



BLACK GOLD

COOPERATIVE LIBRARY SYSTEM

580 Camino Mercado
Arroyo Grande, CA 93420
805 543 6082
Blackgold.org

AUTOMATION AND TECHNICAL SERVICES (ATS) OPERATIONS COMMITTEE AGENDA Wednesday, March 6, 2024– 10:00 a.m. Webinar

Join on your computer, mobile app or room device: [Click here to join the meeting](#)

Meeting ID: 247 570 367 53

Passcode: GbcAgk

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

2) ADOPT AGENDA —

3) *APPROVE MINUTES — February 7, 2024, by Kristina Uvalle (BG)

4) CIRCULATION

- a) **'Reply to' email addresses for notices (BG)** - There are new security policies going into place across various email systems in the coming months and some that have already taken action to help reduce spam. Having a different domain in the sending vs reply-to and return path is one of the ways they are cracking down. To keep the patrons receiving their emails we have one of two options; the libraries use a black gold email account to monitor replies and failed emails, or Matt can work with your IT to set up an SMTP relay so emails could come from your domain instead of Black Gold. This will take more work and cooperation and the ability of local IT to accommodate.

Lompoc, Goleta but not Buellton and Solvang, along with Carpinteria are already set up with a black gold email address and have already been using them.

- b) **Patron section – Circ Manual –** review patron section of the circ manual updates and/or changes.

5) TECHNICAL

- a) **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.

6) BLACK GOLD UPDATE

7) ROUNDTABLE

8) ITEMS TO BE FORWARDED

9) AGENDA BUILDING

10) NEXT MEETING — 10:00 a.m., Wednesday, March 6, 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; Shannon St. Arnaud, SM; Dominic Keen, LM; Elizabeth Saucedo, GO; Eric Castro, CC; Brenda Goldy, SP; Matt Duhon, BG; Glynis Fitzgerald, BG; Directors [File Copy];



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AUTOMATION AND TECHNICAL SERVICES (ATS) OPERATIONS COMMITTEE MINUTES Wednesday, February 7, 2024— 10:00 a.m. Goleta Valley Library

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

1) 10:05 A.M. CALL TO ORDER Glynis Fitzgerald, Chair, Presiding
Recorder; Kristina Uvalle (BG)

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

3) *APPROVE MINUTES — January 3, 2023, by Kristina Uvalle (BG). 1st SM/ 2nd GO. Approved

4) CIRCULATION

a) ***Patron Database clean-up** – review current state of the patron database clean-up. Review patron lists and discuss next steps.

Deletion of SLO/SB/PacReg cards after expiration (? Indicates library needs to confirm with Director)

- Lom ?
- SP 90 days
- PR ?
- Gol 90 days
- SM 90 days
- CC ?

Deletion of out of jurisdiction cards

- Lom no
- SP no
- PR yes
- Gol yes
- SM no
- CC ?

Pre 2020 delete?

- Lom yes
- SP yes with balance
- PR yes
- Gol yes with balance
- SM yes with NO balance
- CC ?

Delete expired cards

- Lom ?
- SP 90 days
- PR ?
- Gol 90 days
- SM 90 days
- CC ?

- b) ***Patron section – Circ Manual** – review patron section of the circ manual for updates and/or changes. Discuss options to add to Koha staff view.

SP wanted to add 'use residential address'.

Remove Internet Only patron type. Welcome card if Internet Only.

Add PR to Institution patron type

Add table of Patron types with expiration dates.

page 8 -- If mailing address and physical address is different, please enter both.

page 13 – card expiration s/b corrected.

GO should be listed as GV

Discussion about acceptable IDs for registration should include Mexican Voter cards.

5) TECHNICAL

- a) **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.

- 6) **BLACK GOLD UPDATE** – Matt updated everyone on the move to a new data center. He will be visiting each library to swap out juniper devices over the next couple of months. Palace Project titles can now be added to library search pages in Aspen. We will be working to enable that feature. Discussion about the amount of use Novelist sees and other options and/or how to better utilize the program.

7) ROUNDTABLE – N/A

8) ITEMS TO BE FORWARDED – N/A

9) AGENDA BUILDING – N/A

10) NEXT MEETING — 10:00 a.m., Wednesday, March 6, 2024 (Webinar)

11) ADJOURNMENT at 12:59 p.m. 1st SM/2nd GO.

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

Library code: SP

Name: Blanchard Community Library

Required

Address line 1: 119 N. Eighth Street



Address line 2:

Address line 3:

City: Santa Paula

State: CA

ZIP/Postal code: 93060

Country: USA

Phone: 805-525-2394

Fax:

Email: BSPLibrary@blackgold.org

Reply-To: notices@blanchardlibrary.org

Default: ReplyToDefault system preference

Return-Path: notices@blanchardlibrary.org

Default: ReturnpathDefault system preference

SMTP server: Black Gold SMTP ▾

URL:

OPAC info: Add HTML content

IP:

Can be entered as a single IP, or a subnet such as 192.168.1.*

MARC organization code

If not filled in defaults to system preference MARCOrgCode. You can obtain your code from Library of Congress.

Notes:

Pickup location: Yes ▾

Public: Yes ▾

Set to 'yes' to show this library as a search option and on the libraries page in the OPAC.

Submit

Cancel

Patron Information

INPUT STANDARDS PATRON REGISTRATION

1. When a patron applies for a library card, check for a pre-existing patron account using the following methods in this order:
 - a. Search by name using the patron's last name, comma and first three letters of the first name. Confirm results using date of birth.
 - b. Search using privacy-protected format of driver's license number. Confirm results using date of birth. Entering the Full driver's license will not retrieve patron account; must enter the last four digits of the ID. Koha will search for other IDs so long as the format includes the privacy format.
 - c. Search using patron's date of birth.

BARCODE

1. New patrons – scan account number from library card.
2. Existing patrons – If a pre-existing account for a patron is located do not assign a new barcode. See "Replacement Library Cards".

REPLACEMENT LIBRARY CARDS

No agency charges replacement fees for normal wear and tear or for name changes. Some agencies may charge for a replacement card if the patron has lost or misplaced a card. An ID is required to replace a library card.

If a patron is currently registered at your library and wishes to have the card replaced, assign a new barcode. For Best Practice, the barcode prefix and registered library should match.

If a patron is not currently registered at your library and wishes to have the card replaced, confirm the patron wants to change their registered library. If necessary, update all fields and add new barcode.

1. If the patron wishes to change libraries – assign a new barcode and change the registered library. The barcode prefix and library should match. Online digital accounts may also need to be updated or deleted.
2. If the patron does not wish to change libraries – follow best practices at your location to allow checkout and have the patron follow up at their registered library to obtain a new card.
3. The patron's previous barcode should be noted in the Previous Barcode field. This allows staff to verify the previous barcode when troubleshooting e-material issues (Overdrive, Hoopla, etc.).

SCANNER – PATRON ENTRY

A patron can be registered by scanning a driver's license. All information in the patron record is entered with ALL Caps in this instance. You do not need to change the entry to standards as below (re. Capitalization of first letter only). Please confirm the information on the license is correct.

LAST NAME

Legal last name printed on identification. First letter capitalized. Names with punctuation or spaces should be entered exactly as seen on the ID.

RULE	EXAMPLE
Enter exactly as spelled on the ID, omitting diacritical marks.	ID: Laurence Quarri Last name: Quarri
If the last name consists of more than one name, enter all parts in the Last name field exactly as ID has it printed.	ID: John Van Duzer Last name: Van Duzer ID: James Madison-Park Last name: Madison-Park ID: Roberto Gonzales Chavez Last Name: Chavez ID: Toby O'Connor Last name: O'Connor
If "Jr" or any other addition appears as a part of the last name, enter it in the Last Name field.	ID: Eli Jackson Jr Last name: Jackson ID: John Jones III Last name: Jones

FIRST NAME

Legal first name printed on identification (do not use nickname or abbreviations). First letter capitalized. Optional 'Legal name if different' field available for patrons who use names other than their legal names for patron account.

RULE	EXAMPLE
Enter exactly as spelled on ID.	ID: Tommy Smith First name: Tommy
If the first name is hyphenated, enter both names in the First name field exactly as printed on ID.	ID: Mary-Jane Jones First name: Mary-Jane ID: Jean-Pierre Smith First name: Jean-Pierre

MIDDLE NAME

Middle name (initial if full name unavailable). Enter in Initials field of patron registration.

RULE	EXAMPLE
Enter the whole middle name as spelled	ID: John Quincy Adams Middle name: Quincy
If only a middle initial is available, enter that in the Middle name field.	ID: Lou Q. Stewart Middle name: Q

Do not type a period.	
If more than one middle name is given, enter them all.	ID: John Francis Xavier Smith Middle name: Francis Xavier

LIBRARY

New patrons – automatically set in patron registration wordform using the library location where the card is being created (barcode prefix matches branch).

Existing patrons – If a patron has moved or wishes to change their registered library the registered library should match the barcode prefix so the card may need to be replaced. See “Replacement Library Cards” to allow checkout.

PATRON CODE

Select the appropriate patron type. Not all jurisdictions use the same codes.

PATRON TYPE	EXPIRATION LIMIT
Adult	48 months
Foster	12 months
Homebound	48 months
Institution	48 months
Juvenile	48 months
Teen	48 months
Visitor	3 months
Welcome	3 months

ADDRESS

A valid home address is required for all patrons except for ~~“internet only”~~ and ‘Welcome’. State law requires that patrons receive written notices before being sent to collections. **It is imperative we have a valid address.**

To add an address, use the Main Address field (or Alternate Address if adding multiple addresses). If entering a second address, list the mailing or local address in the Main Address section. **If mailing address and physical address are different, enter both.**

Enter zip code, city, and state.

~~For “internet only” patrons, enter “internet only” in the address field and add the library’s zip code.~~

RULE Enter the street address and apartment number (if applicable), or PO box number. Use the following abbreviations:	Example
Apartment Apt Avenue Ave Boulevard Blvd Building Bldg Circle Cir Highway Hwy Lane Ln Place Pl Road Rd Room Rm Street St Suite Ste	Address: 15 Main St Address: 123 W 45 St Apt 67 Address: 89 Grand Ave Ste 10 Address: PO Box 333
If a street address includes a compass direction, use N, S, E, W, NE, NW, SE, or SW If a street name is a numbered street, use the cardinal number only, (without the “-st”, “-nd”, “-rd”, “-th”)	Address: W Main St Apt 4B Address: 1200 Parks Ave NW Address: 13 E 67 St

TELEPHONE/EMAIL, ETC.

Enter as appropriate. Set notification option according to patron’s choice. Not required fields in Koha.

RULE	EXAMPLE
Enter the number in the Primary phone field. If a second number has been provided, enter it in the Secondary phone field.	Telephone #: 805-777-7777

PHONE FIELD ENTRY GUIDELINES

“Primary phone” is a mandatory field in the current automated system. For patrons who do not have a telephone, or refuse to give a telephone number, as of November 17, 2010, the agreed upon standard for this field on the patron registration screen is “none” or “refused” (no note in the patron record).

If a patron refuses to give either an email address or a telephone number, the staff member should put an agreed upon staff email address in the email field. Failure to do so will result in a patron account with fees/fines over \$40 going to Collections without any prior notice, or not going to Collections at all if the notice cycle cannot begin/complete.

Email or telephone notification is required for the notice cycle to begin. Telephone overdue notices that are not completed (answered) will receive a print bill notice after 30 days.

TELEPHONE INPUT STANDARDS FORMAT

The acceptable format for telephone numbers for automated calling is:

1- AAA-PPP-NNNN. “AAA” is area code, “PPP” is prefix, “NNNN” is number.

Some general rules:

- Format applies to all telephone fields in the record.
- Only one telephone number per field (not “PPP-NNNN or PPP-NNNN” in the same line)
- The iTiva system can only call a direct number. If the phone number contains any of the following, it cannot be used:
 - An extension number.
 - A work number that needs to go through a switchboard.
 - A call blocking service access number such as *82
 -
- Words in the telephone number are acceptable as the iTiva system ignores them. Examples: parents’ home, work, cell.
- **Do not enter any symbols such as # or *.**
- Do not use a contiguous set of numbers such as 1111111 or 999. This could result in the automated system dialing 9-1-1 as it uses dialing formats to reach outside lines.

PASSWORD

Will default overnight to the last four digits of phone number if nothing is entered. If no phone number is entered, default to ‘1234’.

PREVIOUS BARCODE

If the patron is replacing their card rather than creating a new account, copy and paste the former account number into this field. **In Koha, this is not a searchable field.**

DATE OF BIRTH

Enter the date of birth, which is required, in the (MM/DD/YYYY) format. If the patron refuses to provide the year of birth, enter the birth year as 01-01-1900.

UNIQUE ID

Enter the last four digits of the ID number, followed by the type of ID in this order:

Driver's License

1. Enter the last four digits of the number, followed by a space.
2. Enter the abbreviation of the issuing state, followed by **DL** to denote Driver's License, (with the exception of California which would be entered as CDL). Do not place a space between the two (i.e. AZDL, not AZ DL).

9760 CDL 1721 WADL

State ID

Follow the same entry procedure as Driver's License; use **ID** to denote identification.

9760 CID

Military ID

1. Enter the last four digits of the number, followed by a space, then **MLID**

0628 MLID

Alien Resident Number

1. Enter the last four digits of the number, followed by a space
2. Enter **INSID** (Immigration & Naturalization Identification) and the issuing country.

0497 INSID Mexico

Passport Number

1. Enter the last four digits of the number, followed by a space.
2. Enter **PPN**, followed by a space.
3. Enter the country of origin, or the country's abbreviation (e.g. **USA**).

9023 PPN USA

4568 PPN FRA

Border Crossing Card

1. Use the back of the card (no photo)
2. Use the last four digits of the number at the bottom on the first line beginning with MEX

MEX 6789

Matricula Consular

1. Enter the last four digits of the number in the lower right corner on the picture side of the ID location below the expirations date followed by a space
2. Enter the country abbreviation followed by a space then **MAT CON**

1244 MX MAT CON

Employment Authorization Document

1. Use the front of the card (photo)
2. Under the name is a USCIS number. Enter the last four digits of the number followed by a space, then **USEA**

1244 USEA

Mexican Voter Registration Cards

1- Use photo?

2- Number?

PARENT/GUARDIAN

Only use for Juvenile or Teen cards. Input information in ID field using the same parameters listed above. Optionally a P/ may be added (meaning parent) before type of identification, i.e., 9760 P/CDL, 9760 P/CID, 0628 P/MLD, etc.

Enter first name first, middle initial or name, and last name last: **Mary Jane Patron**

STAFF INITIALS

Use your library's 2-letter code as used in Koha and a forward slash and your initials: **LM/ss**

STANDARDS FOR PATRON NOTES IN KOHA

Select the appropriate type of note to deliver the message to patron and/or staff.

- All notes should be brief and include only pertinent facts.
- All free-text notes should include date first, then Branch/staff initials
- In Patron Status Notes put most recent note at the top, date first, then Branch/staff initials.

If the notes field is full, refer to the supervisor for review.

PATRON REGISTRATION REQUIREMENTS

A jurisdiction should only change another library's patron codes if the individual has moved to that jurisdiction.

TYPE	SP	LM	PR	SM 2	GV	CC
Adult	ID & proof of address	ID & proof of address	ID & proof of address	ID & proof of address	ID & proof of address see below 1	See below 1
Group Cards	n/a	n/a	n/a	n/a	parent ID & proof of address see below 1	n/a
Juvenile	parent ID & proof of address	parent ID	parent ID	parent ID & proof of address	see below 1	See below 1
Welcome	ID	ID	ID	ID	see below 1	n/a
Teen	N/A	n/a	parent ID	n/a	Age 13-17 issued w/out ID and w/out proof of address	Ages 13-17 issued w/out ID
Internet Only	N/A		N/A		Ages 18 & up issued w/out ID	Ages 18 & up issued w/out ID

1 ~~GO~~ GV will issue a card with a government-issued ID with photo and proof of address. If there is no proof of address the patron will be asked to write the address on a preprinted confirmation postcard which will be mailed. The subsequent presentation of this card with its postmark shall constitute proof of address. GO issue cards to institutions with proper institutional ID and with individuals associated with institutions accepting personal responsibility.

2 SM will mail cards to patrons who have no other way to verify their mailing address. Patron is allowed to check out 2 items before card is mailed.

LIBRARY CARDS

It is a common practice to issue library cards to individuals only, apart from ILL institutions. Lompoc issues cards to the prison. The prison gets a higher checkout limit.

In October 2020, the Administrative Council voted that juvenile or teen patrons 'aging up' to adult cards should have existing fines and fees removed from their account.

ONLINE REGISTRATION *

Patrons may register online and receive a temporary barcode starting with the library prefix and then an 'E' (example 22138E). Libraries are assigned based on zip code designations through a 3rd party vendor that does address verification. "E" cardholder registration expiration ~~varies by jurisdiction~~ is set at 3 months. These cardholders may place holds and use online services such as Overdrive. ~~Online registrations should be deleted if there is no activity on the account for more than six months.~~

*Paso Robles Libraries to do not use online registration at this time.

CARD EXPIRATION

~~On March 23, 2013, the Administrative Council voted to set Card Expiration to 99 years.~~ Address Check is determined by jurisdiction. See Patron Type table for expiration dates.