on CD and print titles are attached to the same series authority record.

Marc Maps are instructions for the parsing of fields and tags from authority and bibliographic records, and they are used to index records, display MARC information in Horizon, limit searches based on MARC data, and define linking tags. If we modify the series Marc Map definition to include subfield H, we will be able to reindex our bibliographic records and have distinct series records for print and audio titles, making it easier for staff and patrons to locate items in a series in the medium they prefer.

**PROPOSED SOLUTION:**

1. Modify the Series Marc Map definition to extract subfield H from 1XX tags in authority records and 8XX tags in bibliographic records.
2. Re-index the series indexes

**OUTCOME:**

Motion:

Second:

\_\_\_\_\_PASSED

\_\_\_\_\_REJECTED