



**AUTOMATION AND TECHNICAL SERVICES
(ATS) OPERATIONS COMMITTEE AGENDA
October 6, 2021– 10:00 a.m.
Video Webinar – ATS Ops**

<https://blackgold.webex.com/blackgold/j.php?MTID=mc6c00e9d264a125f0788425caca2d8a3>

Meeting number: 625 911 376

Join by phone: 1-650-479-3208 Call-in toll number (US/Canada)
Access code: 625 911 376

* Item accompanies the agenda

- 1) **10:00 A.M. CALL TO ORDER** Kim Hunter, Chair, Presiding
Recorder; Kristina Uvalle (BG)
- 2) **ADOPT AGENDA** —
- 3) ***APPROVE MINUTES** — September 1, 2021, by Kristina Uvalle (BG)
- 4) **CIRCULATION** –
- 5) **ILL** –
- 6) **TECHNICAL** —
 - a) Discuss/Review Aspen installation
 - b) Polaris Upgrade 10/23/21
- 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, November 3, 2021 – 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, LM; Alain Dussert, 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 September 1, 2021– 10:00 a.m. Video Webinar – ATS Ops

Attending: Dominic Keen, LM; Karen Christiansen, PR; Marci Cunningham, SLO; Selena Fierro, SM; Alain Dussert, SB; Marie Crusinberry, Brent Field, GO; Justin Formanek SP; Kim Hunter, ATS; Matt Duhon, ATS; Glynis Fitzgerald, Kristina Uvalle, BG

* Item accompanies the agenda

- 1) **10:02 A.M. CALL TO ORDER** Kim Hunter, Chair, Presiding
Recorder; Kristina Uvalle (BG)
- 2) **ADOPT AGENDA** — 1st KC/2nd SF
- 3) ***APPROVE MINUTES** — August 4, 2021, by Kristina Uvalle (BG) - 1st AD/2nd MC (SLO)
- 4) **CIRCULATION** –
 - a) Circulation Manual review (Click [here](#) for most recent version)
Reviewed most recent changes to Circ Manual.
Approved to forward to Admin Council for approval. - 1st MC(SLO)/2nd KC
 - b) * Unique ID Field Patron Reg Data Entry Standard (SLO)
MC(SLO) reported the BayScan has updated programming to blank out necessary fields. A possible issue with ID's that do not use numbers prompted a change from "numbers" to "characters" for the Circ Manual.
A motion to approve entry standards with a change to read "last 4 characters" - 1st KC/2nd JF
 - c) *SUSPEND Patron types (PR)
KH clarified that Envisionware allows suspension by "patron type", this is not a Polaris issue. KC(PR) that they are running into circumstances with a patron that requires the ability to suspend his access to internet inside the library. DK (LM) volunteered to send the Ops group instructions on how to suspend a patron through PCRez. Various options were discussed concerning both the need and practice of adding new patron types.
A motion to add "Suspend Internet" to Patron Types was approved. - 1st MC (SLO)/2nd MC(GV)
This is an option that can be applied by Branch, so anyone not wanting to use it can let KH(BG) know if they do not want it to appear as an option.
- 5) **ILL – N/A**
- 6) **TECHNICAL** —
 - a) Discuss/Review Aspen installation
GF(BG) encouraged everyone to review the left-hand menu items on the PAC to ensure they have everything available on their websites. Also, libraries will need to ensure that links on their home websites are going to the appropriate Aspen link and not back to Polaris. We are working with Mark at Bywater to build a spreadsheet to work on the Spanish translation for the Aspen site. GF (BG) will send a Google doc to everyone with the terms needing translating. Several libraries have people who are willing able to help with translations. Once we have the spreadsheet filled in, Mark will be able to upload them all at once. There are a few paragraphs that will need to be translated as well. Kristina (BG) will add them as separate tabs on the Google doc.

b) *Aspen Transitional Web Pages

SM, GV, SP and LM are all ready to go to Aspen within the next couple of weeks. SLO will be ready at the end of September/early October. SB and PR are waiting on the Spanish translations to be further along.

The BG homepage on the training site was reviewed for possible messages to guide patrons to the new Aspen pages. Slight changes to the wording included: Changing “Each” to “Some”; “have designed” to “are designing” and adding “to get started” to the beginning of the second line. Libraries will need to contact Kristina (BG) to update portal pages once they are ready to transition to Aspen.

c) *Polaris upgrade training – review documentation

The training server has been upgraded to 7.0 and is ready for testing. There are many changes to cataloging for LEAP this time around. Libraries are encouraged to check things out and see how they look and work. Please remember to test ancillary products that use SIP or have outside vendor interaction (self-checks/RFID) – the vendor product has to be re-configured to point to BGTRAIN5.

d) Polaris upgrade Production - October 23rd

The upgrade for the Production server is scheduled for October 23rd. Libraries will need to make sure any and all Windows updates are current before that time.

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? —

SM is adding Cloud Library.

c) PCI Informational Minute

The forensic investigation from the data center theft in January came back positive. The way we store, and access data makes it nearly impossible to glean meaningful information on patrons. Our system is safe and secure.

8) BLACK GOLD UPDATE

GF(BG) – RAS Committee is looking at Press Reader and will have a Flipster demo next week.

Feedback on the new release moratorium: PR: new release shelves are full. SLO: much more labor intensive and more patrons contacting the library to ask about wanting to place holds on unavailable items. SM: patrons noticing more available new releases, a few complaints about unavailable items but not too many. LM: patrons like the number of new items on the shelves, a few complaints about holds. GV: new shelves pretty normal, not participating in the moratorium, lots of holds. SB: no complaints, hoping the upgrade to Polaris 7.0 will make the template process easier. SP: positive comments on more items on the shelves, patrons have notice that they can't place some holds. Mostly positive comments and results to the moratorium so far.

MD: Polaris 7.0 Installer is on the ATS website to add to workstations for training. Cenic connections are making progress for Cuyama and Los Alamos. We are in the final testing phase for Cuyama.

KH: Working on Aspen and Polaris upgrades. MC(SLO) will forward programming changes to libraries that use BayScan for the change in DL license input.

9) ROUNDTABLE -N/A

10) ITEMS TO BE FORWARDED — (To Council or other committees) 4a

11) AGENDA BUILDING – N/A

12) NEXT MEETING — 10:00 a.m., Wednesday, October 6, 2021 – Webinar

13) ADJOURNMENT at 11:52 am - 1st KC/2nd MC(GV)