



# SAN JOAQUIN VALLEY LIBRARY SYSTEM

## Automation Committee Meeting

### November 15, 2023

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

#### C. ADOPTION OF THE AGENDA

1. Clark (Tulare City) motioned to adopt the agenda.
  - i. Pratt (Kern) 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 (Kern) motioned to adopt the minutes with corrections to the spelling of "Announcements" and a correction to the start date of Fresno's Holocaust exhibit.
  - i. Polfer (Fresno) seconded the motion.
  - ii. The motion passed.

#### F. PROJECTS FOR DISCUSSION AND ACTION

1. Guidelines on Adding Notes to Other Member's Materials – Wymer
  - i. Wymer started the discussion by providing background on the request. Clark previously reached out to ask if the committee could discuss when libraries should add notes to items that belong to another member.

Clark informed the committee that she recently had a situation where Tulare Public's material came back with check-in notes added to the item that they did not create. Her impression on adding notes was that only the owning jurisdiction should add notes to their items. Clark noted that she understands adding check-in notes to items that were received with minor damages to ensure the most recent borrower is not charged for damages that happened before they received the item but would like to have some standardization about when and how they're added systemwide.

- ii. McIntyre noted that in Madera they will add check-in notes to items received through shipment with some form of damage, to ensure their patron isn't charged for damages that were not their responsibility.
- iii. Clark asked if SJVLS had any existing guidance or policy on when to add notes to items and mentioned that in the past there was an effort to reduce the number of notes on item and borrower records. Wymer said that he was not aware of any formal policy on the topic but is in favor of discussing and drafting guidelines for members to follow and bringing it back for discussion at the next meeting.
- iv. Galvan asked about a related topic about guidelines for when libraries are allowed to set other jurisdiction's items to a status of "trace." She's encountered several Coalinga-Huron owned items that were put in trace by another jurisdiction and added "damaged" notes to the material. Wymer mentioned those items were likely items that were expired holds that could not be found on the hold shelf. Clark and Pratt informed Galvan that this is a standard practice when an expired hold cannot be located on the hold shelf. The item is checked in as damaged to prevent it from filling other holds, and then the status is updated to trace to indicate that it cannot be found. Galvan asked why Coalinga wasn't being notified if one of their items goes missing from the hold shelf. Wymer asked about possible ways to notify owning jurisdictions when these situations arise. Different options were discussed, and the consensus was that the easiest solution would be to create a report for these items. When staff are updating these item's status to trace, they can add an internal note that reads "MISSING FROM HOLD SHELF" plus the location it went missing from and the username of the staff member that set it to trace. SJVLS can create reports for each member's items with that note. Wymer will draft guidelines for this new procedure and bring it back at the next meeting.
- v. Returning to internal and check in notes, Polfer mentioned that she's encountered several situations where patrons have requested staff add notes to material regarding damage prior to checking out the item.
- vi. Arellano mentioned that sometimes he receives items with notes of damage and cannot locate the damage himself. He also mentioned that staff can always clear the note at the owning jurisdiction if they don't think it's relevant. He likes the idea of using check in notes to communicate small damages in the interest of making sure patrons are not held responsible for damages that happened before they borrowed it.

- vii. Wymer will draft guidelines for adding notes based on the criteria identified during the discussion, including guidance on when to follow damaged procedures when an item is received with significant damages. He will return to the committee with draft guidelines for approval at the next meeting.
- 2. Editing Account Information in Enterprise – Wymer
  - i. Wymer informed the committee about an issue that’s been discovered in Enterprise relating to borrower’s editing their account information. Borrowers currently cannot edit their account details on the first visit to My Account. The cause of the issue is OverDrive authentication. When a borrower logs into Enterprise a request is sent to retrieve their OverDrive checkouts and holds. On occasion when this happens, OverDrive authenticates the borrower’s account and updates their last authentication date. The update to the borrower record prevents borrowers from editing their account, because the account was already modified between the data being retrieved and the new data being written. Tests showed that reloading the page allows the borrower data to be freshly retrieved and then the account can be updated.
  - ii. The committee discussed the possible solutions to the problem and decided updating the failure message to read “Your information could not be saved. Please reload the page and try again. If the problem continues, contact your local library.”
    - 1. Clark (Tulare City) motioned to update the message in Enterprise.
      - a. Johnson (Mariposa) seconded.
      - b. The motion passed.
- 3. Passwords for Patron Accounts – Wymer
  - i. Wymer informed the committee that during public comment at the last Administrative Council meeting, a member of the public commented that they would like to see patron accounts use passwords instead of PINs to increase security of patron records. He then asked the committee about their thoughts on potentially adding passwords and making them the primary login mechanism for Enterprise and BC Mobile.
  - ii. The committee discussed challenges with making the transition. The main challenges identified were how to handle existing accounts without passwords, how to have patrons create their passwords, how to help patrons that forgot their password, and how to help patrons that do not have an email in their borrower record.
  - iii. Arellano asked if this change was necessary, given that only one patron has requested the change. The committee’s consensus was that we do not need to make the change at the request of a single patron. As a result, the discussion ended, and no further action will be taken at this time.
- 4. Horizon Migration – Wymer
  - i. Wymer updated the committee on the status of the Horizon migration. Horizon was migrated to the new server, along with the comres and test databases. The SIP servers have been migrated as well. Only Web Services has not been migrated. In addition, the nightly restore test from

- the latest Horizon backup is working, and some of the custom SQL processes have already been updated.
- ii. Members with self-check systems will need to do some testing to ensure the self-checks can communicate with the new Horizon database. Wymer will put together specific instructions and send them to JSAs.
  - iii. Wymer informed the committee that the production migration will occur on Monday, December 11, and we'll need as many staff members available as possible. He will schedule a meeting for early December to review specifics of what needs to happen that day.
5. Weeding Procedures – Wymer
- i. Wymer informed the committee that McIntyre had reached out to ask about weeding procedures and the use of the “weeded” item status. Wymer asked the committee to describe their methods for weeding items.
  - ii. Pratt shared that Kern County has staff change the status to “weeded” and send the items to their headquarters. Headquarters staff review the material to see if another branch could use the item and send it there if that's the case, otherwise they will change the status to “withdrawn” so it can be deleted.
  - iii. Deshpande shared that Merced County generates weeding lists for staff and send them to staff to pull the items off the shelf.
  - iv. Arredondo shared that she runs a report in BC Analytics to generate a weeding list, and then shares it with staff to pull the items.
  - v. Polfer shared that in Fresno County branch staff run their own weeding reports and change the item status to “withdrawn.”

## **G. STAFF REPORTS**

1. Senior Systems Network Engineer
  - i. Nelson had no report.
2. Associate System Administrator
  - i. Drake informed the committee that he's been working on testing and converting Jasper Reports to run on MSSQL. He has 160 reports to review. He's also figured out how to use the Jasper API to run reports on the Jasper Server itself. That includes being able to generate a report of scheduled reports by user, and the email recipients of those reports. If any members are interested, he can run the reports for them.
3. System Administrator
  - i. Wymer had no report.

## **H. CALENDAR ITEMS**

1. Date and location for next Automation Committee Meeting
  - i. January 17, 2024, at 10:00 am at the Tulare Public Library.

## **I. ANNOUNCEMENTS**

1. Clark shared that Tulare Public's “Night at the Library” was moved to December 4<sup>th</sup> from 5:30 – 8:00.
2. Pratt shared that all Kern County Libraries will be closed on December 1 for an all-staff training, and will be closed December 22, 2023, through January 1, 2024.

3. Arredondo shared that Tulare County Libraries will be closed on December 8, 2023, for an all-staff training. They will also be closed on December 26.

**J. ADJOURNMENT**

1. There being no further business to discuss the meeting adjourned at 11:25 a.m.