



**AUTOMATION AND TECHNICAL SERVICES  
(ATS) OPERATIONS COMMITTEE AGENDA  
Wednesday, March 1, 2023– 10:00 a.m.  
Webinar**

<https://blackgold.webex.com/blackgold/j.php?MTID=md55405196da3aea78513203b58866fc2>

Meeting number: 2553 200 8416

Password: reF4vNuSX83 (73348687 from video systems)

Join by phone: 1-650-479-3208 Call-in toll number (US/Canada)

Access code: 255 320 08416

\* Item accompanies the agenda

- 1) **10:00 A.M. CALL TO ORDER** Glynis Fitzgerald, Chair, Presiding Recorder; Kristina Uvalle (BG)
- 2) **ADOPT AGENDA** —
- 3) **\*APPROVE MINUTES** — February 1, 2023, by Kristina Uvalle (BG)
- 4) **CIRCULATION**
  - a) Circ Manual edits – due by 03/29/23 (BG)
  - b) \*Koha – closing funds at year end (BG)
  - c) \*Disposition of Items checked out by SLO and SB patrons (BG)
  - d) \*Purging of Digital Use Accounts (PR/BG)
- 5) **TECHNICAL**
  - a. \*Contacting Black Gold for issues after hours. (BG)
- 6) **BLACK GOLD UPDATE**
- 7) **ROUNDTABLE**
- 8) **ITEMS TO BE FORWARDED** — (To Council or other committees)
- 9) **AGENDA BUILDING**
- 10) **NEXT MEETING** — 10:00 a.m., Wednesday, April 5, 2023 (Webinar)
- 11) **ADJOURNMENT**

Distribution — email notice of web-posted agenda packet (available at [www.ats.blackgold.org](http://www.ats.blackgold.org)): Karen Christiansen, PR; Selena Fierro, SM; Joanne Britton SM; Dominic Keen, LM; Elizabeth Saucedo, GO; Carla Mason, GO; Eric Castro, CC; Justin Formanek, SP; Matt Duhon, ATS; Glynis Fitzgerald, BG; Directors [File Copy];



**AUTOMATION AND TECHNICAL SERVICES  
(ATS) OPERATIONS COMMITTEE MINUTES  
Wednesday, February 1, 2023– 10:00 a.m.  
Webinar**

**Attending:** Karen Christiansen, PR; Joanne Britton SM; Dominic Keen, LM; Elizabeth Saucedo, GO; Justin Formanek, SP; Matt Duhon, ATS; Glynis Fitzgerald, BG; Directors [File Copy];

**1) 10:04 A.M. CALL TO ORDER** Glynis Fitzgerald, Chair, Presiding  
Recorder; Kristina Uvalle (BG)

**2) ADOPT AGENDA** — 1<sup>st</sup> KC/ 2<sup>nd</sup> JBH. Approved.

**3) \*APPROVE MINUTES** —January 4, 2023, by Glynis Fitzgerald (BG) 1<sup>st</sup> KC/ 2<sup>nd</sup> JBH. Approved.

**4) CIRCULATION –**

a) [Circ Manual](#) – Start the next round of edits with a clean copy.

KU (BG) will send out a Word document to the ATS committee for the next round of edits. We will use the April in-person meeting to go through the latest round of changes. The goal will be to have a completed copy ready by May, so it can be forwarded to the Admin Council for final approval. Suggestions included adding a section for Aspen standards required for individual library pages (privacy policy, Get a Library Card, etc.). KC (PR) also suggested adding a section detailing Black Gold responsibilities including who to direct requests to and how to report problems or issues that come up.

b) Koha upgrade – Discuss problems since the latest upgrade.

It was proposed that after the next round of upgrades is uploaded to the training server, we use the next ATS meeting to test for errors. It will give libraries a designated time and space to test the system in a timely manner.

DK (LM) shared with the group a work around for using birthdates in a patron search. It was suggested that we create a page on the ATS website for helpful hints and work-arounds that could be beneficial to the group. DK (LM) will send instructions to KU (BG) to post on the ATS site.

**5) BLACK GOLD UPDATE**

GF (BG) reported the Capira upgrade is scheduled to take place in February. Teresa is currently uploading new items. KU (BG) reported we are doing inventory on hotspots to check for missing and broken devices. The student initiative upload for PR is complete. The process is fairly straightforward and is available should other libraries have a need for it.

**6) ROUNDTABLE – N/A**

**7) ITEMS TO BE FORWARDED** — N/A

**8) AGENDA BUILDING** – Circ Manual, Claim return (Polaris vs. Koha),

**9) NEXT MEETING** — 10:00 a.m., Wednesday, March 1, 2023 (Webinar)

**10) ADJOURNMENT** at 11:12 a.m. 1<sup>st</sup> KC/ 2<sup>nd</sup> JF. Approved.

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<b>TOPIC:</b>	Koha – closing funds at year end	<b>PRIORITY LEVEL:</b> (1-Low 3 – High)	<input checked="" type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
<b>SUBMITTED BY:</b>	Glynis Fitzgerald		
<b>TYPE OF ITEM:</b>	<input type="checkbox"/> For Discussion <input checked="" type="checkbox"/> For Recommendation <input type="checkbox"/> Other: _____		
<b>BACKGROUND STATEMENT</b>			
<b>BACKGROUND:</b> <i>Describe why you are bringing this item before the committee. What problem are you trying to solve?</i>	We previously established a procedure for closing out funds at year-end for the libraries. This was previously done by Kim Hunter who has left Black Gold, and the process was done on Polaris		
<b>OUTCOME(S)</b>			
<b>DESIRED OUTCOME(S):</b> <i>Describe your desired outcome(s)</i>	Since we are nearing our first year-end close on Koha and we have to establish new procedures, I would like to discuss the expectations of libraries and I would like to know what if any reports you were previously provided with related to closing out funds.		
<b>OTHER COMMENTS:</b>			



<b>TOPIC:</b>	Disposition of Items checked out by SLO and SB patrons	<b>PRIORITY LEVEL:</b> (1-Low 3 – High)	<input checked="" type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3
<b>SUBMITTED BY:</b>	Glynis Fitzgerald		
<b>TYPE OF ITEM:</b>	<input type="checkbox"/> For Discussion <input checked="" type="checkbox"/> For Recommendation <input type="checkbox"/> Other: _____		
<b>BACKGROUND STATEMENT</b>			
<b>BACKGROUND:</b> <i>Describe why you are bringing this item before the committee. What problem are you trying to solve?</i>	When SLO and SB withdrew from Black Gold, there were still items checked out by their patrons that belonged to Black Gold. It has now been a year since we last shared items with SLO and SB.		
<b>OUTCOME(S)</b>			
<b>DESIRED OUTCOME(S):</b> <i>Describe your desired outcome(s)</i>	I have attached 2 lists of items checked out from all the Black Gold libraries by SLO and SB patrons. Please review the items that belong to your library. I would like to determine how Black Gold libraries should deal with these outstanding items. We could: Remove the fees Move the items to lost Do nothing		
<b>OTHER COMMENTS:</b>			

Due date	Item type	Title	Collection	Location	Home library	Checked out on	Call number	Fine	Price
03/25/2022Long Overdue (Lost)	Adult Non-Fiction	The sacred mushroom and the cross : a study of Adult Non-Fiction	Adult Non-Fiction	Blanchard Community Library	Blanchard Community Library	03/01/2022 11:33	YAFIC GAMBER	0.00	25.00
03/25/2022Long Overdue (Lost)	Juvenile Fiction	Legendary : a Caraval novel / by Gaber, Stept Juvenile Fiction	Teen Fiction			03/01/2022 11:33		0.00	25.00
05/04/2022Long Overdue (Lost)	Music CD	Binaural 37510000274451	Audio Visual	Music CD	Goleta Valley Library	04/01/2022 18:54	MR PEAR BIN P65	0.00	20.00
03/23/2022Long Overdue (Lost)	Adult Trade Pbk	Serial photography : using themed images to tm Adult Trade Pbk	Adult Non-Fiction		Lompoc Village Library	02/27/2022 11:33		0.00	20.00
03/24/2022Long Overdue (Lost)	Adult Trade Pbk	Physics 1 for dummies / by Holzner, Steven. 32 Adult Trade Pbk	Adult Non-Fiction		Village Library	02/28/2022 11:34	530 H762	0.00	20.00
05/07/2022Long Overdue (Lost)	Juvenile Non-Fiction	Let's discover ships and boats / 32113008542 Juvenile Non-Fiction	Children's Non-Fiction		Orcutt Library	04/15/2022 22:37		623.82	0.00
03/23/2022Long Overdue (Lost)	Juvenile Non-Fiction	Minecraft master builder: Mega metropolis / b Juvenile Non-Fiction	Children's Non-Fiction		Santa Maria Public Library	03/01/2022 20:19	j 794.85 ROONEY 20	0.00	25.00
03/23/2022Long Overdue (Lost)	Juvenile Non-Fiction	Minecraft : guide to survival / by Milton, Stept Juvenile Non-Fiction	Children's Non-Fiction		Santa Maria Public Library	03/01/2022 20:18	J FIC	794.8	0.00
03/23/2022Long Overdue (Lost)	Juvenile Fiction	Goodfriends forever / by Dareshwar, Gity. - Juvenile Fiction	Children's Non-Fiction		Santa Maria Public Library	03/01/2022 20:18	J FIC	0.00	25.00
03/23/2022Long Overdue (Lost)	Juvenile Fiction	Percy Jackson : sea of monsters. 321130083008 DVD	Popular Library		Santa Maria Public Library	03/01/2022 20:18	ACTION	0.00	30.00
03/23/2022Long Overdue (Lost)	Juvenile Fiction	Percy Jackson & the Olympians: The lightning th DVD	Popular Library		Santa Maria Public Library	03/01/2022 20:18	ACTION	0.00	30.00
03/23/2022Long Overdue (Lost)	Juvenile Fiction	Jumanji: Welcome to the jungle. 32113008771 DVD	Popular Library		Santa Maria Public Library	03/01/2022 20:18	ACTION	0.00	30.00
03/23/2022Long Overdue (Lost)	Adult Non-Fiction	The Doberman pinscher / by Kerfmann, Wood Adult Non-Fiction	Adult Non-Fiction		Santa Maria Public Library	02/27/2022 11:34	636.73	0.00	40.00
03/23/2022Long Overdue (Lost)	DVD	10 things i hate about you. 32113006603685 DVD	Popular Library		Santa Maria Public Library	02/27/2022 11:33	COMEDY	0.00	30.00
03/23/2022Long Overdue (Lost)	Blu-Ray	The Croods : a new age / 32113008796479 Blu-Ray	Popular Library		Santa Maria Public Library	03/27/2022 11:33	FAMILY	0.00	30.00
03/24/2022Long Overdue (Lost)	Juvenile Fiction	Monster High, Who's that ghoulfriend? / by D. Juvenile Fiction	Children's Fiction		Santa Maria Public Library	03/02/2022 21:04	J FIC	0.00	25.00
03/24/2022Long Overdue (Lost)	Juvenile Fiction	Monster High, Ghoulfriends just want to have f. Juvenile Fiction	Children's Fiction		Santa Maria Public Library	03/02/2022 21:04	J FIC	0.00	25.00
03/24/2022Long Overdue (Lost)	DVD	G.I. Joe : retaliation / - Gift 02-2021 321130077 DVD	Popular Library		Santa Maria Public Library	03/02/2022 21:04	ACTION	0.00	30.00
03/24/2022Long Overdue (Lost)	DVD	Apocalypts / - Gift 03-2019 32113007098463 DVD	Popular Library		Santa Maria Public Library	03/02/2022 21:04	ACTION	0.00	30.00
03/24/2022Long Overdue (Lost)	DVD	300 / - Gift 03-2017 32113006867132 DVD	Popular Library		Santa Maria Public Library	03/02/2022 21:04	ACTION	0.00	30.00
03/24/2022Long Overdue (Lost)	DVD	Pirates of the Caribbean : dead men tell no tale: DVD	Popular Library		Santa Maria Public Library	03/02/2022 21:04	ACTION	0.00	30.00
03/24/2022Long Overdue (Lost)	DVD	Pirates of the Caribbean: At world's end / - Gift DVD	Popular Library		Santa Maria Public Library	03/02/2022 21:04	ACTION	0.00	30.00
03/24/2022Long Overdue (Lost)	DVD	Pirates of the Caribbean. Dead man's chest / - DVD	Popular Library		Santa Maria Public Library	03/02/2022 21:04	ACTION	0.00	30.00
03/24/2022Long Overdue (Lost)	DVD	Pirates of the Caribbean. The curse of the Black DVD	Popular Library		Santa Maria Public Library	03/02/2022 21:04	ACTION	0.00	30.00
03/24/2022Long Overdue (Lost)	Adult Non-Fiction	Braiding sweetgrass : indigenous wisdom, scient Adult Non-Fiction	Popular Library		Santa Maria Public Library	02/28/2022 11:34	PEOPLE 305.8 KIMM	0.00	40.00
03/24/2022Long Overdue (Lost)	DVD	Two lovers / 32113006764630 DVD	Popular Library		Santa Maria Public Library	02/28/2022 11:34	DRAMA	0.00	30.00
03/24/2022Long Overdue (Lost)	DVD	A simple favor / 3211300878345 DVD	Popular Library		Santa Maria Public Library	02/28/2022 11:34	DRAMA	0.00	30.00
03/24/2022Long Overdue (Lost)	Adult Non-Fiction	The songs of Paul Simon for easy piano. by Sin Adult Non-Fiction	Adult Non-Fiction		Santa Maria Public Library	02/28/2022 11:34	784.0924	0.00	40.00
03/24/2022Long Overdue (Lost)	DVD	The jungle book 32113006862414 DVD	Popular Library		Santa Maria Public Library	02/28/2022 11:34	FAMILY	0.00	30.00
03/24/2022Long Overdue (Lost)	DVD	Talladega nights the ballad of Ricky Bobby / - G DVD	Popular Library		Santa Maria Public Library	02/28/2022 11:34	COMEDY	0.00	30.00
03/24/2022Long Overdue (Lost)	DVD	Fun an imaginary portrait of Diane Arbus / 321 DVD	Popular Library		Santa Maria Public Library	02/28/2022 11:34	DRAMA	0.00	30.00
03/24/2022Long Overdue (Lost)	DVD	Sin City / - Gift 03-2018 32113006947306 DVD	Popular Library		Santa Maria Public Library	02/28/2022 11:34	ACTION	0.00	30.00
03/24/2022Long Overdue (Lost)	DVD	The Croods 32113006603701 DVD	Popular Library		Santa Maria Public Library	02/28/2022 11:34	FAMILY	0.00	30.00
03/24/2022Long Overdue (Lost)	DVD	The best of Superman 32113008298765 DVD	Popular Library		Santa Maria Public Library	02/28/2022 11:34	TELEVISION SHOWS	0.00	30.00
03/25/2022Long Overdue (Lost)	Juvenile DVD	The Polar Express / - Winter Christmas 321130 Juvenile DVD	Children's Audio Visual		Santa Maria Public Library	03/01/2022 11:32		0.00	30.00
03/27/2022Long Overdue (Lost)	Adult Non-Fiction	Chinese astrology : exploring the eastern zodiac Adult Non-Fiction	Adult Non-Fiction		Santa Maria Public Library	03/05/2022 21:00	133.59251	0.00	40.00
03/27/2022Long Overdue (Lost)	Juvenile Non-Fiction	American paint horses / by O'Brien, Kim, 3211 Juvenile Non-Fiction	Children's Non-Fiction		Santa Maria Public Library	03/05/2022 18:19	636.13	0.00	25.00
04/01/2022Long Overdue (Lost)	Juvenile Non-Fiction	I spy school days : a book of picture riddles / b Juvenile Non-Fiction	Children's Non-Fiction		Santa Maria Public Library	03/10/2022 18:01	j 793.73 MARZOL 2C	0.00	25.00
04/12/2022Long Overdue (Lost)	Juvenile Fiction	Arthur's underwear / by Brown, Marc Tolon. 3 Juvenile Fiction	Children's Fiction		Picture Boo Santa Maria Public Library	03/21/2022 17:20	J PB	0.00	25.00
04/15/2022Long Overdue (Lost)	Juvenile Fiction	La galletita = The little cookie / by Hillert, Mar Juvenile Fiction	Children's Spanish Fiction		Beginning F Santa Maria Public Library	03/24/2022 21:27	J BR	0.00	25.00
05/03/2022Long Overdue (Lost)	Adult Non-Fiction	Surprised by joy : the shape of my early life. by Adult Non-Fiction	Adult Non-Fiction		Santa Maria Public Library	04/11/2022 18:38	616.86	0.00	40.00
05/03/2022Long Overdue (Lost)	Adult Non-Fiction	Untamed / by Doyle, Glennon, - FOL 07-2020 : Adult Non-Fiction	Adult Non-Fiction		Santa Maria Public Library	04/11/2022 18:38	248.1673	0.00	40.00
05/03/2022Long Overdue (Lost)	Adult Non-Fiction	The undefeated / by Alexander, Kwame, - Win Juvenile Non-Fiction	Children's Non-Fiction		Santa Maria Public Library	04/05/2022 17:37	306.893 DOWLE 2021	0.00	40.00
05/03/2022Long Overdue (Lost)	Adult Fiction	Cypress point / by Chamberlain, Diane, 32113: Adult Fiction	Adult Fiction		Caldecott	04/05/2022 16:30	FIC CHAMBE 2002	0.00	35.00
05/03/2022Long Overdue (Lost)	Adult Fiction	Her mother's shadow / by Chamberlain, Diane Adult Fiction	Adult Fiction		Santa Maria Public Library	04/05/2022 16:30	FIC CHAMBE 2004	0.00	35.00
05/03/2022Long Overdue (Lost)	Magazine	Rolling stone [magazine] 2022. (03/2022) 3211 Magazine Series	Magazine		Santa Maria Public Library	04/04/2022 19:35		0.00	8.00
05/03/2022Long Overdue (Lost)	Magazine	Hemphrys classic car [magazine] 2022. (04/20 Magazine Series	Magazine		Santa Maria Public Library	04/04/2022 19:35		0.00	8.00
05/04/2022Long Overdue (Lost)	Music CD	Binaural 32113005841591	Popular Library	Music CD	Santa Maria Public Library	04/01/2022 18:54	Rock	0.00	0.00
05/04/2022Long Overdue (Lost)	Kit-CD	We read together early learning diversity kit; f8 Kit-CD	Children's		Santa Maria Public Library	04/13/2022 16:21	SP DIV KIT	0.00	20.00





<b>MEETING DATE:</b>	3/1/23	<b>ESTIMATED TIME FOR ITEM:</b>	20 minutes?
<b>TITLE OF ITEM:</b>	Purging of Digital Use Accounts	<b>PRIORITY LEVEL: (1-Low 3 – High)</b>	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input checked="" type="checkbox"/> 3
<b>SUBMITTED BY:</b>	Karen Christiansen (but was also discussed at Council)		
<b>TYPE OF ITEM:</b>	<input checked="" type="checkbox"/> For Discussion <input checked="" type="checkbox"/> For Decision/Request Motion <input type="checkbox"/> Other: _____		

**BACKGROUND STATEMENT**

**BACKGROUND:**

*Describe why you are bringing this item before council. What problem are you trying to solve? List information that would be helpful for decision making such as committee recommendations, pros/cons.*

Since SB and SLO libraries left BG, remaining libraries have seen an upsurge not only in the numbers of cards being issued to residents of those jurisdictions, but also increases in the numbers of patrons accessing only eLibrary materials, impacting our service populations’ access to these collections (longer wait times for OverDrive materials, daily limits on hoopla being hit regularly).

Because many non-resident patrons are only using their cards to access eMaterials, we would like to expire these accounts more frequently, thereby allowing our resident patrons better access to our eLibrary collections.

We need to determine if we want to expire these cards and, if so, what the criteria for expiration will be. In past discussions on this topic, criteria that have been discussed include:

- Expiration after a specific amount of time (1 year for example)
- Expiration of accounts with no physical checkouts over a period of time (no physical items checked out within a year for example)

We will also need to determine what constitutes a resident or non-resident card (zip code? Other?)

**OUTCOME(S)**

**DESIRED**

**OUTCOME(S):**

*Describe your desired outcome(s)*

Determine a course of action to assist our resident populations in better accessing our eLibrary collections by expiring non-resident cards based on certain criteria as described above.

**OTHER COMMENTS:**

## **Black Gold Cooperative Library System**

### **Technical issues reporting**

**Daytime phone: (805) 543-6082**

**After-hours phone: (805) 597-6901**

Reporting a technical problem to Black Gold between 8:00 and 5:00 M-F,  
regular business hours:

1. During an emergency, do not send email. There may be a significant delay between the time you send an email and when we read it. If it's not an emergency, you may email Black Gold.
2. If the library's technical contact is available, report issue to them and they will determine if Black Gold should be contacted. If so, they should call the daytime phone number above for emergencies.
3. If possible, check with another branch to see if they are experiencing problems.
4. If library's technical contact is not available, and public Internet and Wi-Fi are not working, but Koha and the PAC's are working, please wait to speak with your technical contact when they are available.
5. If library's technical contact is not available and Koha or the PAC's are not working, call us at the daytime number above.

Reporting a technical problem to Black Gold after 5:00 pm and on  
weekends or holidays:

1. Do not send email. We do not monitor email after hours.
2. If Koha and the PAC's are working, but public Internet and Wi-Fi are not available, please wait until the next business day to contact Black Gold or your local IT.
3. If Koha or PAC's are not working, call us at either number above.
4. Branch staff are welcome to contact Black Gold, we suggest that someone in a supervisory role make the call if possible. The caller will be asked a few questions to troubleshoot the problem, they will include:
  - a. Is the internet working? (Can you get to websites like [www.msn.com](http://www.msn.com) or [www.google.com](http://www.google.com))
  - a. Can you get to Koha?
  - b. Can you get to the PAC from a staff machine? From a public machine? From the PAC computer?
  - c. Is the issue limited to Wi-Fi and public workstations? Or staff computers as well?
  - d. Please describe what you were doing when you first noticed the error? What does the error say if applicable? And tell us when the issue started.

Callers will need to provide the best phone number for a call back. If the problem is somehow resolved before we get back to you, please call and let us know.

Updated 2/22/2023.