BLACK GOLD
COOPERATIVE LIBRARY SYSTEM

**AUTOMATION AND TECHNICAL SERVICES
(ATS) OPERATIONS COMMITTEE AGENDA
January 8, 2020 – 10:00 a.m.
Multipurpose Room – Goleta Valley Library**

* Item accompanies the agenda

1) **10:00 A.M. CALL TO ORDER** – Mathew Duhon, Vice-Chair, Presiding Recorder; Dominic Keen (LM)

2) **ADOPT AGENDA** —

3) ***APPROVE MINUTES** — November 6, 2019 by Marie Crusinberry (GV)

4) **CIRCULATION**

   a) *Addition of Memory Kits to the catalog (SB)

   b) *Discuss Hoopla blocks

5) **ILL –**

6) **TECHNICAL** —

   a) *Discuss Changing messaging on ITIVA (phone message)

   b) *Discuss carousel title of 'New DVD' on PAC

7) **ONGOING DISCUSSION ITEMS**
   a) What Technology vendor(s) are you in discussions with for your library? –
   b) Are any new installs of technology hardware planned? –
   c) PCI Informational Minute –

8) **BLACK GOLD UPDATE** —

9) **ROUNDTABLE** —

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

11) **AGENDA BUILDING** —

12) **NEXT MEETING** — 10:00 a.m., Wednesday, February 5, 2020 – Webinar

13) **ADJOURNMENT** —

Distribution — email notice of web-posted agenda packet (available at www.ats.blackgold.org):
Karen Christiansen, PR; Marci Cunningham, SLO; Selena Fierro, SM; Joanne Britton SM; Dominic Keen, Donn Adolfo, Jonathon Cardenas, LM; Alain Dussert, Cassidy Charles, Molly Wetta, SB; Marie Crusinberry GO; Justin Formanek SP; Kim Hunter, ATS; Matt Duhon, ATS; Glynis Fitzgerald, BG; Directors [File Copy];

**AUTOMATION AND TECHNICAL SERVICES
(ATS) OPERATIONS COMMITTEE MINUTES
November 6, 2019 – 10:00 a.m.
Video Webinar – ATS Ops**

WebEx URL:
https://blackgold.webex.com/blackgold/j.php?MTID=mc6c00e9d264a125f0788425caca2d8a3
Join by phone: 1-650-479-3208
Access code: 625 911 376

Those attending: Matt Duhon, ATS; Glynis Fitzgerald, BG; Marci Cunningham, SLO; Marie Crusinberry, GV; Dominic Keen, LM; Justin Formanek, SP; Karen Christiansen, PR; Cassidy Charles, SB
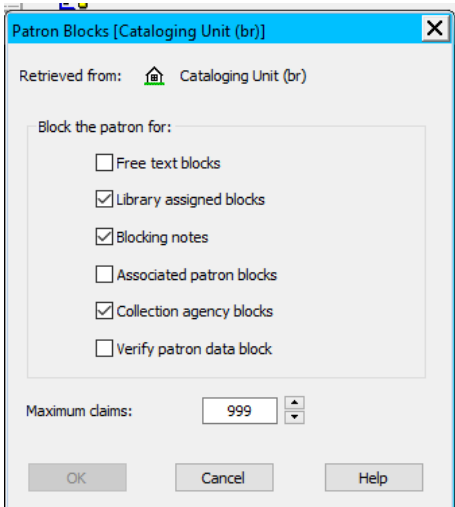* Item accompanies the agenda

- **10:00 A.M. CALL TO ORDER** at 10:05 by presiding Vice-Chair Matt Duhon, Recorder; Marie Crusinberry (GV)

- **ADOPT AGENDA** — Cunningham moved, Charles seconded and carried as presented.

- ***APPROVE MINUTES** — October 2, 2019 by Marci Cunningham (SLO)

  Formanek moved, Cunningham seconded and carried as presented.

- **CIRCULATION** –

  a. *Forwarded from Admin Council: Review and compare jurisdictional and Black Gold privacy policy: Group expressed consensus that the Black Gold policy does not conflict with jurisdictional policies, and in fact is used as or mirrors jurisdictional policy. LM will review for conflicts with their city policy. SM will be contacted for their input. As of now, the policy will be kept as is since there is no conflict.

  b. *Discuss notification of local IT staff by ATS: Is there interest in local IT being notified of upgrades, power outages, location outages, changes, etc.? Jurisdictions expressed interest and need to individually determine the circumstances of notification. Email Matt whom you would like on the contact list and under what circumstances.

  c. *Discuss changing messaging for phone notification, phasing out service (BA): Group continued with a previous discussion about phone notification options. Discussed the possibility of adding a message about automatic renewals. There are sections in the phone tree that may work well with adding verbiage. The verbiage needs to be exact as there is a fee for the company to make this change. The actual fees are vague because it depends on different factors, and the costs would be considered by Admin Council, not Ops Committee. Implementation could take several months. Jurisdictions are open to adding verbiage. We should all call in to hear the current phone tree. Tabled until we review actual verbiage. Matt also suggests the best practice of having something other than print for our default, email or text, so that mailing costs are kept down.

- *Discuss addition of Memory Kits (BA): Group discussed whether jurisdictions are receiving these kits, from a grant from the California State Library, and how/if they are adding them, as kits or library of things. BA, PR and SLO have the kits. SB will report back to the group what they do with them and share thoughts to help build consensus for future decisions regarding these kits.

- **ILL** –

- **TECHNICAL** —

  - Upgrade Feedback: Matt shared that the birthday displaying wrong in Leap has been fixed, and the one click hold on the PAC has been fixed to indicated when there are too many holds. He would like feedback on the order of the drawers on the PAC. The group would like to see a list of the different possibilities of drawers. Also, if the wording on the drawers be changed. Matt and Kim will find out and we'll go from there. Matt also shared that the small search window on the PAC is a bug and Polaris is working on it.

  - Discuss- ctx/access to branch PAC page: No one has started using it.

  - *BG PAC Contact Us page information/email: Patrons are emailing libraries but getting the wrong jurisdictions. Would we each like to have an email link on this page? We can also have a jurisdiction website link that then has an email on the website. If you are interested, send Matt the email address to add. Also, would each library rather have the 800 renewal number on each branch page or the individual location phone number- generic number or branch phone number? Matt will see if we can have both the 800 renewal number and an individual location phone number. Review your pages to see if it's what you desire and let Matt know if you would like to make a change.

  - *Review of PAC Change Form and FAQ: There is a form on the ATS website to request changes. There is also an FAQ to help with the form.

  - *Power outages and what they mean for the BG network: This has been a current issue because of the recent fires and potential losses of power. Matt shared a diagram and some info- not all connections go to same spot, many routes and locations, libraries can still be affected even if the issue is not in your immediate area, everyone is unique, there are variables and a lot of moving pieces to all this. In general, we should be able to stay up because of backup power/generators. CENIC is our primary internet connection, but we have a backup internet connection at our data center, Charter. It's unlikely that both would be down at the same time.

- **ONGOING DISCUSSION ITEMS**
  - What Technology vendor(s) are you in discussions with for your library?: LM has new stand-alone Biblioteca kiosks. SLO is looking at AMH systems.
  - Are any new installs of technology hardware planned?: No
  - PCI Informational Minute: The Polaris update didn't affect PCI. Please send Matt your contact info for PCI compliance.

- **BLACK GOLD UPDATE**: The Polaris upgrade is done and went smoothly for all changes made. The Capira testing for Android continues. The i-tiva upgrade is moving forward. The end of life for Windows7 support will be the middle of January. There will be no more updates, and this can be a security risk for Black Gold. Jurisdictions should upgrade to Windows10. Envisionware won't support Windows7 beginning the end of January. Kim will be out from November 18-22 at which time Matt can assist, but more advanced help will have to wait for her return.

- **ROUNDTABLE:**

- **ITEMS TO BE FORWARDED** — (To Council or other committees): Forward the Black Gold privacy policy with no changes to be made.

- **AGENDA BUILDING**: Memory kits standards

- **NEXT MEETING** — 10:00 a.m., Wednesday, January 8, 2020 – Goleta

- **ADJOURNMENT** — Meeting was adjourned at 11:47. Charles moved, Christiansen seconded and carried as presented.

TOPIC:	California State Library – Dementia/Alzheimer's Resource Kits	**PRIORITY LEVEL: (1-Low 3 – High)**	☐ 1 ☐ 2 ☒ 3
SUBMITTED BY:	Cassidy B. Charles, SBPL		
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?*	September 2019, SBPL received an equipment grant from the California State Library to provide Dementia/Alzheimer's Kits. Attached is documentation of the resources that will provided in each kit.		

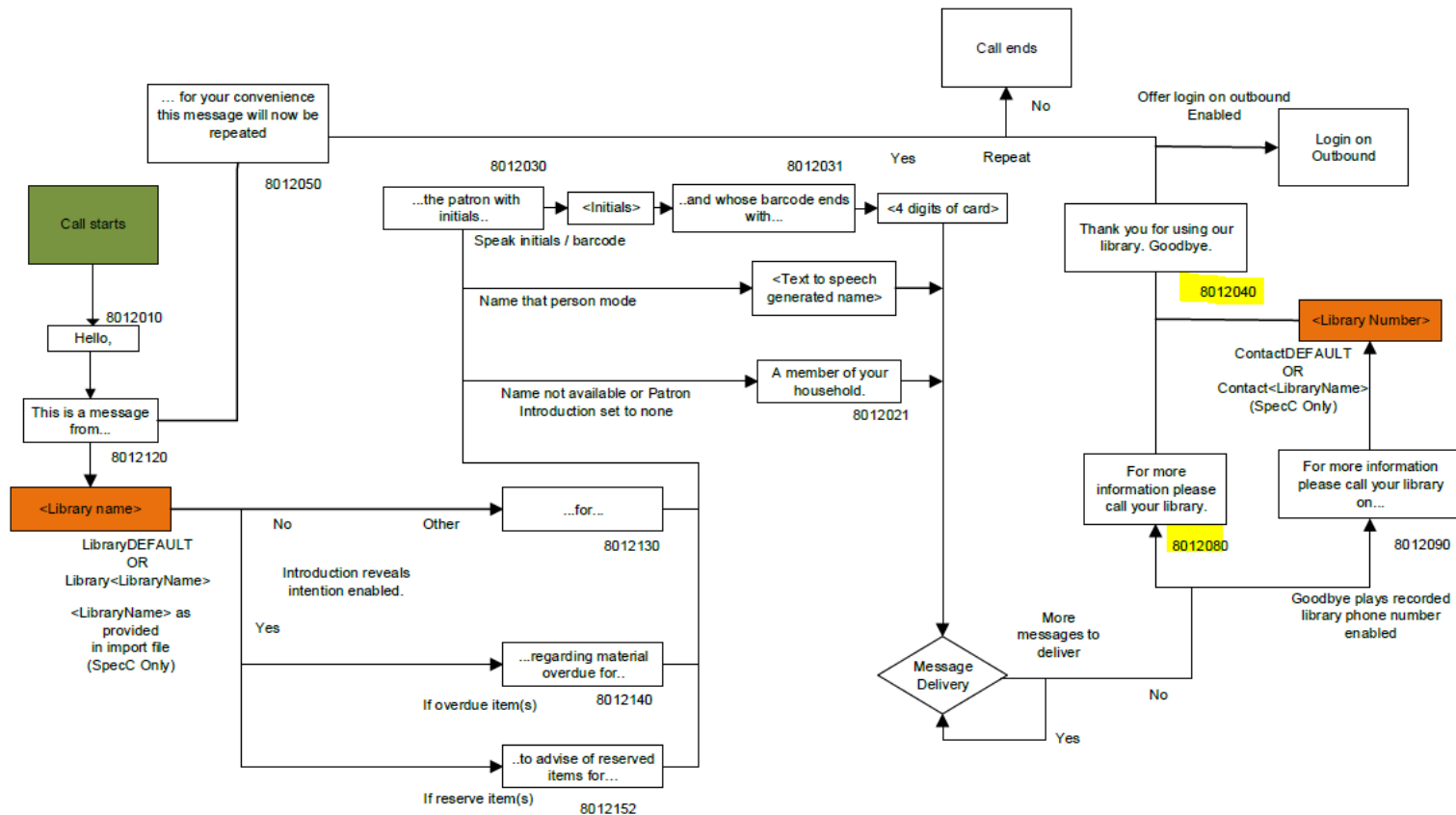|	OUTCOME(S)		
DESIRED OUTCOME(S): *Describe your desired outcome(s)*	Awareness of SBPL's plans for the grant program, inclusion of the items as circulating materials (like the early literacy and BCIAB kits); an understanding of if other Black Gold library's received the grant and their plans for implementation so that there can be consortium understanding of if this applies as Library of Things item or a BCIAB/Kit item.		
OTHER COMMENTS:			

TOPIC:	Hoopla block settings	**PRIORITY LEVEL: (1-Low 3 – High)**	☐ 1 ☐ 2 ☒ 3
SUBMITTED BY:	ATS		
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?*	Hoopla recently changed their SIP settings and is using the 'block' settings for self checks at the Cataloging Unit. These have never been utilized. A consensus needs to be made on which blocks (if any) the Cooperative would like to utilize. The screenshot below indicates which are currently set.

OUTCOME(S)				

DESIRED OUTCOME(S): *Describe your desired outcome(s)*	A decision whether to keep or change the current settings for SIP blocks used by Hoopla currently. Other vendors do not use these blocks at this time.
OTHER COMMENTS:	

TOPIC:	Phone Renewal and Notification Service – Planning	**PRIORITY LEVEL:** (1-Low 3 – High)	☐ 1 ☐ 2 ☒ 3
SUBMITTED BY:	Cassidy B. Charles, SBPL		
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?*	Santa Barbara Public Library is interested in discussing planning options for discontinuing the phone renewal line and phone notification service. Ideas that SBPL would like to discuss include: • Change service messages for phone renewal to "materials automatically renew if there are no holds, no need to call" etc. • Add to phone notification: Did you know you can receive notices via email or text message? Contact your library to update your contact preferences, etc. • Begin verifying patron contact information and making the switch with patrons. (Something SB is interested in re-visiting.) • Practice to begin setting not checking phone notices for new patron registration or updated patron registration.

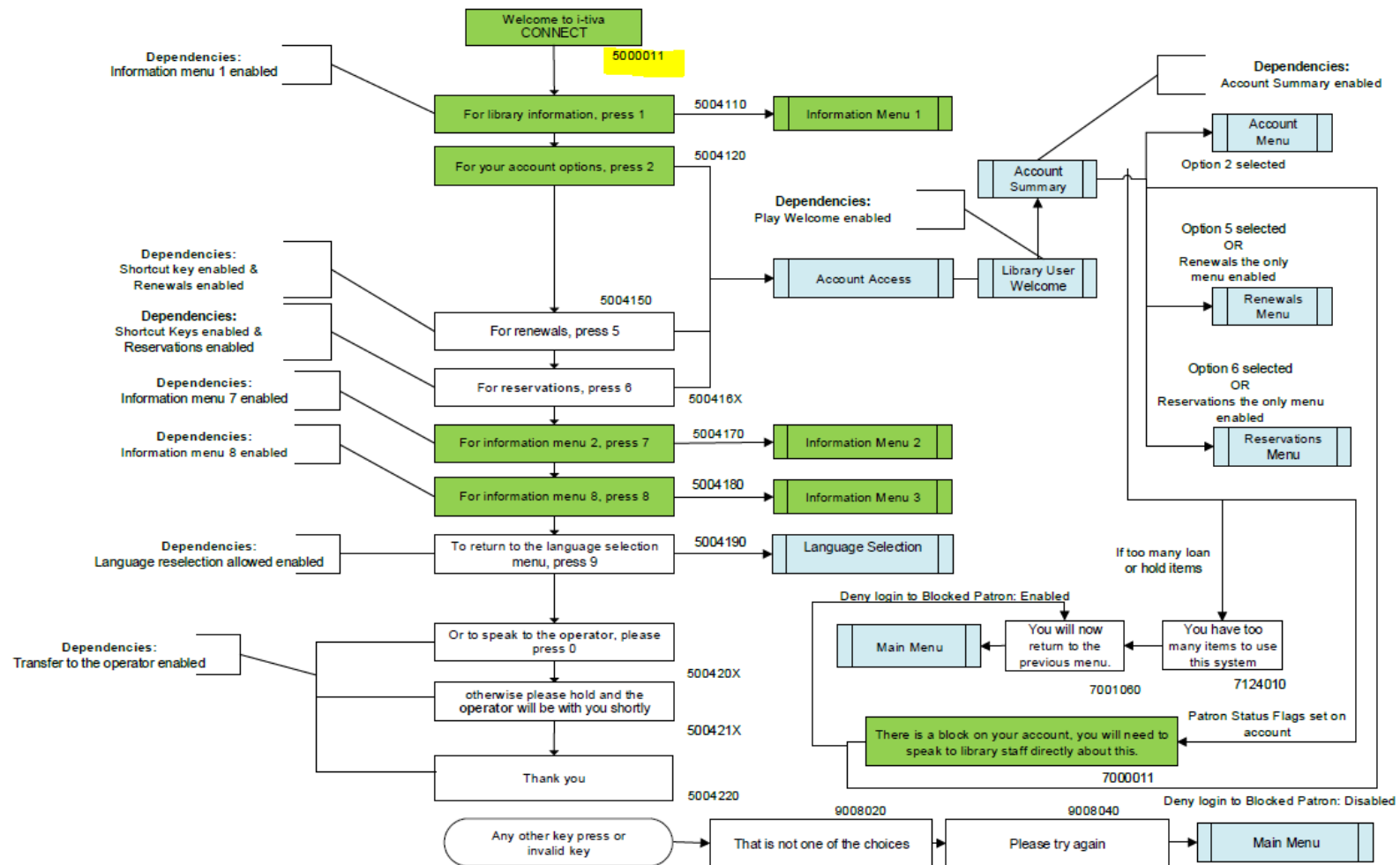| **OUTCOME(S)**	
DESIRED OUTCOME(S): *Describe your desired outcome(s)*	Discuss current Phone Renewal and Notification Service, and options to begin the reduction of the service; set a timeline to phase-out the service.
OTHER COMMENTS:	

Introduction and Goodbye message

The introduction to the caller and the corresponding goodbye message after the message has been delivered.

The Initial Menu is presented either immediately to the library patron upon dialling into the system or after selecting the preferred language.

Welcome to i-tiva CONNECT — 5000011

Dependencies: Information menu 1 enabled

For library information, press 1 — 5004110 → **Information Menu 1**

For your account options, press 2 — 5004120

Dependencies: Play Welcome enabled

Dependencies: Account Summary enabled

Account Summary → **Library User Welcome**

Account Access

Account Menu — Option 2 selected

Option 5 selected OR Renewals the only menu enabled → **Renewals Menu**

Dependencies: Shortcut key enabled & Renewals enabled

Dependencies: Shortcut Keys enabled & Reservations enabled

For renewals, press 5 — 5004150

For reservations, press 6 — 500416X

Option 6 selected OR Reservations the only menu enabled → **Reservations Menu**

Dependencies: Information menu 7 enabled

For information menu 2, press 7 — 5004170 → **Information Menu 2**

Dependencies: Information menu 8 enabled

For information menu 8, press 8 — 5004180 → **Information Menu 3**

Dependencies: Language reselection allowed enabled

To return to the language selection menu, press 9 — 5004190 → **Language Selection**

If too many loan or hold items

Deny login to Blocked Patron: Enabled

Main Menu ← You will now return to the previous menu. — 7001060 ← You have too many items to use this system — 7124010

Or to speak to the operator, please press 0

Dependencies: Transfer to the operator enabled

otherwise please hold and the operator will be with you shortly — 500420X

There is a block on your account, you will need to speak to library staff directly about this. — 7000011

Patron Status Flags set on account

Thank you — 500421X / 5004220

Deny login to Blocked Patron: Disabled

Any other key press or invalid key → That is not one of the choices — 9008020 → Please try again — 9008040 → **Main Menu**

TOPIC:	Change title of carousel on PAC	PRIORITY LEVEL: (1-Low 3 – High)	☐ 1 ☒ 2 ☐ 3
SUBMITTED BY:			
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?*	Some locations have patrons complaining about the title for the 'New DVD and Blu Ray" carousel. Some titles that display are, in fact, not new titles just 'New' to the library. Do other locations get comments and could the title be changed to 'Recently Added DVD's and Blu Rays"? The SQL job "Dashboard_NewTitles" (the process is different for 'On-order', 'most popular' and 'hardcover' carousels) updates the list nightly and includes items that are new in the last 31 days. Although the title search is for Bibliographic Records, if the process finds any Bibliographic Records that do not have a First Available date, the process checks their associated items to see if an item has become available since the last time it was processed. If so, the First Available date in the bibliographic record is updated with the item's First Available date. For the record to display, it must be set to display in PAC, and the record status must be final. For each title, the carousel contains the cover image if any, and title and author tags and subfields specified in the Primary Display Title and Primary Display Author database tables. When the PAC connection is to a branch, carousels based on new titles include only new titles for that branch. When the PAC connection is to the system, the carousel includes new titles for the whole system.		

	OUTCOME(S)		
DESIRED OUTCOME(S): *Describe your desired outcome(s)*			
OTHER COMMENTS:	The title to the carousel can be changed in SA – Please provide the title you would like to use		