



Automation Committee Agenda Packet

SAN JOAQUIN VALLEY
LIBRARY SYSTEM
2420 Mariposa Street
Fresno, CA 93721
559-600-6256

July 27, 2022

10 a.m.

Online via Teams

Enclosed are the agenda and prepared attachments for this meeting.

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

The public may participate by using the following URL:

<https://go.sjvls.org/automation220727>

To participate in the meeting by telephone, call:

(559) 785-0133

Enter Phone Conference ID: 696 515 741#

Accessibility and Accommodations: In accordance with the Americans with Disabilities Act, if you need special assistance to participate in this meeting, please contact the San Joaquin Valley Library System at (559) 600-62xx no later than 10:00 a.m. on Tuesday, July 26, 2022.

Public records: Disclosable public records related to this agenda are available for public review at the Fresno County Public Library, Business Office, located at 2420 Mariposa Street, Fresno, CA 93721, during regular business hours, 8:00 a.m. – 5:00 p.m., Monday through Friday.

AGENDA

A. COUNCIL OPENING

1. Call to Order
2. Introductions
3. Adoption of the Agenda
4. Public Comment – The Public may comment on any items relative to SJVLS and not on the agenda.

B. APPROVAL OF MINUTES OF JUNE 29, 2022 (ATTACHMENT 1)

C. ITEMS FOR DISCUSSION AND ACTION

1. ACTION: Certification of the Need to Continue Virtual Meetings – Wymer
2. ACTION: Damaged Item Procedures – Wymer (Attachment 2)
3. DISCUSSION: COVID-19 Horizon Customizations – Wymer
4. DISCUSSION: Review of Horizon Staff Accounts – Wymer
5. DISCUSSION: Original Cataloging Services Update – Wymer
6. DISCUSSION: New Enterprise Theme Feedback – Wymer

D. STAFF REPORTS

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

E. CALENDAR ITEMS

1. Set the date and agenda building for the next meeting, tentatively Wednesday, August 24, 2022, online via Microsoft Teams.

F. ANNOUNCEMENTS

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

G. ADJOURNMENT



SAN JOAQUIN VALLEY LIBRARY SYSTEM

Automation Committee Meeting

June 29, 2022

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.
 - i. PRESENT
 1. Faythe Arredondo, Kristin Baer, Yvonne Galvan, Kelly Jo Jones, Brian Martin, Kristie Pratt, Krista Riggs, Chris Wymer (chair)
 - ii. EXCUSED
 1. Anthony Arellano, Heidi Clark, Smruti Deshpande
 - iii. OTHERS PRESENT
 1. Mike Drake, Mark Lewis, Kevin Nelson, Tiffany Polfer, Logic Vang

C. ADOPTION OF THE AGENDA

1. Pratt motioned to adopt the agenda.
 - i. Jones 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. Baer 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. Baer motioned to continue virtual meetings.
 2. Arredondo seconded.
 3. The motion passed.

G. STAFF REPORTS

1. Senior Systems Network Engineer
 - i. Nelson reported that the outstanding Dell invoices have been paid, and the hold on placing new orders has been lifted. He is going to re-quote the Spring PC Order and then get it placed. He asked if any members had outstanding items they would like to order. Jones asked if Mariposa had placed an order. Nelson said they had not and asked Jones to contact him after the meeting to discuss options. Martin asked if he placed an order, and Nelson confirmed he did.
2. Associate System Administrator
 - i. Drake reported that he is compiling a list of each member's BC Analytics users and will make it available when completed so the members can review their current accounts.
3. System Administrator
 - i. Wymer reported that the 3-year and 7-year inactive patron purges were completed over the last 2 weeks. Summary reports are available in the system shared folders. The summary reports show the number of borrowers and dollar amount of debts purged.
 - ii. Wymer reported that the new JasperServer has been upgrade and work is underway to migrate the reports from the old server. He ran into an issue where the bad email address report would not execute, due to a SQL validation process on the JasperServer.
 - iii. Wymer reminded the committee members that SJVLS will be rebranding their logo and color scheme next week. He asked the committee to replace the SJVLS logo in their websites and other materials. Pratt asked if the new logo will be made available to staff. Wymer said he would send a link to the logo files.
 - iv. Wymer asked the committee members to remind their staff that they need to close Horizon clients overnight. He is observed a large number of clients still logged in each morning. Pratt asked if Wymer could send a list of the workstations, and he said he would add it to his morning routine.
 - v. Wymer informed the committee that due to staff shortages, original cataloging is suspended systemwide.

H. CALENDAR ITEMS

1. Date and location for next Automation Committee Meeting
 - i. July 27, 2022 at 10:00 am via Teams.

I. ANNOUNCEMENTS

1. Arredondo informed the committee that she will be going on an extended leave soon and Tulare County will have an interim JSA.
2. Baer informed the committee that she accepted a position with Fresno City College and will be leaving Fresno County Library in August. Polfer will transition to being Fresno County's JSA.
3. Wymer announced that on Friday, July 1, the Porterville Library will re-open after 2 and a half years of being closed.

J. ADJOURNMENT

1. There being no further business to discuss the meeting was adjourned at 10:21 a.m.

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.

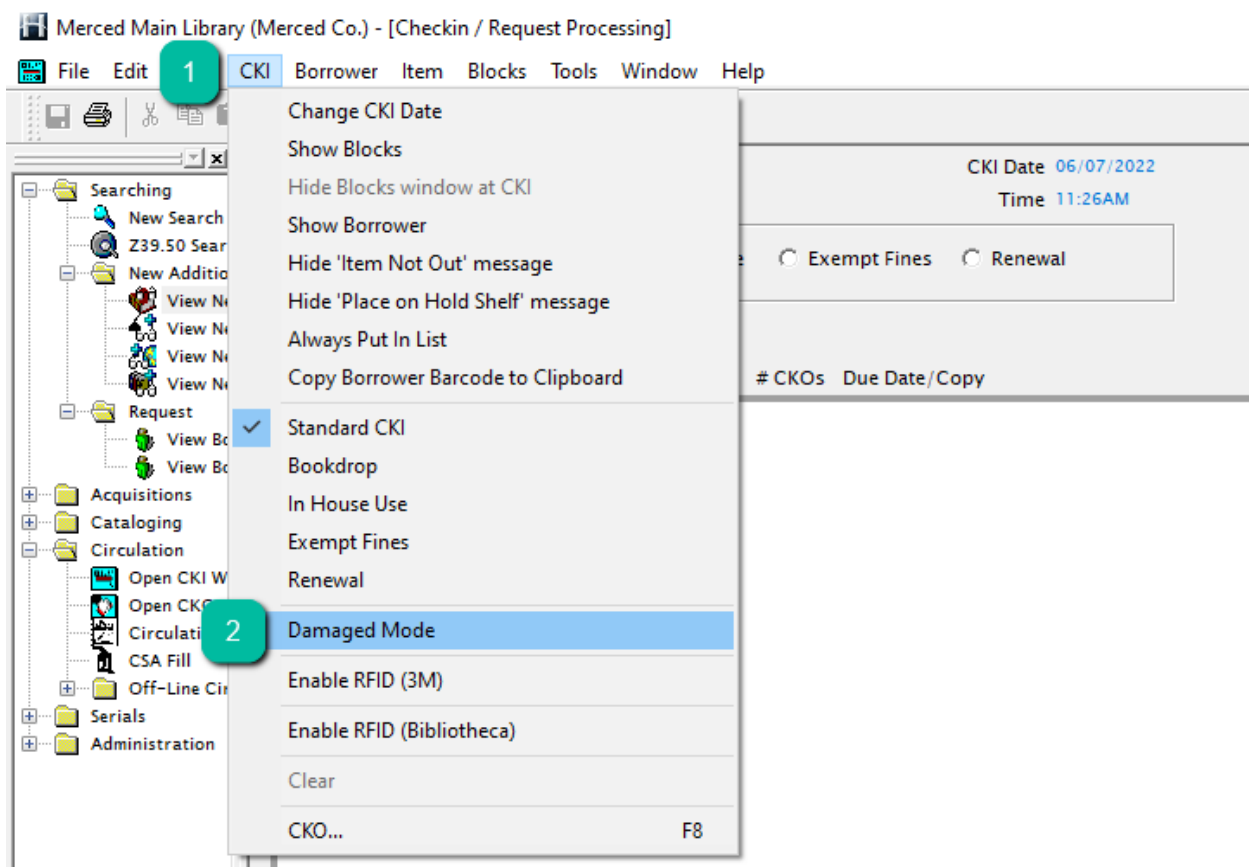
PROCEDURES

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

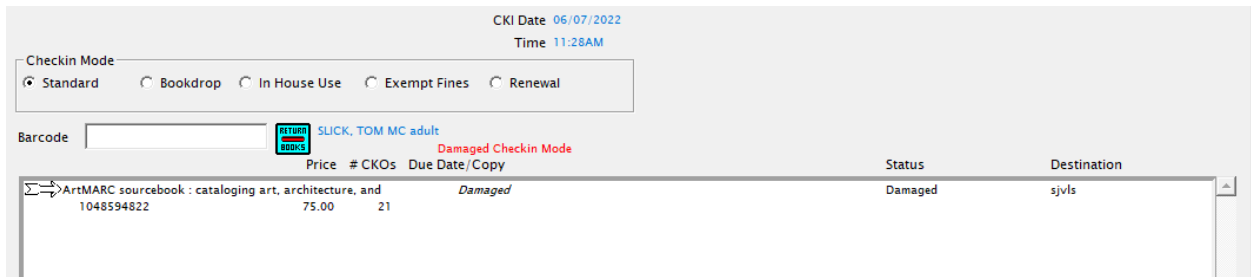
CHECK IN LOCATION

Please follow these procedures for checking in damaged items.

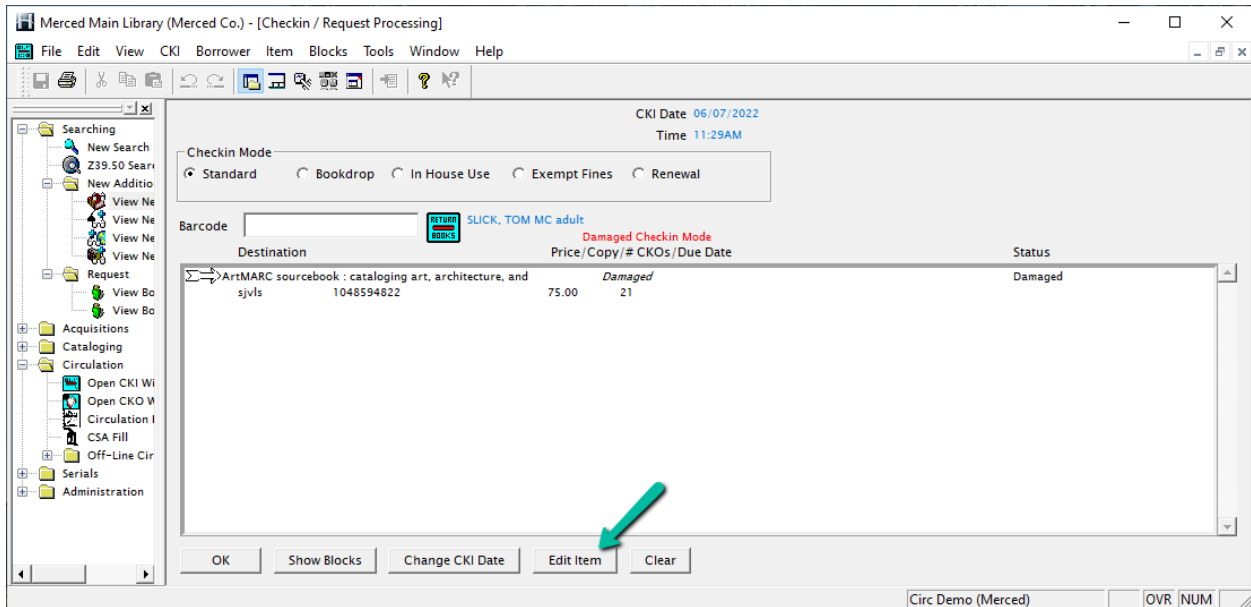
1. Switch to Damaged Mode Check in
 - a. Under CKI menu select "Damage Mode", you will see RED Text appear next to barcode input.



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



Title ArtMARC sourcebook : cataloging art, architecture, and

Call No. 025.34 Ar789 **Copy No.** **Item No.** 1600901 *** Status** *Damaged*

Status Updated 06/07/2022

Checkin Note

*** Barcode** **Collection** *sjvismf* *Sjvis Reference Military & Firearms*

Internal Note

Location *sjvls* *SJVLS Headquarters*

Prior Circ Info

Borrower *SLICK, TOM MC adult*

Barcode 0028740983 **2nd ID** 0028740983

CKI Date 06/07/2022 **Time** 11:28AM **Location** *mer*

CKO Date 06/07/2022 **Time** 11:13AM **Location** *mer*

Renewals 0 **by Phone** 0 **by OPAC** 0 **Auto Renewals** 0 **No. of Pieces** 0

Used In-house **No. In-house Uses** 0

IType *sjvibk* *Sjvis Book*

Price 75.00

Statistics

Created 10/03/2002 **Updated** 06/07/2022 **Status Changed** 06/07/2022

Inhouse Use 0 **Last Inhouse Date**

CKOs 21 **Last CKO Date** 06/07/2022 **CKO Loc**

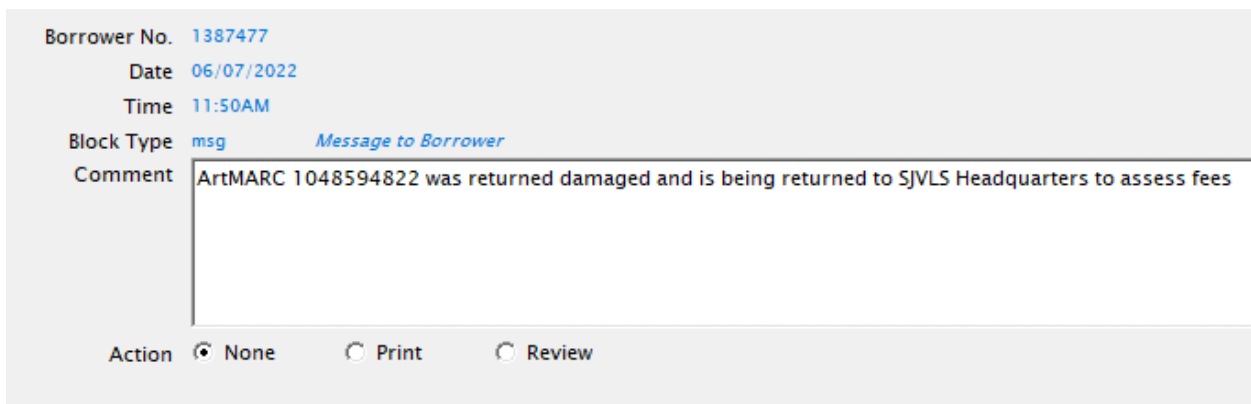
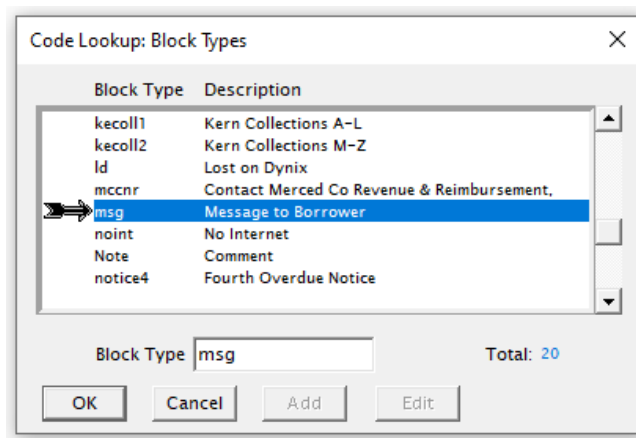
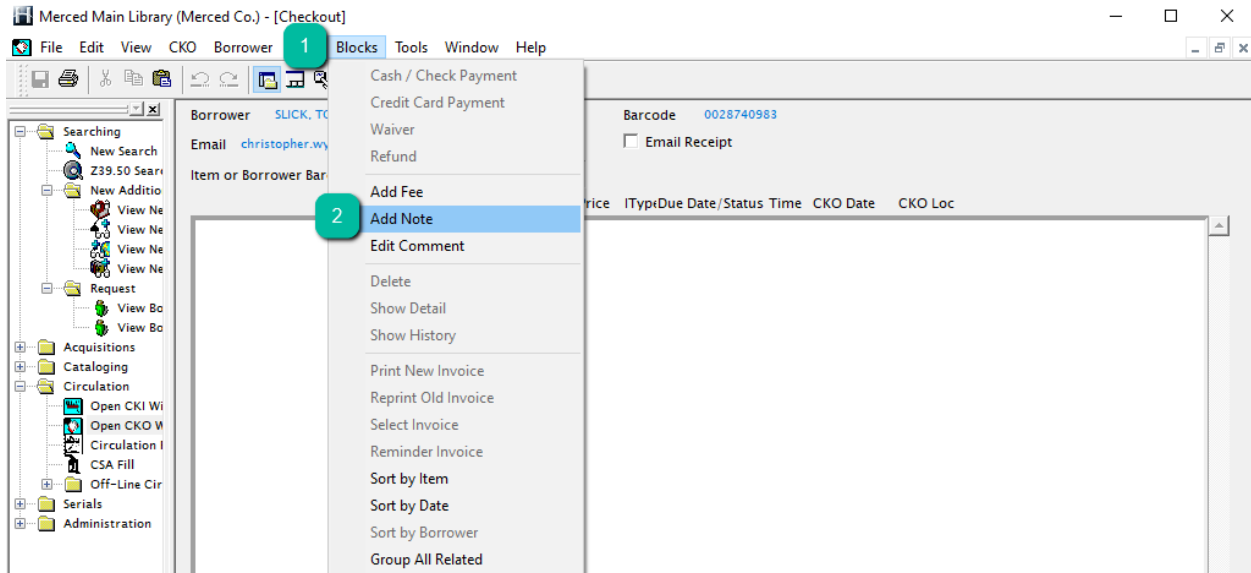
Renewals 0 **Phone Ren** 0 **OPAC Ren** 0 **Auto Renewals** 0

Bib No. 1418376

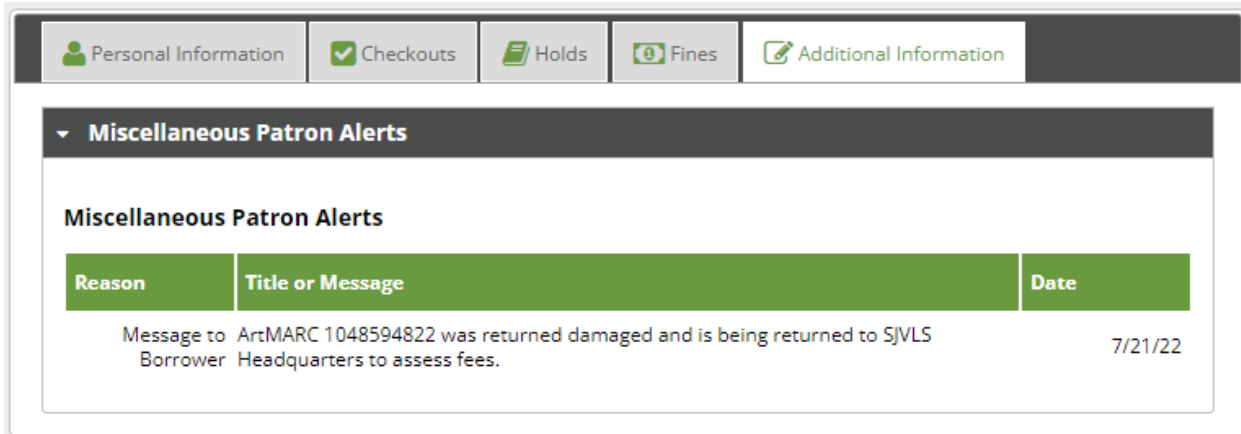
 Page 1 of 1

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."

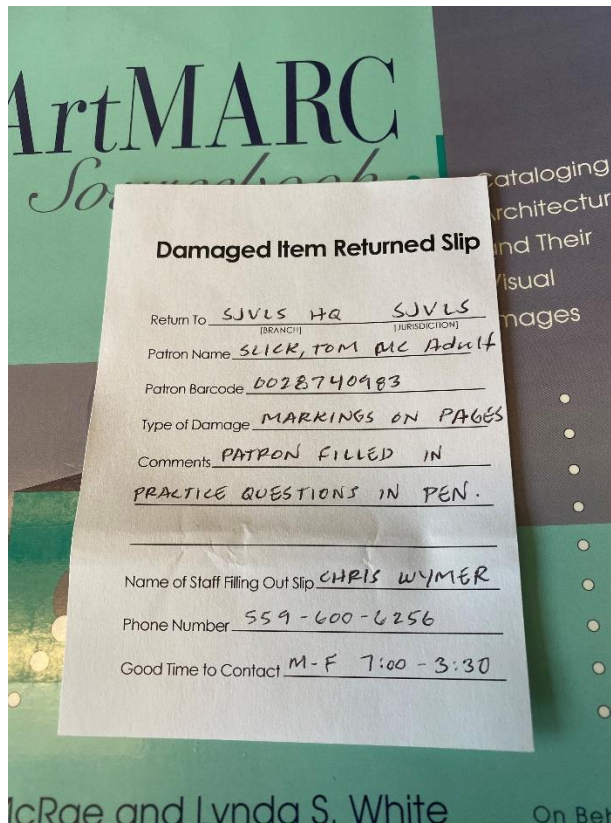


b. This is what the borrower will see in Enterprise:



c. NOTE: BC Mobile does not currently display message to borrower blocks to patrons.

6. Fill out a damaged item slip and put in transit back to owning library.



OWNING LOCATION

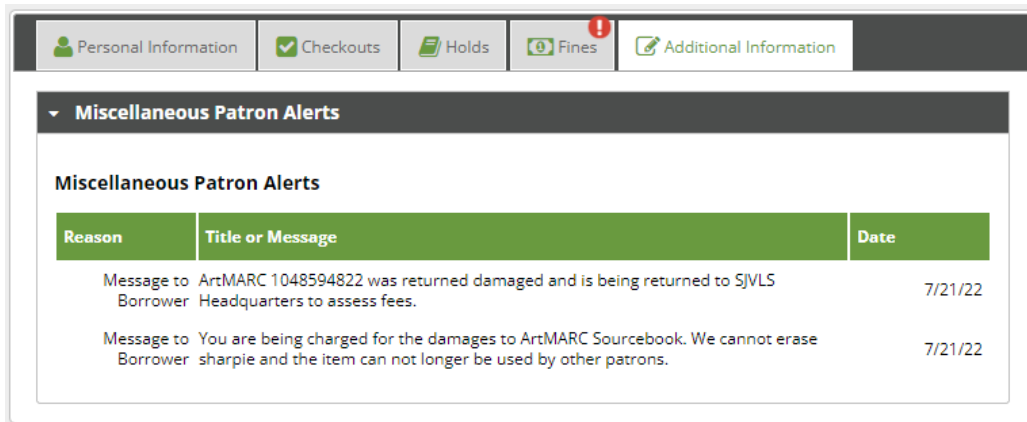
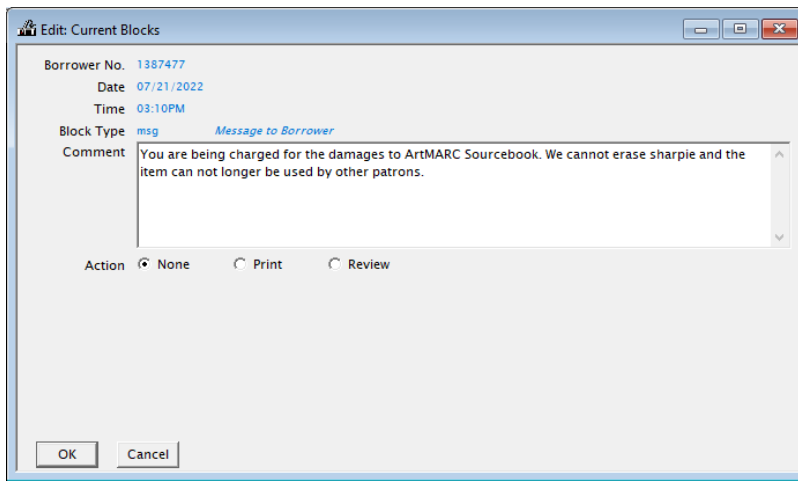
When the item arrives at the owning library, please follow these instructions for adding charges to a borrower's account.

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. In "Amount" enter the fee for the item, including any processing fees.
 - b. In "Comment" enter the barcode followed by the title of the item
 - i. NOTE: Only the first 35 characters of the comment print on the notice. The borrower can view the full block note by viewing their account in Enterprise or BC Mobile.

- c. After adding the charge, update the "Message to Borrower" block with a comment that fees were assessed.

- i. NOTE: the borrower will not see the comment, but staff will be able to view it in Horizon and this creates a record of what has happened.

- d. Add a second Message to Borrower block noting that they will be charged for the damages to the item. The borrower will be able to view this message in the “Additional Information” section of My Account in Enterprise.



- 3. If the borrower will not be charged for the damage:
 - e. Delete the “Message to Borrower” block related to the damaged item.
 - f. Add a new “Message to Borrower” block noting the title and that the borrower will not be charged.
- 4. After adding the charges, each jurisdiction will withdraw the items according to local policy.