BLACK GOLD
COOPERATIVE LIBRARY SYSTEM

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Blackgold.org

**AUTOMATION AND TECHNICAL SERVICES
(ATS) OPERATIONS COMMITTEE AGENDA
Wednesday, April 3, 2024– 10:00 a.m.
Webinar**

Join on your computer, mobile app or room device: Click here to join the meeting
Meeting ID: 222 438 290 596
Passcode: RWsq82

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

2) **ADOPT AGENDA** —

3) ***APPROVE MINUTES** — March 6, 2024, by Kristina Uvalle (BG)

4) **CIRCULATION**

   a) **Item Type Update – Moxi Pass to Museum Pass (GV)** – Goleta would like to change the item type name for Moxi Pass to Museum Pass. This would be a more generic name and cover a wider variety of passes.

   b) **New Shelf Locations (PR)** – Paso would like to add shelving locations to items to enhance data for reporting purposes.

   c) **Library Card Policies (GV)** – Goleta is working on their internal policies and is looking to discuss policies and procedures that other libraries have in place.

   d) **Welcome Emails (PR)** – Paso would like to turn on the auto email option in Koha for all new library patrons upon registration.

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.

   b) **ATS Committee Changes –** Administrative Council has made changes to the Black Gold Committee structure and how groups will meet. These include minor changes to the current ATS committee.

   i) Topic Request – Discuss options for submitting topic requests for future meetings.

6) **BLACK GOLD UPDATE**

7) **ROUNDTABLE**

8) **ITEMS TO BE FORWARDED**

9) **AGENDA BUILDING**

10) **NEXT MEETING** — 10:00 a.m., Wednesday, May 1, 2024 (Santa Maria)

11) **ADJOURNMENT**

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

Attending: Meg Weber, PR; Shannon St. Arnaud, SM; Dominic Keen, LM; Elizabeth Saucedo, GO; Brenda Goldy, SP; Matt Duhon, BG; Kristina Uvalle, BG; Glynis Fitzgerald, BG

1) **10:03 A.M. CALL TO ORDER** Glynis Fitzgerald, Chair, Presiding
   Recorder; Kristina Uvalle (BG)

2) **ADOPT AGENDA** — 1st DK/ 2nd BG. Approved.

3) ***APPROVE MINUTES** — February 7, 2024, by Kristina Uvalle (BG). 1st BG/ 2nd DK. Approved.

4) **CIRCULATION**

   a) **'Reply to' email addresses for notices (BG)**

   MD (BG) presented libraries with two different options:

   Option 1: (BEST) Create a blackgold.org address for each library. Example: BSPLibrary@blackgold.org

   Option 2: Have each library's local IT set up an SMPT server and allow us to send emails. Example: notices@cityofgoleta.org.

   ACTION ITEM: MD (BG) will create blackgold.org email addresses for each library to handle the "reply to" emails.

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

   ACTION ITEM: Committee forwarded Patron section to Administrative Council with latest updates for review and approval.

5) **TECHNICAL**

   a) **Koha/Aspen Issues**

   MW (PR) reported things are going well with the wand. The set up took longer than expected but inventory is moving quickly. They are putting together a basic operation manual and should be able to send it along in a couple of weeks.

6) **BLACK GOLD UPDATE**

   KU (BG) reported Aspen has added Palace Project to the search options for Aspen pages. We have loaded it on our Aspen Training sites for everyone to look at it. Patron clean-up is continuing. PACREG, SLO and SB cards are expiring in March and April. Active patron accounts expiration dates are being updated to match the new parameters decided by Council.

   MD (BG) reported the move to the new data center is in progress. He will be visited libraries to replace their junipers in coming weeks. The move of the physical server will happen on a Sunday with the least amount of interruption possible. Time needs to be scheduled when data center staff is available to meet. A Monday migration of internet connections will start at 6 a.m. with a goal of finishing by 10a.m., libraries will get plenty of notice of the dates once they are confirmed. Additional messaging can be add to Koha staff in the news section.

7) ROUNDTABLE – N/A

8) ITEMS TO BE FORWARDED- Patron section of the Circulation manual.

9) AGENDA BUILDING – Notices and slips section of the Circulation manual.

10) NEXT MEETING — 10:00 a.m., Wednesday, April 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; 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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AGENDA ITEM REQUEST

TOPIC:	Item Type Update – Moxi Pass to Museum Pass	**PRIORITY LEVEL: (1-Low 3 – High)**	☐ 1 ☐ 2 ☒ 3
SUBMITTED BY:	Elizabeth Saucedo (GO)		
TYPE OF ITEM:	☐ For Discussion ☒ For Recommendation ☐ Other: _____		

BACKGROUND STATEMENT		
BACKGROUND: *Describe why you are bringing this item before the committee. What problem are you trying to solve?*	Goleta is currently using the Item Type "Moxi Pass" for our Moxi Passes. We do not use "LOT" or "Passes" Item Types for this pass due to the unique circulation rules for this item. We do use "LOT" and "Passes" for other items in our collection. We recently obtained two other museum passes and would like for them to circulate exactly as the Moxi Passes do. We are currently the only jurisdiction using this Item Type in Koha.

OUTCOME(S)		
DESIRED OUTCOME(S): *Describe your desired outcome(s)*	Would the Committee approve updating the name of the "Moxi Pass" Item Type to "Museum Pass" so that it can be used for all of GO's Museum Passes, rather than indicating the Moxi Pass only?
OTHER COMMENTS:	

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AGENDA ITEM REQUEST

TOPIC:	.New Shelf Locations	**PRIORITY LEVEL: (1-Low 3 – High)**	☐ 1 ☐ 2 ☐ 3

SUBMITTED BY:	Meg Weber

TYPE OF ITEM:	☐ For Discussion ☒ For Recommendation ☐ Other: _____

BACKGROUND STATEMENT

BACKGROUND: *Describe why you are bringing this item before the committee. What problem are you trying to solve?*	I would like to Add new shelving locations for fiction and nonfiction (likely for both Kids and adults). In terms of fully utilizing reporting and understanding our collections, I would recommend that all items have a shelf location listed, which is what I'm trying to move Paso's collection towards.

OUTCOME(S)

DESIRED OUTCOME(S): *Describe your desired outcome(s)*	-simplify reporting
OTHER COMMENTS:	

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AGENDA ITEM REQUEST

TOPIC:	Library Card – Local Policies/Practices	PRIORITY LEVEL: (1-Low 3 – High)	☐ 1 ☒ 2 ☐ 3
SUBMITTED BY:	Elizabeth Saucedo (GO)		
TYPE OF ITEM:	☒ For Discussion ☐ For Recommendation ☐ Other: _____		

BACKGROUND STATEMENT

BACKGROUND: *Describe why you are bringing this item before the committee. What problem are you trying to solve?*	We are in the process of clarifying our internal practices regarding library cards. The following questions have arisen recently and input from other Black Gold libraries would be helpful in informing our decision: • As technology changes, many patrons are not carrying their physical ID with them and present a photo of their ID on their smartphones. If patrons do not have their library card with them, does your library accept a photo of an ID to pull up a patron record? • If a physical library card is not present, what extent of circulation service does your library staff provide? For example, if patrons have memorized their card number or have it written on a piece of paper or saved in their smartphone notes or photos, do you accept that in lieu of the library card itself? Would you provide limited service where you allow check-outs but not provide account information? If your library has self-check machines, would you direct patrons to type in the number themselves so that staff are not facilitating the process? • As patrons come into the library to renew their expired cards, does your library require the same documentation needed for initial registration (photo ID and proof of address)?

OUTCOME(S)

DESIRED OUTCOME(S): *Describe your desired outcome(s)*	Awareness of how fellow BG libraries approach this topic locally, with consideration to both privacy and customer service perspectives.
OTHER COMMENTS:	

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AGENDA ITEM REQUEST

TOPIC:	.Automatic Welcome Email through Koha	PRIORITY LEVEL: (1-Low 3 – High)	☐ 1 ☐ 2 ☐ 3
SUBMITTED BY:	Meg Weber		
TYPE OF ITEM:	☒ For Discussion ☒ For Recommendation ☐ Other: _____		

BACKGROUND STATEMENT

BACKGROUND: *Describe why you are bringing this item before the committee. What problem are you trying to solve?*	Koha has the ability to automatically trigger welcome emails to new patrons when their accounts are created. Each library can customize the message that sends, but whether they send automatically is a universal setting we would all need switched on. Is this a feature all libraries would be interested in?

OUTCOME(S)

DESIRED OUTCOME(S): *Describe your desired outcome(s)*	-Set up automatic welcome emails sent by Koha when a new patron is created
OTHER COMMENTS:	