



Automation Committee Agenda Packet

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

March 20, 2024

Hanford Library

10:00 a.m.

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

**Hanford Library
401 N. Douty St
Hanford, CA 93230
March 20, 2024, 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) 600-62xx no later than 10:00 a.m. on Tuesday, March 19, 2024.

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 JANUARY 17, 2024 (ATTACHMENT 1)

C. ITEMS FOR DISCUSSION AND ACTION

1. ACTION: BC Mobile – Wymer (Attachment 2)
2. DISCUSSION: Changing OverDrive Authentication – Wymer (Attachment 3)
3. ACTION: Mobile Printing – Wymer (Attachment 4)
4. DISCUSSION: CA State Library Student Success Cards – Wymer
5. DISCUSSION: Digital Barcodes in the Catalog – Wymer
6. DISCUSSION: COSUGI Conference Report – 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, May 15, 2024 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

January 17, 2024

DRAFT MINUTES

A. CALL TO ORDER

1. The meeting was called to order at 10:16 a.m. by Chris Wymer

B. ROLL CALL AND INTRODUCTIONS

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

C. ADOPTION OF THE AGENDA

1. Pratt (Kern) motioned to adopt the agenda.
 - i. Clark (Tulare City) 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. Arellano (Porterville) motioned to adopt the minutes as presented.
 - i. Deshpande (Merced) 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 presented the draft guidelines to the committee for review and comment. Pratt asked if the guidelines could be updated to have staff enter the branch code instead of the full branch name when entering a check in note for damages on an item. She also noted that the check in

note field in Horizon is limited to 80 characters, and recommended adding instructions for staff on how to handle notes that are longer than 80 characters. Her recommendation was to have staff enter "See internal notes" as the check in note, and then provide the full check in note details as an internal note.

- ii. When discussing procedures for items missing from the hold shelf, Pratt noted that when an item is checked in as damaged, the "Damaged" check-in note that is automatically added overwrites any previous check-in note that was already there. Wymer stated he had an idea for a Jasper Report that could run nightly to find items where a previous check-in note was overwritten. Pratt also requested to add a step to the guidelines that instructs staff to delete the Damaged check-in note when checking in an item missing from the hold shelf, since the item itself is missing, not damaged.
 - iii. The committee also discussed what reports would be needed to track items that go missing. It was decided that 3 reports will be created. The first will list all items with a status of "trace" with an internal note that contains "MISSING FROM HOLD SHELF". The second report is similar but has a filter to limit the results to only items with the note since a specific date. The final report would be for found items, which are items that have a missing internal note, but no longer have a status of "trace". That would imply that the items were found in one form or another. Wymer will create the reports and let the JSAs know when they're ready.
 - iv. Clark (Tulare Public) motioned to adopt the guidelines with the changes discussed during the meeting.
 1. Polfer (Fresno) seconded.
 2. The motion passed.
2. Horizon Post-Migration – Wymer
 - i. Wymer provided an update on the new Horizon server's performance post-migration, and asked for feedback on how the migration went in their libraries. Pratt commented that since the migration, merging borrowers takes significantly less time. Deshpande and Polfer agreed and mentioned that it's much better now. One challenge post-migration is the need to enter the database credentials every time a staff member logs into a workstation for the first time. There are also a few workstations where the credentials are not saved after staff logoff. Wymer is not sure why that's happening on specific workstations for specific staff members and will have to research it further.
 - ii. Arellano asked about laptops having problems post-migration. Wymer asked him to reach out to Logic to make sure the laptops are set up correctly.
 3. New at the Library Search Limit – Wymer
 - i. Due to Drake's absence at the meeting, Wymer presented the New at the Library search limits to the committee. SJVLS can create search limits in the online catalog that automatically search for and display new materials for a member library. The limit is constructed using a combination of itypes or collection codes, plus a filter for pub date on the current year. In order to keep results relevant as the year progresses,

- a filter for bib# greater than a specific number can be added to the limit, reducing materials to those that were added since a certain date.
- ii. Any member that wants to add the Search Limits can open a ticket and request the limits be set up. SJVLS will need to know an English and Spanish name for the limit, for example “New Children’s DVDs”, plus the itype, collection code, or combination of itype and collection code for items that should be included in the limit.
4. SJVLS Collection Development Policy – Wymer
- i. The committee reviewed the current draft SJVLS Collection Development Policy, along with Electronic Resource Committee’s comments on the draft. Clark shared the background and intent of the policy with the rest of the committee. The committee then reviewed the policy section by section, making comments on how to improve or clarify various sections.
 - ii. They did not have comments on the Purpose section of the policy.
 - iii. In the “Selection Criteria for Shared Resources” the committee recommended adding “Electronic” to the section title, so it reads “Selection Criteria for Shared Electronic Resources”. This is because SJVLS only purchases shared electronic resources like eBooks, Databases, and other electronic applications like language learning. SJVLS does not select or purchase physical materials. The committee also recommended re-wording the bullet point relating to the ability to catalog materials in SJVLS’s ILS and update it to “ability of electronic resources to integrate with SJVLS’s ILS, when applicable.”
 - iv. In the section labeled “Deselection Criteria” the committee recommended updating the title to “Deselection Criteria for Shared Electronic Resources.” The committee also recommended separating the criteria into two sections, one relating to eBooks and a second relating to Databases, to make the process clear for each type of resource. The committee also posed a question about what happens when an article or journal contained in a larger database package is challenged, given that SJVLS typically does not have the ability to remove individual articles or titles from our subscriptions.
 - v. In the section titled “Reconsideration of Shared Materials”, the committee recommended updating the title to read “Reconsideration of Shared Electronic Resources” for clarity. The committee’s first recommendation was to separate the process to request reconsideration for eBooks from requests to reconsider databases or other electronic resources, since they are two distinct processes. The committee had several questions and observations regarding the process for hearing reconsideration requests for eBooks. The first question was about the best way for patrons to submit reconsideration requests. The current draft states that patrons must mail their request to either the Administrative Librarian or the Administrative Council of SJVLS but does not provide an address to mail the letter to. The committee discussed whether an online form would be better, and if emailed requests would be acceptable. Pratt commented that this section should indicate what elements are needed to submit a reconsideration request and suggested that it be added to this section.

The committee also discussed who can submit a request for reconsideration and recommended that requests be limited to residents of SJVLS's service area, or card holders at an SJVLS member library, if their residence is outside SJVLS's service boundaries. From there the discussion focused on questions about scenarios for when an ad-hoc committee would be needed, and how the committee should be composed. It was recommended that the section be re-worded to read "An ad hoc committee of library professionals and/or members of the public may be formed by the Administrative Council when deemed necessary." Further discussion focused on the ambiguity regarding the ad hoc committee, including, how is the committee composed? What are the circumstances when Administrative Council would create a committee? Who chairs or oversees the committee's work? How many members are on the committee, and who can volunteer to participate? Do committee members need to reside within SJVLS's boundaries? How will we inform the public that the committee is being formed? What reports or recommendations will the committee produce regarding their decision? Their final recommendation was to add a statement that Administrative Council's decisions are final to the section stating a letter will be sent regarding their decision, and to develop a form letter for such responses. After considering eBooks, the committee recommended moving the section discussing ERC hearing reconsideration requests for Databases and other Electronic Resources to its own section after eBooks. They also recommended clarifying how ERC will decide on a reconsideration request, and what happens after a decision is made.

- vi. The committee recommended moving the second paragraph under "Reconsideration of Shared Materials" to its own section at the beginning or end of the policy and naming the section "Regarding Minors Access to Electronic Resources." They also recommended re-wording the first sentence to read "SJVLS and its member libraries do not act *in loco parentis*, or in place of parents/guardians, regarding access to materials within the consortium."
- vii. In the section titled "Reconsideration of Jurisdiction-Owned Materials" the committee recommended renaming it to "Jurisdiction-Owned Materials and Electronic Resources." The committee recommended clarifying the first bullet point by changing "in which the patron is a cardholder" to "where the item will be checked out" given that patrons registered in one jurisdiction can check out physical materials from any other jurisdiction, and when they do, that jurisdiction's checkout rules apply. The committee also recommended updating the second bullet point to state "Concerns about an item in a library jurisdiction's individual collection or Electronic Resources, must be addressed directly with the specific library following that jurisdiction's policies and procedures. They recommended switching the order of the sentences in the third bullet point and replacing "Materials under review" with "Challenged materials." The committee felt the last bullet point wasn't clear but had a difficult time finding updated wording.

- viii. The committee's suggestions and comments will be sent to the ad hoc committee along with ERC's comments for their consideration.
5. PC Reservation Session Pause Feature – Wymer
 - i. Wymer provided the committee with a quick overview of a feature in PC Reservation that allows patrons to lock the PC they're using without having to end their session. Pratt informed the committee that the feature isn't a "pause" but rather a "lock" of their session. Wymer then explained how the setting works, and that it can be enabled if other members wanted to offer the feature to their patrons. Anyone that's interested can contact Logic Vang about setting it up.
 6. BC Mobile Development – Wymer
 - i. Wymer reviewed the events that occurred in November 2023 that led to the mobile app becoming unusable. During Thanksgiving weekend, Solus shutdown the servers that support the mobile app, and as a result, important functions like searching the catalog, placing requests, viewing current checkouts and holds stopped functioning. Additionally, SJVLS lost access to the administration interface, and cannot make any changes or put up a notice about the app no longer functioning. SJVLS removed the app from the Google Play and Apple App stores, so no new downloads can happen, but there's nothing we can do about patrons that already downloaded the app.
 - ii. Wymer then provided an update on the current development of BC Mobile 2.0 by SirsiDynix. SirsiDynix anticipates releasing the first version of the app in March. The app is being developed using the native tech stacks for Android and iOS devices, and the Administration interface is integrated into BC Central. Those are positives that will allow for the development of features that were missing in the previous version, such as push notifications.
 - iii. Wymer shared the pros and cons of the current development roadmap. Pros were the development using native tech stacks, integration of biometrics to login, and the integration of the Admin Interface into BC Central, which will allow for automatic updates to the mobile app when configuration changes are made. The cons of the current roadmap are the uncertainty about whether placing requests will be available in the first release, and that there's been no mention of ERC integration.
 7. Maintaining URLs and other Enterprise Components – Wymer
 - i. Wymer informed the committee that if they make any changes to their library websites, they need to ensure the changes do not break links in the online catalog. If URLs are changed and that page is linked to from the online catalog, it's the member's responsibility to inform SJVLS and ask us to update the link to point to the correct page. Common pages with links in Enterprise are pay fines, and hours and locations.
 - ii. Wymer also informed the committee that he recently discovered we do not have Spanish versions of our display codes in Enterprise. Display codes provide the plain text description for elements like collection codes, locations, and item types from Horizon. Collection codes are used to inform patrons where they can find the material within the library. Some codes have display text that reads "Ask at Circ Desk" or "See Reference" and lack Spanish translations. In total, there are more than

1,500 display codes between all members. Wymer obtained a full list of Enterprise's display codes with their English and Spanish display text. He will separate the list by jurisdiction and send it to JSAs to fill out. There is no rush or deadline to complete this project, but JSAs should try to get Spanish display codes filled out when they have time to work on it.

G. STAFF REPORTS

1. Senior Systems Network Engineer
 - i. Nelson provided an update on the E-Rate WiFi Expansion project. Funding Commitment Decisions Letters were issued, and he is currently working with EdTechnologyFunds and AMS to finalize the project. He will be meeting with directors next week to finalize their parts of the project.
 - ii. Nelson also shared that he has not received the CENIC bids for the upcoming year. He will share them as soon as they're received.
 - iii. Nelson's final update was that all items from the PC Order have been received and are ready for pickup.
2. System Administrator
 - i. Wymer informed the committee that he completed a script to automatically update the test database nightly. The updates modify the name of all locations to include "- ***TEST DATABASE***" and sets a custom "testing environment" background image for all accounts. The intent is to make it as obvious as possible that staff are connected to the test database.
 - ii. Wymer also informed the committee that he is working on an updated version of the app that logs patrons into eResources. Most of the groundwork is done, and now he needs to finish finalizing the individual login scripts for each member.
 - iii. Wymer's final update was to inform the committee that he was contacted by Lyris in December to create an enhancement request with SirsiDynix for the creation of an ERC connector for The Palace Project. To date it's received a lot of positive votes from other SirsiDynix customers, and Wymer hopes it will be accepted during formal enhancement request voting in February.

H. CALENDAR ITEMS

1. Date and location for next Automation Committee Meeting
 - i. March 20, 2024, at 10:00 am at the Hanford Library.

I. ANNOUNCEMENTS

1. Pratt announced that the Southwest branch is currently closed for renovations until June 2, 2024. All items checked out from Southwest had their due dates extended to June 3, 2024. The Lamont branch will be closing on February 1, and will not re-open until June 3, 2024. Due dates for items checked out from Lamont will also be extended.
2. Polfer shared that the Selma branch will be closing on March 1 for renovations.

J. ADJOURNMENT

1. There being no further business to discuss the meeting adjourned at 1:30 p.m.

DATE: March 20, 2024

TO: Automation Committee

SUBMITTED BY: Chris Wymer – Administrative Librarian

SUBJECT: BC Mobile

RECOMMENDED ACTION:

1. Approve SJVLS re-listing the ValleyCat mobile app in the iOS App Store.
2. Authorize SJVLS to create a Google Developer Account.

Approval of the recommended action will allow SJVLS staff to re-list the ValleyCat mobile app in the iOS App Store and create a Google Developer Account prior to BC Mobile 2.0's release.

ALTERNATIVE ACTION(S):

Do not re-list the app. Patrons would only be able to download the app on Google devices.

FISCAL IMPACT:

There is no fiscal impact associated with the recommended or alternative actions.

DISCUSSION:

On February 20, SirsiDynix announced they reached an agreement with Solus that allows a path forward for BC Mobile subscribers and allowed the app to function again. On February 29, functionality was restored to the ValleyCat mobile app. At that time, Solus automatically re-listed the app in the Google Play Store. Because SJVLS de-listed the iOS App, we need to re-list it before it is available to download on Apple devices.

Based on the information provided by SirsiDynix, if we re-list the app in the iOS App Store, SirsiDynix will be able to deploy BC Mobile 2.0 to the app ID used by the current ValleyCat mobile app. Once it's released, patrons with the app on their devices would be prompted to download the updated version of the app, and we would avoid a situation where we have two apps on patron's devices. To deploy BC Mobile 2.0 in the Google Play Store, we'll have to create our own Google Developer Account to manage the app. The Google version of the current ValleyCat mobile app is deployed under Solus's Google Developer Account, which we have no control over.

PRIOR AGENDA REFERENCE:

No prior reference.

ATTACHMENTS INCLUDED AND/OR ON FILE:

No attachments on file.

Motion:

Second:

_____ PASSED

_____ REJECTED

DATE: March 20, 2024

TO: Automation Committee

SUBMITTED BY: Chris Wymer – Administrative Librarian

SUBJECT: Changing OverDrive Authentication

BACKGROUND:

In the middle of February, SirsiDynix announced that they're working with OverDrive to switch customers from SIP2 to Web Services for authentication of patrons. According to SirsiDynix:

“This will provide a more robust interface and allow OverDrive to develop a variety of new end-user facing functionality in the future. OverDrive will contact customers to schedule the move over the next several months, and SirsiDynix will work closely with OverDrive and customers to complete this straightforward process. OverDrive's Sora customers are not affected by this change at this time.”

SJVLS welcomes this transition, especially for the increased security it provides during the authentication process. Because SJVLS is not an OverDrive customer, we will not be contacted regarding this change, and will have to rely on our members to help implement the change. If your library is contacted by OverDrive about updating authentication, please refer them to SJVLS staff and we'll coordinate the transition with OverDrive and SirsiDynix.

DATE: March 20, 2024

TO: Automation Committee

SUBMITTED BY: Chris Wymer – Administrative Librarian

SUBJECT: Mobile Printing

RECOMMENDED ACTION:

1. Approve sending a recommendation to Administrative Council to authorize SJVLS to add mobile printing services to our existing Envisionware subscription in the upcoming fiscal year.
2. Recommend the first-year subscription costs for all members be paid from the Technology Plan budget, with each member paying for their share of the subscription in subsequent years.

Approval of the recommended action will authorize SJVLS to present an agenda item to Administrative Council to add mobile printing to our current Envisionware subscription. First year costs for the service would be paid from SJVLS's Technology Plan budget, and the member's will be responsible for their respective costs beginning in FY 2025-2026.

ALTERNATIVE ACTION(S):

Alternatively, members could elect to not set up mobile printing as a system-wide service and manage their own subscriptions without assistance from SJVLS.

FISCAL IMPACT:

Approval of the recommended action would increase expenditures from SJVLS's technology plan budget in FY 2024-2025 by approximately \$65,000, depending on pro-rated subscription costs based on members with existing subscriptions.

DISCUSSION:

With the proliferation of smart phones, tablets, and laptops, more library patrons are bringing their own devices to the library, and mobile printing has become an important service for libraries to offer patrons. With a mobile printing solution, patrons can print documents directly from their devices, eliminating the need to send a document to their email, login to a library PC, and then print the document, streamlining services. Additionally, with mobile printing, patrons can submit print jobs to the library from anywhere and pick up the print when they arrive at the library.

Some SJVLS member libraries already have existing subscriptions, and others have created their own processes for handling mobile printing requests. Under the current model, the system office is unable to offer support for these solutions, either because we do not have access to the applications and have not been trained on their use, or because we do not know the process used by the member and cannot troubleshoot problems. By adding mobile printing as a systemwide service, SJVLS staff will be able to provide support to our member libraries. An additional benefit is that the mobile printing service will be the same across all members, providing a consistent process for patrons that use libraries in multiple jurisdictions, or who move to a new jurisdiction within SJVLS's service area.

For the SJVLS members that already have a subscription to Envisionware's mobile printing

service, they would be added to SJVLS's subscription when their current subscription ends, and costs for the first year would be pro-rated accordingly, at least based on Envisionware's account representative's initial description of the transition.

Adding this service aligns with Strategic Technology Goal #3: Improve Patron-facing Network Infrastructure, objective #2: Investigate options to implement mobile printing at library branches, from the 2023-2026 SJVLS Technology Plan.

PRIOR AGENDA REFERENCE:

Technology Planning Summit. November 2022.
Administrative Council Agenda – May 26, 2023. Item #4.

ATTACHMENTS INCLUDED AND/OR ON FILE:

None.

Motion:

Second:

_____ PASSED

_____ REJECTED