



**AUTOMATION AND TECHNICAL SERVICES  
(ATS) OPERATIONS COMMITTEE AGENDA**  
February 3, 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** — January 6, 2021 by Kristina Uvalle (BG)
- 4) **CIRCULATION** –
  - a) \*Unique Notices – language change (G. Fitzgerald)
  - b) \*Discuss opportunity to add ‘specialized’ collections and shelf locations (ATS)
  - c) Discuss Patron privacy/registration input changes (G. Fitzgerald)
- 5) **ILL** –
- 6) **TECHNICAL** —
- 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, March 3, 2021 – Webinar
- 13) **ADJOURNMENT**

Distribution — email notice of web-posted agenda packet (available at [www.ats.blackgold.org](http://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, 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  
January 6, 2021– 10:00 a.m.  
Video Webinar – ATS Ops**

**Attending:** Karen Christiansen, PR; Marci Cunningham, SLO; Selena Fierro, SM; Dominic Keen, LM; Alain Dussert, SB; Ariana Bilek, SB; Brent Fields, GV; Kim Hunter, ATS; Matt Duhon, ATS; Glynis Fitzgerald, BG; Kristina Uvalle, BG.

- 1) **10:01 A.M. CALL TO ORDER** Kim Hunter, Chair, Presiding  
Recorder; Kristina Uvalle (BG)
- 2) **ADOPT AGENDA** — Moved/seconded KC/SF. Approved. Motion carried.
- 3) **\*APPROVE MINUTES** — October 7, 2020 by Kristina Uvalle (BG). Moved/seconded MC/DK.  
Approved. Motion carried.
- 4) **CIRCULATION** –
  - a) \*Change UMS wording for notices – GF (BG) reported on the request by the Admin Council for Ops to work on rewording the notice to a general statement suitable for all jurisdictions and focused on material recovery and included a “no credit reporting” statement. AD (SB) shared the text from SB to Admin Council as an example. KH (ATS) agreed to check on character limitations, as well as, adding a phone to the address block at the top. It was agreed that a copy would be emailed to Ops members and they could work on possible suggestions to be reviewed at the February Ops meeting.
  - b) Discussion - Upcoming directions for the ILS – GF (BG) wanted to inform everyone of possible big changes coming up in the next year. Directors are looking to add the aspen overlay to the existing Polaris set-up and possibly moving to KOHA at a later date. Santa Barbara is still working to see if moving to their own ILS is feasible and should have a decision prior to the Admin Council meeting schedule on January 15<sup>th</sup>. Black Gold will still coordinate discovery committees to evaluate Aspen and KOHA. The Ops committee will be asked to take a look at the Global settings to see if changes need to be made concerning the way we currently do business. We are looking at a late February start date for the KOHA discovery process.
  - c) Discuss Capira app – MC (SLO) introduced the idea of no longer using Capira. The app has had problems since the change requirements made to the system because of COVID. The app also looks very dated and beyond the electronic library card feature is not used by very many patrons. It was agreed to table the issue to see what evolves with the Aspen overlay and how it might affect Capira and/or provide its own mobile app.
- 5) **ILL – N/A**
- 6) **TECHNICAL** —
  - a) Feedback from the Polaris 6.6 upgrade – KH (OPS) asked if there was any feedback to the 6.6 upgrade that took place in October. MC (SLO) asked if the LEAP login issue was fixed. KH (OPS) reported it is fixed in 6.7. KH reported that offline documentation for LEAP is being added to the ATS website and encouraged everyone to ask if they needed any help.
- 7) **ONGOING DISCUSSION ITEMS**
  - a) What Technology vendor(s) are you in discussions with for your library? N/A
  - b) Are any new installs of technology hardware planned? — AD (SB) adding to RFID pads to Envisionware
  - c) PCI Informational Minute – N/A

- 8) BLACK GOLD UPDATE** – GF (BG) reported that Polaris has been down since early Monday morning due to a vandalism incident at the Data Center in SLO. New drives are due in today and we should be up and running by Thursday morning. MD (ATS) reported that we have three plans currently in progress. 1. Replacement hard drives are arriving today to restore the program servers. 2. The Cloud server is being prepped to provide services at a limited capacity. 3. The BG or back-up server can be brought into play with limited speed as a back-up should the other two options fail to work. The problem stems from the fact that all the drives were unplugged. Had we lost only one drive which is usually the case in a server going down, the remaining drives would have managed to keep things running without a problem. GF (BG) reported that we are working with attorneys and insurance to determine if a security breach is a concern. Currently, our message to the public is that the servers are down, and we are working to fix the problem quickly. MD has the NYT online accessible with a generic username and password. Hoopla, Overdrive, Enki and RB Digital are accessible through direct links to their websites. Anyone using offline staff-client will need to send the files to Kim to upload to the server once it is back online.
- 9) ROUNDTABLE** N/A
- 10) ITEMS TO BE FORWARDED** — N/A
- 11) AGENDA BUILDING** – Unique notices
- 12) NEXT MEETING** — 10:00 a.m., Wednesday, February 3, 2021 – Webinar
- 13) ADJOURNMENT** 11:14 am KC/MC Approved.

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<b>TOPIC:</b>	Unique Management Notices	<b>PRIORITY LEVEL:</b> (1-Low 3 – High)	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input checked="" type="checkbox"/> 3
<b>SUBMITTED BY:</b>	Glynis Fitzgerald –requested by Admin Council		
<b>TYPE OF ITEM:</b>	<input type="checkbox"/> For Discussion <input checked="" type="checkbox"/> For Recommendation <input type="checkbox"/> Other: _____		

**BACKGROUND STATEMENT**

<b>BACKGROUND:</b> <i>Describe why you are bringing this item before the committee. What problem are you trying to solve?</i>	<p>The mailed letter notices that Unique Management sends out to patrons with lost materials on their accounts have confusing and outdated language. Patrons who receive these letters are often upset and fearful that they will be credit reported over library fees because of the references that they will be reported to a collection agency. See the various notices below:</p> <p><b>Fine Notice</b></p> <div style="border: 1px solid #ccc; padding: 5px;"> <p><b>Custom:</b> This message is to inform you that our records indicate your account has accrued fines/fees that may cause you to be reported to a collection agency. To view your account and see these charges online, go to <a href="http://www.blackgold.org">www.blackgold.org</a> . If you have any questions regarding your account, please call your local library.</p> <p>Default:</p> </div> <p><b>Bill Notice</b></p> <div style="border: 1px solid #ccc; padding: 5px;"> <p style="text-align: center; font-size: small;">NT_BILL_EM_TEXT</p> <p><b>Inherited Custom:</b> THIS IS A BILL. These charges have not been paid. Contact your LOCAL LIBRARY within 10 days or your account may be referred to a collection agency.</p> </div> <p><b>3<sup>rd</sup> Overdue Notice</b></p> <div style="border: 1px solid #ccc; padding: 5px;"> <p style="text-align: center; font-size: small;">NT_OVD3RD_EM_TEXT</p> <p><b>Inherited Custom:</b> As of the date shown our files show that the following items charged to your account are overdue. Please return these items as soon as possible or you will be billed a replacement fee.</p> </div>
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**OUTCOME(S)**

<b>DESIRED OUTCOME(S):</b> <i>Describe your desired outcome(s)</i>	Admin Council has directed the Ops committee to review the language on the notices and reword them to indicate that while the notice is a “material recovery” effort and that while it does go to collections, it is not reported to credit bureaus.
<b>OTHER COMMENTS:</b>	

**SBPL Version (Please note that highlighted sections will have to be changed to a more generic language)**

Hello,

You are receiving this letter from the **Santa Barbara Public Library**. The following items are more than thirty days overdue and have been charged to your library account:

TITLE	AUTHOR	FORMAT	REPLACEMENT COST	PROCESSING FEE	TOTAL
Owl Babies	Waddell, Martin	Juvenile Fic	30.00	0.00	30.00

These items are now presumed LOST and your library account will be charged with replacement costs. Please contact **Santa Barbara Public Library at 805-962-7653** at your earliest convenience. After thirty days from the date of this notice, the account charges are permanent and may not be contested, even if the materials are returned to the library.

View your account, renew items, or make payments online at **sbplibrary.org**.



<b>TOPIC:</b>	Specialized collections and shelf locations	<b>PRIORITY LEVEL:</b> (1-Low 3 – High)	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input checked="" type="checkbox"/> 3
<b>SUBMITTED BY:</b>	K Hunter		
<b>TYPE OF ITEM:</b>	<input checked="" type="checkbox"/> For Discussion <input 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>	<p>I have had a request for different collections and shelf locations to be available at different branches. This is completely 'doable' in SA but will require work on the library side as well. Items that are going to be placed in these new collections or shelf locations will have to be placed in a record set and bulk changed once the new collections/shelf locations have been added to SA. Staff will also need to decide if floating will be activated for the collection and which locations would be participating in the floating process and notify ATS of these choices so it can be set up in the ILS.</p> <p>ATS will notify Ops members when a collection/shelf location has been added so jurisdictions/branches can 'opt in' to using it. If other locations choose to use the new collections/shelf locations the same choices/processes (record sets, bulk changes, floating) will have to occur.</p>		
<b>OUTCOME(S)</b>			
<b>DESIRED OUTCOME(S):</b> <i>Describe your desired outcome(s)</i>			
<b>OTHER COMMENTS:</b>			