



BLACK GOLD

COOPERATIVE LIBRARY SYSTEM

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AUTOMATION AND TECHNICAL SERVICES (ATS) OPERATIONS COMMITTEE AGENDA Wednesday, November 1, 2023– 10:00 a.m. Webinar

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Meeting ID: 225 820 138 360

Passcode: h65QAj

* Item accompanies the agenda

1) 10:00 A.M. CALL TO ORDER Glynis Fitzgerald, Chair, Presiding
Recorder; Kristina Uvalle (BG)

2) ADOPT AGENDA —

3) *APPROVE MINUTES — October 4, 2023, by Kristina Uvalle (BG)

4) CIRCULATION

- a) **M - *3 new facets in Aspen (BG)** – Aspen can add 3 new search facets to the existing list. Review and discuss which facets libraries would like to have added to the existing list.
- b) **M - Deleting Messages and permissions (Global setting) (GO)** - Turn on the capability to delete messages added to a patron's account by other libraries. Currently, a library cannot delete or alter messages placed on a patron's account by another library. Even within a library group (i.e., Buellton cannot delete a message added by Goleta.)
- c) **M - *Aspen page upgrades** – Review and approve upgrades available in Aspen Administration.
 - i) Move Search Tools from bottom of search results to the top.
 - ii) Use floating book cover style.
 - iii) Display covers for editions in search results.
 - iv) Enable the “New” badge in search results for titles that are new to your catalog within the last 7 days.
- d) ***No autorenewals on new releases (PR) – Discussion.** Paso wants to reduce autorenewals on new releases to 0. We want new releases to circulate faster even when they haven't been put on hold by another patron. We want them back on the shelves and browsable.
- e) ***Circulation Manual Updates (BG)** – Discussion – An opportunity to get feedback from libraries on circ manual topics that are being created/rewritten.
 - i) **Hold Policy for Book Club Selections – BEST PRACTICES** - It has been reported that previously, libraries were not permitted to place admin holds on books for Book Clubs. Given that we have so many new staff members, we would like to review the policy and make sure everyone agrees going forward.
 - (1) Do we want to create a Book Club card to use to place holds in place of an Admin card?
 - (2) Do we want to replace a restriction based on book release date?
 - (3) Do we need to extend the length of the lending period?

ii) ***Electronic Material Sharing**

- (1) Libraries can determine whether to share electronic materials (hotspots, laptops, park passes). Do we need to add BEST PRACTICE to this policy?

iii) ***BEST PRACTICES for notes/restrictions/messages**

- (1) What information goes into each section?
 (2) Is it possible to have consistency between libraries?
 (3) What should be the clean-up timeline for older notes/messages?

iv) ***Notices & timeline**

- (1) \$10 collection fee

5) TECHNICAL

- a) **Twilio/SMS (BG)** – Informational - We are updating to Twilio for our SMS messaging system. Discuss when changes will take effect and what adjustments staff will need to make on Patron accounts going forward.
- b) **Cooperative Shared Wand for Inventory** – The directors have agreed to purchase a wand for inventory to be shared by the cooperative. Update on the type of device is being purchased. Discuss schedule and procedure for use.
- c) **Koha/Aspen Issues** – Discussion – A chance to talk about issues happening in Koha or Aspen. Talk about a 'Wish List' of possible enhancements or workarounds for existing issues. Follow up on questions/topics from the October meeting including group item holds; update to Koha to 11.22.09 and date errors in registration and expiration fields of patron records.

6) BLACK GOLD UPDATE

7) ROUNDTABLE

8) ITEMS TO BE FORWARDED — (To Council or other committees)

9) AGENDA BUILDING

10) NEXT MEETING — 10:00 a.m., Wednesday, January 3, 2024 (Webinar)

11) ADJOURNMENT

Distribution — email notice of web-posted agenda packet (available at www.ats.blackgold.org): Meg Weber, PR; Joanne Britton-Holland SM; Dominic Keen, LM; Elizabeth Saucedo, GO; Eric Castro, CC; Brenda Goldy, SP; Matt Duhon, BG; Glynis Fitzgerald, BG; Directors [File Copy];

**AUTOMATION AND TECHNICAL SERVICES
(ATS) OPERATIONS COMMITTEE MINUTES
Wednesday, October 4, 2023– 10:00 a.m.
Webinar**

Attending: Joanne Britton-Holland SM; Dominic Keen, LM; Elizabeth Saucedo, GO; Brenda Goldy, SP; Matt Duhon, BG; Glynis Fitzgerald, BG; Kristina Uvalle, BG; Teresa Van Doren, BG.

1) 10:13 A.M. CALL TO ORDER Glynis Fitzgerald, Chair, Presiding
Recorder; Kristina Uvalle (BG)

2) ADOPT AGENDA — 1st SM/2nd GO. Approved.

3) *APPROVE MINUTES — September 6, 2023, by Kristina Uvalle (BG). Change *until to after*. ‘*The Capira app will no longer be available until the end of September*’. 1st SM/ 2nd GO. Approved.

4) CIRCULATION

- a) **3 new facets in Aspen (BG)** – Aspen can add 3 new search facets to the existing list. Review and discuss which facets libraries would like to have added to the existing list.

TV (BG) reviewed possible facets that can be added to the Aspen catalog search lists. KU (BG) will send out a survey that will allow libraries to choose their top 3 choices to be voted on at the November meeting. TV (BG) will update bibs for Battle of the Books and remove old listings.

- b) **Policy for Admin card holds (BG)** – Discussion – It has been reported that previously, libraries were not permitted to place admin holds on books for Book Clubs. Given that we have so many new staff members, we would like to review the policy and make sure everyone agrees going forward. Discuss whether there are similar policies in need of review and need to be added to the Circ Manual.

In the past, libraries were discouraged from using an Admin card to place holds on books for Book Club groups. There is a need to add a Best Practices policy to the circulation manual. Things to consider include creating a Book Club card that would allow other libraries to know that a book is being used for a Book Club. Restrict books by release date, and does it require an adjustment in the lending period. Committee members will gather opinions from their directors so that we can draft a policy to add to the circulation manual.

- c) **Welcome email and patron privacy (GO)** – Discussion

Welcome emails are customizable by the library branch. Each library has the capability of adding and using welcome email options and having it reflect their individual policies on patron privacy.

- d) **Suppressing LOT of other libraries (and other limited circ collections) (GO)**

Libraries have the option of using their Aspen page to communicate messages concerning their collections. Sharing items is up to each library to decide. It is suggested that a Best Practice policy for sharing specialty items be added to the circulation manual.

- e) **Deleting Messages and permissions (GO)** – Discussion

There is a global setting that will allow libraries to delete messages left by other libraries from a patron account. The need to develop a Best Practice policy to aid in a consistency in the use of the notes/restrictions/messages sections in Koha. Add to the November agenda to be voted on.

f) **Dates for notices and billing (GO)** – Discussion

Include sample notices and a timeline in the circulation manual. GF (BG) will confirm when the \$10 collection fee is added to a patron account.

- g) **Delivery** – Informational – Our current delivery driver is out due to health issues. We have substitute drivers covering the route for now. Please be aware that there may be delays in the time schedule and inform Black Gold of any issues if they arrive.

5) TECHNICAL

- a) **Twilio/SMS (BG)** – Informational - We are updating to Twilio for our SMS messaging system. Discuss when changes will take effect and what adjustments staff will need to make on Patron accounts going forward.

MD (BG) is working with Bywater to test the Twilio on the testing server and moving forward to adding it to the production server hopefully by next week.

- b) **Koha/Aspen Issues** – Discussion – A chance to talk about issues happening in Koha or Aspen. Talk about a 'Wish List' of possible enhancements or workarounds for existing issues. Follow up on questions/topics from the September meeting including database management, previous barcode field and group holds.

Patrons will lose access to the Capira app starting October 4th. Auto renewals in Koha are now set to 3 as of October 1st. This includes items checked out prior to October 1st which is in direct contrast to what Bywater told prior to the change.

DK (LM) gave an overview of a possible change to add to Koha for GroupItemHolds. This would allow patrons to place a first available hold by volume within a group. (i.e., graphic novels with multiple volumes of the same story, the change would allow to place a hold on any available volume 1's as opposed to a specific copy of the item). We will move this to the November agenda as a new agenda topic for consideration.

- 6) BLACK GOLD UPDATE** – GF (BG) informed everyone that going forward the deadline for agenda topics is a hard deadline. Any topic that does not make the deadline will be pushed to the next meeting. Kristina Uvalle has been moved into a new position, Technical Support Specialist, which better reflects her actual job responsibilities and duties. Work is on-going on Twilio for phone messaging, we will keep everyone posted when it is ready on the Production server. Kristina will send out a checklist of items from today's meeting that committee members may need to go back to their directors for feedback. This may help get decisions made in a timely manner.

7) ROUNDTABLE – n/a

8) ITEMS TO BE FORWARDED – n/a

9) AGENDA BUILDING 4a, 4e, GroupItemHolds

10) NEXT MEETING — 10:00 a.m., Wednesday, November 1, 2023 (Webinar)

11) ADJOURNMENT at 1:09 p.m.

TOPIC:	Add 3 new facets in Aspen	PRIORITY LEVEL: (1-Low 3 – High)	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
SUBMITTED BY:	TVanDoren		
TYPE OF ITEM:	<input checked="" type="checkbox"/> For Discussion <input type="checkbox"/> For Recommendation <input type="checkbox"/> Other: _____		
BACKGROUND STATEMENT			
BACKGROUND: <i>Describe why you are bringing this item before the committee. What problem are you trying to solve?</i>	<p>Aspen can add 3 new search facets to the existing list:</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p style="text-align: center; background-color: #4f7942; color: white; margin: 0;">Narrow Your Results</p> <ul style="list-style-type: none"> > Fiction / Non-Fiction > Format > eContent Collection > Audience > Available Now At > Author > Language > Added in the Last > Publication Date > Subject > Series > Awards > Movie Rating > AR Reading Level > AR Point Value > Audience > Shelf Location > Branch </div> <p>They must be pulled directly from a field/subfield already existing in MARC records. They need to be facets for all libraries, though Aspen says they can be hidden by library if a library doesn't want to display them.</p>		

OUTCOME(S)	
DESIRED OUTCOME(S): <i>Describe your desired outcome(s)</i>	<p>Here are some options that can be pulled from fields/subfields in our existing bib records:</p> <p>Library of Things</p> <p>Book Group Kits</p> <p>Battle of the Books</p> <p>Hotspots</p> <p>Works by local authors</p> <p>Kits (for non-LOT kits, mental health kits, we read together kits, laptops, electronics, etc.)</p> <p>Choose 3.</p> <p>Also, if you want a Genres facet to display genres like Thrillers, Mystery fiction, Graphic novels, Fantasy fiction, Science fiction, Love stories, Romance fiction, Paranormal fiction, War stories, etc., tell Kristina and she can set it up. It is available and does not have to be one of the custom three.</p>
OTHER COMMENTS:	

TOPIC:	Deleting Messages and permissions	PRIORITY LEVEL: (1-Low 3 – High)	<input checked="" type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
SUBMITTED BY:	Elizabeth Saucedo (GO)		
TYPE OF ITEM:	<input checked="" type="checkbox"/> For Discussion <input type="checkbox"/> For Recommendation <input type="checkbox"/> Other: _____		
BACKGROUND STATEMENT			
BACKGROUND: <i>Describe why you are bringing this item before the committee. What problem are you trying to solve?</i>	Currently, it appears that Messages may not be deleted by other libraries. Is the setting that the message can only be deleted by the library that entered it, or by the patron's home library?		
OUTCOME(S)			
DESIRED OUTCOME(S): <i>Describe your desired outcome(s)</i>	Is there a way to adjust the settings so that Messages can be deleted by other libraries, and is this something that we would want to enable? An example of this being a helpful change is if Solvang Library wishes to remove an Address Check message from a Goleta Valley Library patron after verifying their information.		
OTHER COMMENTS:			

1) Move Search Tools from the bottom of search results to the top.

Before:

The following appears below search

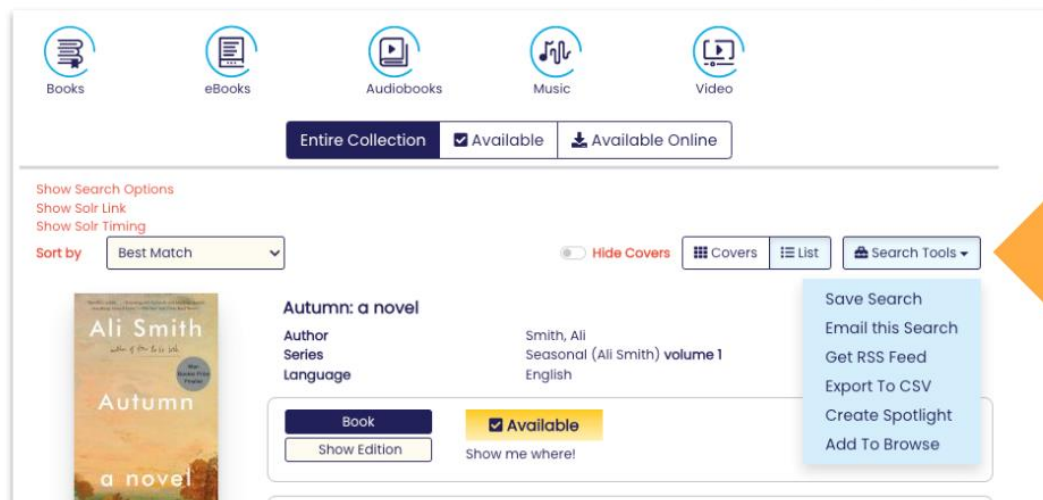
results

Search Tools Get RSS Feed Email this Search Save Search Export To CSV Create Spotlight Add To Browse

After:

The following appears at the top of search

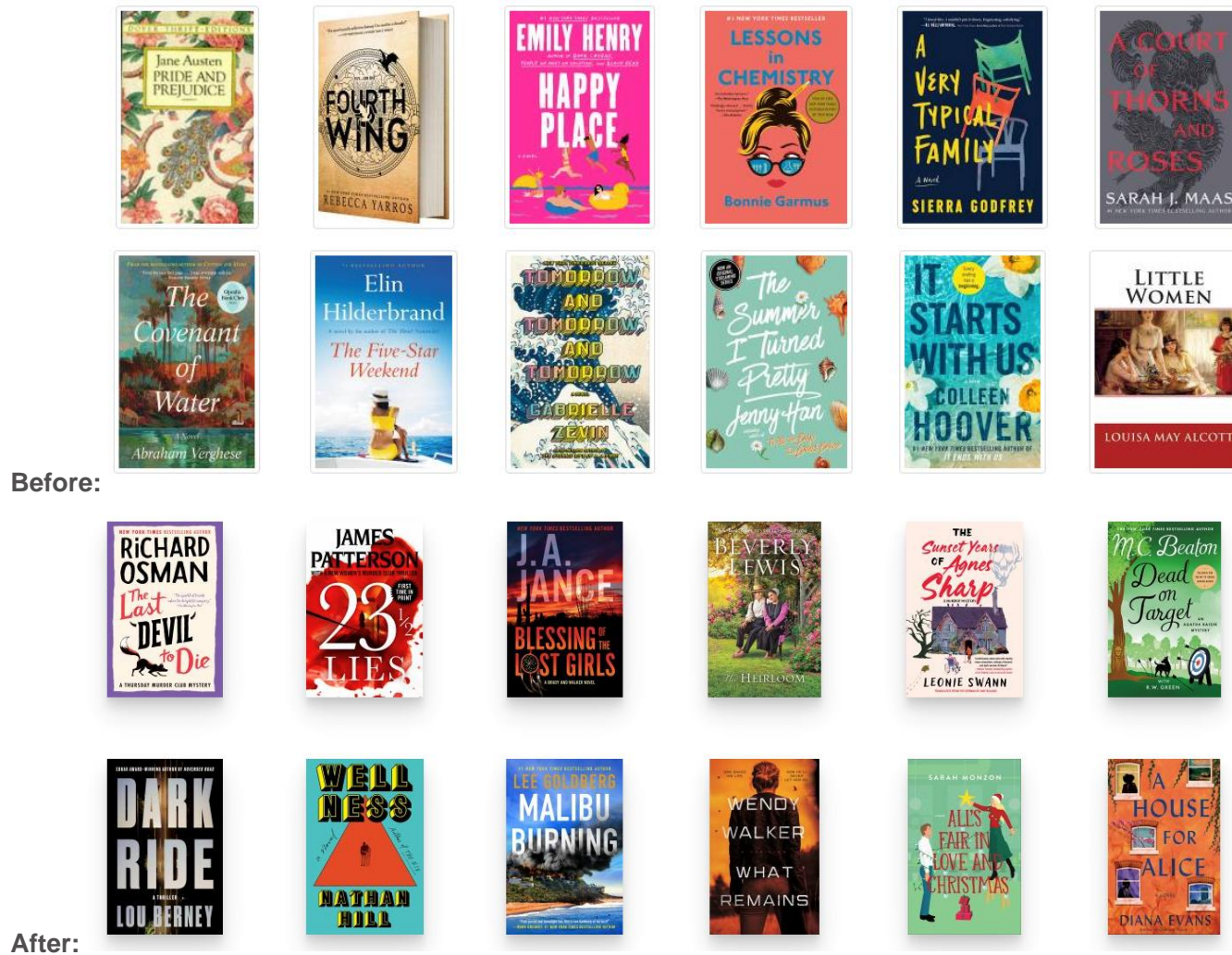
results



The screenshot shows the search results interface. At the top, there are icons for Books, eBooks, Audiobooks, Music, and Video. Below these are filters: Entire Collection, Available (checked), and Available Online. A section for search options includes links for Show Search Options, Show Solr Link, and Show Solr Timing. A 'Sort by' dropdown is set to 'Best Match'. A 'Hide Covers' toggle is present. The 'Search Tools' dropdown menu is open, showing options: Save Search, Email this Search, Get RSS Feed, Export To CSV, Create Spotlight, and Add To Browse. An orange arrow points to this menu. Below the search options, a book result for 'Autumn: a novel' by Ali Smith is displayed, including its cover, title, author, series, language, and availability status (Available).

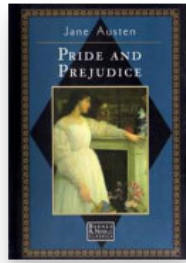
[More information on this setting](#)

2) Use the “Floating” book cover style.



[More information on this setting](#)

3) Display covers for editions in search results.



1) **Pride and prejudice**

Author Austen, Jane
 Series The Ten greatest novels of the world
 First Avenue Classics
 Best loved classics
 More Series...
 Appears on these lists Summer Reading 2023
 Women's History Month

Book		On Shelf	Place Hold
Show Editions		Goshen Co. Library - Fiction CLASSIC AUSTEN 1 available Where is it?	
Published	2004, c2003 Barnes & Noble Classics	On Shelf	More Info
Edition	Hardcover edition	Goshen Co. Library - Fiction CLASSIC AUSTEN 1 available	Place Hold
Physical	xxxv, 392 pages ; 22 cm.	Where is it?	
Description			
Published	1993 Barnes & Noble Books	Not Owned	More Info
Physical	282 pages ; 22 cm.	Where is it?	Request
Description			
Published	1970 Oxford U.P.	Not Owned	More Info
Physical	xxiv, 352 pages ; 21 cm.	Where is it?	Request
Description			
Published	1995 The Modern Library	Not Owned	More Info
Physical	ix, 281 pages ; 21 cm.	Where is it?	Request
Description			
Published	1980 Franklin Library	Not Owned	More Info
Physical	367 pages : illustrations ; 24 cm.	Where is it?	Request
Description			
Published	[1978?] Grolier Enterprises Corp	Not Owned	More Info
Physical	x, 522 pages ; 24 cm.	Where is it?	Request
Description			





Before:



1) **Pride and prejudice** (74817173000000)

Author Austen, Jane
 Series 100 greatest books of all time
 Chartwell classics
 Recorded Books classics library
 Courage classics
 More Series...

Language English
 Appears on these lists Capricorn Reads
 Classics
 Classics - St. Charles Public Library
 More Lists...

Book	Available from another library	Place Hold
Show Editions  2008. Penguin 435 pages ; 21 cm.	Available from another library Where is it?	More Info Place Hold
 2014. Penguin Books Revised edition. xl, 400 pages ; 20 cm.	Available from another library Where is it?	More Info Place Hold
 1995. Modern Library ix, 281 pages ; 21 cm	Available from another library Where is it?	More Info Place Hold
 2009. Penguin Books 339 pages : illustrations ; 21 cm.	Available from another library Where is it?	More Info Place Hold

After:

[More information on this setting](#)

-
- 4) Enable the “New” Badge in Search Results for titles that are new to your catalog within the last 7 days.



TOPIC:	No autorenewals on new releases.	PRIORITY LEVEL: (1-Low 3 – High)	<input checked="" type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
SUBMITTED BY:	Meg Weber		
TYPE OF ITEM:	<input checked="" type="checkbox"/> For Discussion <input type="checkbox"/> For Recommendation <input type="checkbox"/> Other: _____		
BACKGROUND STATEMENT			
BACKGROUND: <i>Describe why you are bringing this item before the committee. What problem are you trying to solve?</i>	<p>Paso wants to reduce autorenewals on new releases to 0. Even though patrons are able to put items on hold which would block the autorenewal for currently checked out titles, we want new releases to circulate faster even when they haven't been put on hold by another patron. We want them back on the shelves and browsable.</p> <p>This will require making a new item type for "New" so we can manage it in our Circ rules.</p>		
OUTCOME(S)			
DESIRED OUTCOME(S): <i>Describe your desired outcome(s)</i>	<p>We want to increase circulation of new items to make sure they return to the shelves faster and are browsable. We are hoping to see increased circulation of new items.</p>		
OTHER COMMENTS:			

TOPIC:	Suppressing LOT of other libraries (and other limited circ collections)	PRIORITY LEVEL: (1-Low 3 – High)	<input checked="" type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
SUBMITTED BY:	Elizabeth Saucedo (GO)		
TYPE OF ITEM:	<input checked="" type="checkbox"/> For Discussion <input type="checkbox"/> For Recommendation <input type="checkbox"/> Other: _____		
BACKGROUND STATEMENT			
BACKGROUND: <i>Describe why you are bringing this item before the committee. What problem are you trying to solve?</i>	Some libraries have collections that circulate only from their libraries or to their patrons, such as Library of Things collections. However, some of these collections remain visible throughout the catalog, which can cause confusion for patrons at other jurisdictions who may wish to borrow them, but are ineligible to do so.		
OUTCOME(S)			
DESIRED OUTCOME(S): <i>Describe your desired outcome(s)</i>	Would the group be open to establishing a practice that collections with limited circ permissions are suppressed from the catalog, such as non-circulating Storytime collections? Perhaps Reference and Library of Things collections should remain visible if those collections are able to be borrowed by any patron if they elect to check out from that physical location.		
OTHER COMMENTS:			