



Automation Committee Agenda Packet

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

July 19, 2023

Visalia Library

10:00 a.m.

The next meeting of the SJVLS Automation Committee will be held at:

**Visalia Library
200 W Oak Ave
Visalia, CA 93291
July 19, 2023, at 10:00 a.m.**

Enclosed are the agenda and prepared attachments for this meeting.

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

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) 600-6256 no later than 10:00 a.m. on Tuesday July 18, 2023.

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 MAY 24, 2023 (ATTACHMENT 1)

C. ITEMS FOR DISCUSSION AND ACTION

1. ACTION: Remove old Drivers License Field from Borrower Record Display – Wymer
2. ACTION: Horizon Migration – Wymer (Attachment 2)
3. ACTION: Web Services and SIP Migration – Wymer (Attachment 3)
4. ACTION: Upgrade Enterprise and Kid's Catalog to latest versions – Wymer
5. ACTION: Upgrade Web Services to the latest version – Wymer
6. DISCUSSION: Self-Registration – Wymer
7. DISCUSSION: Cataloging Services to non-Cat Center Libraries – 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 Tuesday, September 20, 2023, at the Woodward Park Library.

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

May 24, 2023

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. Yvonne Galvan (Coalinga-Huron), Tiffany Polfer (Fresno), Kristie Pratt (Kern), Sarah McIntyre (Madera), Smruti Deshpande (Merced), Anthony Arellano (Porterville) Heidi Clark (Tulare City), Faythe Arredondo (Tulare County), Chris Wymer (Chair)
 - ii. EXCUSED
 1. Matt Johnson (Mariposa)
 - iii. OTHERS PRESENT
 1. Brian Martin (Kings), Kevin Nelson (SJVLS), Mike Drake (SJVLS)

C. ADOPTION OF THE AGENDA

1. Clark (Tulare City) motioned to adopt the agenda.
 - i. Polfer (Fresno) 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 (Tulare City) motioned to adopt the minutes as distributed.
 - i. Deshpande (Merced) seconded the motion.
 - ii. The motion passed.

F. PROJECTS FOR DISCUSSION AND ACTION

1. COSUGI Conference Report – Wymer
 1. Wymer provided an update on information shared about SirsiDynix products at the 2023 COSUGI Conference. Products discussed were: Horizon, Web Services, Enterprise, CloudSource Discovery, Universal Harvester, SIP, BC Analytics, BC Mobile and BC Circulation.

2. Telemessaging Server Replacement – Wymer
 - i. Wymer informed the committee that the current Telemessaging server is only under warranty through March 2024, and the current operating system's end of life date is in October 2023. He asked the committee to support a recommendation to Administrative Council to replace the current server with costs not to exceed \$15,000. Funding for the purchase is already included in the budget.
SJVLS staff have gathered quotes for a replacement server and migration services from SirsiDynix to migrate the Telemessaging software from the old server to the new server. SJVLS will re-use the existing telephony cards to reduce the costs of the project by \$3,600. Purchasing the server through Dell instead of SirsiDynix will save approximately \$3,000.
 - ii. Arellano (Porterville) motioned to send a recommendation to Administrative Council to replace the Telemessaging server and have SirsiDynix provide migration services, with project costs not to exceed \$15,000.
 1. Deshpande (Merced) seconded.
 2. The motion passed.
3. Self-Registration Policy Review – Wymer
 - i. Wymer provided a review of the current self-registration policy and configuration, and asked the committee how the current self-registration criteria were working in practice. The consensus was that self-registration has been an appreciated and convenient service for patrons, especially during the pandemic, although there are users attempting to circumvent duplicate borrower policies to create multiple borrower records. Other challenges included some confusion about what's required when filling out the self-registration form, and that patrons weren't aware they needed to provide their street address twice. Other issues included name and address verification preventing borrowers from registering after they just moved into the area, and issues with young adult cards when the patron's last name isn't the same as their parents. Wymer will work with the self-registration vendor to see if there are any ways to improve the process.
 - ii. The committee also discussed potential improvements to self-registration, including the ability to host the self-registration form on their web page, and using the form as a "pre-registration" when the patron is signing up for a card within the branch. SJVLS staff will work with the vendor to see what's possible and report back to the committee.
4. Deleting Unused Locations, Itypes, and Collection Codes – Wymer
 - i. Wymer informed the committee that codes within Horizon can be deleted, if a member desires. Previously, we were not able to delete locations, so closed library branches still display and existing within Horizon. The current version of Horizon supports deleting locations and other codes. Wymer provided committee members with considerations before deleting a code, and informed the committee that they can open a work order to request any codes be deleted prior to Annual Stats compilation on July 1.

5. Inactive Self-Registered Patron Purges – Wymer
 - i. Wymer asked the committee to consider included inactive self-registered patrons in the upcoming inactive patron purges. Since self-registration went live, SJVLS has not purged expired accounts. Last year Automation Committee decided to give self-registered patrons an extra opportunity to convert self-registered accounts to full accounts. His proposed criteria are accounts that have been expired longer than 12 months and owe less than the 3-year purge threshold for the jurisdiction. Borrowers would have a period of at least 18 months to verify their accounts prior to being included in a purge. Wymer estimated that approximately 9,250 accounts would be purged based on this criterion.
 - ii. Pratt (Kern) motioned to purge self-registered borrower accounts that have been expired longer than 12 months and owe less than a jurisdiction's 3-year purge threshold.
 1. Clark seconded.
 2. The motion passed.
6. FY 2023-24 Meeting Schedule – Wymer
 - i. Wymer presented the proposed Automation Committee meeting schedule for the upcoming fiscal year.
 - ii. Pratt motioned to accept the proposed schedule as distributed.
 1. Polfer seconded.
 2. The motion passed.

G. STAFF REPORTS

1. Senior Systems Network Engineer
 - i. Nelson informed the committee that the PC Order has been submitted. He does not have estimated delivery dates. Nelson also provided an update on the network, noting that there are only 12 branches remaining with speeds lower than 100 mbps, and 10 of those locations are scheduled to be upgraded. Seven of those locations are under contract to migrate to faster speeds with Geolinks, however those locations are stalled due to challenges installing infrastructure.
2. System Administrator
 - i. Wymer informed the committee that he's been working on drafting agenda items for this meeting and Friday's Admin Council meeting. He informed the committee that he's finished the ECF tracking script. He's also working on grant applications for broadband improvements and finalizing the upcoming year's budget.

H. CALENDAR ITEMS

1. Date and location for next Automation Committee Meeting
 - i. July 19, 2023, at 10:00 am at the Visalia Library.

I. ANNOUNCEMENTS

1. Pratt shared that Kern County's Beale and Southwest branches have expanded hours and are open Monday through Saturday. They are gearing up for Summer Reading Program.

J. ADJOURNMENT

1. There being no further business to discuss the meeting adjourned at 11:55 a.m.

DATE: July 19, 2023
TO: Automation Committee
SUBMITTED BY: Chris Wymer – Administrative Librarian
SUBJECT: Horizon Migration

RECOMMENDED ACTION:

1. Approve sending a recommendation to Administrative Council to migrate the Horizon database to MSSQL with assistance from SirsiDynix.

Approval of the recommended action will approve sending a recommendation to Administrative Council to migrate the Horizon database to MSSQL.

ALTERNATIVE ACTION(S):

Remain on Sybase and forgo any further enhancements and new additions to the Horizon ILS.

FISCAL IMPACT:

Approval of the recommended action will not have an impact on Membership dues. Funding for these projects was already set aside in System Committed Projects to support the goals identified in the Technology Plan. Migrating Horizon to MSSQL will cost \$14,000 in the first year and increase our Annual Maintenance in FY 24-25 by an additional \$2,430 to pay for the MSSQL licensing costs.

DISCUSSION:

SirsiDynix no longer supports Sybase, and all Horizon customers must migrate to MSSQL to continue receiving upgrades and access to new features and functionality in the newest version, 7.6.0. The project timeline would be:

- Platform Migration Checklist – Horizon Local
- Platform Migration Meeting – Kickoff Call
- Verify Remote Connectivity and setup MSSQL instance
- Migrate Sybase to MSSQL – Test instance
- Migrate Sybase to MSSQL Comres Test instance
- Install & setup SQL connectivity tool
- Testing of MSSQL Test Horizon
- Setup of MSSQL for Horizon production migration
- Complete Sybase to MSSQL Horizon production migration
- Complete Sybase to MSSQL Comres production migration

Motion:

Second:

_____ PASSED

_____ REJECTED

DATE: July 19, 2023
TO: Automation Committee
SUBMITTED BY: Chris Wymer – Administrative Librarian
SUBJECT: Web Services and SIP Migration

RECOMMENDED ACTION:

1. Authorize SJVLS staff to work with SirsiDynix to migrate Web Services and both SIP servers to new versions of Windows Server.

Approval of the recommended action will allow SJVLS staff to work with SirsiDynix to migrate Web Services and SIP instances to new servers at a cost of \$3,380.

ALTERNATIVE ACTION(S):

There are no viable alternative actions.

FISCAL IMPACT:

Approval of the recommended action will not increase membership dues. Funding for the project was already allocated in System Committed projects to support the goals identified in the Technology Plan. Migrating the other services will cost \$3,380 with no additional on-going costs. Windows Server licensing costs are still being researched and will be included in a separate project for the Technology Plan.

DISCUSSION:

Our current version of Windows Server goes end of life at the beginning of October. In order to continue to receive security updates SJVLS has to migrate these services to a newer version of Windows Server.

Motion:

Second:

_____ PASSED

_____ REJECTED