



# BLACK GOLD

COOPERATIVE LIBRARY SYSTEM

580 Camino Mercado  
Arroyo Grande, CA 93420  
805 543 6082  
[Blackgold.org](http://Blackgold.org)

## AUTOMATION AND TECHNICAL SERVICES (ATS) OPERATIONS COMMITTEE AGENDA April 7, 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:

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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** — March 3, 2021 by Kristina Uvalle (BG)
- 4) **CIRCULATION** —
  - a) \* Annual patron delete parameters (KH)
  - b) Hotspots (GF)
  - c) \*Discuss ID entry in patron record (GF referred by AC)
  - d) \*Discuss patron printing (BA) - [Click here](#) for informational brochures (provided by BG)
  - e) \*IUG review (KH) – [Click here](#) to access report
- 5) **ILL** –
- 6) **TECHNICAL** —
  - a) Demo review (Insignia, Aspen)
- 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, May 5, 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];



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## **AUTOMATION AND TECHNICAL SERVICES (ATS) OPERATIONS COMMITTEE MINUTES March 3, 2021– 10:00 a.m. -Video Webinar – ATS Ops**

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

- 1) **10:06 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** — February 3, 2021 by Kristina Uvalle (BG). Moved/seconded MC/JF. Approved. Motion carried.
- 4) **CIRCULATION** –
  - a) Unique Notices – language change (G. Fitzgerald)- Ops reviewed draft. KC (PR) provided an edit with changes for review. Ops approved the version provided by KC (PR) with additional changes by committee members. Sample letters will be presented to Admin Council for final approval. Santa Barbara and SLO are creating their own notice and will cover the costs of the specialized notices.
  - b) Follow up ‘specialized’ collections and shelf locations (ATS) -ATS added a shelf location for SB. The new designation is available to everyone but only be added if you request it. KC (PR) commented that the list helped them clean up a lot of things in their database which was good. It was suggested that Ops work out a yearly review process of the collections/shelf locations to help keep things up to date.
- 5) **ILL** – N/A
- 6) **TECHNICAL** — N/A
- 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? — MC (SLO) reported SLO is working on an RFP for AMH systems for Atascadero and Morro Bay.
  - c) PCI Informational Minute – MD (BG) reminded everyone to check for PCI compliance when evaluating new products. Not to use staff or public computers for credit card transactions and to be aware of unknown email/attachments.
- 8) **BLACK GOLD UPDATE**

GF(BG) reported the Admin Council voted to increase holds to 20 until June 30<sup>th</sup>. At which point they will decide as to whether to extend or revert to pre-COVID numbers. Directors determined that driver licenses numbers need to be removed from patron accounts as the risk is too great for a potential security breach. BG will investigate alternatives and discuss at Ops possible solutions. We are scheduling demos with Insignia and Aspen for review. KH (BG) reported that monthly reports should be done today, and she is working on mid-year reports. MD (BG) Goleta is on fiber now and everything seems to be going well. Cuyama and Los Alamos are next on the schedule.
- 9) **ROUNDTABLE** N/A
- 10) **ITEMS TO BE FORWARDED** – 4a to Admin Council.
- 11) **AGENDA BUILDING** – Demo review
- 12) **NEXT MEETING** — 10:00 a.m., Wednesday, April 7, 2021 – Webinar
- 13) **ADJOURNMENT** – Moved/seconded KC/MC at 10:56 am. Approved. Motion carried.

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];



<b>TOPIC:</b>	Patron delete	<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 type="checkbox"/> For Discussion <input type="checkbox"/> For Recommendation <input checked="" type="checkbox"/> Other: __Review/confirmation__		
<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>Annual patron delete is done prior to the end of June. I have included below what your library normally uses. Patrons in collections will not be deleted. As in past years, I will notify you prior to running the job.</p> <p>SLO- Last Activity Date more than 2 years and less than \$100 on patron account          BA- Last Activity Date more than 5 years and less than \$100          GO- Last Activity Date more than 2 years and less than \$100 on patron account          MM- Last Activity Date more than 5 years and less than \$100          LM- Last Activity date more than 2 years less than \$100 on account          PR- Last Activity Date more than 5 years and less than \$100          SP- Last activity Date more than 5 years and less than \$100 on account</p>		
<b>OUTCOME(S)</b>			
<b>DESIRED OUTCOME(S):</b> <i>Describe your desired outcome(s)</i>	Please confirm the information included here is appropriate to utilize. If you would like to change the parameters used, please let me know.		
<b>OTHER COMMENTS:</b>			



<b>TOPIC:</b>	Discuss removal of ID from patron record	<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>	G Fitzgerald – referred by Admin Council		
<b>TYPE OF ITEM:</b>	<input checked="" 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>	<p>At the last Admin Council meeting the directors decided that the full identification information should no longer appear in the patron registration information. ATS is asking III if there is an automated way to take care of the data currently in Polaris.</p> <p>AC would like Ops members to decide how the information should be entered moving forward. Some of this may be dependent on what BayScan (the vendor that has coded the DL scanners) is able to do. For example, CDL might look like-</p> <p>N54xxx25 CDL          Nxxxxx25 CDL          CDL</p> <p>A choice would have to be made for all forms of ID listed in the circ manual, but it would be best to follow the same format for all ID types if possible.</p>		
<b>OUTCOME(S)</b>			
<b>DESIRED OUTCOME(S):</b> <i>Describe your desired outcome(s)</i>	<p>Decision on entry standards/ID field for patron reg beginning immediately. Automated processes for current data and DL scan are dependent on vendors but Ops should decide on first, second, third choice etc.</p>		
<b>OTHER COMMENTS:</b>	<p>This is a high priority item.</p>		



<b>TOPIC:</b>	How does your library handle paying for printing?	<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>	Alain Dussert, on behalf of SBPL		
<b>TYPE OF ITEM:</b>	<input type="checkbox"/> For Discussion <input type="checkbox"/> For Recommendation <input checked="" type="checkbox"/> Other: Wanting to know how other libraries charge patrons for print jobs, and what systems they use to do it		
<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>	SBPL is considering getting rid of its Jamex machines and trying to figure out how to charge both library patrons and visiting patrons via one system for print jobs.		
<b>OUTCOME(S)</b>			
<b>DESIRED OUTCOME(S):</b> <i>Describe your desired outcome(s)</i>	Just reconnaissance.		
<b>OTHER COMMENTS:</b>			