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
May 6, 2020– 10:00 a.m.
Video Webinar – ATS Ops

Meeting number: 625 911 376
https://blackgold.webex.com/blackgold/j.php?MTID=mc6c00e9d264a125f0788425caca2d8a3

Join by phone
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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** — April 1, 2020 by Kristina Uvalle (BG)
4) **CIRCULATION** –
   a. *RB Digital SIP review – blocks/messages
   b. *PAC – catalog options holds and items
   c. COVID 19 update
   d. Quipu registration - E barcodes
   e. Patron delete reminder - May
5) **ILL –**
6) **TECHNICAL** —
   a. ***CAPIRA – app self-checkout options, push notifications
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, July 8, 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];

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AUTOMATION AND TECHNICAL SERVICES
(ATS) OPERATIONS COMMITTEE MINUTES
April 1, 2020– 10:00 a.m.
Video Webinar – ATS Ops

* Item accompanies the agenda

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

1) **10:00 A.M. CALL TO ORDER** at 10:08 am. Kim Hunter, Chair, Presiding
Recorder; Kristina Uvalle (BG)

2) **ADOPT AGENDA** — Moved/seconded (SF/JF). Approved. Motion carried.

3) ***APPROVE MINUTES** — March 4, 2020 by Kristina Uvalle (BG) Moved/seconded (DK/KC). Approved. Motion carried.

4) **CIRCULATION** –

a) **COVID – 19 Update – status reports**

PR: Karen reported that while the library is closed, they have a staff member going in to empty the book drop, collect the mail and other misc. tasks. Two other staff members are working from home. The director is working in Disaster Services and Karen is overseeing library operations in her absence. Part time staff are WFH doing professional development. Melissa is working with city IT to upload online story time files to the city website.

SLO: Marci reported that libraries have been closed since 3/18. The director has been redeployed to managing the care and shelter programs for the county. Some staff are working to set-up the alternate care center that will be housed at CalPoly. In the library, they are maintaining basic functions like emptying the book drop and cleaning. They are also working to create online library resources, niche academy materials and fielding questions about schools. The homeless population are making themselves at home outside the library more than normal.

SM: Selena reported all the 32-40-hour staff are working in the library. Many are working with the Food Bank call center which is receiving 200+ calls per day for food and assistance. They are starting their online story time and have cancelled all events through the end of April. They are sending staff out to the branches to take care of book drops, mail and other basic tasks.

LM: Dominic reported that they are operating with barebones staff. Part-time help is done as of Friday. They have closed the book drops and fielding phone calls between 10-4 daily. They are working on social media posts including Storytime with Jess. Mostly working on cleaning and preparing the library for the new carpet that is coming. Full-time staff is considered part of the city's disaster preparedness staff as well.

GV: Marie reported that all staff is WFH for now and are also considered part of the disaster service staff. They have closed and locked all book drops and are working on online content and story time programs. They have a link to the Library of Congress that encourages people to help clean up their database. The city is using Slack to communicate with each other. There is no target date for returning to work.

SB: Alain reported the library has been closed since 3/14. All hourly staff were let go last Friday. Most of the remaining staff have been reporting to the building except for 3-4 librarians who have been deployed to emergency services. A few employees are WFH. The book drops have been closed. They are working on computer upgrades and repairs within the library. They are offering SBPL Delivers to patrons who call or email in with requests for books in place of the book bundles they were offering previously.

SP: Justin reported the library closed 3/17 and staff has been home since 3/20. They are being paid for the next two weeks, but everything is shut down. The director still goes in daily and Justin is WFH now.

BG: Glynis reported that all staff is WFH and nothing much has changed except delivery and hotspots. Matt has done a great job in getting everyone set-up to work from home including the phone system that works with everyone's cell phones. We are currently working on ways to improve Overdrive hold times and help deliver on e-material content to patrons.

b) Follow up on Kit/E-device/Staff only material types (ATS)

No one reported having time to review any of the material types. KH stated that we are hoping to not add all three of them, but to narrow down the material types that will work for everyone. The topic is tabled to the next meeting. KH encouraged everyone to try to work review the types into their schedule this next month.

5) ILL –

6) TECHNICAL —

a) ***Discuss Upgrade to 6.4 delay**

Due the issues with COVID-19 and library closures, the Admin Council did not meet with a normal agenda schedule in March. Version 6.5 is being released. KH stated that Ops will explore the upgrade to 6.4 and/or 6.5 in the fall at the normal time.

KH asked what the plans for each library's summer programs was at this time.

SB: Alain stated that at this time SB is 90-95% sure they will cancel their summer programming. Their concerns were what kind of staff would be available to run programs.

SM: Selena stated that SM is still on board with their summer calendar and are in process of deciding how it will work.

PR: Karen stated that PR is taking things one day at a time. They are still planning their May and summer programming and will see how things continue to evolve.

GV: Marie stated that staff is working to figure out alternatives if the summer program is not able to go on as normal.

SLO: Marci stated staff was working on online programs for all ages as well as events. Their major concern at this point is the summer lunch program.

b) ***Quipu barcode option**

KH initiated the discussion of changing the current PACREG format to a 5-digit prefix plus E (21447E) in Quipu to allow patrons access services that do not allow them access when using a PACREG number. Currently, Lynda.com doesn't allow access when a patron used a PACREG number. KH pointed out that a library would have to decide between the PACREG or the 5-digit plus E and would not be able to use both. GF pointed out that the 5-digit E format would allow for more accurate end of the year reporting numbers. Each jurisdiction would continue to have its own prefix for identity purposes. KH did state that libraries would have to decide if this was a

permanent card even though the patron account would be blocked with the 'verify patron-online registration' that is placed on the account currently and asked to go to their local library to verify their address. The other option would be to merge the online and physical card in the ILS when the patron came into the library to verify their address but at that point online services would have to be moved to the new number (much like occurs now with the PACREG number). Each library would have to work with vendors like Lynda.com to recognize the new 5-digit E number. GF can send the info to Overdrive. There would be no charge from Quipu to make the change to apply this prefix specific to jurisdiction to online registrations. While some libraries pointed out that they were not affected by the PACREG restrictions, they all liked the 5-digit E format. KH stated that SB would be the guinea pig and start testing the new format with other vendors. AD agreed that would be acceptable. MC (SLO) asked if other vendors worked to verify against the ILS database. GF that while Hoopla uses our database to authenticate patrons, RB Digital does not (it only uses the 5-digit prefix). We could, however, switch over RB Digital at no extra cost to use SIP to authenticate patron numbers.

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?** –

SB: Alain reported that they were working on replacing all the public computers with Windows 10 machines. It is slow going as he is doing the bulk of the work by himself. Many staff members have been moved into disaster services; he has one city IT person that comes into help. City IT created a build to make install easier and added screen connect software so that computer upgrades could be finished remotely should it become necessary.

SM: Selena reported that the library was working on moving furniture with the help of city IT. Library staff was also working on inventory using lists she has created through Simply Reports and comparing them to items on the shelves.

No one else had anything to report at this time.

c) **PCI Informational Minute** –

MD reminded everyone the PCI compliance rules still apply when WFH with home computers, laptops or desktops from work. He reminded everyone to not use personal emails or save patron records to personal computers. He encouraged everyone to be conscious of their actions with patron data. More phishing emails are going out, be suspicious of emails with COVID-19 or Coronavirus in the subject line.

8) BLACK GOLD UPDATE —

GF reported that BG is operating close to normal with only delivery and hotspots being affected. Matt has done a great job ensuring that the phone system is working and assessible to all staff via cell phones. KH reported that work was very active and steady. She expressed her appreciation for everyone's patience and understanding as we figure out how to make things work. MD reported he was working to provide the proper amount of remote access to those who needed it while keeping everyone secure and safe online. Ops members were reminded that the ATS site has a forum site available to ask questions, keep in contact with other library members and share ideas or concerns.

9) ROUNDTABLE —

10) ITEMS TO BE FORWARDED — (To Council or other committees) Possibly item 6b. GF will check to see if it needs AC approval since each jurisdiction can decide individually whether to make the change.

11) AGENDA BUILDING — 4b

12) NEXT MEETING — 10:00 a.m., Wednesday, May 6, 2020 – Webinar

13) ADJOURNMENT — at 11:16 Moved/seconded (MC/AD) Approved. Motion carried.

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AGENDA ITEM REQUEST

TOPIC:	RB Digital/ SIP Verification	**PRIORITY LEVEL: (1-Low 3 – High)**	☐ 1 ☒ 2 ☐ 3
SUBMITTED BY:	K Hunter		
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?*	RB Digital is now offering SIP verification. What blocks do you want (if any) • IF we can pick and choose blocks what do you want to block on? • Address/expired reg? collections? Lost card? Other library assigned blocks? Patron block? Blocked for fines? Blocked invalid card number:? • messaging associated with each active block. • If possible should patrons that do not have matching reg library/barcode be blocked?		
OUTCOME(S)			
DESIRED OUTCOME(S): *Describe your desired outcome(s)*	Information on how locations would like the SIP verification set up		
OTHER COMMENTS:			

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AGENDA ITEM REQUEST

TOPIC:	PAC setup	**PRIORITY LEVEL: (1-Low 3 – High)**	☐ 1 ☒ 2 ☐ 3
SUBMITTED BY:	K Hunter		
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?*	Admin Council would like to consider different types of temporary setup for PAC. I would like to get a feeling for general attitude at libraries for the PAC. • Do you see offering holds in the near future? Your location only, within your jurisdiction, only certain libraries within your jurisdiction? Would you want these options to appear on the PAC? • In a perfect world would you like patrons to see only your items if they are logged into the PAC on your branch page? • Once delivery starts again, do you see continuing to lend to other locations within the Cooperative (continue business as usual) and is that 'ideal' for you?		
OUTCOME(S)			
DESIRED OUTCOME(S): *Describe your desired outcome(s)*	Information on how locations would like the PAC set up – if changes need to be addressed now		
OTHER COMMENTS:			

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AGENDA ITEM REQUEST

TOPIC:	CAPIRA self checkout/push notifications	**PRIORITY LEVEL: (1-Low 3 – High)**	☐ 1 ☒ 2 ☐ 3
SUBMITTED BY:	K Hunter		
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?*	For the BG consortium app, we can add in the Self-Checkout feature to individual library sub-apps (additional cost) who wish to participate by offering this to their patrons. There would be a one time set-up fee and then an annual cost per-participating library for maintenance. Once we have the SIP2 port in place from iii, and the list of libraries who would like Self-Check added in their sub-app, implementation would only take 1-2 weeks if interested in moving ahead. In addition, we can support routing to multiple SIP ports (per library) if needed to ensure statistics go into their proper stat groups instead of using a single port, should that be an important item for your libraries. We also have the capability to enforce custom checkout rules to fit membership needs, such as disallowing certain patrons or library items from being checked out that Polaris may allow, such as a library who does not wish to participate and does not want patrons from other libraries checking out their items. I do want to note that currently we do not support RFID - the issue occurs that while we can check an item out in the ILS, there's no way for a mobile device to disable the RFID or EM security on the item, although some other vendors accomplish this using required proprietary external hardware such as a standalone self check machine, sending patrons to these devices to complete the desensitization process before leaving the building. Developing a "curbside pickup" feature that would be available in the app as well as patrons being to access it via a website. This feature would allow patrons to pre-schedule curbside pick up for library materials. The staff console backend allows for limiting the amount of patrons for each time slot, alerts to when the patron arrives and more. Patrons can also easily edit information such as their car details, license plate number and more. Think Instacart but for hold's delivery in the parking lot instead of groceries. We are aiming to have this feature live by late May. Push notifications are also available: The Push Notifications would be per library system. So Goleta would have a login, Lompoc their own login, etc. You only receive notifications for the library youve chosen as your theme in the app, Lompoc patrons most likely don't want notifications from Santa Barbara, etc.

OUTCOME(S)

DESIRED OUTCOME(S): *Describe your desired outcome(s)*	Interest level in items offered (to be installed prior to Capira upgrade we have not completed testing for) so ATS can pursue if technical needs can be met
OTHER COMMENTS:	