



Automation Committee Agenda Packet

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

September 18, 2024

Tulare Public Library

10:00 a.m.

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

**Tulare Public Library
475 North M St
Tulare, CA 93274
September 18, 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) 600-6256 no later than 10:00 a.m. on Tuesday September 17, 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 JULY 17, 2024 (ATTACHMENT 1)

C. ITEMS FOR DISCUSSION AND ACTION

1. DISCUSSION: Cataloging Questions: Data Load Error Log and Linking Serials – Polfer (Attachment 2)
2. DISCUSSION: Horizon Server Migration 2.0 – Wymer
3. DISCUSSION: Horizon 7.6.1 Upgrade – Wymer
4. ACTION: Approve BC Mobile 2.0 Upgrade – Wymer (Attachment 3)
5. ACTION: Borrower Preferred and Legal Names – Wymer (Attachment 4)
6. ACTION: Approve Updated Cataloging Policy – Wymer (Attachment 5)
7. ACTION: Approve Updates to Borrower Blocks View – Wymer (Attachment 6)
8. ACTION: Add Boolean Advanced Search to Enterprise – Wymer (Attachment 7)

D. STAFF REPORTS

1. Senior Network Systems Engineer
2. System Administrator

E. CALENDAR ITEMS

1. Set the date and agenda building for the next meeting, tentatively Wednesday November 20, 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

July 17, 2024

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. Yonne Galvan (Coalinga-Huron), Tiffany Polfer (Fresno), Kristie Pratt (Kern), Brian Martin (Kings), Alma Madrigal-Ward (Madera), Maureen McCormick (Mariposa), Smruti Deshpande (Merced), Anthony Arellano (Porterville), Faythe Arredondo (Tulare County), Sheri Haveman (Tulare City), Chris Wymer (Chair)
 - ii. OTHERS PRESENT
 1. Kevin Nelson (SJVLS), Logic Vang (SJVLS)
2. Introductions were conducted.

C. ADOPTION OF THE AGENDA

1. Pratt (Kern) motioned to adopt the agenda.
 - i. Polfer (Fresno) seconded the motion.
 - ii. The motion passed with McCormick abstaining.

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 as distributed.
 - i. Arredondo (Tulare County) seconded the motion.
 - ii. The motion passed with McCormick abstaining.

F. PROJECTS FOR DISCUSSION AND ACTION

1. 2021 Category 2 Project Update – Wymer
 - i. Wymer provided an update on the status of the 2021 Category 2 project. He reviewed the timeline of the project, which started at the beginning of the COVID-19 pandemic. At the time, the State Library had grant funding to help libraries upgrade network infrastructure, which would cover the unfunded portion for Category 2 e-rate projects. The initial

scope of the project was to expand Wifi infrastructure through SJVLS, adding the service at locations that did not have it previously, expanding it at locations that needed more coverage, and adding outside wireless to broadcast library Wifi outside library branches.

- ii. The project was delayed when SJVLS was audited by USAC. During an audit, USAC stops reviewing and approving pending funding requests. The audit delayed review of our 2021 application for nearly 2 years. While review was delayed, the equipment we were requesting went end-of-life. When USAC began reviewing the funding requests again, they denied our request because of the end-of-life equipment.
 - iii. SJVLS submitted requests to substitute the end-of-life equipment with current equipment, and after more review, the funding was finally approved in late March/early April.
 - iv. Last week SJVLS had the kick-off meeting for the project. During the meeting, SJVLS requested to prioritize the Fresno County branches using an outside vendor to provide Wifi, in order to allow them to end the contract. After that, SJVLS will prioritize Hanford, so the upgrades there can be completed before they close for renovations. Pratt asked if this project meant that Kern County could also end their contracts with outside vendors, and Wymer said yes, that's correct.
 - v. Wymer then reviewed the scope of the project per member, and asked committee members to review the branches included in the project and let SJVLS know if any of the buildings are leased.
2. MFA for Office365 – Wymer
- i. Wymer gave an update on the multi-factor authentication transition that's currently underway. SJVLS has purchased and distributed authentication tokens to all members that needed them, and it's up to the member libraries to ensure they are distributed to staff in a timely manner.
 - ii. Wymer also informed the committee that SJVLS was able to defer the start date for MFA on all accounts. When Aaron Lusk enabled MFA and then immediately turned it off, Microsoft asked him to complete a survey about why it was being disabled. Lusk responded by stating SJVLS is in the process of purchasing tokens and distributing them to staff and that we need additional time to complete the process. This seems to have delayed Microsoft's imposed deadline of July 18.
 - iii. While there isn't a hard-and-firm deadline at this time, SJVLS still wants the members to prioritize completing the transition, so we can enable MFA and not have to worry about being forced to implement it.
 - iv. Some of the committee members provided updates about the transition in their jurisdictions. Porterville has enabled MFA for all of their staff, who are using the authenticator app or receiving phone calls at their desks. Fresno has received their tokens but hasn't started distributing them to staff. Kern is working on distributing them but is running into challenges related to the logistics of getting to branches while staff are there. This is further complicated by a lack of access to County vehicles. In Madera the transition is going smoothly. Tulare Public has had their librarians test using the authentication app. Their

director is testing tokens with one staff member to get familiar with the process, then they'll roll it out to the rest of their staff.

- v. Merced is nearly finished distributing tokens. There's a single staff member that presents a challenge because they only work on Saturdays, which is when Deshpande is off. In total, there's only four staff members that still need MFA enabled. In Mariposa, MFA has been set up with nearly all employees with the exception of a few extra help employees that work infrequently.
3. Updating Cataloging Policy – Wymer
 - i. With the recent changes to cataloging within SJVLS, the committee reviewed the current Policy on the Addition of Bibliographic Records to the SJVLS Shared Catalog and discussed what needs to change or be added to reflect the new approach to cataloging. Wymer informed the committee that he already knows he needs to acknowledge that each member is allowed to copy catalog their own materials, and that he needs to add a section that addresses how libraries request the creation of new catalog records. Wymer presented the committee with a set of questions focused on the change to copy cataloging.
 - ii. The first question for discussion was what criteria new staff need to meet in order to obtain permissions to copy catalog records. After discussion, the committee agreed that new staff should, at a minimum, watch the recorded copy cataloging training, and do a practice set of records to demonstrate their understanding of the Cataloging Procedures. SJVLS will need to develop the practice materials, along with procedures for reviewing the practice exercises. Additionally, they would also need to watch or review any additional trainings identified by SJVLS. Examples of additional trainings could include SirsiDynix webinars on the cataloging module in Horizon, OCLC Connexion trainings, or CALL or Library Juice Academy courses. Lastly, the request to grant staff access to cataloging in Horizon needs to come from either the jurisdiction's director, or the JSA. The director or JSA will be responsible for ensuring the new staff member completed the required trainings.
 - iii. The second question discussed who reviews the records imported by copy cataloging staff, and if review was necessary. The committee agreed that review is necessary and suggested using a peer review model. In jurisdictions with multiple staff members doing copy cataloging work, they will review each other's work to ensure SJVLS standards are being followed. In smaller jurisdictions, or jurisdictions where only one staff member does copy cataloging, they will work with other solo catalogers and peer review their records. To facilitate the review, SJVLS will work on creating reports that track records imported by copy cataloging staff and find a way to view the records individually. It was suggested that new staff's work be reviewed weekly, and we'd use a longer period for established cataloging staff, likely once a month.
 - iv. The third question related to handling situations where a staff member does not follow SJVLS's cataloging guidelines. The consensus was to remember that people are humans, and humans occasionally make mistakes. With that in mind, in these situations the focus would be on trying to help staff understand the guidelines as opposed to being

punitive. Wymer proposed the idea of a “3 strikes” model, where staff aren’t punished for making mistakes, but if peer review reveals that certain guidelines are consistently not followed, then the staff member will lose their cataloging permissions. They will be expected to review the cataloging training materials. They will also have to allow their JSA to review the records they export from Connexion, and if they meet the guidelines, the JSA will import the records for them. Once they’ve demonstrated they can meet guidelines consistently, their cataloging permissions will be restored.

- v. The fourth question related to how to handle a situation where an entire jurisdiction does not follow the cataloging guidelines. The committee agreed that this would be a very rare situation, but it’s something that should be addressed before it becomes a problem. In the event an entire jurisdiction fails to follow the cataloging guidelines, all staff in the jurisdiction will lose their cataloging permissions. If this situation ever comes up, it will become an item for Administrative Council to discuss. The jurisdiction’s cataloging staff will be expected to work with SJVLS on re-training and to demonstrate their compliance with SJVLS’s cataloging guidelines. After completing re-training and demonstrating compliance, SJVLS will restore their permissions.
- vi. The final question asked if there was anything in the current policy that should be removed, or sections that should be updated, and if there were any suggestions on how to order the policy. Arellano mentioned that the policy will need to have procedures for how to request new original records. Wymer reviewed the sections of the current policy and addressed which sections are still relevant, which sections need to be revised, and which sections no longer apply.
- vii. Wymer will take the feedback and ideas mentioned during the discussion and draft an updated Cataloging Policy. He will bring it back to the committee for discussion and review at the September meeting.

G. STAFF REPORTS

- 1. Senior Systems Network Engineer
 - i. Nelson updated the committee on the recent emergency project to replace seven end-of-life firewalls at member library headquarters. The purchase order was sent last week, and this morning he received a notice that the new firewalls are scheduled for delivery today. Nelson will work with Vang and Lusk to determine a schedule for replacing firewalls and inform the members when their replacement is scheduled. He noted that replacing the firewalls will require the entire jurisdiction to be offline while the work is done.
 - ii. Nelson also informed the committee that SJVLS is preparing to reach out to members to plan for the CENIC Year 11 bids. In addition to the normal request, he also mentioned that SJVLS needs to know if there will be any branches closing, moving, or opening during Year 11, so we can include those in the CENIC bid requests.
- 2. System Administrator
 - i. Wymer informed the committee that he’s continuing to work with SirsiDynix’s SPP group for BC Circulation. This group is working with

SirsiDynix's product manager to work with SirsiDynix to add functionality needed by Horizon libraries.

- ii. Wymer informed the committee that the upgrade requests for Web Services and Horizon. The Web Services upgrade is required for SJVLS to migrate to BC Mobile 2.0 when it's released. SirsiDynix is scheduled to do upgrade prep for both Web Services and Horizon on July 25. The Web Services upgrade will happen in early August, and the Horizon upgrade will happen in late August or early September. The actual dates of the upgrades will be scheduled after the prep, and Wymer will inform committee members when a date is finalized. Wymer also reminded the committee that a Web Services upgrade will require downtime for the catalog, mobile app, and electronic resource authentication for some resources.
- iii. Wymer mentioned that he hasn't made a lot of progress on e-rate or the contract for the new original cataloging vendor. He asked Fresno County Library's Business Manager for advice regarding required Certificates of Insurance for the agreement and hasn't received a response in over a month. Right now, that's holding up the contract and the process.
- iv. Wymer also informed the committee that he's done some work to improve reporting from the EZ Proxy logs database. Previously, the EZ Proxy reports would take approximately 10 minutes to run, which was longer than it should take. Additionally, the report cannot be scheduled because the report uses input prompts to filter report start and end dates. He's made revisions to the reports to remove the need for date input prompts, so the report automatically runs for the previous month. He also optimized the database to allow the reports to run faster. As a result of the optimization, reports now return results in less than 30 seconds.
- v. Wymer informed the committee that there's one interview for the System Administrator position. The interview is scheduled for tomorrow. In the event we're unable to hire the candidate, Wymer will have to work with Fresno County HR to re-post the position.

H. CALENDAR ITEMS

1. Date and location for next Automation Committee Meeting
 - i. September 18, 2024, at 10:00 am at the Tulare Public Library.

I. ANNOUNCEMENTS

1. Pratt announced that the Wilson and Holloway-Gonzales branches will be closing on August 6 for renovations. They're expected to re-open on January 6, 2025. More branches will close before the end of the year, but the other dates are not finalized at this time. Pratt reminded committee members that due dates for those items will be extended for items checked out from these branches.
2. Arredondo shared the Dinuba branch re-opened last Wednesday. Tulare County is hoping to break ground on Springville by September. Their next branch renovation will be Alpaugh, but there isn't a set start date at this time.

3. Arellano shared that Porterville received the Solar Charger backpack kits from the State Library grant. They also received a privacy booth for their library. He asked about original records for kits and library of things type materials.
4. Madrigal-Ward shared that Madera had to modify their hours at the main branch because their AC is broken. They are opening earlier and closing earlier to try to prevent being open when the building is too hot. It's creating issues because their patrons are having difficulty returning items.
5. McCormick shared that all Mariposa Library Branches were opened as cooling centers. For 10 days their locations were open from 11 a.m. to 8 p.m. They had to scramble to find staff to cover their branches, especially in their small remote branches. They'll likely be cooling centers again next week.
6. Polfer shared that four rural Fresno branches were also cooling centers. No services were provided, but the buildings were open.

J. ADJOURNMENT

1. There being no further business to discuss the meeting adjourned at 11:36 a.m.

DATE: 18 September 2024

TO: SJVLS Automation Committee

SUBMITTED BY: Tiffany Polfer

SUBJECT: Cataloging Questions: Data Load Error Log and Linking Questions

DISCUSSION:

With the changes and transitions in the cataloging procedures, FCPL Collection Development have run into a couple questions and reminders. First, FCPL Collection Development would like to review the direction of where to send cataloging questions. Now that SJVLS has Backstage, should catalog linking questions (specifically Magazine linking questions) be directed to SJVLS like other copy cataloging questions. We have received some questions regarding properly linking magazines, and have offered in the past to help and send information along – but we wanted to see if this was still the case, or is we should be passing them on like the other copy cataloging questions.

And finally, in our bib record cleanup efforts, we noticed that the Data Load Error Log (Mistrake log) had over 3000 entries, and we wanted to double check that the procedure was still to delete the error messages after we resolved them. The entries, when last we checked, did not have information on who important them – which is why we are bring this to the entire group.

DATE: September 18, 2024
TO: SJVLS Automation Committee
SUBMITTED BY: Chris Wymer – Administrative Librarian
SUBJECT: Approve BC Mobile 2.0 Upgrade

RECOMMENDED ACTION:

1. Approve upgrading BC Mobile to the new version.

Approval of the recommended action will allow SJVLS staff to request an upgrade to BC Mobile before the September 30, 2024, deadline to receive a discount on our annual costs for the mobile app.

ALTERNATIVE ACTION(S):

Alternatively, Automation Committee could elect to remain on the current version of BC Mobile. We would not be able to secure a discount if we migrate to version 2.0 in the future, but members would be able to retain all the current features in use.

FISCAL IMPACT:

Approval of the recommended action will decrease BC Mobile subscription costs by 10%, resulting in an annual savings of approximately \$2,341.95.

DISCUSSION:

At the end of July, SirsiDynix released their updated mobile app, BC Mobile 2.0, the successor to the former SOLUS app currently in use by SJVLS.

The new version of the mobile app was developed from the ground up to have full integration with Apple and Android devices. It has a modern UI, and takes advantage of native features in both devices, including digital library cards, using Face ID to login to the app, and paves the way for more features like push notifications. Additionally, BC Mobile 2.0 administration is fully integrated into BC Central, and app updates are pushed out to the respective app stores nearly instantaneously. The app still allows each member to have separate branding and distinct templates for their branches.

Unfortunately, some features from the first app are not yet available in version 2.0. Those features include linked accounts, the ability to create custom menus and content, and click and collect.

SirsiDynix is offering current BC Mobile customers a 10% discount on their current subscription costs to customers that request a migration before September 30. The discount applies until we renew our annual maintenance.

Motion: _____ Second: _____
 _____ PASSED _____ REJECTED

DATE: September 18, 2024

TO: SJVLS Automation Committee

SUBMITTED BY: Chris Wymer – Administrative Librarian

SUBJECT: Borrower Preferred and Legal Names

RECOMMENDED ACTION:

1. Approve adding legal names to borrower registration in Horizon.
2. Approve allowing the current name field to be used as a borrower's preferred name.
3. Approve changes to Borrower Registration Standards to account for the changes to name fields.
4. Approve allowing borrowers to modify their preferred name through Enterprise.
5. Approve making these changes effective starting October 1, 2024.

Approval of the recommended action will add borrower legal names to borrower registration in Horizon, update registration standards to include the changes to name fields and allow borrowers to update the name used on notices through Enterprise, with an effective date of October 1, 2024.

ALTERNATIVE ACTION(S):

Alternatively, Automation Committee could elect to not enable preferred names for borrowers and leave the current name field and registration standards as they are. Another option is to add legal name to registration and convert name to preferred name, but not allow patrons to update their own preferred names.

Additionally, Automation Committee could decide to implement the feature sooner or later, depending on the time needed to train staff and communicate the change to their patrons.

FISCAL IMPACT:

Approval of the recommended or alternative actions will not have an impact on SJVLS's budget.

DISCUSSION:

The newest version of Horizon added a new field for a borrower's legal name, allowing the current name field to function as a preferred name for notices to borrowers. This is a welcome addition because it allows library communications to address patrons by their preferred name, while allowing the library to maintain a record of their legal name for billing and other formal processes.

To implement the feature, SJVLS needs take several steps to reconfigure Horizon. The first change is to add the Legal Name field to borrower registration and borrower edit views. Automation Committee will need to determine where the legal name field should appear in the registration and edit views. An initial is to add the field right beneath the driver's license field, since both values are associated with the borrower's identification. The second step is to copy all borrower's current names to the legal name field before they can be edited. If approved, Web Services and Enterprise will need to be updated to allow borrowers to edit their preferred name, as well as to display their legal name as a "read-only" field. Once that is decided, Automation needs to decide how to modify self-registration to account for the

change. Based on the committee’s decision, SJVLS will work with Quipu to make the change. Lastly, Borrower Registration Standards need to be updated to account for the new legal name field, and to update the requirements for preferred name so it allows borrowers to use names other than their legal name. Staff procedures for searching for a borrower before creating a new record will also need to be updated, and the legal name search index option moved higher in the search index list.

If Automation Committee decides to allow borrowers to change their preferred name on their own, it will need to determine what types of preferred names are allowed, and if there’s anything that’s unacceptable, plus how to resolve it if it arises. Wymer’s initial proposal is not to allow profanity or hateful terms to be used in preferred names. If found, the borrower’s preferred name will be updated to their legal name value.

One potential impact of this change is there’s no longer a guarantee that a borrower’s name will be entered in the format: [Last Name], [First Name]. As a result, some built-in functions, like printing a borrower’s First Name or Last Name on circ slips or notices may not work correctly, because there will not be a comma to separate the name into two parts.

PRIOR AGENDA REFERENCE:

No prior reference.

ATTACHMENTS INCLUDED AND/OR ON FILE:

Attachment 1 – Updated Borrower Registration Standards

Motion:

Second:

_____ PASSED

_____ REJECTED

SJVLS Borrower Registration Data Entry Standards

Background

Because we have a shared database and our borrowers often utilize more than one jurisdiction, we all have an interest in maintaining the integrity of our borrower data. These are the Jurisdiction-approved guidelines for data entry of borrower records which all staff should be trained to follow. These instructions are in the same order as the sections appear when you are entering a patron for the first time. The screen is arranged differently when you are just editing a patron’s information. If section in Horizon’s registration is not covered in this form, we are not using it now and you do not need to fill that out.

Data entry rules for the Address are based on the US Postal Service Addressing Standards.

Data Entry Standards

Ord	Field	Format
1	<p>Location</p> <p>Enter the branch where the borrower is registering. Click the code button on the right side of the form and select the proper code for your library’s jurisdiction which is listed in parentheses.</p> <ul style="list-style-type: none"> • Branches are listed alphabetically by their abbreviations. 	<p>AUB - Auberry Branch Library (Fresno Co.)</p> <p>BEA - Beale Memorial Library (Kern Co.)</p>
2	<p>Name (Preferred)</p> <p>Enter the borrower’s preferred name in ALL CAPS (if possible), formatted how the borrower wants it.</p> <ul style="list-style-type: none"> • This does not need to match or include their legal name. • No profanity or hateful terms are allowed. • This is the name that will be used on notices to the borrower, unless the notice requires their legal name to be used. 	<p>Examples:</p> <p>BILL WYMER (legal name William Wymer)</p> <p>MARK TWAIN (legal name Samuel Clemons)</p> <p>BOND, JAMES BOND</p>
3	<p>Address – Perm</p> <p>Borrower’s physical address of their permanent residence. REQUIRED for all borrowers.</p> <ul style="list-style-type: none"> • Enter address in ALL CAPS, no punctuation, on a single line whenever possible. • Put the apartment (APT), suite (STE), space (SPC), etc. at the end. • If the street name makes the address too long to put apartment/unit number at the end, put the street address on Line 1, and the APT / STE on Line 2. • If registering a child borrower that requires a parent/guardian as a responsible party, enter C/O 	<p>NUMBER STREET UNIT</p> <p>Example:</p> <p>1/ 3077 W SAMPLE AVE</p> <p>1/1307 GRAND AVE APT 311</p> <p>1/ 123 CECIL B DEMILLE BLVD</p> <p>2/ STE 501</p>

	<p>and their name in Line 1 and enter the rest of the address in the Lines below.</p> <ul style="list-style-type: none"> • Proper entry of mailing address affects our postal rates and is based on USPS standards. <p>DO NOT enter PO Boxes here. See 3A.</p> <p>If a borrower does not have a physical or mailing address, for example they're unhoused, enter their physical address as follows on Line 1:</p> <p>GENERAL DELIVERY</p> <p>Enter the City/ST and Postal Code information for the post office nearest to your branch.</p>	<p>Parent/Guardian Example: 1/ C/O MUMMY PIG 2/ 3 ASTLEY STREET 3/ PEPPATOWN</p>
<p>3A</p>	<p>Address – Mailing</p> <p>Use only if borrower has an address for mail delivery of correspondence / notices that differs from their PERMANENT address.</p> <ul style="list-style-type: none"> • Click "New" to create an additional address. When the pop up asks "Insert after displayed record, yes or no" choose yes. • Click "Mailing" radio button. • Enter the PO Box/address, City St, and postal code following rules in #3, 4 & 5. • If registering a child borrower that requires a parent/guardian as a responsible party, enter C/O and their name in Line 1 and enter the rest of the address in the Lines below. 	<p>NUMBER STREET UNIT</p> <p>Example: PO BOX 123</p> <p>818 FIRST AVE APT 114</p>
<p>3B</p>	<p>Address – Temp</p> <p>Use only if borrower has a temporary mailing address, e.g. summer resident or college student.</p> <ul style="list-style-type: none"> • Click "New" to create an additional address. When the pop up asks "Insert after displayed record, yes or no" choose yes. • Click the "Temp" radio button. • Enter the date to begin using the temporary address in begin. • Enter the date to stop using the address in end. • Use the format MM/DD/YYYY for begin and end dates. • Enter the street address, City St, and postal code following rules in #3, 4 & 5. 	
<p>4</p>	<p>City, ST</p> <p>Enter the city code</p> <ul style="list-style-type: none"> • Most cities in SJVLS and many other CA cities have a code. If you aren't sure of the code, click on the codes button. 	<p>CITY CODE</p> <p>Example: MAR (displays as MARIPOSA CA) VIS (displays as VISALIA CA)</p>

	<ul style="list-style-type: none"> • Since the City Code is an abbreviation of the actual City and State, make sure the full name of the City/ST that is displayed is correct. • If there a city code cannot be found, enter the full name of the city and the state abbreviation in Line 3 of the address. Use ALL CAPS and do NOT use a comma. Leave the City, St box empty. • Do NOT enter the zip code on this line. Use the Postal Code field. 	<p>TUL (displays as TULARE CA)</p> <p>If no city code, then enter CITY and State on Line 3 of the address.</p> <p>Example: BEATRICE NE DALLAS TX</p>
5	<p>Postal Code</p> <p>Enter the zip code. If you have a 9-digit code, please enter it.</p>	<p>12345</p> <p>12345-6789</p>
6	<p>Notice By</p> <p>Click “Std” radio button for mail or phone notices, click “email” for email notices.</p> <p><u>If email notices are their notice by method:</u></p> <ul style="list-style-type: none"> • Name - this is the name that will appear on the email. • Address - this is the full email address: jsmith@comcast.net • Pay close attention to spelling and punctuation. Don’t forget the @ symbol. They are *not* case sensitive. • IMPORTANT: All phone types must be “no telephone notices” for email notices to be delivered. • If a borrower has an email address entered, Horizon will use this email address to send an auto-renew notice when their items are auto-renewed, regardless of the notice options on their account. 	<p>NAME: Example: Mary Martin</p> <p>ADDRESS: Example: Mary.Martin@sjvls.org</p>
6a	<p>Preoverdue</p> <p>Check mark if the borrower wants to receive a reminder 3 days before an item is overdue. Only applicable for borrowers with email addresses in their borrower record.</p>	
6b	<p>Allow Email Checkout Receipt</p> <p>Check this box if a patron wants to receive their checkout receipt through email.</p> <ul style="list-style-type: none"> • NOTE: patrons can opt to receive both a printed and email receipt. 	

<p>6c</p>	<p>Allow Print Checkout Receipt</p> <p>Check this box if a patron wants their checkout receipt printed.</p> <ul style="list-style-type: none"> NOTE: patrons can opt to receive both a printed and email receipt. 	
<p>7</p>	<p>Phones</p> <ul style="list-style-type: none"> Enter the home phone number with the area code. See a list of Valid TM3 Area Codes. If no phone number, enter 000-000-0000 and make it "h-no" type. If the borrower only has a cell phone, list it as Mobile. Do not list it again under Home. If the number has an extension, enter one space, then "x" followed immediately by the extension number, e.g. x1234. Do not write out the word "extension". Do not put comments such as MESSAGE or MOM in the phone number field. To receive email notices, all phone numbers must be "No Telephone" types (-no). Telemessaging calls the first (eligible) number listed in the Borrower Phone area. "First" is defined as lowest "Order" value in borrower_phone for that borrower. Telemessaging will not call numbers that begin with 999. Any numbers beginning with xxx-999-xxxx cannot receive phone notices. <p>List of Phone Types</p> <ul style="list-style-type: none"> h (Home) h-no (Home, No telephone notices) m (Mobile, with telephone notices SMS) m-no (Mobile, no telephone notices SMS) o (Other, with telephone notices) o-no (Other, No telephone notices) <p>SMS Notices</p> <p>Only mobile phone types (m, m-no) are eligible to receive SMS notices. To sign a borrower up for SMS notices, you must check the checkbox for the notice types they want to receive (hold, overdue, general).</p>	<p>nnn-nnn-nnnn</p> <p>nnn-nnn-nnnn xnnn</p> <p>Examples: 559-488-3462 661-868-3333 559-600-6285 x5675</p> <p>If no phone: 000-000-0000</p> <p>Make sure phone type is h-no</p>

<p>8</p>	<p>Birth Date Enter the borrower's date of birth. Do not enter the Guardian's DOB, or the ID expiration date on this line.</p>	<p>MM/DD/YYYY Example: 1/29/1986</p>
<p>9</p>	<p>Btype Is the borrower a permanent resident of your library service area? YES - Enter the correct BTYPE from your library jurisdiction's list of btypes. Use the Codes button if unsure. NO - See Correct Combination of Location, Btype & Bstat</p> <ul style="list-style-type: none"> NOTE – borrowers with an in-collections btype are exempt from the location, btype, bstat combination requirements. In-collections btypes are used to indicate the jurisdiction that sent a borrower to collections, and on occasion will not match the borrower's location or bstat. 	<p>YES Examples FAD Fresno Adult FCH Fresno Child FSURF Fresno Internet Surfer FST Fresno Staff FYA Fresno Young Adult ----- NO Examples FNC Fresno Out of State, Non-Res FNR Fresno In-Jurisdiction Non-Res FNS Fresno Out-of-Jurisdiction Non-Res FTR Fresno Temp. Resident</p>
<p>10</p>	<p>Expiration Date Automatically calculated based on the Btype selected.</p>	
<p>11</p>	<p>Language Enter the language Telemessaging should use.</p>	<p>LANGUAGE eng – English spa – Spanish</p>
<p>12</p>	<p>Stat Class (bstat) Is the borrower a permanent resident of your library service area? YES - Enter the proper code or codes assigned to your library jurisdiction. NO - Enter the appropriate "x" code. See Correct Combination of Location, Btype & Bstat.</p> <ul style="list-style-type: none"> Do not use codes from other library jurisdictions. Use only those assigned to your library jurisdiction. All out of state borrowers get the "xzout" bstat regardless of the library jurisdiction. 	<p>Examples of resident Bstats: TP1 Tulcentr22</p> <p>Examples of non-resident Bstats</p> <p>XKINGS XLOS XSAC XTULCO</p>

	<ul style="list-style-type: none"> Do not use codes starting with “x” for borrowers who are permanent residents of your jurisdiction. 	<p>Out of state resident is always XZOUT</p>
13	<p>Barcode</p> <p>Enter the barcode you are assigning to this borrower. If a customer's card is lost, enter Date Lost. DO NOT DELETE barcodes.</p> <p>If a borrower reports their card as lost and does not replace it, enter today's date in the date lost field. Then, in the barcode (ID) field add an “L” before the barcode number. This will report the card as lost if a patron tries to use it, along with preventing access to CKO if staff click “cancel” on the lost card popup message.</p>	
14	<p>PIN#</p> <p>Enter the 4-digit pin chosen by the borrower</p>	
15	<p>Driver's License#</p> <p>Enter the driver's license or ID number of the person who has signed for responsibility exactly as it appears on the document including dashes.</p> <ul style="list-style-type: none"> Put in only the license or ID number, no notes or comments. If it is an out-of-state license, add a hyphen at the end followed by the two-letter abbreviation for the state. <p>If the ID is from outside the United States, add a hyphen at the end followed by an abbreviation for the Country and note the ID expiration date in the comments field.</p>	<p>Example: B1234567</p> <p>Out-of-state Examples:</p> <p>VAR123456-MA H507603316-MN D252-420-55-463-0-FL</p>
16	<p>Legal Name</p> <p>Enter the borrower's name in ALL CAPS in “phone book” format.</p> <ul style="list-style-type: none"> Use the full legal name as it appears on ID. Place commas between last name and first name and between first name or middle initial and titles, such as JR., III. <p>Do not add comments in this field.</p>	<p>LAST NAME, FIRST NAME, TITLES</p> <p>Examples: CRUZ, JOHN MORALES CLINTON, WILLIAM J. MORA-FLORES, GABRIEL, JR.</p>
17	<p>Parent/Guardian</p> <p>Enter the name of the parent or guardian as it appears on their ID, using same format as line #1.</p>	<p>LAST NAME, FIRST NAME, TITLES</p>

18	<p>Guardian Address</p> <p>No longer used.</p> <p>Removed from New Borrower Registration screen, but still appears when editing a borrower, due to usage in older accounts.</p>	
19	<p>Guardian City</p> <p>No longer used.</p> <p>Removed from New Borrower Registration screen, but still appears when editing a borrower, due to usage in older accounts.</p>	
20	<p>Guardian ZIP</p> <p>No longer used.</p> <p>Removed from New Borrower Registration screen, but still appears when editing a borrower, due to usage in older accounts.</p>	
20a	<p>Notice To</p> <p>No longer used.</p> <p>Removed from New Borrower Registration screen, but still appears when editing a borrower, due to usage in older accounts.</p>	
21	<p>PAC Access Type</p> <p>Use this field if your jurisdiction has assigned access codes for use of online resources or Internet</p>	
22	<p>Barcode ID</p> <p>Enter the assigned barcode again. The BARCODE and BARCODE ID should match.</p> <ul style="list-style-type: none"> • If a borrower reports their card as lost or stolen and does not replace it, add an “L” in front of the barcode number in this field. <p>We use this field to validate the borrower’s active barcode in the event more than one barcode is set as active in the list of barcodes.</p>	
22a	<p>Borrower Note</p> <p>Enter any notes related to the borrower’s account that you want to show to the borrower.</p>	

	<ul style="list-style-type: none"> Notes entered here display to the borrower when they view their personal information in Enterprise. 	
22b	<p>Comments</p> <p>Enter date of birth for guardian here, and any other borrower notes that you do not want to display to patrons.</p> <ul style="list-style-type: none"> If a borrower’s ID is from a country outside the United States, record the ID expiration date here. 	
23	<p>Home Service</p> <p>Some jurisdictions may use this for book-by-mail services.</p> <ul style="list-style-type: none"> If you accidentally click in this section, you must click the ‘delete’ button before you can save the record. 	
24	<p>Proxy Borrower</p> <p>Leave this section blank.</p> <ul style="list-style-type: none"> If you accidentally click in this section, you must click the ‘delete’ button before you can save the record. 	
25	<p>Keep Circ History</p> <p>This field is automatically filled in when the account is saved. System policy is to not keep circ history.</p>	DO NOT KEEP is automatically selected when the record is saved.
26	<p>Preferred ID</p> <p>Leave this section blank, this field is not currently used, but may be implemented at a later date.</p>	
27	<p>Auto-Renew</p> <p>Check this box if the patron wants to participate in the Auto-Renew process. This box is checked by default.</p>	
28	<p>Change Password Upon Next Login</p> <p>Leave unchecked. This field is not currently used but may be implemented at a later date.</p>	
29	<p>Password</p> <p>Leave this section blank. Passwords are not enabled on borrower records but may be implemented at a later date.</p>	

30	Source Set up (March 2011) so Tulare Co. could record bookmobile stops. Can be used by other members for this purpose.	
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DATE: September 18, 2024

TO: SJVLS Automation Committee

SUBMITTED BY: Chris Wymer – Administrative Librarian

SUBJECT: Approve Updated Cataloging Policy

RECOMMENDED ACTION:

1. Approve the updated Cataloging Policy.

Approval of the recommended action will formally document the recent changes to cataloging processes within SJVLS.

ALTERNATIVE ACTION(S):

Alternatively, Automation Committee could suggest revisions to the policy and have SJVLS return with an updated draft at the next meeting.

FISCAL IMPACT:

Approval of the recommended or alternative actions will not have an impact on SJVLS's budget or membership dues.

DISCUSSION:

With the substantial changes to cataloging that took effect at the beginning of July, SJVLS would like to update our Cataloging Policy to account for the changes to both copy and original cataloging. The discussion and suggestions from the previous meeting were incorporated into the updated policy draft.

PRIOR AGENDA REFERENCE:

Automation Committee Agenda – July 17, 2024

ATTACHMENTS INCLUDED AND/OR ON FILE:

Attachment 1 – Updated Policy on the Addition of Records to the SJVLS Shared Catalog

Motion:

Second:

_____ PASSED

_____ REJECTED



**San Joaquin Valley Library System
Administrative Headquarters**
2420 Mariposa St. Fresno, CA 93721

Addition of Bib Records To the SJVLS Shared Catalog	Policy No.	
	Effective Date	7/1/2024
Admin Librarian Approval:	Next Review	7/1/2025

Background

SJVLS maintains a library automation system with a single bibliographic database, ValleyCat, shared by the entire system. The system strives to maintain the quality of the records in ValleyCat by supporting cataloging according to prevailing US standards. All member libraries are allowed to import copies of full bibliographic records from OCLC’s WorldCat database. Designated libraries are permitted to do their own original cataloging, and the other members can request to have original records created through SJVLS’s cataloging vendor. All libraries are responsible for their own call numbers, item labeling, and linking items to bib records. This policy will outline the goals for ValleyCat, SJVLS’s standards for bibliographic records, responsibilities of staff doing copy and original cataloging work, and outline consequences and remedies for situations where standards are not followed.

Goals of the SJVLS Database

ValleyCat exists to provide a flexible, timely, comprehensive and cost-effective tool to support the operations of SJVLS and its member libraries. In order to accomplish this task, it must allow users from both member library staff and the public to perform the following activities:

1. Locate specific works of which characteristics such as the title, author, IS number (ISBN, LCCN, Barcode, etc.) or subject is known. Users should be able to use additional characteristics such as treatment and format to further describe the desired item.
2. Create lists of materials which have specific characteristics in common (e.g. author, title, subject, format), while minimizing differences in terminology.
3. Determine relationships (both similarities and differences) among materials according to a variety of characteristics.
4. Explore subject fields, entering at various levels of analysis, from general to specific, with references provided to broader, narrower, and related topics.
5. Enter the request through vocabulary common to substantial numbers of users, either specialized or lay.
6. Find a formal description including listing of authorship, title(s), physical description, subject content, and other relevant details on any bibliographic unit listed in the most precise, specific, and consistent terms possible.
7. Select from among all items in a category according to a variety of criteria (such as most thorough, most recent, least complex, etc.).
8. Utilize a variety of complex searching strategies, such as multiple aspect (Boolean) searching, query by example, citation tracking, in addition to single aspect searching and browsing.

Standards for Bibliographic Records

Bibliographic records loaded or created in ValleyCat should adhere to the prevailing US standards at the time of entry, as identified by the Automation Committee. When a variation from these standards is in the best interest of serving patrons, it is approved by the Automation Committee and recorded in the SJVLS Cataloging Procedures Manual. Approved variations include local general material designators (GMDs) and using existing records when a new one is technically required in defined situations. When cataloging rules (AACR2) conflict with Library of Congress Rule Interpretations, the committee decides which practice SJVLS will follow. It is the responsibility of the library importing the record to ensure it meets system standards.

Fast Adds, On Order Records, Cataloging-in-Process (CIP), and other "temporary" MARC Records

Fast Adds are minimal records added at the time of need, usually by circulation staff to allow an item to circulate. The automated system has rules for treatment of Fast Add items and bibliographic records. In general, those rules should never allow a circulation added Fast Add to remain in the system "as is". It should either flag the item for full cataloging or delete the item and bibliographic record when the fast add is returned.

Bibliographic records for acquisitions are likely to be created or imported as brief MARC records or CIP records. It is expected that these incomplete records will be overlaid or merged with more complete/correct records upon receipt of item. It is the responsibility of the ordering library to ensure that brief records are replaced with complete bibliographic records using standard system cataloging channels.

Full MARC records imported from vendor order sites during the order process must be edited to meet system standards for bibliographic records. It is the responsibility of the importing library to check these records and make appropriate changes, or request assistance from SJVLS.

CIP records should only be used for published items when a more complete record is unavailable. CIP records for works of fiction should be corrected to proper form for title, edition and collation as set forth in the Cataloging Manual. CIP records for works of non-fiction should be re-searched and overlaid with a complete record when one becomes available or sent to a cataloger for correction/enhancement.

Preprocessing Records from Vendors

Member libraries may import MARC records from library materials vendors as part of a preprocessing contract where the vendor is expected to provide the item and MARC records "shelf-ready".

MARC records provided as part of a preprocessing contract are expected to meet SJVLS standards for Cataloging records. Adherence to those standards should be clearly stated in the member's contract with the vendor. Whenever a vendor is preprocessing items to be added to an existing bibliographic record, they should use the System's existing record obtained via Z39.50 to prevent overlay of records already customize to meet local practices. Special import configurations may be required. Vendor-supplied cataloging should be periodically checked for quality by the member library.

Libraries should always check with the system office when importing records from a new source. The library automation system should always be configured to strip out extraneous tags as part of the import process.

Copy Cataloging

All SJVLS member libraries are approved to do their own copy cataloging when a bibliographic record for an item is not already in ValleyCat, but a full-level record exists in OCLC's WorldCat database. Every SJVLS member is allowed to designate one or more staff as copy catalogers. Copy catalogers will be required to complete training and demonstrate their understanding of SJVLS's standards for records before they are given access to cataloging functions within the library automation system and OCLC's database. Once approved, copy catalogers will be expected to do the following when importing records:

1. Ensure a record for an item does not already exist in ValleyCat prior to searching for a record to import.
2. Search WorldCat for a record matching their title using a variety of search indexes, including ISBN/ISSN/UPC, Title, Author, Title + Author, or Title + Format.
3. Modify the record in WorldCat according to SJVLS's standards. At a minimum this should include deleting ISBNs for electronic records, adding GMDs to 245 tags, and deleting subject headings other than Library of Congress subject headings (not Children's), LCGFT, and Faceted Application of Subject Terminology (FAST).
4. Resolve any errors encountered during import and delete the error entries from the library automation system's error log.

Approval to Copy Catalog Records

To help maintain the quality of records in ValleyCat, all copy cataloging staff will be required to complete a series of trainings. These trainings currently include:

- SJVLS's Copy Cataloging Training Recordings. If staff have previous cataloging experience, only Day 2 is required. If staff do not have cataloging experience, both Day 1 and Day 2 are required.

Additional trainings may be added at the recommendation of the Automation Committee.

After completing the required training, staff will need to also complete a set of practice records in order to demonstrate their understanding of the copy cataloging procedures and SJVLS's requirements for bibliographic records. It will be the responsibility of the member library's director or JSA to verify the required training and practice exercises are completed correctly. After verification, the director or JSA can submit a request to SJVLS to add the staff member to cataloging groups. At the same time the JSA can update the staff member's automation system account to provide them with access to the cataloging module.

Peer Review of Copy Cataloging

To ensure adherence to standards, all copy cataloging staff will participate in peer-review of newly imported records. For members with more than one copy cataloging staff member, those staff members will peer review each other's work. For members with only one copy cataloger, they will do peer review with another member that only has one copy cataloger.

Peer review of records must be done on a regular basis to help catch errors or mistakes early and before they require extensive time and effort to clean up and correct. For newly approved

copy cataloging staff, peer review should be done on a weekly basis for at least the first month. If peer review demonstrates that the staff member understands and follows SJVLS's guidelines, then the staff member's peer review interval will be increased to monthly reviews. For experienced cataloging staff, peer review should occur monthly. If an experience staff member is not following SJVLS guidelines, then their records will be reviewed weekly for at least 4 weeks. If no further issues arise, then they will return to a monthly review interval. If issues continue to occur, then the procedures outlined later in this document will take effect.

When reviewing records, staff will need to check for the following:

- The record does not include eBook ISBNs.
- The record has the OCLC Control Number in the 001 field.
- The correct GMD was added in the correct part of the 245 tag, if needed.
- The record does not contain subject headings from sources other than: Library of Congress Subject Headings, Library of Congress Genre/Form Terms (LCGFT), and Faceted Application of Subject Terminology (FAST).

Any errors or mistakes should be noted by the reviewer and shared as soon as possible with the reviewee so they can be corrected. The reviewer will be responsible for noting the bib number of the record, the tag where the error or mistake appears, and what needs to be corrected. The reviewee will be responsible for correcting any identified issues with records they imported.

Original Cataloging

When a record does not exist in ValleyCat, and a full-level record cannot be found in WorldCat, then an original record needs to be created. Member libraries with a cataloging librarian, are allowed to create their own original records in ValleyCat. Currently only Fresno County, Kern County, and Merced County are allowed to create their own records. The other members can request original records through SJVLS's cataloging vendor, currently Backstage Library Works. Original cataloging libraries are also allowed to submit record requests to Backstage as well, when the need arises, such as acquiring foreign language material, or working through a backlog of records.

Requests for original catalog records from Backstage must be submitted by the member's JSA. Prior to requesting a record, staff will verify that a record does not exist in ValleyCat or WorldCat. After verifying a record is needed, staff will scan or take photos of the material to create a digital surrogate that Backstage can use, fill out an original catalog records request spreadsheet, and submit it to SJVLS through the Cataloging Request Form.

Once SJVLS receives a request for an original record, SJVLS staff will perform one final check for existing records. If no records are found, the request will be sent to Backstage. Once records are returned, SJVLS will review them for accuracy, ensure they are uploaded to WorldCat on the member's behalf, and imported into the automation system. The bib record number from the automation system will be added to the record request spreadsheet and returned to the requesting member. It will be the requesting member's responsibility to link their items to the new record, affix any labels such as spine labels or barcodes, and assign call numbers.

At least once a year original cataloging librarians should have samples of their work peer reviewed by another cataloging librarian at an original cataloging library.

Criteria to be Certified as an Original Cataloging Library

In order to be certified to create their own original catalog records, a member library must meet the following criteria:

1. Employ a librarian familiar with current cataloging practice to perform any cataloging work or extensive record changes.
2. Staff performing cataloging work must work a minimum of 8 hours per week on cataloging tasks.
3. Be trained on the use of OCLC's cataloging interface prior to initial original cataloging work. At a minimum this would include doing the online tutorials provided by OCLC.
4. Submit to peer review of cataloging work by another original cataloging library at the beginning of original cataloging work, and occasionally thereafter.
5. Participate in any on-going cataloging training provided by SJVLS, or other applicable cataloging trainings when held within the system area or available online.

Certification is recommended by the Automation Committee and affirmed by SJVLS's Administrative Council. Any changes in staffing at original cataloging libraries must be reported to SJVLS, so that the original cataloging status can be reassessed.

Failure to Adhere to System Standard Practices

Adherence to System standard practices is important to ensure both staff and the public are able to search ValleyCat using a variety of search strategies and locate a comprehensive list of titles that meet their search criteria. Failure to follow System standards on bibliographic records will start a "three strikes" process that could result in a staff member or jurisdiction losing their ability to add or edit MARC records. Strikes occur when peer review reveals that a staff member or jurisdiction are not following SJVLS standards. The peer reviewer will document the issue, inform the reviewee what was incorrect with their records, and ask them to fix them. Strikes reset once a staff member completes peer review without any issues being identified.

The intent of the process is to recognize that people are human, and humans make mistakes, but they can also learn and grow from them. In the event that a staff member or jurisdiction reaches three strikes, then corrective actions will be taken. Corrective actions will differ depending on whether the situation involves a single staff member, or an entire jurisdiction.

For situations where a single staff member fails to follow System standards, they will lose their permissions to import, or edit records in the automation system. To regain access to cataloging, staff will be expected to review SJVLS's cataloging guidelines and training materials, and submit records exported from WorldCat to their JSA for review. If the staff member adhered to System standards, then the JSA will import the records into Horizon for them. After demonstrating that they can follow guidelines successfully over three batches of records, then their cataloging permissions will be restored.

When an entire jurisdiction fails to follow standards, or if the jurisdiction only has a single cataloging staff member, then the entire jurisdiction will lose the ability to add or edit MARC records. If the situation is severe enough, it will become a discussion item for Administrative Council. To resume cataloging work, all staff in the jurisdiction will be re-trained on SJVLS's standards. They will submit exported records from Connexion for SJVLS to review. If the records adhere to standards, SJVLS will import them into. After completing re-training and submitting three successful batches of records, their cataloging permissions will be restored.

DATE: September 18, 2024
TO: SJVLS Automation Committee
SUBMITTED BY: Chris Wymer – Administrative Librarian
SUBJECT: Approve Updates to Borrower Block Views

RECOMMENDED ACTION:

1. Approve implementing the updated borrower block view to include the full comment associated with a block.
2. Approve moving comment to the last field in the detail block list view.

Approval of the recommended action will approve SJVLS staff to make modifications to the borrower block view to allow the full text of a comment to display on the main block detail screen.

ALTERNATIVE ACTION(S):

Alternatively, Automation Committee could elect to leave the view as it is, or recommend another configuration for its display.

FISCAL IMPACT:

There are no fiscal impacts associated with the recommended or alternative actions.

DISCUSSION:

The newest version of Horizon fixes a bug where the full 255-character comment associated with a block does not display after a staff user edits the comment. This means we can configure the block’s list screen and the edit block screen to display the extended comments.

Wymer would like to expand the number of characters displayed from comments on the current block detail view and when editing a comment to allow the full comment to be visible to staff. At the same time, he would like to move comment to the last field in the list display and increase the length of the transaction location field to ensure comments always display on a new line. Making this change will have impacts on staff, because the order of information related to a block will be presented differently, requiring staff to adjust to the new display.

If Automation approves this change, they will also need to set a date for the changes to go into effect.

PRIOR AGENDA REFERENCE:

No prior reference.

Motion:

Second:

_____ PASSED

_____ REJECTED

DATE: September 18, 2024
TO: SJVLS Automation Committee
SUBMITTED BY: Chris Wymer – Administrative Librarian
SUBJECT: Add Boolean Advanced Search to Enterprise

RECOMMENDED ACTION:

1. Approve adding Boolean advanced search to Enterprise.

Approval of the recommended action will authorize SJVLS staff to work with SirsiDynix's consulting services team to replace the current advanced search form with a Boolean advanced search form.

ALTERNATIVE ACTION(S):

Alternatively, Automation Committee could decide to leave the advanced search form as it currently is.

FISCAL IMPACT:

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

DISCUSSION:

Recently, SirsiDynix released a new free consulting services option for Enterprise that replaces the current advanced search form with a new form that incorporates Boolean logic into searches. Now that SJVLS has upgraded Web Services to the most recent version, we can request the updated form for Enterprise.

The new advanced search form will only be able to search the ILS records, it is not able to include ERC, or federated search content in the search results. It will also require some styling and customizations to get the appearance correct on the page. The work is worth it though to be able to include OR logic in searches, as well as combining terms from multiple search fields into a single search string.

PRIOR AGENDA REFERENCE:

No prior reference.

Motion:

Second:

_____ PASSED

_____ REJECTED