



SAN JOAQUIN VALLEY LIBRARY SYSTEM

Automation Committee Meeting

September 18, 2024

DRAFT MINUTES

A. CALL TO ORDER

1. The meeting was called to order at 10:10 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), Sarah McIntyre (Madera), Smruti Deshpande (Merced), Alex Pollock (Porterville), Faythe Arredondo (Tulare County), Heidi Clark (Tulare City), Chris Wymer (Chair)
 - ii. ABSENT
 1. Matt Johnson (Mariposa)
 - iii. OTHERS PRESENT
 1. Kevin Nelson (SJVLS), Albert Boyd (Member of the public)
2. Introductions were conducted.

C. ADOPTION OF THE AGENDA

1. Clark (Tulare City) motioned to adopt the agenda with a modification, moving the Cataloging Questions discussion to the end of items for discussion and action.
 - i. Pratt (Kern) seconded the motion.
 - ii. The motion passed.

D. PUBLIC COMMENT

1. Albert Boyd attended the meeting and is a resident of Mariposa County. Mr. Boyd shared with the committee challenges he has encountered using public computers at various branches throughout SJVLS, as well as availability of staff to provide assistance completing various tasks involving computers and the internet. He expressed that he challenges using computers, and shared positives experiences and adaptations that other libraries outside SJVLS have implemented to help. He commented that it would be beneficial to offer at least one public PC at each branch for patrons experiencing technical difficulties that isn't time-limited, offers a mouse with reduced sensitivity, larger text sizes, and other accommodations. Wymer commented that SJVLS does not

have the ability to enforce a policy like this on all our member libraries, because each of them set their own public PC usage policies. He will take into consideration the suggestion about a profile that includes lower mouse sensitivity and other modifications that could be beneficial for patrons experiencing technical difficulties.

E. APPROVAL OF PREVIOUS MEETING MINUTES

1. Pratt (Kern) motioned to adopt the minutes with a correction to the spelling of Yvonne's name.
 - i. Arredondo (Tulare County) seconded the motion.
 - ii. The motion passed.

F. PROJECTS FOR DISCUSSION AND ACTION

1. Horizon Server Migration 2.0 – Wymer
 - i. Wymer informed the committee that SJVLS will be doing another Horizon migration starting at the beginning of October. This migration is needed to move Horizon to the latest version of Windows Server, and free up a server license to be used for other purposes. Wymer provided the committee with the key dates for the project. There will be brief downtime on the day the production database is migrated, but it will be minimal. Polfer and Pratt asked if staff would have to take time for testing. Wymer said he does not anticipate needing extensive staff testing for this migration.
2. Horizon 7.6.1 Upgrade – Wymer
 - i. The committee discussed the recent Horizon upgrade, new features in this version, and challenges members are encountering with the new version. The most prevalent issue post-upgrade relates to the configuration of circulation slips. Staff are reporting that various circulation slips do not print all information on the slip at different times. On transit slips the jurisdiction occasionally does not print on the slip. Wymer suspects the problem relates to the printer having an incorrect paper size but has not had an opportunity to do extensive testing. He asked committee members to gather more information about current settings when receipts print incorrectly, so he can work on reproducing the issue.
 - ii. Other new features that were discussed included: reload previous borrower, and alt hold IDs for hold slips. Pratt asked a question about a new check-in feature to copy a borrower's barcode to the clipboard. Wymer will get information about the feature and pass it on to committee members.
 - iii. Deshpande had a question about how Horizon accounts for refunds and credits when a borrower returns a lost item they paid for at an earlier date. Pratt shared Kern County's policies on refunds and how they're handled.
3. BC Mobile 2.0 Upgrade – Wymer
 - i. Wymer shared details about the logistics of upgrading to BC Mobile 2.0. Previously the committee was given a demonstration of the new app by SirsiDynix staff and had an opportunity to ask questions about features

and functionality. Wymer shared information from SirsiDynix that if SJVLS requests the upgrade prior to September 30, we will receive a 10% discount on our BC Mobile annual subscription costs. Furthermore, customers do not have to go-live with the new app until they're ready to. The way it's been presented makes Wymer believe we could request the upgrade to secure the discount but wait until enough functionality is in the app before making it live.

- ii. The committee discussed features that would be lost if we upgrade, which include the ability to set up linked accounts, and the ability to add custom information and menus to the app's interface. Several committee members expressed that linked accounts are one of the most used and beneficial features of BC Mobile. Especially for families, because digital versions of each family member's library card can be accessed from a single login to the app. This saves families time and makes it much easier to access everyone's cards when they're checking out.
 - iii. Polfer expressed that Fresno would like to see Punjabi and Hmong language support added to the app.
 - iv. Pratt expressed that Kern still uses the Click and Collect feature. It would be challenging to lose it, but they would find a way to adapt.
 - v. The committee then discussed the roadmap for future development. Currently BC Mobile 2.0's roadmap includes adding patron list support, self-check functionality so patrons can use the app to check out items, and push notifications. Wymer noted that patron lists in the mobile app will not sync with patron lists in Enterprise, so patrons would have to manage their lists in both interfaces. SirsiDynix's BC Discovery product will share lists with BC Mobile 2.0 once it's released.
 - vi. Pratt (Kern) motioned to approve getting in the upgrade queue but defer going live until linked account support and the current roadmap items are completed.
 1. Deshpande (Merced) seconded.
 2. The motion passed.
4. Borrower Preferred and Legal Names – Wymer
- i. The committee discussed a new feature in Horizon – Preferred Names for notices. This allows patrons to receive notices using their preferred name, while allowing member libraries to have a record of a borrower's legal name. Wymer provided an overview of how the change was made within Horizon, and reviewed how it could be implemented, along with potential challenges of doing so.
 - ii. The first consideration was how to update borrower registration, and where to put the field for legal name. Pratt suggested that the legal name field should be the first field in the record, with preferred name underneath it. This way staff don't overlook it when registering a patron. Pratt also suggested making the field required so staff must fill it in before saving and closing.
 - iii. The second consideration was how to update procedures for searching for an existing record when registering a borrower. The committee discussed how the search index list could be modified and what indexes to use. Wymer will work with Pratt, Deshpande and other committee

members to fine-tune the indexes and their order in advance of the feature being enabled. He will also set up an alternate view that staff can use to present the updated form to staff for training.

- iv. The third consideration was how should preferred names be entered, and what affects it would have on various automated processes, like notices and checkout receipts. If we allow preferred names to be in a format other than Last Name, First Name, then processes which parse names won't parse the parts of a name correctly. Wymer will do testing on how various notices are affected by different name formats and bring a summary back to the committee in November. Wymer also noted that there is now an option to print a borrower's legal name on notices in place of their preferred name. This could be implemented on billing notices and in-collections notices.
 - v. The fourth consideration was whether patrons should be able to edit their own preferred names through Enterprise. The committee expressed doubts about allowing this, especially if borrowers would enter their name in the correct format, or if they would abuse the process. The committee's consensus was that it should not be allowed at this time, but maybe at a later date.
 - vi. The fifth consideration was the timing of the change. Wymer initially proposed implementing it on October 1. After discussion, the committee felt that was a bit too quick, and recommended a later implementation.
 - vii. Other considerations discussed included what would be allowed as a preferred name. Wymer shared that his understanding of the feature is to allow someone to receive notices with their name in a form other than the legal name recorded on their identification. As an example, his first name is Christopher, but he prefers to be called Chris. Polfer shared the example of an individual that's transitioning and no longer wishes to be called by their dead name, but also has not changed their legal name. The field isn't intended to be a username, or alias that hides an identity.
 - viii. Clark (Tulare City) motioned to approve adding borrower legal names to borrower registration and allowing borrowers to be noticed by their preferred name, and updating borrower registration standards to account for the change, with an effective date of January 1, 2025.
 1. Pratt (Kern) seconded.
 2. The motion passed.
5. Approve Updated Cataloging Policy – Wymer
- i. Wymer presented the Updated Cataloging Policy to the committee for approval. The updated policy reflects the revisions and recommendations that were discussed during the July Automation Committee meeting.
 - ii. Polfer and Pratt pointed out small grammatical errors that needed to be fixed.
 - iii. Pratt asked about procedures for doing peer review of records. Wymer mentioned that he hasn't determined the exact procedures, because there are a lot of different ways to locate records to review, and each method has its pros and cons. His preference would be to let staff find

the method that works best for them, if possible. He will create procedures separately from the policy document.

- iv. Polfer (Fresno) motioned to approve the policy with the changes discussed.
 1. Pratt (Kern) seconded.
 2. The motion passed.
6. Approve Updates to Borrower Blocks View – Wymer
 - i. Wymer presented a revision to the way borrower blocks are displayed, in order to allow the new, extended length comments to be viewed by staff. The current view does not display the entire comment, requiring staff to edit the comment in order to view the full text. Unfortunately, the edit view is configured to only show a single line from the comment, requiring staff to use the arrow keys to read additional lines. Making the change will alter where information displays for blocks like overdue and lost items but will be worth it to make it easier to view the full comments.
 - ii. Pratt (Kern) motioned to update the borrower block views to allow full comments to display with an effective date of September 19, 2024.
 1. Deshpande (Merced) seconded.
 2. The motion passed.
7. Add Boolean Advanced Search to Enterprise – Wymer
 - i. Wymer informed the committee that SirsiDynix recently made an enhancement for the advanced search page in Enterprise free. The enhancement enables Boolean searching across multiple search fields and replacing the current advanced search page. The downside of this enhancement is that it only searches Library Catalog content and does not include eResource or research database content in the search results, whereas the current advanced search page does include eResources in the search results.
 - ii. The committee discussed the pros and cons of replacing the advanced search page, and felt that the inclusion of eResource content was more important than allowing Boolean operators across search fields.
 - iii. Martin (Kings) motioned to keep the advanced search page as is.
 1. Deshpande (Merced) seconded.
 2. The motion passed.
8. Cataloging Questions: Data Load Error Log and Linking Serials – Polfer
 - i. Polfer informed the committee that Fresno recently had questions about clearing the data load error log in Horizon, and procedures for handling questions about linking serials.
 - ii. Recently, Fresno cataloging staff noticed the data load error log grew to more than 3,000 entries and older entries were not being purged on a regular basis. Staff wanted to ensure that the procedures for clearing the log were being followed. Wymer gave update that part of the reason for the large amount of entries was a staff mistake in loading records. Staff attempted to load the local bib record database file from Connexion into Horizon, instead of loading the file that contained the exported bibliographic records. Because the local bib record database file did not begin with the information needed for the Horizon bib import process, a large number of false errors were written to the log. Wymer previously

cleared those entries once their source was determined. Wymer reminded the committee that import errors should be resolved in a timely manner.

- iii. In regards to serials, Fresno cataloging staff wanted to check where questions about linking serials should be directed. In the past Fresno staff helped answer questions about linking serials. Wymer said those questions should be directed to SJVLS, and SJVLS staff will help with proper procedures for linking.

G. STAFF REPORTS

1. Senior Systems Network Engineer
 - i. Nelson provided an update on the 2021 WiFi Expansion project. Work started on September 18 at Woodward Park. Fresno County's metro locations, and the Hanford Library are the priority locations for the start of the project. Once those locations are finished we will begin working on the other member's branches.
 - ii. Nelson also provided an update on the Fall PC Order. He is aiming to open the PC Order Form on October 1. Nelson informed the committee that the receipt printers and barcode scanners we've purchased for years were finally discontinued. He's going to work on locating a replacement model for them. For barcode scanners, he's found a new model that includes 2D scanning, to allow the scanners to read digital library cards.
2. System Administrator
 - i. Wymer informed the committee that he's spent a lot of time post-upgrade trying to resolve issues with circulation slips, without much success. One of the biggest issues seems to be paper sizes, or something else causing data to be left off the slips.
 - ii. Wymer also provided an update on State Library Reports. In August he submitted the 23-24 Annual Report for SJVLS.
 - iii. Wymer gave an update on the status of hiring a new System Administrator. Fresno County HR has approved an updated Essential Functions list for the position that actually describes the position's job duties. He's unsure if he should hire an Associate System Administrator before a System Administrator, or focus on hiring the System Administrator and allowing them to be involved in the hiring of their associate.

H. CALENDAR ITEMS

1. Date and location for next Automation Committee Meeting
 - i. November 20, 2024, at 10:00 am online via Microsoft Teams.

I. ANNOUNCEMENTS

1. Pratt announced the Southwest branch is still closed for renovations. The Wilson and Holloway-Gonzales branches are still closed. The Kern River Valley branch recently closed, but is being serviced as a bookmobile stop, due to the lack of alternative library branches in the area. The Ridgecrest branch will be closing for one week on October 1. There will be a second closure at a later date.

2. Polfer announced that the Fresno Central Library is undergoing renovations. Fresno was able to hire an architect for the remodel of the Selma branch, and work has started to prepare for their renovation. Fresno County is in the process of closing their Biola branch and replacing services with a bookmobile stop.
3. Arredondo shared that Tulare County broke ground on their new Springville branch on September 16. They also have other projects coming up.
4. Deshpande announced that the new Dos Palos branch is nearly completed and will be opening in December.
5. Clark announced that Tulare Public Library would be hosting a banned books trivial night next week.
6. McIntyre shared that the air conditioning unit at the Madera County Main Library is still broken. They're hoping that repairs will be finished soon.

J. ADJOURNMENT

1. There being no further business to discuss the meeting adjourned at 1:09 p.m.