



# SAN JOAQUIN VALLEY LIBRARY SYSTEM

## Automation Committee Meeting

### June 1, 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, Jennifer Bethel, Heidi Clark, Smruti Deshpande, Yvonne Galvan, Kelly Jo Jones, Brian Martin, Kristie Pratt, Chris Wymer (chair)
  - ii. EXCUSED
    1. Krista Riggs, Kristin Baer
  - iii. OTHERS PRESENT
    1. Kevin Nelson, Aaron Lusk, Logic Vang, Mark Lewis, Natalie Rencher

### C. ADOPTION OF THE AGENDA

1. Clark motioned to adopt the agenda with the added agenda item.
  - i. Arellano 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. Clark 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. Clark motioned to continue virtual meetings.
    2. Pratt seconded.

3. The motion passed.
2. Charges for Damaged Items - Wymer
  - i. Wymer presented the procedures for handling damaged items from other jurisdictions that was discussed at the previous meeting. After reviewing the procedures, Clark asked about the guidance of withdrawing the item once the fees are assessed. Pratt commented that Kern has a procedure for withdrawing damaged items where staff send the item to their headquarters to be withdrawn and recommended the final step be revised to "items will be withdrawn according to local policy." The committee then discussed updating borrower notes during the process. The consensus was to leave the notes on the account until the item was paid for and resolved, but to update the message to borrower to note when fees were assessed. Pratt mentioned that there should be instructions for how to resolve notes if a jurisdiction decides against charging the borrower for the damages.
    1. Clark motioned to adopt the procedures as distributed with the revisions discussed by the committee.
    2. Arellano seconded.
    3. The motion passed.
3. Spoken Word Series Authority Records – Wymer
  - i. Wymer gave an overview of a problem he encountered with how Horizon processes series authority records for spoken word authorities. The recent batch of authority records processed by Backstage contained a spoken word authority record that generated an overlay error during import. After review, the series record the importing authority was attempting to overlay was not a match, but rather was the print version of the series, which should not have been considered a match. The source of the problem was identified as the way Horizon's marc maps process 8XX tags from bibliographic records to link to existing series authorities. The series marc map does not process subfield H, which is the field that contains the medium. Wymer worked with SirsiDynix to find a solution to allow distinct authority records for print and spoken word series authorities. He will need to modify Horizon's series marc map to include subfield H in the extraction and then re-index the series indexes. Doing so will help improve series searches because staff and patrons will be able to quickly locate records for print or book on CD editions of a series.
    1. Pratt motioned to modify the series marc maps as presented.
    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. OPAC Renewals and Requested Items Bug – Wymer
  - i. Wymer attempted to provide an overview of a recent bug discovered in Horizon and ValleyCat that allows patrons to renew items when the item has pending hold requests and should not renew. He mis-remembered the details of the bug and Drake updated the committee with the correct conditions. Horizon is configured to allow a patron to renew an item with pending hold requests if another item is available to fill the hold. When an item is in “transit hold” status it is considered as an item that can fill a hold – because that is exactly what it is doing. Unfortunately, on popular titles this means patrons can renew their items if there is an item with a status of “transit hold.” We also cannot disable OPAC renewals because of a separate bug in Web Services that does not check the max OPAC renewals setting.
6. SJVLS Logo Transition – Wymer
  - i. Wymer informed the committee that SJVLS will transition to using the new logo and branding at the change of the fiscal year. Wymer is aiming to make the change on July 5, and asked committee members to identify locations in their jurisdictions where they use SJVLS’s logo. He will provide access to a directory where staff can obtain graphics files for the new logo.

## **G. STAFF REPORTS**

1. Senior Systems Network Engineer
  - i. Nelson reported he is still waiting for the ability to place the Spring PC Order. Due to delays in processing payments, he cannot order through Dell until the Fall PC Order has been paid. Geolinks has been at Fresno Central finalizing their circuit install. CENIC year 7 installs are finally finished and year 6 is almost done. Work will begin soon on year 8. Pratt asked about the Envisionware license renewal because the expired license has created challenges with operating LPTone at their branches. Nelson replied that they had issues getting Envisionware to issue a quote for the renewal, and now that they’ve received it they’re working on getting it paid.
2. Associate System Administrator
  - i. Drake had nothing to report.
3. System Administrator
  - i. Wymer reported that he worked on drafting the CLSA Plan of Service for next fiscal year. Next year’s allocation is \$240,000. \$209,000 will be allocated to subsidize delivery service and use \$32,000 to increase SJVLS’s budget for CloudLibrary purchases. He also reported that Merced’s CEP set up is in process. His final report was that he began the

process of upgrading JasperReports. He worked with Lusk to get a new VM created and JasperServer installed. Rather than attempt to upgrade the existing server to a recent version, he is going to set up and populate a fresh instance from scratch and slowly migrate the reports from the old server to the new one. He will report back with an update over the next meetings.

#### **H. CALENDAR ITEMS**

1. Date and location for next Automation Committee Meeting
  - i. June 29, 2022 via Teams.

#### **I. ANNOUNCEMENTS**

1. Clark shared that Roache is leaving the Tulare Public Library, so she will continue as Tulare Public's JSA for the foreseeable future. She is hoping to be able to open recruitment soon.

#### **J. ADJOURNMENT**

1. There being no further business to discuss the meeting was adjourned at 10:53 a.m.